

**CONSULTANTS PERFORMANCE REVIEW**

Consultant Name:	_____	Project Number:	_____
Address:	_____	Project Title:	_____
City, State, Zip:	_____	Sub-Title:	_____
Consultant Contact:	_____	County:	_____
Work Type:	_____	Agreement No.:	_____

A. Knowledge of Department Needs: Rating\_\_\_\_\_

Remarks:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. Cooperation: Rating \_\_\_\_\_

Remarks:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. Consultant Personnel, Supervision & Management: Rating \_\_\_\_\_

Remarks:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

D. Work Schedules & Deadlines: Rating \_\_\_\_\_

Remarks:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E. Design & Detail Accuracy: Rating \_\_\_\_\_

Remarks:

\_\_\_\_\_  
\_\_\_\_\_  
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F. Budget:

Rating \_\_\_\_

Remarks:

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G. Billing Records:

Rating \_\_\_\_

Remarks:

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H. Creativity:

Rating \_\_\_\_

Remarks:

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I. Overall Performance:

Rating \_\_\_\_

Remarks:

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Prepared By:

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Date:

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Reviewed By:

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Date:

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Reviewed By:

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Date:

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Consultant's Comments:	

## INSTRUCTIONS FOR PREPARING CONSULTANT PERFORMANCE REVIEW

### PURPOSE OF EVALUATION

The Consultant Performance Review has two purposes. The first is a vehicle to let the Consultant know how the Department views his work and to allow him to see what his strong and weak points are. Second the review is used as input for evaluating the Consultant for future work.

### RATING

The Consultant's performance in each area should be rated according to the key provided below. **Ratings of poor or excellent shall be explained in more detail in the remarks column.**

		KEY
5	Excellent	Consultant <u>consistently exceeded</u> expectations
4	Very Good	Consultant <u>frequently exceeded</u> expectations
3	Good	Consultant <u>consistently met</u> expectations
2	Fair	Consultant <u>occasionally failed</u> to meet expectations
1	Poor	Consultant <u>consistently failed</u> to meet expectations
(NA)	Not Applicable	As determined by the rater

### RATING CRITERIA

The following areas explain in more detail what the preparer of this form should consider when evaluating the Consultant's performance.

#### A. KNOWLEDGE OF DEPARTMENT NEEDS

- Consultant was knowledgeable and fulfilled his contractual agreement with the Department.
- Consultant maintained the scope of services sought by the Department.
- Consultant was familiar with the Department's policies and procedures.
- Consultant maintained the flexibility necessary for meeting the changing Department needs.
- Consultant serves the Department, but is not subservient to it. This means that the Consultant must occasionally give the Department unpleasant news such as: costs of a design concept exceed the budget.

#### B. COOPERATION

- Consultant displayed a willingness to work as a team member in the development of a project. Liaison with the Department's Project Manager is undertaken at the earliest possible time ensuring a common understanding of the scope of the project as well as conformity with the Department's standards, practices, accuracy requirements, format, survey practices and such other items critical to a given project.
- Consultant was accessible to Department staff and responsive to their questions, needs and concerns.
- Consultant maintained working relationship with the Department and other agencies.

- Consultant participated in community workshops/public meetings and responded to citizens/groups seeking information or assistance.

C. CONSULTANT PERSONNEL, SUPERVISION & MANAGEMENT

- Consultant did not over extend his human resources to where manpower was inadequate to maintain schedule.
- The work was checked prior to submission to the Department.

D. WORK SCHEDULES AND DEADLINES

- Consultant obtained approvals and decisions from the Department in a timely manner, thereby permitting the project to flow smoothly and quickly.
- The Project Manager was informed of any changes in scope, lack of information, or decisions acquired from the Department or other agencies that adversely affect the schedule or do not permit the work to progress in a logical manner.
- The Consultant communicated with the Project Manager with regard to the progress of work.
- Consultant participated and contributed to the decision making process.
- Consultant submitted plans, specifications and supporting documentation to the Department in a timely manner.
- Work was checked for accuracy and content prior to submission to the Department.

E. DESIGN AND DETAIL ACCURACY

- Consultant provided the Department with plans and specifications that meet Department standards for content and format. These plans and specifications were therefore readily understood by all those persons who were required to work with them.
- Consultant explained, defended and justified technical decisions and actions.
- Consultant provided hard copy documentation concerning design decisions, calculations, and other supporting data so that a project history is maintained.

F. BUDGET

- Consultant prepared plans and specifications for a project considering the project budget. If the project approached a budget overrun, the Consultant brought this fact to the attention of the Project Manager in a prompt and timely manner and offered alternative solutions to the budget problems.
- Consultant performed the scope of services within the anticipated man hours and actual estimated fee.
- Supplemental contracts and change orders to the original contract were minimized through careful planning and forethought when establishing the original scope of services and contract agreement with the Department.

G. BILLING RECORDS

- Consultant provided the Department with mathematically correct and itemized breakdowns of billing charges in accordance with the required accounting practices both upon completion of the project and when requested.
- Salaries, indirect costs, fixed fees and other rates submitted agreed with the contract cost proposal.

- Supporting documentation for charges were provided and questions were answered in a timely manner.

#### H. CREATIVITY

- Consultant ensured that only appropriate design alternatives meeting the Department's objectives were selected.
- Innovative and/or state-of-the-art methods, procedures, designs or theories in solving problems were used.
- Consultant looked beyond minimum standards to evaluate and incorporate desirable standards where practical and appropriate to do so.

#### I. OVERALL PERFORMANCE

- Consultant provided work that was technically accurate and complete, and displayed professional competence with regard to content.
- Construction oversights were not drawn from omissions or confusing details provided by the Consultant in the plans or specifications.
- Consultant's work was checked prior to submission to the Department to ensure quality and accuracy of the work in meeting the scope of services under the agreement.
- Although a design was unique, innovative and creative, the project remained constructible.

#### CONSULTANT COMMENTS

A copy of the completed Performance Evaluation Form will be furnished to the Consultant for review and comments. Any comments received from the Consultant in response to the evaluation will be routed to the appropriate Program Manager, District Engineer, and/or Executive Staff for review.