

**REGIONAL MUNICIPALITY OF WOOD BUFFALO
VENDOR / CONTRACTOR PERFORMANCE EVALUATION FOR SERVICES & CONSTRUCTION**

ALL FIELDS ARE MANDATORY

Contractor Name:		Contract Title and Number:		
Purchase Order Number:	Contract Term:	Contract Period:	From:	To:
Contract Value:		Department:		

Performance Evaluation completed:

Six (6) Month Interval
 Contract Closeout

PERFORMANCE

<u>EXCEPTIONAL (7)</u>	<u>VERY GOOD (5)</u>	<u>SATISFACTORY (3)</u>
<p>Meets contractual requirements and exceeds many to the District's benefit. The scope of services was accomplished. Corrective actions taken by the contractor were highly effective.</p> <p>All significant program elements, including technical performance and schedule, are above what was planned.</p>	<p>Meets contractual requirements and exceeds some to the District's benefit. The scope of services was accomplished with minor problems. Corrective actions taken by the contractor were effective.</p> <p>Significant elements were as planned.</p>	<p>Meets contractual requirements. The actions taken by the contractor appear or were satisfactory.</p> <p>Some significant program elements are behind what was planned or above the negotiated cost.</p>

<u>MARGINAL (2)</u>	<u>UNSATISFACTORY (0)</u>	<u>N/A</u>	<u>INSUFFICIENT INFO. TO RATE</u>
<p>Does not meet some contractual requirements. The scope of services was not accomplished. Problems were serious. The contractor has yet to identify corrective actions, or the contractor's proposed actions appear only marginally effective or were not implemented.</p> <p>Some significant program elements are significantly behind.</p>	<p>Does not meet most contractual requirements, and recovery is not likely in a timely manner. The contractor's corrective actions appear or were ineffective.</p>	<p>Not Applicable</p>	<p>There is not sufficient information to rate performance.</p>

PERFORMANCE RATING	Score (0,2,3,5,7)	COMMENTS (Attach additional sheets if necessary)
<p>Work performed in compliance with contract terms</p> <p><input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate</p>		

PERFORMANCE RATING		Score (0,2,3,5,7)	COMMENTS (Attach additional sheets if necessary)
Materials, supplies and equipment provided as required?	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Staff availability	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Staff training	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Staff professionalism	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Customer service	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Staff turnover	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		

PERFORMANCE RATING		Score (0,2,3,5,7)	COMMENTS (Attach additional sheets if necessary)
Communication and Accessibility	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Prompt and effective correction of situations and conditions	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Contractor compliance with Wage & Benefits (if appropriate)	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Documentation records, receipts, invoices and computer generated reports received in a timely manner and in compliance with contract specifications	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Licensing requirements met	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Insurance certificates and documentation, timely and complete	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		

PERFORMANCE RATING		Score (0,2,3,5,7)	COMMENTS (Attach additional sheets if necessary)
Safety: <ul style="list-style-type: none"> ▪ Reporting of incidents ▪ Completing safety talks with employees ▪ Compliance of hazard assessment / site safety plans ▪ Total Recordable Injury Rate (TRIR) for the duration of the contract 	<input type="checkbox"/> Exceptional <input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Marginal <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate		
Would you recommend this firm again?	<input type="checkbox"/> Yes <input type="checkbox"/> No (Explain)		

**REGIONAL MUNICIPALITY OF WOOD BUFFALO
VENDOR / CONTRACTOR PERFORMANCE EVALUATION FOR SERVICE**

- OVERALL ASSESSMENT:**
- Total score out of 91**
- Exceptional (66-91)
 - Very Good (40-65)
 - Satisfactory (27-39)
 - Marginal (10-26)
 - Unsatisfactory (<10)

Comments: _____

Name of Evaluator: _____ (Print) _____ (Signature)

Title: _____ Date: _____

The Procurement Branch will arrange performance review meetings with vendors receiving a "Marginal" score or less on a Vendor Performance Evaluation report.

FISCAL COMPLIANCE:

Number of Financial Change Orders _____

Original Contract/Award Value \$ _____

Dollar amount of increase (decrease) \$ _____

Percent of increase (decrease) _____ %

Reason for increase (decrease) _____

MANAGER/DIRECTOR REVIEW:

_____ Title _____ Signature

_____ Date