

Prime Consultant Evaluation and Scoring Guidance

Introduction: The prime consultant scoring guide has been developed to support both vendors and project managers through the Vendor Performance Management scoring process and evaluation discussions.

Suggested Benchmarks: Understanding that each contract is unique, suggested benchmarks have been provided as examples only and can be used by project managers and vendors to discuss and set expectations specific to their contract requirements.

Supplemental Clarification/Guidance: Supplementary clarification has been provided as guidance to assist vendors and project managers to understand and set definitions of exceeding, meeting and needs improvement to support scoring. While using the evaluation and scoring guidance document it is important to understand a **score of '3' equates to satisfactory achievement of the KPI, having delivered the services or product according to the contract requirements and meets expectations.**

INDICES	KEY PERFORMANCE INDICATORS	SCORING GUIDE: EXCEEDS EXPECTATIONS	SCORING GUIDE: MEETS EXPECTATIONS	SCORING GUIDE: NEEDS IMPROVEMENT
<p>1. QUALITY OF DELIVERABLES</p> <p>Suggested methodology and examples of benchmarks:</p> <div style="border: 1px solid black; padding: 5px;"> <p>EXCEEDING EXPECTATIONS</p> <ul style="list-style-type: none"> Score 5: If all or nearly all of the deliverables exceed expectations. Example: 90-100% of deliverables exceed expectation. Score 4: If more than half of deliverables exceed expectations. Example: 50-89% of deliverables exceed expectation </div> <div style="border: 1px solid black; padding: 5px;"> <p>MEETS EXPECTATIONS</p> <ul style="list-style-type: none"> Score 3: If all deliverables meet quality expectations outlined in the contract. </div> <div style="border: 1px solid black; padding: 5px;"> <p>NEEDS IMPROVEMENT</p> <ul style="list-style-type: none"> Score 2: If a minimal portion of deliverables are below expectations. Example: Less than 10% of deliverables below expectation. Score 1: If more than a minimal amount of deliverables are below quality expectation. Example: More than 10% of deliverables below expectation. </div> <p>Supplementary Clarification: When considering benchmarks they should allow for the evaluation to take a holistic approach to the assessment of criteria, where it may be important for some deliverables to be weighted slightly heavier due to importance or impacts to the contract deliverables. For example if the majority are exceeding</p>	<p>KPI:</p> <p>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.</p> <p>Supplemental Clarification (What this means):</p> <p>Provides contract deliverables that are complete, accurate, and contain the required level of detail as per contract.</p>	<p><i>Deliverables exceed expectations.</i></p> <p><i>Consultant responds to questions or concerns promptly and maintains productivity to meet milestones at or before the scheduled time.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Proposes creative design solution(s).</p> <p>Demonstrates thoroughness and a logical approach to problem analysis and exploration of alternatives.</p>	<p>Supplemental guidance to support scoring:</p> <p>Provides contract deliverables that are complete, accurate, and contain the required level of detail.</p>	<p><i>Project experiences delays, unnecessary increased project costs, missed milestones and/or completion date delays, as a result of Consultant action or inaction.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Provides contract deliverables that are incomplete or inaccurate or lacking in the required level of detail.</p> <p>Inadequate approach to problem analysis.</p> <p>No attempt to explore alternatives.</p>
	<p>KPI:</p> <p>Is responsive regarding owner project input, communicating updates on deliverables as required.</p> <p>Supplemental Clarification (What this means):</p> <p>Responds to Infrastructure and client project input on deliverables.</p>	<p><i>Responds to Infrastructure feedback, and incorporates Infrastructure and client input where reasonable and appropriate in accordance with the contract.</i></p> <p><i>Exceeds expectations through incorporating Infrastructure feedback.</i></p> <p><i>Communicates updates on contract deliverables as required.</i></p> <p><i>Proposes creative design solution(s).</i></p> <p><i>Demonstrates thoroughness and logical approach to problem analysis and exploration of alternatives.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Goes to great lengths to incorporate Infrastructure and/or client input given short turnaround times and maintaining project budget while satisfying the requests.</p> <p>Incorporates changes in a timely and cost-effective manner.</p> <p>Proactively advises Alberta Infrastructure and client of potential issues before they arrive.</p>	<p>Supplemental guidance to support scoring:</p> <p>Incorporates Infrastructure and client input and feedback on deliverables.</p>	<p><i>Fails to consider and/or incorporate feedback from Infrastructure and client as required by the contract.</i></p> <p><i>Does not provide or provides inadequate communication on updates and contract deliverables.</i></p> <p><i>Inadequate approach to problem analysis and exploration of alternatives.</i></p>
	<p>KPI:</p> <p>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.</p>	<p><i>No Infrastructure intervention required to correct drawings or specifications.</i></p> <p><i>Consultant addresses compliance issues with requirements earlier than requested.</i></p> <p><i>Documents are clear and concise and error-free.</i></p>	<p>Supplemental guidance to support scoring:</p> <p>Manages errors and omissions in specifications and drawings. Issues clear amendments and addenda as required.</p>	<p><i>Consultant fails to address or inadequately addresses compliance issues in accordance with requirements within committed timeframes.</i></p> <p><i>Extensive re-works are required due to noncompliance with standards or criteria.</i></p>

<p>expectations, but there are a minimal amount that also fall below expectations the project manager has the flexibility to look at this holistically and apply judgement in scoring.</p>	<p><i>Addenda are clear and concise, properly referencing specification documents and drawings as required.</i></p> <p>Supplemental Clarification:</p> <p>Manages errors and omissions in specifications and drawings.</p> <p>Issues amendments and addenda as required.</p>	<p><i>Incorporates changes in a timely and cost-effective manner.</i></p> <p>Supplemental guidance to support scoring:</p> <p>No Infrastructure intervention required to correct drawings or specifications; Consultant proactively identifies and corrects any errors and omissions themselves.</p> <p>Specifications, drawings, amendments, addenda, and similar documents are error-free.</p>		<p><i>Inadequate quality control of deliverables.</i></p> <p><i>Poorly formatted reports containing errors.</i></p> <p><i>Requires Infrastructure intervention to meet requirements for deliverables.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Inadequate quality control of deliverables. Specifications, drawings, and similar documents contain numerous errors of substance and/or format.</p> <p>Errors and omissions incurred significant costs to the Province.</p>
<p>2. QUALITY OF DESIGN/SAFETY</p> <p>Suggested methodology and examples of benchmarks:</p> <div style="border: 1px solid black; padding: 5px;"> <p>EXCEEDING EXPECTATIONS</p> <ul style="list-style-type: none"> Score 5: If all or nearly all of the deliverables exceed expectations. Example: 90-100% of deliverables exceed expectation. Score 4: If more than half of deliverables exceed expectations. Example: 50-89% of deliverables exceed expectation </div> <div style="border: 1px solid black; padding: 5px;"> <p>MEETS EXPECTATIONS</p> <ul style="list-style-type: none"> Score 3: If all deliverables meet quality expectations outlined in the contract. </div> <div style="border: 1px solid black; padding: 5px;"> <p>NEEDS IMPROVEMENT</p> <ul style="list-style-type: none"> Score 2: If a minimal portion of deliverables are below expectations. Example: Less than 10% of deliverables below expectation. Score 1: If more than a minimal amount of deliverables are below quality expectation. Example: More than 10% of deliverables below expectation. </div> <p>Supplementary Clarification:</p> <p>When considering benchmarks they should allow for the evaluation to take a holistic approach to the assessment of criteria, where it may be important for some deliverables to be weighted slightly heavier due to importance or impacts to the contract deliverables. For example if the majority are exceeding expectations, but there are a</p>	<p>KPI (Pass/Fail):</p> <p><i>Is not assessed any safety violations (such as WCB and OHS notices) during the course of the project.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Are safety concerns/violations resolved promptly and appropriately? How many safety violations occurred?</p>	<p>Not Applicable. This is a pass/fail KPI, not scored on a scale of 1-5, expectations are met or not met, they can not be exceeded.</p>	<p>Supplemental guidance to support Pass:</p> <p>Safety concerns/violations, if any, are resolved promptly and appropriately</p>	<p>Supplemental guidance to support Fail:</p> <p>Safety concerns or violations involving the Consultant are not resolved promptly or appropriately.</p>
	<p>KPI:</p> <p><i>Design at each stage meets basic legislative requirements, codes and standards related to safety, accessibility, and community needs.</i></p>	<p><i>No safety issues at each design stage.</i></p> <p><i>Addresses safety concerns quickly, causing no delays (in schedule or adversely affecting the scope/timeframe).</i></p> <p><i>Proactively demonstrates inclusive public accessibility to all infrastructure.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Produces innovative design approaches for meeting codes, standards, and other legislated requirements.</p> <p>Proactively integrates accessibility aspects into design for all infrastructure.</p> <p>Proactively provides recommendations/solutions to design issues not previously considered by Alberta Infrastructure and/or users.</p>	<p>Supplemental guidance to support scoring:</p> <p>Produces a design at each stage which meets codes, standards, and legislated requirements related to safety, accessibility, and community needs.</p>	<p><i>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.).</i></p> <p><i>Fails to address or inadequately addresses identified safety issues.</i></p> <p><i>Lacks inclusive public accessibility to infrastructure as required.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Safety issues (e.g., not meeting the required code(s) and/or standard(s)) identified in one or more designs.</p>
	<p>KPI:</p> <p><i>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.</i></p> <p><i>Provides clear understanding of the overall project objectives and provides substantiated recommendations for the project.</i></p> <p><i>Design reflects overall project objectives and constraints.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Functional programming is performed to exceed user requirements and expectation.</p>	<p><i>Provides improvements that exceed requirements (i.e. with respect to standards, that consider mandatory requirements) that enhance asset preservation. User expectations are exceeded.</i></p> <p><i>Provides clear understanding of the overall project objectives and provides substantiated recommendations for the project.</i></p> <p><i>Design reflects overall project objectives and constraints.</i></p>	<p>Supplemental guidance to support scoring:</p> <p>Provides a design that functions for users in accordance with requirements.</p> <p>Design reflects overall project objectives and constraints.</p>	<p><i>Final product is inadequate and/or does not fulfill requirements; requires intervention from Infrastructure to meet standards and other mandatory requirements.</i></p> <p><i>Design inadequately enhances asset preservation and fails to reflect project objectives and constraints.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Numerous aspects of the design are inadequate in accordance with requirements.</p> <p>Design fails to or inadequately reflects project objectives and constraints.</p> <p>Design requires intervention from Infrastructure to meet minimum user-functionality requirements.</p>

<p>minimal amount that also fall below expectations the project manager has the flexibility to look at this holistically and apply judgement in scoring.</p>		<p>Provides user-centred substantiated design choices and recommendations in a majority of the design.</p>		
	<p>KPI: <i>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.</i></p> <p>Supplemental Clarification (What this means): Provides a technical concept that aligns with Infrastructure's Technical Design Requirements. Addresses any compliance issues with Infrastructure's Technical Design Requirements within required timeframes. Provides a technical concept which meets the project's environmental requirements, including sustainable design criteria.</p>	<p><i>Deliverables exceed mandatory environmental expectations, and long-term sustainability requirements.</i></p> <p><i>Negotiates and incorporates changes due to regulatory requirements (over and above guidelines and standards), in a timely and cost effective manner.</i></p> <p><i>Has no compliance issues with TDR.</i></p> <p>Supplemental guidance to support scoring: Provides an innovative design that creatively satisfies Infrastructure's Technical Design Requirements in the context of the project. Provides a design with no compliance issues with Infrastructure's Technical Design Requirements. Proactively works with Infrastructure's Technical Services unit to minimize/eliminate non-compliance prior to submission. Technical concept exceeds mandatory environmental expectations and sustainability requirements.</p>	<p>Supplemental guidance to support scoring: Provides a technical concept that aligns with Infrastructure's Technical Design Requirements. Addresses any compliance issues with Infrastructure's Technical Design Requirements within required timeframes. Provides a technical concept which meets the project's environmental requirements, including sustainable design criteria.</p>	<p><i>Deliverables fail to consider or inadequately considers required environmental issues and sustainability, or life cycle costs and/or long-term sustainability.</i></p> <p><i>Consultant fails to address or inadequately addresses compliance issues with the requirements within committed timeframes.</i></p> <p>Supplemental guidance to support scoring: Extensive re-work of the technical concept is required due to noncompliance with standards or criteria. Technical concept fails to consider or inadequately considers required environmental and sustainability requirements. Does not comply with Infrastructure's Technical Design Requirements Does not respond to Infrastructure's Technical Services unit during Technical Design Requirement reviews.</p>
<p>3. MANAGEMENT</p> <p>Suggested methodology and examples of benchmarks:</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p>EXCEEDING EXPECTATIONS</p> <ul style="list-style-type: none"> Score 5: If all or nearly all of the time, management expectations are exceeded (relevant to the project). Example: 90-100% of the time, expectations are exceeded. Score 4: If more than half of time, management expectations are exceeded. Example: 50-89% of the time, management expectations are exceeded. </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p>MEETS EXPECTATIONS</p> <ul style="list-style-type: none"> Score 3: If all management expectations are met as outlined in the contract. </div> <div style="border: 1px solid black; padding: 5px;"> <p>NEEDS IMPROVEMENT</p> </div>	<p>KPI (Pass/Fail): <i>No substitutions to key resources, or any substitutes thereto have been vetted and approved by Infrastructure in accordance with requirements.</i></p> <p>Supplemental Clarification (What this means): If there were any substitutions to key resources (such as, but not limited to personnel, labour, materials, and equipment), was Infrastructure advised? Did Infrastructure approve of the substitution(s)?</p> <p>KPI: <i>Manages and facilitates good quality control and inspection process as required: provides timely field reviews, site monitoring/reviews and reporting as required.</i></p>	<p>Not Applicable. This is a pass/fail KPI, not scored on a scale of 1-5, expectations are met or not met, they can not be exceeded.</p> <p><i>Performed on time or ahead of schedule and with no intervention required from Infrastructure staff or user groups.</i></p> <p><i>Exceeds quality of deliverables.</i></p> <p>Supplemental guidance to support scoring: Exceeds required quality control and inspection of deliverables.</p>	<p>Supplemental guidance to support Pass: No substitutions, or if there were any substitutions to key resources, Infrastructure was advised and Infrastructure approved of the substitution(s), or the substitution was allowed per the contract documents.</p> <p>Supplemental guidance to support scoring: Manages and facilitates quality control and inspection processes. Conducts field reviews and site monitoring/reviews as required. Provides reports on inspections and reviews as required. Reviews shop drawings and other submissions following Infrastructure's stated format.</p>	<p>Supplemental guidance to support Fail: Substitutions were made to resources without following processes outlined in the contract (Infrastructure approval, following change order process).</p> <p><i>Consultant is unreliable, does not show up on-site during scheduled times.</i></p> <p><i>Does not perform or inadequately performs required duties and has conflicts with user groups.</i></p> <p><i>Inadequate quality control of deliverables.</i></p> <p>Supplemental guidance to support scoring:</p>

<ul style="list-style-type: none"> • Score 2: If a minimal portion of management expectations need improvement. Example: If 1-2 instances demonstrate below quality co-ordination following corrective feedback from project team. • Score 1: If more than a minimal amount of management expectations need improvement. Example: More than 2 instances demonstrate below quality co-ordination following corrective feedback from project team 	<p><i>Expedient review of shop drawings and submissions following Infrastructure's stated format.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Manages and facilitates quality control and inspection processes.</p> <p>Conducts field reviews and site monitoring/reviews as required or as specified by PM.</p> <p>Provides reports on inspections and reviews as required or as specified by PM.</p> <p>Reviews shop drawings and other submissions following Infrastructure's stated format.</p>	<p>All reports on inspections and reviews are comprehensive while also being solution-oriented if issues are uncovered.</p> <p>Review of shop drawings and other submissions adds value to Infrastructure's stated format.</p>		<p>Does not show up on-site during scheduled times or does so irregularly.</p> <p>Does not resolve conflicts with user groups.</p>
<p>Supplementary Clarification: When considering benchmarks they should allow for the evaluation to take a holistic approach to the assessment of criteria, where it may be important for some deliverables to be weighted slightly heavier due to importance or impacts to the contract deliverables. For example if the majority are exceeding expectations, but there are a minimal amount that also fall below expectations the project manager has the flexibility to look at this holistically and apply judgement in scoring.</p>	<p>KPI: <i>Is responsive in managing the contract elements and communicating updates as required.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Communicates regarding deliverables, issues, and activities to relevant stakeholder(s).</p> <p>Responds in a timely manner.</p> <p>Communicates in the manner and format agreed-to.</p>	<p><i>Proactively communicates updates on contract deliverables, responds quickly ahead of required timeframes.</i></p> <p><i>Timely, accurate and clear internal responses to contractor/stakeholders.</i></p> <p><i>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.</i></p> <p>Supplemental guidance to support scoring: Communication style results in excellent working relationships with all stakeholders.</p>	<p>Supplemental guidance to support scoring: Communicates regarding deliverables, issues, and activities to relevant stakeholder(s).</p> <p>Responds in a timely manner.</p> <p>Communicates in the manner and format agreed-to.</p>	<p><i>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.</i></p> <p><i>Fails to respond within required timeframes.</i></p> <p><i>Responses are unclear and result in call-backs/RFI responses.</i></p> <p>Supplemental guidance to support scoring: Infrastructure intervention required to acquire information on deliverables.</p> <p>Communication style results in poor working relationships and drives conflict.</p> <p>Correspondence is disorganized; accurate information is difficult to access.</p>
	<p>KPI: <i>Provides proficient contract administration (accurate, organized, effective, practical adherence to the contractual obligations and procedures) as required.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Manages and coordinates sub-consultants, contractors, and suppliers (as applicable).</p>	<p><i>Contract administration tasks such as reviewing work, certifying contractor payment, and commissioning coordination are up to date and exceed requirements with no issues.</i></p> <p>Supplemental guidance to support scoring: Exceeds expectations in managing and coordinating sub-consultants, and is cooperative and available as required.</p> <p>Communication flow is timely and efficient.</p>	<p>Supplemental guidance to support scoring: Manages and coordinates sub-consultants, contractors, and suppliers (as applicable) as required.</p> <p>Employs sub-consultants who perform the work in accordance with all requirements.</p>	<p><i>Contract administration tasks such as reviewing work, certifying contractor payment, and commissioning coordination are late and/or inadequately performed.</i></p> <p>Supplemental guidance to support scoring: Fails to or inadequately manages and coordinates sub-consultants as required.</p> <p>Fails to employ sub-consultants who perform the work in accordance with all requirements.</p> <p>Fails to cooperate and be available pursuant to contract.</p> <p>Instructions do not reach sub-consultants/sub-contractor/supplier in a timely fashion; material input from sub-consultant/sub-contractor/supplier does not reach Alberta Infrastructure in time, impacting overall contract progression.</p>

	<p>KPI:</p> <p><i>Able to work well with stakeholders and engage the public as required, escalating issues for additional monitoring.</i></p> <p><i>Assists Infrastructure with preventing and resolving site problems, claims, or disputes.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Works with stakeholders (including Alberta Infrastructure staff, clients, and the public) to facilitate the completion of the project.</p>	<p><i>Exceeds scope requirements for the public involvement process and stakeholder sensitivities.</i></p> <p><i>Provides prompt issue prevention and resolution activities in accordance with the contract.</i></p>	<p>Supplemental guidance to support scoring:</p> <p>Works with stakeholders (including Alberta Infrastructure staff, clients, and the public) to facilitate the completion of the project.</p> <p>Assists Infrastructure with preventing and resolving site problems, claims, and disputes.</p> <p>Stakeholder requests are duly considered and adequately addressed to the stakeholder's satisfaction.</p>	<p><i>Does not address or fails to adequately address public concerns as required by contract; external communication is poor.</i></p> <p><i>Fails to provide a solution-focused approach to help prevent and resolve site issues, claims and/or disputes in accordance with the contract.</i></p>
	<p>KPI:</p> <p><i>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.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Provides contract administration.</p>	<p><i>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.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Contract administration tasks such as reviewing work, certifying contractor payment, and commissioning coordination are always up to date and exceed requirements with no issues.</p> <p>Proactively advises the project management team and Contractor before compliance issues arise.</p>	<p>Supplemental guidance to support scoring:</p> <p>Provides contract administration pursuant to the contract.</p>	<p><i>Fails to or inadequately manages and coordinates sub-consultants as required.</i></p> <p><i>Fails to employ sub-consultants who perform the work in accordance with all requirements.</i></p> <p><i>Fails to cooperate and be available pursuant to contract.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Contract administration tasks such as reviewing work, certifying contract payment, and commissioning coordination are regularly late and/or inadequately performed.</p>
<p>4. SCHEDULE</p> <p>Suggested methodology and examples of benchmarks:</p> <div style="border: 1px solid black; padding: 5px;"> <p>EXCEEDING EXPECTATIONS</p> <ul style="list-style-type: none"> • Score 5: If the schedules are continuously accurate, and the vendor proactively manages the schedule, saving money and time. • • Score 4: If the schedules are continuously accurate, and the vendor proactively manages the schedule, saving time. </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>MEETS EXPECTATIONS</p> <ul style="list-style-type: none"> • Score 3: If schedule is managed according to the contract requirements the vendor receives a 3. </div>	<p>KPI (Pass/Fail):</p> <p><i>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).</i></p> <p>Supplemental Clarification (What this means):</p> <p>Meets scheduled milestones and deliverables.</p>	<p>Not Applicable. This is a pass/fail KPI, not scored on a scale of 1-5, expectations are met or not met, they can not be exceeded.</p>	<p>Supplemental guidance to support Pass:</p> <p>Meets scheduled milestones and deliverables on time as submitted in approved schedule.</p> <p>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).</p>	<p>Supplemental guidance to support Fail:</p> <p>Does not meet scheduled milestones and deliverables on time.</p>

<p>NEEDS IMPROVEMENT</p> <ul style="list-style-type: none"> • Score 2: If Schedule is inaccurate or milestones are missed, resulting in need for clarification or updates and causes project delay. • Score 1: If Schedule is inaccurate or milestones are missed, resulting in need for clarification or updates and causes project delay, and additional costs. <p>Supplementary Clarification: When considering benchmarks they should allow for the evaluation to take a holistic approach to the assessment of criteria, where it may be important for some deliverables to be weighted slightly heavier due to importance or impacts to the contract deliverables. For example if the majority are exceeding expectations, but there are a minimal amount that also fall below expectations the project manager has the flexibility to look at this holistically and apply judgement in scoring.</p>	<p>KPI:</p> <p><i>Provides adequate/appropriate time for Infrastructure to review contract deliverables in accordance with requirements.</i></p>	<p><i>Exceeds schedule expectations.</i></p> <p><i>Provides contract deliverables well ahead of committed timeframes for Infrastructure to review.</i></p> <p><i>Consultant's actions and responses to questions contributed to meeting all milestones and early project completion.</i></p> <p>Supplemental guidance to support scoring:</p> <p>Works with Alberta Infrastructure proactively to minimize review time and expedite the review process by resolving potential issues prior to submission.</p>	<p>Supplemental guidance to support scoring:</p> <p>Provides adequate/appropriate time for Infrastructure to review contract deliverables.</p>	<p><i>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.</i></p>
<p>5. COST</p> <p>Suggested Cost Benchmarks to support scoring:</p> <div data-bbox="77 1153 459 1663" style="border: 1px solid black; padding: 5px;"> <p>EXCEEDING EXPECTATIONS</p> <ul style="list-style-type: none"> • Score 5: If change order submissions include proposed innovation resulting in a substantial cost savings. Example: proposed innovation result in a cost savings of greater than 10% of the total contract value. • Score 4: If change order submissions include proposed innovation resulting in a moderate cost savings. Example: proposed innovation results in a cost saving of up to 10% of total budget for project receives a 4. </div> <div data-bbox="77 1663 459 1844" style="border: 1px solid black; padding: 5px;"> <p>MEETS EXPECTATIONS</p> <ul style="list-style-type: none"> • Score 3: If costing services are provided as outlined in the contract the vendor receives a score of 3. </div> <div data-bbox="77 1844 459 1951" style="border: 1px solid black; padding: 5px;"> <p>NEEDS IMPROVEMENT</p> <ul style="list-style-type: none"> • Score 2: If a minimal portion of submissions related to cost </div>	<p>KPI:</p> <p><i>Contract amendment requests comply and align with contract requirements, accounts for items included in scope, maximization of time value while minimizing cost.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Provides compliant contract amendment requests.</p>	<p><i>No additional costs / amendments for in-scope work.</i></p> <p><i>Exceeds expectations with respect to communication and is transparent with Infrastructure regarding contract amendments as required.</i></p> <p><i>Monitors change and risk management plans, making recommendations in order to meet required outcomes (including fundamental shifts in project direction).</i></p> <p>Supplemental guidance to support scoring:</p> <p>Provides transparency with Infrastructure regarding contract amendments as required.</p>	<p>Supplemental guidance to support scoring:</p> <p>Contract amendment requests comply and align with contract requirements, accounts for items included in scope, maximization of time value while minimizing cost.</p>	<p><i>Fails to account, or inadequately accounts for items included in scope.</i></p> <p><i>Amendments for additional fees do not comply or align with contract requirements and are not approved.</i></p> <p><i>Fails to manage changes in project direction, Infrastructure intervention is required.</i></p>
<p>KPI:</p> <p><i>Invoices and change orders submitted are in compliance with requirements and align with the work.</i></p> <p>Supplemental Clarification (What this means):</p> <p>Provides invoices and change orders that are accurate, detailed, supported by factual evidence, and reflect the services provided in support of the work.</p>	<p><i>Change orders and requests for substitutions are requested in compliance with the requirements and align with the work.</i></p> <p><i>Reviewing work, certifying contractor payment, commissioning coordination is up to date and exceeds requirements.</i></p> <p><i>No cost impact due to errors and omissions. Invoices are error-free and are submitted on a regular basis in the prescribed format.</i></p>	<p>Supplemental guidance to support scoring:</p> <p>Provides invoices and change orders that are accurate, detailed, supported by factual evidence, and reflect the services provided in support of the work.</p> <p>Invoices are submitted in the prescribed format.</p>	<p><i>Change orders and requests for substitutions are inadequate, and/or not in compliance with the requirements and/or do not align with the work.</i></p> <p><i>Reviewing work, certifying contractor payment, commissioning coordination is delayed or inaccurate. Cost impact occurs due to errors and omissions.</i></p> <p><i>Invoices are inaccurate, illegible, submitted very late or before work completed.</i></p> <p>Invoices and/or change orders are continuously not submitted in the prescribed format after</p>	

<p>expectations need improvement. Example: If 1-2 instances demonstrate improvement is required following corrective feedback from project team.</p> <ul style="list-style-type: none"> • Score 1: If more than a minimal amount of cost submissions need improvement. Example: More than 2 instances demonstrate improvement required following corrective feedback from project team 				
<p>Supplementary Clarification: When considering benchmarks they should allow for the evaluation to take a holistic approach to the assessment of criteria, where it may be important for some deliverables to be weighted slightly heavier due to importance or impacts to the contract deliverables. For example if the majority are exceeding expectations, but there are a minimal amount that also fall below expectations the project manager has the flexibility to look at this holistically and apply judgement in scoring.</p>	<p>KPI: <i>Contract is completed on budget. Manages final product in accordance with Infrastructure's approved budget.</i></p> <p>Supplemental Clarification (What this means): Keeps project costs within Infrastructure's approved budget.</p>	<p><i>Recommending and improving scope of work and standards that reduces project costs.</i></p> <p><i>Continuously monitoring Infrastructure's approved budget, and finds innovative ways to save costs.</i></p> <p><i>No to minimal variation in pre-bid estimate versus bids received.</i></p> <p><i>Estimates include provisions to adjust productivity factors to improve accuracy.</i></p> <p><i>Completes work within or under approved budget.</i></p> <p>Supplemental guidance to support scoring: Proactively manages costs by collaborating with Alberta Infrastructure and Contractor to meet the approved budget.</p>	<p>Supplemental guidance to support scoring: Keeps project costs within Infrastructure's approved budget.</p>	<p><i>Stages were delayed/late, over forecasted compared to the actuals at each stage.</i></p> <p><i>Fails to account for scope of work and standards, lacks contingency or risk mitigation strategies for changes, resulting in additional costs.</i></p> <p><i>Significant variation in pre-bid estimate and bids received. Costs are outside the accuracy range as detailed in the contract.</i></p> <p><i>Estimates do not include all factors and are inaccurate. Fails to complete work within approved budget.</i></p>