**How**



# Performance Evaluation Instructions

* Form should be reviewed and discussed with the Consultant prior to contract negotiations. Establish performance expectations.
* Performance evaluation ratings include a reflection of sub-consultants used by the prime consultant.
* Evaluation may include additional criteria, noted as 7. “Other Criteria (As Agreed)”, as mutually agreed to by both parties in advance of performing contract work(e.g. public involvement or volume of work
* Provide justification for performance ratings above or below “Meets Std.” Include examples.
* The evaluator and the consultant should understand and discuss at the beginning of the work and during the evaluation process that a “Meets Standard” score should be interpreted as a positive score. It simply means that the product was delivered as expected and that it meets the requirement of the work. As a reference, a “Meets Standard” score would indicate that the product was similar to what WSDOT would expect from a typical design team from WSDOT.

## When

### Final Evaluation

* Complete and distribute a performance evaluation at the point of termination of the agreement. Distribute the form as

specified at bottom of form.

### Interim Evaluation

* Interim evaluations should be performed as follows:
  1. At phase transitions
  2. When project management changes occur
  3. Provide consultant with constructive feedback in order to correct poor performance
  4. Annually if none of the other conditions occur Distribute as specified at the bottom of the form.
* Distribute as specified at the bottom of the form.

### Subconsultant Evaluation

* For sub-consultants with significant project participation (more than $100,000) an evaluation is recommended. Ensure coordination and review with the prime consultant prior to distribution.
* Performance evaluation ratings include a reflection of sub-consultants used by the prime consultant.
* Distribute as specified at the bottom of the form,including prime consultant and sub-consultant.

## Why

* Meaningful evaluations provide consultants with constructive feedback to improve performance and meet WSDOT expectations. Scores from these evaluations factor into “Past Performance” ratings, which are used to help determine selection of future consultants. In addition, poor ratings may lead to being disqualified to perform WSDOT work and elimination from pre-qualification status.

DOT Form 272-019 Instructions Revised 01/2024

# Performance Evaluation Consultant Services



|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Consultant Name  Click or tap here to enter text. | | | | | | | Evaluation Type  Interim | | Subconsultant | Final |
| Project Title  Click or tap here to enter text. | | | | | | | | | | |
| Consultant Address  Click or tap here to enter text. | | | | | | | Agreement Number  Click or tap here to enter text. | | | |
|  | | | | | | | Type of Agreement | | | |
|  | | | | | | | Lump Sum | | | |
| Type of Work |  |  |  | | |  | Hourly Rate | | | |
| Study | Design | R/W | PS&E | | | Other (Specify Below): | Cost Plus Fixed Fee | | | |
| Click or tap here to enter text. | | | | | | | Other | | | |
| Complexity of Work | | | | Date Agreement Approved | | |  | | | |
| Difficult  Routine | | | | Click or tap to enter a date. | | |  | | | |
| Amount of Original Agreement  $ Click or tap here to enter text. | | | | | Total Amount Modifications  $ Click or tap here to enter text. | | | Total Amount Agreement  $ Click or tap here to enter text. | | |
| Completion Date Including Extensions  Click or tap to enter a date. | | | | | Actual Completion Date  Click or tap to enter a date. | | | Actual Total Paid  $ Click or tap here to enter text. | | |
| Type and Extent of Subcontracting  Click or tap here to enter text. | | | | | | | | | | |

|  |  |  |
| --- | --- | --- |
| Performance Rating Scale (From Average Score Below)  S AR MR BR P Superior Above Std. Meets Std. Below Std. Poor | | |
| **Standard Criteria** | **Comments (Justify Above & Below Ratings)** | **Rating** |
| 1. Negotiations  Cooperative and responsive  Adhered to WSDOT guidelines on fee. Met negotiation schedule.  Open and honest communications.  Willingness to negotiate in good faith | Click or tap here to enter text. | Click or tap here to enter text. |
| 2. Cost / Budget  Finished within agreed budget, including all supplements Appropriate level of effort (Cost commensurate with work) Reasonable direct, non-salary expenses (Approx. xx% -yy%) | Click or tap here to enter text. | Click or tap here to enter text. |
| 3. Schedule  Complete within agreement schedule including supplements. Achieved schedule (Including all supplements).  Prompt response to review comments Adapted to changes by WSDOT  Notified WSDOT early regarding schedule issues | Click or tap here to enter text. | Click or tap here to enter text. |
| 4. Technical Quality  Work products meet WSDOT design policy & standards Performed appropriate quality control and assurance Responds to review comments in subsequent submission Pursued innovative design solutions  Delivered “compatible” electronic files  Implemented principles of practical design | Click or tap here to enter text. | Click or tap here to enter text. |

DOT Form 272-019

Revised 01/2024

Distribution: Original: Consultant

Copies: Project Manager - Area Consultant Liaison - Consultant Services Office

|  |  |  |
| --- | --- | --- |
| 5. Communications  Clear and concise communication (Oral, written, drawings). Demonstrates an understanding of oral and written instructions  Communicated at intervals appropriate for continual progress | Click or tap here to enter text. | Click or tap here to enter text. |
| 6. Management  Provided creative cost control measures  Submitted appropriate, periodic, accurate progress reports Accurate and timely invoicing  Conducted meetings efficiently  Limited the number of consultant-initiated contract  modifications / supplements Collaborated effectively with WSDOT Responsive  Managed subconsultants effectively | Click or tap here to enter text. | Click or tap here to enter text. |
| 7. Other Criteria (As agreed) | Click or tap here to enter text. | Click or tap here to enter text. |
| **Overall Rating** | Click or tap here to enter text. | Click or tap here to enter text. |

|  |  |  |
| --- | --- | --- |
| Rated By (Project Manager Name and Title)  Click or tap here to enter text. | Project Manager Signature | Date  Click or tap to enter a date. |
| Rated By (Area Consultant Liaison Name and Title)  Click or tap here to enter text. | Area Consultant Liaison Signature | Date  Click or tap to enter a date. |
| Executive Review (Name and Title)  Click or tap here to enter text. | Executive Signature | Date  Click or tap to enter a date. |

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