

# ATTACHMENT J.8

Past Performance Evaluation Form



# SUMMARY EVALUATION OF CONTRACTOR/PROVIDER PAST PERFORMANCE

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

| CONTRACTOR/PROVIDER INFORMATION   |  | MONITORING INFORMATION   |  | 1. CONTRACT NUMBER:  |  |
|---|--|--|--|--|--|
| <b>2. Name of Contractor:</b><br>Name:<br>Address:<br>City: State:<br>Zip Code:<br>Telephone:<br>Facsimile:<br>E-mail:<br>Point of Contact: |  | <b>3. Contract Administrator/COTR:</b><br>Name:<br>Address:<br>City: State:<br>Zip Code:<br>Telephone:<br>Facsimile:<br>Agency:<br>E-mail: |  | <b>4. CLASSIFICATION</b> (Check boxes that apply)<br><input type="checkbox"/> a. Small Purchase <input type="checkbox"/> l. Intra-District<br><input type="checkbox"/> b. Contract Action <input type="checkbox"/> m. MOU<br><input type="checkbox"/> c. DC Supply Schedule <input type="checkbox"/> n. COOPurchase<br><input type="checkbox"/> d. Delivery Order <input type="checkbox"/> o. LSDBE<br><input type="checkbox"/> e. Fed Supply Schedule <input type="checkbox"/> p. Subcontract |  |
| <b>6. CONTRACTOR TAX IDENTIFICATION NUMBER:</b>   |  | <b>7. Contract Monitor:</b><br>Name:<br>Address:<br>Telephone:<br>Facsimile:<br>Agency:<br>E-mail:   |  | <b>5. DATE OF AWARD:</b>   |  |
| <b>9. CAPTION / DESCRIPTION:</b>  |  |  |  | <b>8. COST ON DATE OF AWARD:</b>   |  |
| <b>11. CONTRACT PERIOD:</b> (Specify Month, Day, Year)<br>From _____ To _____   |  | <b>12. PERIOD OF PERFORMANCE EVALUATION REVIEW:</b> (Specify Month, Day, Year)<br>From _____ To _____                                      |  | <b>10. FINAL CONTRACT COST:</b>  |  |

| Evaluation Item   | 0                        | 1                        | 2                        | 3                        | 4                        | 5                        |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 13. Evaluate the Contractor's adherence to the specific contract requirements or Scope of Work.                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Evaluate the quality of the Contractor's delivered item or final work product, or service.                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. Evaluate the timeliness and adherence to interim and final delivery requirements and milestones.                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Evaluate the reliability of the Contractor.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Evaluate the effectiveness of the Contractor's service delivery and interaction.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Evaluate the accuracy, timeliness, and completeness of contractor's documentation.                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Evaluate contractor's technical performance and approach to the contract.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. Evaluate the ability of contractor to deliver or perform at the original price or budget.                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. Evaluate the effectiveness of Project Management. (Check only if applicable.)   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Evaluate the Contractor's compliance with Safety Standards. (Check if Applicable) (Required for construction contracts.)    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 23. Evaluate the Contractor's compliance with Labor Standards. (Required for construction contracts.)                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 24. Evaluate Contractor's facility(ies) (Check only if applicable. Note each location, if more than one).                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. Provide an OVERALL PERFORMANCE EVALUATION RATING and add any additional comments. (Attach separate sheet if necessary.) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|                                |          |               |          |              |
|--------------------------------|----------|---------------|----------|--------------|
| 26. Evaluator                  | a. Name: | b. Signature: | c. Date: | d. Comments: |
|                                |          |               |          |              |
| 27. Contracting Officer Review | a. Name: | b. Signature: | c. Date: | d. Comments: |
|                                |          |               |          |              |

**DISTRIBUTION (FOR OCP USE ONLY):**

|  |   |   |
|--|---|---|
| <input type="checkbox"/> a. Procurement File                     | <input type="checkbox"/> e. Contract Administrator/COTR | <input type="checkbox"/> l. Agency Chief Financial Officer            |
| <input type="checkbox"/> b. Agency Chief Contracting Officer     | <input type="checkbox"/> f. Contract Monitor            | <input type="checkbox"/> m. D.C. Office of Inspector General          |
| <input type="checkbox"/> c. Chief Procurement Officer (CPO)      | <input type="checkbox"/> g. Agency Director             | <input type="checkbox"/> n. D.C. Office of Local Business Development |
| <input type="checkbox"/> d. OCP Headquarters (Quality Assurance) | <input type="checkbox"/> h. Agency Program              | <input type="checkbox"/> o. OTHER: _____                              |

## 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) | <b>UNSATISFACTORY</b> | 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) | <b>POOR</b>           | 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) | <b>SATISFACTORY</b>   | 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 were undertaken by the contractor and were successful.   |
| (3) | <b>GOOD</b>           | 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) | <b>VERY GOOD</b>      | 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) | <b>OUTSTANDING</b>    | 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):

- 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, exclusive of all modifications.
- Block 10. Enter the final cost of the contract, or what has been, or will be paid to the contractor, inclusive 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 than 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, service, 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 to 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.