

## Performance Evaluation for Consultant Services – SMC 20.50.080

Completed evaluations are retained in department contract files.

\* Complete these sections if your project required an Inclusion Plan

Consultant Name:		Evaluation Type <input type="checkbox"/> Interim (i.e., multi-phase contract) <input type="checkbox"/> Final <input type="checkbox"/> Other	
Consultant Project Manager Name		Project Title	
		Agreement Number	
Date Agreement Approved	Type of Work <input type="checkbox"/> Study <input type="checkbox"/> Design <input type="checkbox"/> Engineering <input type="checkbox"/> Training <input type="checkbox"/> Other		
Amount of Original Agreement \$	Amount for Amendments \$	Total Amount Agreement \$	
End Date Including Extensions	Actual Completion Date	Actual Total Paid \$	
*WMBE Goal per Inclusion Plan %	*WMBE Actual Performance %	*Total WMBE Dollars Paid %	
Brief description of work			
<b>Performance Scoring Criteria:</b> Select from the score ranges and descriptions listed to the right for all areas evaluated for each consultant.	<b>Performance Score</b>		<b>Description</b>
	• Satisfactory		Good to excellent, exceeding performance typically seen from consultants in the category.
			Acceptable to good performance, similar to typical consultant performance.
	• Unsatisfactory		Difficult and/or low performance, inadequate and below expectations.

Category of Performance	Comment	Satisfactory? Y / N
1. Negotiations: Cooperative and Responsive.		
2. Cost/Budget: finished within budget, including all supplements (amendments). Appropriate level of effort, reasonable direct, non-salary expenses.		
3. Schedule: Achieved scheduled (including all supplements (amendments). Prompt response to review comments. Adapted to changes initiated by Department. Notified department early regarding schedule impacts.		
4. Technical Quality: Work products meet standards. Performed appropriate quality control. Response to review comments in subsequent submissions. Sought opportunities to incorporate innovative designs/approaches. Delivered "compatible" electronic files.		
5. Communications: Produced clear, concise oral and written communication. Demonstrated an understanding of oral and written instructions. Communicated at intervals appropriate for the work. Respected and used lines of communications. Interaction the public.		
6. Management: Provided creative cost control measures/ideas. Submitted appropriate, periodic accurate progress reports. Provided accurate and timely invoices. Conducted meetings efficiently. Limited the number of consultant-initiated contract modifications/supplements. Coordinated with Department effectively; was a team player. Responsive; managed subconsultants effectively		
7. *WMBE Inclusion (rated for contracts of \$260,000 or more): Did the contractor comply with the commitments for good faith efforts in their Inclusion Plan, were reports submitted per the contract requirements; did the consultant cooperate with requests for information regarding compliance, was the consultant actively engaged, performing outreach and recruitment efforts in effective ways.		
8. Other		

Rated by (Project/Contract Manager Name and Title)	Project/Contract Manager Signature	Date
Department Review (Name and Title)	Department Signature	Date