



Contractor Report Card-Professional Services

Name Of Contractor: <u>Assessments of the Southwest</u>	Date Contract Began: <u>Varies</u>
Contract Number:	Date Contract Ended: <u>Auto Renewal</u>
Name of Project:	Date Report Card Completed: <u>8/21/18</u>
Project Number:	Previous Report Card Rating: <u>N/A</u>

POINTS - Yes=5, No=0, NA=5

Topic	Questions	Findings	Points	Comments
PRICE LISTS				
Pricing	Was approved pricing honored?	Yes/No	5	
Modifications	Was the contractor responsive to City directed changes to priorities and/or schedule?	1...2...3...4...5 <u>(5)</u>	5	
Modifications	Number of change orders?	<u>N/A</u>	5	
	Contractor recommended change orders			
	City recommended change orders			
Billing	The contractor complying with billing responsibility?	1...2...3...4...5 <u>(5)</u>	5	
FINANCIAL				
Bankruptcy	Is the Contractor free from Bankruptcy proceedings?	Yes/No	5	
Billing	Was billing accurate when received from the contractor?	1...2...3...4...5 <u>(5)</u>	5	
Sub-contractors	If applicable, was sub-contractor information collected in the contractor's system and included in the billing detail?	1...2...3...4...5 <u>(5)</u>	5	
Sub-contractors	Were sub-contractors paid timely without notices filed?	1...2...3...4...5 <u>N/A</u>	5	
ADMINISTRATIVE				
Change of Name	Did the contractor comply with Change of Name requirements?	Yes/No/ <u>NA</u>	5	
Administrative	Was the contractor's Contact for Contract Administration information (address/phone/fax/email) correct?	Yes/No	5	
PROJECT (Answer in a scale of 1-5: 1 being below agreed upon standards - 5 being exceeded expectations)				
Timeline	Did contractor complete project in contracted timeframe?	Yes/No	5	
Timeline	Did contractor complete project milestones on time?	1...2...3...4...5 <u>(5)</u>	5	
Contract Scope	Did the contractor demonstrate that they comply with the scope of their contract?	1...2...3...4...5 <u>(4)</u>	4	
Sub-contractors	If there are participating sub-contractors, are the sub-contractors listed and current in the contract?	Yes/No/ <u>NA</u>	5	
Value added	Did contractor provide value added options for cost, schedule, or final product?	1...2...3...4...5 <u>N/A</u>	5	
Professionalism	Did contractor exhibit professionalism and courtesy when dealing with City Staff?	1...2...3...4...5 <u>(4)</u>	4	
Professionalism	Did contractor exhibit professionalism and courtesy when dealing with Citizens and the business community?	1...2...3...4...5... <u>NA</u>	5	
Professionalism	Was the quality of work performed to the standards required in the contract?	1...2...3...4...5 <u>(4)</u>	4	
Professionalism	Did the contractor and the contractor's staff perform in a professional manner?	1...2...3...4...5 <u>(5)</u>	5	
Professionalism	Did the contractor's key personnel remain consistent throughout the duration of the project?	1...2...3...4...5 <u>(5)</u>	5	
OVERALL				
Any other issues on the job?				
Additional Comments?				
		TOTAL POINTS		
Grade (86-95=A, 76-85=B, 66-75=C, below 66=F)		A...B...C...F	<u>99</u>	

10/1/2014 version

Directions: The lead manager on the contract will complete the form with input from accounts payable and any additional departments affected by the contract. This form must be filled out between 90 and 30 days before contract completion. If the contract is going out for new bid, this form must be completed before solicitation is posted.

*Once the contractor report card is complete, two copies must be created. One copy will be kept in the project folder and the other copy sent to the Purchasing Department for cataloging.

 Lead Manager Signature