

Attachment J.9

Past Performance Evaluation Form



SUMMARY EVALUATION OF CONTRACTOR/PROVIDER PAST PERFORMANCE

(Please Read The Attached instructions Prior To Completing This Form.)

Contract information section including fields for Name of Contractor, Contract Administrator/COTR, Classification, Date of Award, Contractor Tax ID, Contract Monitor, and Final Contract Cost.

Contract period section with fields for Contract Period and Period of Performance Evaluation Review, both with 'From' and 'To' date ranges.

Table with 25 rows for performance evaluation criteria (e.g., adherence to requirements, quality of work, timeliness, reliability) and a 5-point rating scale (0-5).

Signature section for Evaluator and Contracting Officer Review, including fields for Name, Signature, Date, and Comments.

Distribution section for OCP use only, listing various roles and departments with checkboxes for distribution.

INSTRUCTIONS

GENERAL INSTRUCTIONS:

1. This form shall be generated to rate the performance of any contractor, provider, or supplier of goods and services to the District of Columbia.
2. The performance shall be summarized in the comments blocks included on the front of this form by checking the appropriate rating block, and adding any additional comments.
3. If there is not enough space to provide additional comments, please provide the comments on a separate sheet and attach that sheet to the form.
4. Please complete and transmit the attached form to your Agency Chief Contracting Officer in the Office of Contracting and Procurement (OCP), no less than three (3) weeks from the date that a contract ends; or the final delivery and receipt of goods and services pursuant to a contract, or upon the specific request of a representative of the Office of Contracting and Procurement.
5. Please evaluate the performance of the contractor in each area requested, checking the appropriate block on the performance evaluation form in accordance with the Rating Schedule listed below.

RATING SCHEDULE

- | | | |
|-----|-----------------------|---|
| (0) | UNSATISFACTORY | The performance was substandard, and does not meet most contractual requirements. The contractual performance contained serious compliance problems for which the contractor's corrective actions appear or were ineffective. |
| (1) | POOR | The performance was simply marginal, and just barely met the contractual requirements. There are, or were, deficiencies in the overall performance that the contractor needs to address. Generally, there were several concerns with the contractor's performance, quality and service. |
| (2) | SATISFACTORY | The performance acceptably meets or met the contractual requirements. The performance was timely, in compliance with the contractual requirements. Generally, there were a few minor difficulties or problems for which corrective action was undertaken by the contractor and were successful. |
| (3) | GOOD | The performance on this contract was more than satisfactory and exceeded some of the contractual requirements. The performance was more than timely and the quality of service above compliance with the requirement. Generally, there was good satisfaction and happiness with the contractor performance, quality, and service. |
| (4) | VERY GOOD | The performance met and exceeded most of the contractual requirements, to the benefit of the government, resulting in a high standard of quality, timeliness, and overall customer satisfaction. There were minimal difficulties with this contract for which all corrective actions undertaken by the contractor were met and fully implemented by the contractor. |
| (5) | OUTSTANDING | The performance of the contractor ALWAYS exceeds the contractual requirements, and was reflected by a continued pattern of an exceptional quality goods (or service, or work product); a continued pattern of advance delivery of goods or completion of services; a continued pattern of always performing at or below budget costs, and an unusual pattern of responsiveness to customer concerns; and an exceptionally high standard of demonstrated technical excellence. There were no contractor difficulties with this contract for which corrective action was required. |
6. A written, detailed narrative SHALL be provided to support and sustain all ratings of **UNSATISFACTORY** or **OUTSTANDING**. Please attach additional sheets, if needed.

SPECIFIC INSTRUCTIONS: (All items MUST be completed):

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| Block 1. | Insert the assigned, official contract number of the contract. |
| Block 2. | Enter the name, address, telephone and facsimile numbers, and the name of the point of contact of the contractor. |
| Block 3. | Enter the name, address, and telephone, facsimile and e-mail numbers of the Contract Administrator (CA / Contracting Officer Technical Representative (COTR). |
| Block 4. | Enter the appropriate classification information on the contract, or purchase order. Check all that apply. |
| Block 5. | Enter the contract date of award. |
| Block 6. | Enter the contractor's federal tax identification number that is listed in or on the contract document. |
| Block 7. | Enter a brief statement proving a caption or description of the nature of the contract. |
| Block 8. | Enter the name, address, and telephone and fax numbers of the Contract Monitor, or person completing this evaluation, if other than the CA/COTR. |
| Block 9. | Enter the initial, or agreed upon, price of the contract as listed in the contract or purchase order, <u>exclusive</u> of all modifications. |
| Block 10. | Enter the final cost of the contract, or what has been, or will be paid to the contractor, <u>inclusive</u> of all approved cost modifications. |
| Block 11. | Enter the actual stated contract period of the contract that is listed on the front of the contract document. |
| Block 12. | Enter the specific period for which the performance evaluation is being completed if the specific period is less the total period of the contract. |
| Block 13. | This item is intended to determine whether the contractor met, or is meeting, the specific requirements outlined in the scope of work that is listed in the contract. |
| Block 14. | This item is intended to determine the quality of the contractor goods, services, or work performance. |
| Block 15. | This item is intended to obtain an indication of the timeliness of performance. Ask the question: Did the contractor deliver or perform on time? |
| Block 16. | This item is intended to assess whether the customer believes the contractor is reliable enough to be used again by the District. |
| Block 17. | This item is intended evaluate how well the contractor interacted with the District. Was the contractor responsive, flexible, cooperative and professional. |
| Block 18. | This item is intended to assess the contractor's consistency in submitting the complete documents for payment, and other administrative documents including compliance on obtaining adequate liability insurance coverage where that requirement is applicable. |
| Block 19. | This item is intended to ascertain whether the vendor demonstrated originality and resourcefulness in handling issues addressed in a more traditional manner. |
| Block 20. | This item is intended to evaluate the contractor complied with the stated, or negotiated, contract cost. |
| Block 21. | This item addresses the extent, effectiveness, and overall management capability of the contractor (Primarily in service, consulting and construction contracts.) |
| Block 22. | This item addresses the extent to which the contractor met compliance requirements for a safe work site. (Primarily applicable in construction contracts.) |
| Block 23. | This item addresses the extent to which the contractor met compliance requirements for labor standards and laws. |
| Block 24. | This item is intended to evaluate whether the facilities that are provided by the contractor to the District met requirements, including whether the facilities were clean, and safe; and met all District housing and building code requirements or had a Certificate of Occupancy, where applicable. |
| Block 25. | Provide an OVERALL PERFORMANCE RATING assessing on the contractor's performance. The rating must be consistent with the prior ratings. |
| Block 26. | The Evaluator completing this performance evaluation shall sign and enter the date of signature. |
| Block 27. | The Contracting Officer shall review, and shall sign and enter the date of signature. |