

CONSULTANT PERFORMANCE SCORECARD

SECTION I – SCORECARD INFORMATION			
Scorecard Type:		Prepared By:	
Scorecard #:		Date:	

SECTION II – CONSULTANT DATA		SECTION III – PROJECT DATA	
Purchase Order #:		Bid Call #:	
Vendor's Name:		Project Location:	Ward:
Vendor's Address:		Contract Start Date:	Actual Start Date:
		Contract Completion Date:	Substantial Completion Date:
Vendor's Phone:			
Design Lead:	Contract Administrator:	Contract Award Amount:	Final Contract Amount:
Brief Description of Work:			

RATINGS GUIDE		
	SCORE	DESCRIPTION
	NA	NOT APPLICABLE
	3	POOR
	5	BELOW AVERAGE
	7	AVERAGE
	9	ABOVE AVERAGE
		Deliverable or task is not applicable to this project.
		Deliverable or task is substantially deficient. Issue identified. Not resolved. Negative impact on Budget and or Schedule and or Quality.
		Deliverable or task is somewhat deficient. Issue identified. Resolved. However, negative impact on Budget and or Schedule and or Quality.
		Deliverable or task is acceptable. Issue identified proactively resolved. No impact on Budget and or Schedule and or Quality.
		Deliverable or task is performed with exceptional service. No issues identified, or proactively resolved any identified issues. Resolution had a positive impact on budget and/or schedule and/or quality, or mitigated negative impacts on project outcome.

SECTION IV – NUMERICAL RATING	
1. PRE-DESIGN PHASE	RATINGS
a. Submission and execution of contract documents	
b. Submission of project schedule	
c. Analysis of client program	
d. Determine order of magnitude construction estimate	
TOTAL	
2. DESIGN PHASE	
a. Class C Cost Estimate	
b. Class B Cost Estimate	
c. Drawing submittals – 30%, 60%	
d. 90% Document submittal including Class A Cost Estimate	

e. Review all applicable codes and incorporate design & drawings	
f. Site Plan Approval – application, submissions, etc.	
g. Building Permit Approval – application, submissions, etc.	
h. Approvals from other authorities having jurisdiction if applicable	
TOTAL	
3. TENDERING PHASE	
a. Quality of tender documents	
b. Tender review and evaluation	
TOTAL	
4. CONSTRUCTION PHASE	
a. Contract administration	
b. Attendance at progress meetings – prime consultant and sub-consultants	
c. Review of shop drawings as per contract	
d. Response times to RFIs as per contract	
e. Issuance of PCNs, CDs, SIs in a timely manner	
f. Site Reviews and issuance of SR Reports	
g. Deficiency Lists	
h. Payment Certification	
i. Commissioning Agent coordination	
j. Project closeout process and documentation	
k. Value of changes due to consultant coordination (poor if more than 5% of construction cost)	
TOTAL	
5. POST-CONSTRUCTION AND WARRANTY PHASE	
a. Issuance of as-built drawings	
b. Maintain warranty items log	
c. Response to client concerns regarding warranty items	
d. Response times	
e. Attendance at warranty walkthrough	
TOTAL	
6. GENERAL	
a. Quality of design	
b. Timeliness – adherence to project schedule and milestones	
c. Due diligence	
d. Client consultation and communication, obtaining client approvals	
e. Maintain project documentation – web-based service	
f. Analysis related to project – schedule and budget	
g. Take pro-active action to mitigate issues related to project schedule and budget slippage	
h. Qualified and experienced resources	
i. Changes in resources/deviation from RFP if applicable	
j. Dedicated resources	
k. Coordination with sub-consultants	
l. Coordination with specialty consultants	
m. Adherence to proposal terms and fee management	
TOTAL	
GRAND TOTAL (1-6)	

Overall Performance Rating:	POOR <input type="checkbox"/> <50%	BELOW AVERAGE <input type="checkbox"/> 50-69%	AVERAGE <input type="checkbox"/> 70-79%	ABOVE AVERAGE <input type="checkbox"/> 80-89%
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SECTION V – AUTHENTICATION AND RECOMMENDATION

I have evaluated the Vendor’s performance in accordance with the Evaluation Process and have assigned a fair and objective rating to each criterion in Section IV of this Performance Scorecard.

Comments:

I met with the Vendor on _____^{Date} to discuss this Performance Scorecard.

City Contracts Manager

Print Name Signature Date
Manager or Supervisor

Print Name Signature Date

TO BE COMPLETED WITH THE FINAL PERFORMANCE SCORECARD:

I have considered the Vendor’s comments in making the below recommendation.

Based on my evaluation of the Vendor’s performance in accordance with this Performance Scorecard, the following is recommended (the “Recommendation”):

- The Vendor continue participating in the City’s procurement opportunities.
- The City suspend the Vendor from participating in its procurement opportunities for a period of 1 or 3 years in accordance with the City’s Vendor Suspension Administrative Directive.

State suspension period:

TO BE COMPLETED ONLY IF THE RECOMMENDATION IS TO SUSPEND THE VENDOR:

We confirm that we have reviewed this Performance Scorecard and discussed the ratings and recommendations with the City Contracts Manager, and have obtained the Manager’s confirmation that the Performance Scorecard accurately reflects the Vendor’s performance. We hereby approve or reject the recommendation as follows:

Director

APPROVE REJECT

Print Name Signature Date

Comments:

Department Head

APPROVE REJECT

Print Name Signature Date

Comments:

Purchasing Agent

APPROVE REJECT

Print Name Signature Date

Comments:

Attachments:

DISTRIBUTION:

- Original: Purchasing
- Copy: Departmental Project File
- Copy: Consultant