

CONSULTANT PERFORMANCE EVALUATION

VENDOR NAME	PROJECT MANAGER	<p>NOTE: All evaluations and scoring guide references within are based in accordance with the governing contract; applicable Alberta Infrastructure specifications and guidelines; vendor submissions and project plans.</p> <p>Legend: "As Required" = performed in accordance with contract requirements. "Exceeds" = fulfills and surpasses contract requirements in the opinion of Alberta Infrastructure. "Inadequate" = not performed in accordance with contract requirements.</p>
PROJECT CONTRACT TITLE	PROJECT ID	
CONTRACT AWARD AMOUNT	CONTRACT ID	
CONTRACT AWARD DATE	FINAL AMOUNT	
SUBSTANTIAL COMPLETION DATE	COMPLETION DATE	
PRIMARY VENDOR CONTACTS	EVALUATION NO.	
STATUS	SCHEDULED EVALUATION DATE	
CEA REVIEWER	ACTUAL EVALUATION DATE	

INDICES	KEY PERFORMANCE INDICATORS	SCORE	NARRATIVE / RATIONALE TO SUPPORT SCORE	CORRECTIVE ACTION PLAN	SCORING GUIDE: EXCEEDS/SURPASSED	SCORING GUIDE: NEEDS IMPROVEMENT	
QUALITY OF DELIVERABLES: 3.00	Contract deliverables are concise, complete, accurate, and provide required level of detail with regards to elements such as, but not limited to: Pre-Design, Schematic Design, Design Development, Construction Documents, and Pre-Tender.	3			Deliverables exceed expectations. Consultant responds to questions or concerns promptly and maintains productivity to meet milestones at or before the scheduled time.	Project experiences delays, unnecessary increased project costs, misses milestones and/or completion date delays, as a result of Consultant action or inaction.	
	Is responsive regarding owner project input, communicating updates on deliverables as required.	3			Responds to Infrastructure feedback, and incorporates Infrastructure and client input where reasonable and appropriate in accordance with the contract. Exceeds expectations through incorporating Infrastructure feedback. Communicates updates on contract deliverables as required. Proposes creative design solution(s). Demonstrates thoroughness and logical approach to problem analysis and exploration of alternatives.	Fails to consider and/or incorporate feedback from Infrastructure and client as required by the contract. Does not provide or provides inadequate communication on updates and contract deliverables. Inadequate approach to problem analysis and exploration of alternatives.	
	Manages errors and omissions: issues accurate specifications and drawings that result in minimal amendments and change orders during the construction phase due to errors and omissions. Addenda are clear and concise, properly referencing specification documents and drawings as required.	3				No Infrastructure intervention required to correct drawings or specifications. Consultant addresses compliance issues with requirements earlier than requested. Documents are clear and concise and error-free. Incorporates changes in a timely and cost-effective manner.	Consultant fails to address or inadequately addresses compliance issues in accordance with requirements within committed timeframes. Extensive re-works are required due to noncompliance with standards or criteria. Inadequate quality control of deliverables. Poorly formatted reports containing errors. Requires Infrastructure intervention to meet requirements for deliverables.
QUALITY OF DESIGN / SAFETY: 3.00	Is not assessed any safety violations (such as WCB and OHS notices) during the course of the project.	Yes					
	Design at each stage meets basic legislative requirements, codes and standards related to safety, accessibility, and community needs.	3			No safety issues at each design stage. Addresses safety concerns quickly, causing no delays (in schedule or adversely affecting the scope/timeframe). Proactively demonstrates inclusive public accessibility to all infrastructure.	Additional costs are incurred due to safety issues. Safety issues identified in designs (e.g.: lacks, but not limited to, reference to applicable legislative codes such as the building code, safety code, electrical code, fire code etc.). Fails to address or inadequately addresses identified safety issues. Lacks inclusive public accessibility to infrastructure as required.	
	Provides a final product that functions (i.e., effective, economical, efficient, safe, convenient, easy to operate and maintain including engineering and architectural support and service) for program users in accordance with requirements.	3				Provides improvements that exceed requirements (i.e. with respect to standards, that consider mandatory requirements) that enhance asset preservation. Users expectations are exceeded. Provides clear understanding of the overall project objectives and provides substantiated recommendations for the project. Design reflects overall project objectives and constraints.	Final product is inadequate and/or does not fulfill requirements; requires intervention from Infrastructure to meet standards and other mandatory requirements. Design inadequately enhances asset preservation and fails to reflect project objectives and constraints.
	Provides an effective technical concept, which meets the project's environmental requirements, including sustainable design criteria; addresses any compliance issues with the Technical Design Requirements (TDR) within required timeframes.	3				Deliverables exceed mandatory environmental expectations, and long-term sustainability requirements. Negotiates and incorporates changes due to regulatory requirements (over and above guidelines and standards), in a timely and cost effective manner. Has no compliance issues with TDR.	Deliverables fail to consider or inadequately considers required environmental issues and sustainability, or life cycle costs and/or long-term sustainability. Consultant fails to address or inadequately addresses compliance issues with the requirements within committed timeframes.
	No substitutions to key resources, or any substitutes thereto have been vetted and approved by Infrastructure in accordance with requirements.	Yes					
	Manages and facilitates good quality control and inspection process as required: provides timely field reviews, site monitoring/reviews and reporting as required. Expedient review of shop drawings and submissions following Infrastructure's stated format.	3				Performed on time or ahead of schedule and with no intervention required from Infrastructure staff or user groups. Exceeds quality of deliverables.	Consultant is unreliable, does not show up on-site during scheduled times. Does not perform or inadequately performs required duties and has conflicts with user groups. Inadequate quality control of deliverables.

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MANAGEMENT: 3.00	Is responsive in managing the contract elements and communicating updates as required.	3			Proactively communicates updates on contract deliverables, responds quickly ahead of required timeframes. Timely, accurate and clear internal responses to contractor/stakeholders. Exceeds requirements in coordinating contract deliverables in a clear and transparent manner that incorporates other consultants/contractors, in order to meet contract deliverables on or ahead of schedule.	Does not provide communication, or inadequately communicates on contract deliverables as required, necessitates intervention by Infrastructure staff to provide deliverable information. Causes contract deliverable delays. Fails to respond within required timeframes. Responses are unclear and result in call-backs/RFI responses.
	Provides proficient contract administration (accurate, organized, effective, practical adherence to the contractual obligations and procedures) as required.	3			Contract administration tasks such as reviewing work, certifying contractor payment, and commissioning coordination are up to date and exceed requirements with no issues.	Contract administration tasks such as reviewing work, certifying contractor payment, and commissioning coordination are late and/or inadequately performed.
	Able to work well with stakeholders and engage the public as required, escalating issues for additional monitoring. Assists Infrastructure with preventing and resolving site problems, claims, or disputes.	3			Exceeds scope requirements for the public involvement process and stakeholder sensitivities. Provides prompt issue prevention and resolution activities in accordance with the contract.	Does not address or fails to adequately address public concerns as required by contract; external communication is poor. Fails to provide a solution-focused approach to help prevent and resolve site issues, claims and/or disputes in accordance with the contract.
	Demonstrates effective relationship management and coordination of sub-consultants, contractors and suppliers (if applicable), demonstrating leadership, efficiency, fairness, ensuring positive, professional relationship skills in working with Alberta Infrastructure staff and clients as required.	3			Exceeds expectations in managing and coordinating sub-consultants, and is cooperative and available as required. Employs sub-consultants who perform the work in accordance with all requirements.	Fails to or inadequately manages and coordinates sub-consultants as required. Fails to employ sub-consultants who perform the work in accordance with all requirements. Fails to cooperate and be available pursuant to contract.
SCHEDULE: 3.00	Work is completed on time. Meets required milestones and deliverables, provides on schedule delivery of services at every stage of the project (such as, but not limited to: contract acceptance procedures completed; schedule of schematic design, design development, tender drawings and specifications; cost estimates at each stage; processing of change orders; operation & maintenance manuals; approval of shop drawings, warrant inspections, and post occupancy documentation received).	Yes				
	Provides adequate/appropriate time for Infrastructure to review contract deliverables in accordance with requirements.	3			Exceeds schedule expectations. Provides contract deliverables well ahead of committed timeframes for Infrastructure to review. Consultant's actions and responses to questions contributed to meeting all milestones and early project completion.	Response time is delayed, does not provide Infrastructure adequate time to review. Results in missing milestones contributing to delaying the completion date and/or contributing to increased project costs.
COST: 3.00	Contract amendment requests comply and align with contract requirements, accounts for items included in scope, maximization of time value while minimizing cost.	3			No additional costs / amendments for in-scope work. Exceeds expectations with respect to communication and is transparent with Infrastructure regarding contract amendments as required. Monitors change and risk management plans, making recommendations in order to meet required outcomes (including fundamental shifts in project direction).	Fails to account, or inadequately accounts for items included in scope. Amendments for additional fees do not comply or align with contract requirements and are not approved. Fails to manage changes in project direction, Infrastructure intervention is required.
	Invoices and change orders submitted are in compliance with requirements and align with the work.	3			Change orders and requests for substitutions are requested in compliance with the requirements and align with the work. Reviewing work, certifying contractor payment, commissioning coordination is up to date and exceeds requirements. No cost impact due to errors and omissions. Invoices are error-free and are submitted on a regular basis in the prescribed format.	Change orders and requests for substitutions are inadequate, and/or not in compliance with the requirements and/or do not align with the work. Reviewing work, certifying contractor payment, commissioning coordination is delayed or inaccurate. Cost impact occurs due to errors and omissions. Invoices are inaccurate, illegible, submitted very late or before work completed.
	Contract is completed on budget. Manages final product in accordance with Infrastructure's approved budget.	3			Recommending and improving scope of work and standards that reduces project costs. Continuously monitoring Infrastructure's approved budget, and finds innovative ways to save costs. No to minimal variation in pre-bid estimate versus bids received. Estimates include provisions to adjust productivity factors to improve accuracy. Completes work within or under approved budget.	Stages were delayed/late, over forecasted compared to the actuals at each stage. Fails to account for scope of work and standards, lacks contingency or risk mitigation strategies for changes, resulting in additional costs. Significant variation in pre-bid estimate and bids received. Costs are outside the accuracy range as detailed in the contract. Estimates do not include all factors and are inaccurate. Fails to complete work within approved budget.
TOTAL SCORE		3.00				

OVERALL EVALUATION COMMENTS