

## **CONSULTANT SERVICES**

### **Performance Evaluation Instructions**



#### **Why**

- Scores from these evaluations factor into “Past Performance” ratings, which are used to help determine selection of future consultants. Meaningful evaluations help us hire the very best.

#### **How**

- Form should be reviewed and discussed with the Consultant during contract negotiations to establish your expectations.
- Supplementary forms are available from the Consultant Administration Unit. Further details about the considerations for each criteria (i.e., Schedule: a. Achieved schedule; b. Prompt response to review comments; c. Adapted to changes by ITD; d. Notified ITD early, regarding schedule impacts) are available.
- Score accurately. A “4” is respectable; “5” is exceptional and should be rarely used.
- Send form to Consultant for signature after evaluation totals are completed.

#### **When**

##### **Final Evaluation**

- Always complete and distribute a performance evaluation at the point of termination of the agreement.
- Distribute as noted on the bottom of the form.
- Meet with consultant if evaluation is below requirements.

##### **Subconsultant Evaluation**

- Subconsultants with significant project participation (more than \$25,000) should also be evaluated. Coordinate review with the prime consultant’s review prior to distribution.
- Distribute the same as regular reviews and include the prime consultant and subconsultant.
- When assessing the schedule completion, address ITD delays if any.

## CONSULTANT SERVICES PERFORMANCE EVALUATION

Name and Address of Consultant		Evaluation Type <b>Y</b> Consultant <b>Y</b> Subconsultant	
		Project No.	Key No.
		Project Title	
Type of Work <b>Y</b> Study <b>Y</b> Right of Way <b>Y</b> Design <b>Y</b> Other (Specify)		Agreement Number	
		Type of Agreement <b>Y</b> Lump Sum <b>Y</b> Other <b>Y</b> Cost Plus Fixed Fee	
Complexity of Work <b>Y</b> Difficult <b>Y</b> Routine	Date Agreement Approved		
Amount of Original Agreement \$	Total Amount Supplementals \$	Total Agreement Amount \$	
Agreement Completion Date including Extensions	Actual Completion Date	Actual Total Paid \$	
Type and Extent of Subcontracting		<div style="display: flex; justify-content: space-between;"> <span>Committed %</span> <span>Met %</span> </div> <div style="display: flex; justify-content: space-between;"> <span>DBE GOALS</span> <span></span> </div>	
Performance Rating Scale (from Average Score below) <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> <u>5</u> Superior         </div> <div style="text-align: center;"> <u>4</u> Above Requirements         </div> <div style="text-align: center;"> <u>3</u> Meets Requirements         </div> <div style="text-align: center;"> <u>2</u> Below Requirements         </div> <div style="text-align: center;"> <u>1</u> Poor         </div> </div>			
Criteria		Comment	Score
1. Negotiations and Cost/Budget Cooperative and responsive Completed within agreement budget including supplements			
2. Schedule Completed within agreement schedule including supplements			
3. Technical Quality Met standards			
4. Communications Clear, concise communication (oral, written, drawings)			
5. Management Team player, managed subs, accurate and timely invoices, appropriate periodic progress reports			
6. DBE (to score use only 2, 3, or 4) Met goals			
Total Score			
Average Score (total score ÷ number of criteria rated)			
Rated by (Agreement Administrator Name and Title)		Agreement Administrator Signature	Date
Rated by (Consultant Representative Name and Title)		Consultant Representative Signature	Date
Review by (Consultant Administration Unit Name and Title)		Consultant Administration Unit Signature	Date

Distribution: Original: Consultant Administration Unit; Copies: Agreement Administrator, Consultant

## CONSULTANT PERFORMANCE EVALUATION CRITERIA

Name of Consultant	
Project	Agreement No.
1. Negotiation and Cost/Budget Criteria	Score
A. Recognized ITD guidelines for overhead and fee	
B. Finished within budget, including supplements	
C. Appropriate level of effort	
D. Reasonable, direct, non-salary expenses	
E.	
Total	
Average Score (total score ÷ number of criteria rated)	
2. Schedule Criteria	Score
A. Met negotiation schedule	
B. Achieved schedule, including all supplements	
C. Prompt response to review comments	
D. Adapted to changes by ITD	
E. Notified ITD early regarding schedule "impactor"	
F.	
Total	
Average Score (total score ÷ number of criteria rated)	
3. Technical Quality Criteria	Score
A. Work products meet standards where "practical" and as negotiated on the scope of work	
B. Performed appropriate quality control	
C. Responds to review comments in subsequent submission	
D. Sought opportunities to incorporate innovative designs	
E. Delivered "compatible" electronic files	
F. Implemented procedures to control construction cost	
G.	
Total	
Average Score (total score ÷ number of criteria rated)	

## CONSULTANT PERFORMANCE EVALUATION CRITERIA

Name of Consultant	
Project	Agreement No.
4. Communication Criteria	Score
A. Produced clear, concise, oral and written communications	
B. Demonstrates an understanding of oral and written instructions	
C. Communicated at intervals appropriate for the work	
D. Respects and uses acceptable lines of communication	
E. Open and honest communications	
F.	
Total	
Average Score (total score ÷ number of criteria rated)	
5. Management Criteria	Score
A. Provided effective cost control measures/ideas	
B. Submitted appropriate, periodic, accurate progress reports	
C. Accurate and timely invoices	
D. Conducted meetings efficiently	
E. Limited the number of consultant-initiated contract modifications/supplementals	
F. Coordinated with ITD effectively; was a "team player"	
G. Responsiveness	
H. Managed subconsultants effectively	
I. Adheres to schedule on time	
J.	
Total	
Average Score (total score ÷ number of criteria rated)	
Additional Comments (optional)	