

**Final Report**  
**Collaborative Working Team 6D**  
**Consultant Contract Performance Evaluation Improvement**

**Actions and outcomes address the key steps in the  
“Consultant Contract Program Collaboration Project-Final Report from  
April 2010”**

**STRATEGY 6D: Improve the processes for project performance evaluation  
(High Priority)**

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## **Executive Summary**

### **Background**

MnDOT and ACEC/MN identified the need to revise the Professional/Technical Contract Evaluation process due to a number of factors (e.g.: lack of valuable information, subjectivity, lack of consistency, timing of evaluations, etc.). A collaborative working team was formed with the main goal to develop tools and processes for performance evaluations that benefit MnDOT and the Consultant Community.

### **Goals**

As stated above, the main goal was to develop tools and processes for performance evaluations that benefit MnDOT and the consultant community. In addition, three more goals were identified to improve on the existing evaluation process. Goals:

- Develop tools and processes for performance evaluations that benefit MnDOT and the Consultant Community.
- Transparency and Consistency should be included in the evaluation process.
- Define expectations of both sides up front. Establish and define criteria by which the consultant and MnDOT will be measured /evaluated.
- Include the Department of Administration's evaluation requirements and incorporate into the process.

### **Working Team Approach**

Over the last year, the working team has been developing a number of items centered around the goals mentioned above. The team's approach and subsequent tasks were:

- Researched what other states are using for evaluations.
- Determined what should be included in Minnesota's evaluation. Included global criteria for each contract evaluation no matter what the work type (master evaluation form). Developed contract-specific criteria that will be evaluated for different work types (work-type templates).
- Defined the scoring system to minimize subjectivity and promote consistency.
- Included the ability to give positive feedback, not just areas for improvement.
- Included the Department of Administration's questions in the evaluations.
- Incorporated risk management of the contract.
- Began process of automating evaluations.
- Developed a process for interim evaluations.
- Developed method for scoring (weighted scores).
- Developed the process for improvement and dispute resolution.
- Developed the process for how the evaluations affect the prequalification process.
- Developed the overall process for evaluations.

### **Working Team Outcomes**

- New process for performance evaluations (including interim and final).
- New performance evaluation Master Template that includes global criteria for each contract evaluation no matter what the work type (master evaluation form).
- Contract/work specific criteria for different work types (work-type templates). All templates include the Department of Administration's questions/requirements.
- Scoring system to minimize subjectivity and promote consistency.
- Content and process to enable Consultant Agreement Reporting & Tracking (CART) database consultant to load and create process automated evaluations.
- Process for improvement and dispute resolution.
- Process for how the evaluations affect the prequalification process.

### **Timeline and Next Steps for Performance Evaluations**

The following outlines the anticipated timeline and next steps for the new performance evaluations and process:

- April & May 2013: Share the Final Report with MnDOT and the Consultant Community
- April - June 2013: MnDOT working with CART database consultant on automated system for performance evaluations. All content for evaluations was turned over to CART database consultant in April 2013 and work has begun on new system.
- June – July 2013: Testing on new automated performance evaluation system. This will be performed by MnDOT and Consultant Community.
- July – August 2013: Provide training to MnDOT and Consultant Community on new system.
- August 2013: Implement/kick-off new performance evaluation process/system.

### **Recommendations**

Not all of the issues with the consultant evaluations could be addressed with this working team. Therefore, the working team developed some recommendations to be implemented at a future date:

- Include a post-construction evaluation to review lessons learned (e.g.: Was the design constructible? What can be improved?). This would ultimately improve the performance of all involved in the project.
- Institute the idea/philosophy that consultant contract evaluation is only one element of the overall evaluation of project performance. Projects should be evaluated throughout the Planning – Design – Construction – Operations cycle.
- Automate the evaluations for ease of use for both the consultants and MnDOT.
- Develop and provide training to MnDOT and ACEC/MN about the new performance evaluation process.

## Performance Evaluation Review/Evaluation Process Outline

1. Describe project types requiring a performance review/evaluation
  - a. All Professional/Technical Services contracts over \$25,000
  - b. Excludes Interagency Contracts
2. Who/what requires the review?
  - a. State Statute 16c.08, subdivision 4
  - b. Department of Administration
3. Who desires a review and requirements
  - a. MnDOT
    - i. Before a contract is executed, MnDOT Project Manager will work with MnDOT Contract Administrator (in conjunction with Consultant Project Manager) to establish which Performance Evaluation template and schedule will be utilized for evaluation (s).
    - ii. Final acceptance of deliverables and final invoice approval triggers performance evaluation
    - iii. Interim evaluations are required for contracts longer than 2 years (to be completed at least every year) and may be initiated at the direction and discretion of the MnDOT Project Manager for any contract. Interim evaluations will utilize the same criteria as the final evaluation and will be used as a project management tool to monitor and track performance. Interim evaluations will be documented in Consultant Services Consultant Agreement Reporting & Tracking (CART) database, but will not count toward Consultant's score for reporting purposes or final evaluation score.
    - iv. All evaluations are stored with Consultant Services CART database
    - v. Transparency
      - MnDOT will have access to view all evaluations
      - Consultants will have access to their own evaluations (Non-MnDOT will require data practices request to view evaluations of other consultants)
4. Describe the review process
  - a. MnDOT's new Evaluation Software (ES) initiates the Consultant Review and MnDOT Review following MnDOT Project Manager (PM) approval of final invoice. A link to an electronic evaluation is anticipated to be pushed out to both PM's. *(Note the closeout process, final audit and final invoice payment cannot be completed until the evaluation process is completed.)*
  - b. MnDOT review of Consultant
    - i. MnDOT PM completes the evaluation and submits to ES.
    - ii. ES sends the evaluation to MnDOT Contract Administrator (CA) to review for consistency and compliance with policies. CA coordinates with MnDOT PM if changes are necessary. CA resubmits revised evaluation to ES.

- iii. ES sends the evaluation to the Consultant PM for review. Consultant PM has 5 business days to “accept” or “contest” the evaluation. If after 5 business days, there is no action, the evaluation will default to “accept.”
  - iv. Accepted evaluation is posted to CART, unless Consultant rating is 10 or below, or the evaluation is contested.
  - v. Contested evaluations: Consultant may challenge ratings by requesting a meeting. If the MnDOT PM and Consultant PM cannot resolve the scoring differences, then the issue is escalated to MnDOT PM and Consultant PM’s respective supervisors. When resolved, final evaluation is submitted to ES and posted to CART.
  - vi. Accepted evaluation ratings of 10 or below: ES sends evaluations with ratings of 10 or below to Assistant Consultant Services Director for review and comment. Final evaluation is submitted to ES and posted to CART.
  - vii. For final evaluation ratings of 10 or below, Consultant PM must submit a performance improvement plan to the MnDOT PM. This plan and its content are at the discretion, direction and approval of the MnDOT PM. Improvement plan is saved in MnDOT official contract file.
- c. Consultant review of MnDOT (Concurrent with MnDOT review of Consultant)
- i. Consultant PM completes the evaluation and submits to ES.
  - ii. ES sends the evaluation to the MnDOT PM for review. MnDOT PM has 5 business days to “accept” or “contest” the evaluation. If after 5 business days, there is no action, the evaluation will default to “accept.”
  - iii. Accepted evaluation is posted to CART, unless MnDOT rating is 2.5 or below, or the evaluation is contested.
  - iv. Contested evaluations: MnDOT may challenge ratings by requesting a meeting. If the MnDOT PM and Consultant PM cannot resolve the scoring differences, then the issue is escalated to MnDOT PM and Consultant PM’s respective supervisors. When resolved, final evaluation is submitted to ES and posted to CART.
  - v. Accepted evaluation ratings of 2.5 or below: ES sends evaluations with ratings of 2.5 or below to Assistant Consultant Services Director for review and comment. Final evaluation is sent to ES and posted to CART.
  - vi. For final evaluation ratings of 2.5 or below, MnDOT PM must submit a performance improvement plan to the MnDOT PM Supervisor. This plan and its content are at the discretion, direction and approval of the MnDOT PM Supervisor. Improvement plan is saved in MnDOT official contract file.
- d. ES sends the final evaluations to:
- i. MnDOT PM
  - ii. Consultant PM
  - iii. Consultant Firm Designee

## Use of Performance Evaluations in Prequalification Program & Dispute Resolution

### Guidelines

- Consultant “competency” based on data collected through performance evaluations will be considered for remaining prequalified in the applicable work types.
- A minimum of three consecutive final evaluations within the same work type must be completed to form the basis of prequalification decisions.
- If, after the minimum number of final evaluations are completed, the average of three consecutive scores is 10 or below, the consultant is required to prepare a performance improvement plan including actions such as mentoring and training. Performance improvement plans will be reviewed and accepted by the Prequalification Work Type Owner Committee.
- If on the next project measured performance does not elevate above previously measured performance in that particular work type or evaluation criteria the consultant will be suspended from the prequalified list for that work type.
- If measured performance averaged over the next three projects does not exceed the threshold stated above in that particular work type or evaluation criteria the consultant will be suspended from the prequalified list for that work type.
- At MnDOT’s sole discretion and in an extreme case of poor performance on a particular project, MnDOT may suspend a consultant immediately from the prequalified list for that work type.
- These guidelines apply to the prime consultant only. Sub consultants are the responsibility of the prime consultant and as such their performance is evaluated as a member of the consultant team.
- Reinstatement is at MnDOT’s discretion and will include, but not be limited to, MnDOT’s acceptance of a performance improvement plan and submittal by consultant of replacement personnel for prequalification consideration.

### Dispute Resolution

The following guidelines for dispute resolution are applicable to performance evaluations for a specific project and/or prequalification decisions based on evaluations. The goal will always be to resolve any disagreements at the project manager level whenever possible. If unable to do so, a dispute resolution “ladder” as described below would then be used to elevate the dispute:

- If following the completion and discussion of a performance evaluation, the MnDOT and/or consultant project managers do not concur with the results, written notification to the other party must be made within ten business days.
- If a dispute cannot be resolved at the project manager/district level it will be elevated to the consultant services unit in Central Office.
- If a dispute cannot be resolved within the Central Office consultant services unit it will be elevated to the Division Director and/or Contract Management.
- Final decisions are at the discretion of MnDOT.



## APPENDICES



# **Approach to Performance Evaluation Process Improvement**

**MnDOT/ACEC**

**White Paper**

**(used throughout working team duration to inform and update stakeholders)**

**April 16, 2013**

## **BACKGROUND**

### **Strategy 6D: Improve the processes for project performance evaluation (from original MnDOT-ACEC/MN Consultant Contract Collaboration Project)**

MnDOT and ACEC/MN have identified the need to revise the Professional/Technical Contract Evaluation process due to a number of factors (e.g.: lack of valuable information, subjectivity, lack of consistency, timing of evaluations, etc.). A workgroup has been formed and consists of 5 MnDOT (1 as facilitator) and 4 ACEC representatives. MnDOT and ACEC each have 1 co-chair on the workgroup. This workgroup's main goal is to develop tools and processes for performance evaluations that benefit MnDOT and the Consultant Community.

This white paper is a living document, updated after every meeting, and will include the final recommendations of the workgroup, concluding at that time.

## **DISCUSSION**

As stated above, the main goal is to develop tools and processes for performance evaluations that benefit MnDOT and the consultant community. In addition, three more goals have been identified with supporting criteria to improve on the existing evaluation process.

### **❖ Develop tools and processes for performance evaluations that benefit MnDOT and the Consultant Community**

- Provide specific useful feedback
- Improve mechanics of feedback process
- Utilize existing processes to the extent possible
- Develop user friendly tool
- Provide a tool to assist in all levels of consultant selection
- Clarify how MnDOT and consultants can use data to improve
- Develop a flexible process that can be adapted to different types of work including size/complexity, etc.
- Evaluate firms based on scope/contract requirements– but find a way to address individuals
- Develop some form of 360 degree evaluation or lay the groundwork for future inclusion
- Require check-ins at basic intervals but include flexibility for MnDOT and/or the consultant to add more
- Develop communication framework/tool as part of this process (ladder of communication for firms and MnDOT)
- Develop or recommend training to accompany the new process
- Ensure consistency between work types
- Develop criteria definitions to identify what each score actually means
- Require comments be added for extreme scores
- Incorporate contractor plan evaluations in the process (from Strategy 6D)
- Allow MnDOT the ability to eliminate “poor performers”

### **❖ Transparency and Consistency should be included in the evaluation process**

- Incorporate more than just a back and forth paper evaluation – success of project is dependent on the collaboration and communication of MnDOT and the consultant
  - Remove individual bias's from the evaluation process
- ❖ **Define expectations of both sides up front. Establish and define criteria by which the consultant and MnDOT will be measured/evaluated**
- Integrate the performance evaluation process with overall project performance/success
  - Provide recommendations for construction and post-construction component
  - Deal with issues proactively as they occur
  - Encourage effective and timely communications amongst all members
- ❖ **Include the Department of Administration's evaluation requirements and incorporate into the process**

These goals were identified during the first two meetings along with the goal to present the workgroup's findings at the MnDOT/ACEC Transportation Conference in March of 2013.

## APPROACH

Over the last year, the workgroup has been developing a number of items centered around the goals mentioned above. The workgroup's approach and subsequent tasks have been:

1. Research what other states are using for evaluations.
2. Determine what should be included in Minnesota's evaluation. Include global criteria for each contract evaluation no matter what the work type (master evaluation form). Develop contract-specific criteria that will be evaluated for different work types (work-type templates).
3. Define the scoring system to minimize subjectivity and promote consistency.
4. Include the ability to give positive feedback, not just areas for improvement.
5. Include the Department of Administration's questions in the evaluations.
6. Incorporate risk management of the contract.
7. Automate evaluations if at all possible.
8. Have at least one interim review prior to final check-in point (may be more reviews depending on the contract).
9. Develop method for scoring (weighted scores).
10. Develop the process for improvement and dispute resolution.
11. Develop the process for how the evaluations affect the prequalification process.
12. Develop the overall process for evaluations.

## RECOMMENDATIONS

Not all of the issues with the consultant evaluations can be addressed with this workgroup. Therefore, the workgroup has developed some recommendations to be implemented at a future date.

1. Include a post-construction evaluation to review lessons learned (e.g.: Was the design constructible? What can be improved?) and ultimately improve the performance of all involved in the project.
2. Automate the evaluations for ease of use for both the consultants and MnDOT.

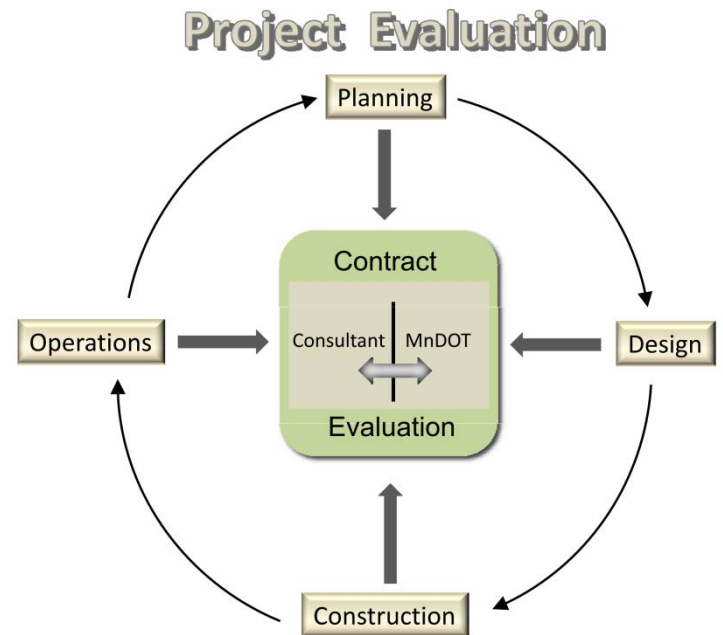
3. Develop and provide training to MnDOT and ACEC/MN about the new performance evaluation process.
4. Utilize the following philosophy in future improvements to the performance evaluation process.

*Consultant contract evaluation is one element of the overall evaluation of project performance.*

*Projects have four primary process improvement evaluation points which continuously interact in a typical improvement cycle. Operational needs lead to planning for design and construction improvements which in turn lead back to operational efficiencies. Project evaluations should be continuous and provide feedback to the other modes.*

*Consultant contracts directly connect to one element of the project cycle. Contract evaluations should be timely and address the respective contract requirements. Feedback from the contract should be given to the prior project cycle element. As an example feedback from a construction contract should be given to the design element of the project. Furthermore, feedback from the next cycle element should be provided to the contract at a later date. The example would be construction feedback given to a design contract.*

*MnDOT should also be evaluated as part of the consultant contract. MnDOT generally works in partnership with consultants to deliver the scope of a contract and should be evaluated in the overall performance of the contract.*



## **Master Evaluation Template**

(Content)

### **Interim and Final Evaluation: Assumptions**

- A score of 3 in each of the criteria is assumed to meet the requirements of the contract
- If the evaluation criteria does not apply to your project, check the "NA" box
- Comments are encouraged and required in some locations
- PM's from Consultant and MnDOT need to define the expectations of the project prior to starting work

### **Interim and Final Evaluation: Definitions**

Project Managers can use this definitions/assumptions page to customize their evaluations. If evaluation criteria don't apply to the project, don't include in the evaluation or check 'NA'.

### **Categories**

#### **Project Management (consulting firm)**

This category evaluates the consulting firm with respect to project knowledge, communication, project administration, issue resolution, leadership, and budget. This category assumes that the consulting firm is the entire team working on the contract, including sub consultants.

- Project Knowledge - What was the overall understanding of issues/constraints on the project? Did the team's understanding of the issues/constraints allow them to meet contract requirements?
- Communication - Did the written/verbal communication meet project needs? How appropriate was the communication methods and level of formality? Were communication policies observed? How often?
- Project Administration (includes subs) - Were typical administrative tasks accurate and timely? Was coordination maintained adequately to meet contract requirements? Were contract issues addressed in a timely manner?
- Issue Resolution - Were project issues addressed collaboratively in a timely manner? Did they meet the needs of the project?
- Leadership - Did the consultant team provide appropriate leadership and direction to the project? Were contract requirements met? Was the project a success?
- Budget - How was/is the consultant team's budget management?

#### **Project Development**

This category evaluates the consulting team with respect to resources, flexibility, schedule, project approach, and public involvement/stakeholder coordination. This category assumes that the consulting firm is the entire team working on the contract, including sub consultants.

- Resources - Were staff qualified to perform their assigned roles/responsibilities? How well? Was the staff well equipped? Did the performance meet contract requirements?
- Flexibility Did the consultant team adapt to changes in the project and scope of work? How well did they adapt? Was the contract accommodated?
- Schedule - Did the consultant team meet the schedule requirements in the contract?

- Project Approach - Was the work plan applicable/appropriate for the project constraints and contract requirements? Were the project constraints mitigated appropriately? Was risk managed appropriately? How well were all of the above done?
- Public Involvement/Stakeholder Coordination - Were the stakeholders listened to? Did the stakeholders needs get addressed and incorporated into the work? Did the consultant team collaborate with other disciplines? Were efforts productive? Were contract requirements met?

### **Deliverables**

This category evaluates the consulting team with respect to preliminary engineering, QMP, layout/plan quality, reports/special provisions, calculations, final design, project deliverables. This category assumes that the consulting firm is the entire team working on the contract, including sub consultants.

- Preliminary Engineering - for projects with type studies, preliminary plans, early layouts, etc. Were alternatives/deliverables provided that met contract requirements?
- QMP - Was the QMP submitted according to contract requirements? Was the QMP thorough, accurate, and used appropriately? Did the QMP require any iteration? How did the consultant team respond to quality issues?
- Layout/Plan Quality - Was the layout/plans professional and conformed to standards? Were the contract requirements met? Were there markups on the submittal, and if so, how many? Were the appropriate details shown? Were economy and constructability taken into account?
- Reports/Special Provisions - Were the reports/special provisions professional, easy to understand, accurate, and complete? Were they organized and logical? Were the contract requirements met?
- Calculations - Were the calculations thorough, accurate, easy to read, and clear? Were applicable codes/standards used? Were design criteria referenced?
- Final Design - Was the design thorough and accurate? Were the applicable codes/standards used? Was engineering judgment used appropriately? Was the design appropriate for the situation? Was the design constructible and economical? Did the design manage risk?

### **Consultant – PM and Key Personnel**

This category evaluates the consultant's key personnel on project knowledge, communication, project administration, issue resolution, leadership, and flexibility. This category is customizable to add additional key personnel to evaluate depending on key personnel required in the consultant selection.

- Project Knowledge - What was the understanding of project issues/constraints? What was the level of understanding? Were contract requirements met?
- Communication - Did the written/verbal communication meet project needs? How appropriate was the communication methods and level of formality? Were communication policies observed?
- Project Administration - Were typical administrative tasks accurate and timely? Was coordination maintained adequately to meet contract requirements? Were the contract issues addressed in a timely manner?
- Issue Resolution - Were project issues addressed collaboratively in a timely manner? Did they meet the needs of the project?
- Leadership - Did the consultant team provide appropriate leadership and direction to the project? Were contract requirements met? Was the project a success?

- Flexibility - Did the PM adapt to changes in the project and scope of work? Was the contract accommodated?

### **MnDOT - Agency**

This category evaluates MnDOT with respect to deliverables, project knowledge, communication, project administration, issue resolution, leadership, and flexibility.

- Deliverables - Were the MnDOT deliverables delivered in a timely manner? Were they complete, thorough, and clear?
- Project Knowledge - What was the understanding of project issues/constraints? What was the level of understanding? What level of collaboration was achieved?
- Communication - Did the written/verbal communication meet project needs? How appropriate was the communication methods and level of formality? Were communication policies observed?
- Project Administration - Were typical administrative tasks processed quickly? Was coordination maintained to help Consultant meet contract requirements? Were contract issues addressed in a timely manner?
- Issue Resolution - Were project issues addressed collaboratively in a timely manner? Did they meet the needs of the project?
- Leadership - Did MnDOT provide the appropriate level of leadership and direction to the project? Was the project a success?
- Flexibility - Did MnDOT adapt to changes in the project and scope of work? Was the contract accommodated?

Each rating area will provide opportunity for comments. Interim evaluations will require comments and explanation for amendments.

Interim Master Evaluation

Project Management (consulting firm)	5	4	3	2	1	NA
Project Knowledge	Quickly and fully understands project; demonstrates exceptional leadership in identifying issues and constraints	Exceeds expectations in understanding of project issues and constraints	Achieves a solid understanding of project issues and constraints to meet the contract requirements	Some understanding of project issues and constraints, however not enough to meet contract requirements	Minimal understanding of project issues and constraints; contract requirements not met	
Communication	Written and verbal communication is exceptional, professional, timely, clear, and easy to understand; communications methods and level of formality are appropriate; maintains outstanding level of collaboration with MnDOT; project communication polices are always observed	Written and verbal communication exceeds the needs of the project; communication methods and level of formality are appropriate; maintains good level of collaboration with MnDOT; project communication polices are almost always observed	Written and verbal communication meets the needs of the project; communication methods and level of formality are appropriate; maintains appropriate level of collaboration with MnDOT; project communication polices are usually observed	Some written and verbal communication meets the needs of the project; occasionally, methods and tone are inappropriate; required greater than normal level of guidance by MnDOT; project communication polices are not observed consistently	Written and verbal communication isn't meeting the needs of the project, are ill-timed, confusing, and/or misleading; methods and tone are inappropriate; requires extraordinary level of guidance by MnDOT; project communication polices are not observed	
Project Administration	Invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. are exceptional and require virtually no discussion; coordination is maintained at a high level; contract issues are anticipated and dealt with before they become an issue	Invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. are accurate and timely exceeding expectations; coordination is maintained at a greater than normal level; contract issues are addressed collaboratively and in a timely fashion	Invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. are accurate and timely; coordination is maintained to meet contract requirements; contract issues are addressed collaboratively and in a timely fashion	Some invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. are accurate and timely; coordination is maintained at a lower than normal level; contract issues are addressed as they arise	Invoicing, supplemental agreements, cost/schedule updates, billing preparation, sub consultant management, etc. are inaccurate and delayed; coordination is not maintained; contract issues aren't addressed timely enough resulting in delays	
Issue Resolution	Project issues are identified and addressed innovatively, collaboratively, in a timely fashion and far exceeds the needs of the project with major benefits to all stakeholders	Project issues are identified and addressed collaboratively, and in a timely fashion, exceeding the expectations of the project	Project issues are identified and addressed collaboratively, in a timely fashion, and meet the needs of the project	Some project issues are identified and addressed collaboratively or in a timely fashion with some needs of the project being met	Project issues are not identified and addressed or are addressed too late	



Leadership	Consultant team provides exceptional leadership and direction to the project; contract requirements are met and exceeds expectations; project is an overwhelming success to date	Consultant team exceeds expectations in leadership and direction to the project; contract requirements are met; project is a success to date	Consultant team provides appropriate leadership and direction to the project; contract requirements are met; project is a success to date	Consultant team provides some leadership and direction to the project; some contract requirements are met; project is on schedule	Consultant team provides unacceptable leadership and direction to the project; contract requirements are not met; project is not successful to date	
Budget	Consultant consistently reviews the budget and communicates issues to MnDOT; outstanding budget management; recommendations/alternatives are provided when changes are necessary; demonstrates careful and precise planning regarding the budget and requires little oversight by MnDOT	Consultant consistently reviews the budget and communicates issues to MnDOT; good budget management; recommendations/alternatives are provided when changes are necessary	Consultant reviews the budget and communicates issues to MnDOT; adequate budget management	Consultant is not consistently reviewing the budget and communicating issues to MnDOT; lack of budget management at times	Consultant is not reviewing the budget and communicating issues to MnDOT; no budget management	
	Required Comments: Explain any amendments to the contract. Include amendment number, description of work, and reason for adding					
Project Development						
	5	4	3	2	1	NA
Resources	Staff (including sub consultants if applicable) are exceptionally well-qualified to perform roles and responsibilities assigned; are well equipped; performance meets contract requirements and exceeds expectations	Staff (including sub consultants if applicable) are well-qualified to perform roles and responsibilities assigned; are well equipped; performance meets contract requirements	Staff (including sub consultants) are qualified to perform roles and responsibilities assigned; are well equipped; performance meets contract requirements	Some staff (including sub consultants if applicable) are not qualified to perform roles and responsibilities assigned; have some equipment; performance meets some contract requirements	Staff (including sub consultants if applicable) lacks experience to perform roles and responsibilities assigned; have insufficient equipment; performance is not meeting contract requirements	



Flexibility	Consultant team shows exceptional leadership in adapting to changes in the project and scope of work, far exceeds expectations, within reasonable accommodation of the contract to date	Consultant team is willing and adapts to changes in the project and scope of work within reasonable accommodation of the contract to date	Consultant team adapts to changes in the project and scope of work within reasonable accommodation of the contract to date	Consultant team adapts to some changes in the project and scope of work	Consultant team is not willing or capable of adapting to changes in the project and scope of work	
Schedule	Consultant team meets the schedule requirements in the contract to date or turned in deliverables early, far exceeds expectations	Consultant team meets the schedule requirements in the contract to date; exceeds expectations	Consultant team meets the schedule requirements in the contract to date	Consultant team meets the schedule requirements in the contract to date for some items, but not others	Consultant team is routinely late turning in deliverables, not meeting the schedule requirements in the contract to date	
Project Approach	Work plan is streamlined and innovative in how project constraints and contract requirements are addressed; project constraints mitigated well to date; project risk has been reduced and managed well	Work plan exceeds expectations in how project constraints and contract requirements are addressed; project constraints mitigated to date; risk has been managed appropriately	Work plan applicable/appropriate to project constraints and contract requirements; project constraints mitigated appropriately to date; risk has been managed appropriately	Expectations are met in most areas of the work plan, however some project constraints and contract requirements are not addressed; some risk has been managed appropriately	Work plan unrelated/inappropriate to project constraints and contract requirements; project constraints are not addressed; no management of risk to date	
Public Involvement/Stakeholder Coordination	Extraordinary approach in dealing with stakeholders' needs; makes extra effort to work with other disciplines involved in developing the project; efforts yield outstanding results; meets contract requirements	Listens to stakeholders' needs and translates them into the work; makes extra effort to work with other disciplines involved in developing the project; productive efforts; meets contract requirements	Listens to stakeholders' needs and translates them into the work; collaborates with other disciplines involved in developing the project; productive efforts; meets contract requirements	Some stakeholders are listened to, others are not; inconsistent collaboration with other disciplines involved in developing the project; some contract requirements are being met	Neglects stakeholders concerns either with no contact or not incorporating concerns into project; no contact with other disciplines	
Deliverables						
	5	4	3	2	1	NA
Preliminary Engineering	Provides thorough and innovative alternatives/deliverables that provides for excellent discussion and streamlines the decision-making process	Provides alternatives/deliverables that exceeds expectations that has made the decision-making process easier	Provides alternatives/deliverables that meets contract requirements	Provides alternatives/deliverables that meets some contract requirements	Alternatives/Deliverables do not provide for project objectives and provides for undesirable situations	

QMP	QMP is above expectations; is revised appropriately when necessary; no quality issues to date; roles/responsibilities are clear; is thorough, accurate, applicable to the project, and followed appropriately	QMP is revised appropriately when necessary, quality issues are addressed immediately after discovery; requires no iterations with MnDOT; is thorough, accurate, applicable to the project, and followed appropriately	QMP is thorough, accurate, applicable to the project, and followed appropriately; requires some iterations with MnDOT	QMP requires multiple iterations with MnDOT; is applicable to the project and sometimes followed	QMP is poorly written, incomplete, not used or inapplicable to the project	
Layout/Plan Quality	Layout/Plans contains outstanding quality; virtually error-free; innovative; clear and easy to read; shows appropriate details; is balance in economy and constructability	Layout/Plans are professional, well developed and conforms to standards; complete; accurate; meets contract requirements; minor or no mark ups on the submittal; shows appropriate details; is balance in economy and constructability	Layout/Plans are professional and conforms to standards; meets contract requirements; minor mark ups on the submittal; shows appropriate details; is balance in economy and constructability	Layout/Plans requires multiple iterations to conform to standards and meet contract requirements; many mark ups on the submittal; shows details; is balance in some aspects of economy and constructability	Plans contain many errors and submittal package was incomplete; doesn't show details; no balance in economy and constructability	
Reports/Special Provisions	Reports/Special provisions are above and beyond contract requirements; is easily understood by all audiences; is presented in a way that is well organized, logical; addresses aspects that weren't expected or known	Reports/Special provisions exceeds contract requirements; is professional; easily understood; all information is accurately included and presented in a way that is well organized and logical	Reports/Special provisions are professional; easily understood; all information is accurately included and presented in a way that is well organized and logical; meets contract requirements	Reports/Special provisions requires multiple iterations to meet contract requirements; some information is missing	Reports/Special Provisions are incomplete and inaccurate; is not organized or presented in a logical manner	
Calculations	Calculations are well above expectations, well presented, streamlined, thorough, accurate, uses applicable codes/standards, easy to read, descriptive and well references design criteria	Calculations are above expectations, thorough, accurate, uses applicable codes/standards, easy to read, descriptive and well references design criteria	Calculations are thorough, accurate, easy to read, uses applicable codes/standards, descriptive, and well references design criteria	Calculations requires multiple iterations between the consultant and MnDOT to be thorough, accurate, use applicable codes/standards, easy to read, descriptive, and well reference design criteria	Calculations are incomplete, sloppy, and hard to follow with no references to design criteria	

Final Design	Design is well above expectations, innovative, optimized, and reduces risk	Design is above expectations, thorough, accurate; appropriate for the situation; constructible, economical, and managed risk	Design is thorough, accurate; appropriate for the situation; constructible, economical, and manages risk	Design meets contract requirements, but requires a lot of guidance from MnDOT to achieve the appropriate constructible design for the situation	Design is incomplete, inaccurate; expensive, inappropriate for the situation, may result in many field design changes, and increased risk	
Deliverable (customizable)	Deliverable is above and beyond contract requirements; is easily understood by all audiences; is presented in a way that is well organized, logical; addresses aspects that weren't expected or known	Deliverable exceeds contract requirements; is professional; easily understood; all information is accurately included and presented in a way that is well organized and logical	Deliverable is professional; easily understood; all information is accurately included and presented in a way that is well organized and logical; meets contract requirements	Deliverable requires multiple iterations to meet contract requirements; some information is missing	Deliverable is incomplete and inaccurate; is not organized or presented in a logical manner	
Deliverable (customizable)	Deliverable is above and beyond contract requirements; is easily understood by all audiences; is presented in a way that is well organized, logical; addresses aspects that weren't expected or known	Deliverable exceeds contract requirements; is professional; easily understood; all information is accurately included and presented in a way that is well organized and logical	Deliverable is professional; easily understood; all information is accurately included and presented in a way that is well organized and logical; meets contract requirements	Deliverable requires multiple iterations to meet contract requirements; some information is missing	Deliverable is incomplete and inaccurate; is not organized or presented in a logical manner	
Consultant – PM & Key Personnel (Customizable)						
	5	4	3	2	1	NA
Project Knowledge	Quickly and fully understands project; demonstrates exceptional leadership in identifying issues and constraints	Exceeds expectations in understanding of project issues and constraints	Achieves a solid understanding of project issues and constraints to meet the contract requirements	Some understanding of project issues and constraints, however not enough to meet contract requirements; requires greater than normal level of guidance by MnDOT	Minimal understanding of project issues and constraints is not achieved; requires extraordinary level of guidance by MnDOT	

Communication	Written and verbal communication is exceptional, professional, timely, clear, and easily understood; communications methods and level of formality are appropriate; project communication polices are always observed	Written and verbal communication exceeds the needs of the project; communication methods and level of formality are appropriate; project communication polices are observed	Written and verbal communication meets the needs of the project; communication methods and level of formality are appropriate; project communication polices are observed	Some written and verbal communication meets the needs of the project; occasionally, methods and tone are inappropriate; project communication polices are not observed consistently	Written and verbal communication does not meet the needs of the project, are ill-timed, confusing, and/or misleading; methods and tone are inappropriate; project communication polices are not observed	
Project Administration	Invoicing, supplemental agreements, cost/schedule updates, etc. are exceptional and requires virtually no discussion; coordination is maintained at a high level; contract issues are anticipated and dealt with before they become an issue	Invoicing, supplemental agreements, cost/schedule updates, etc. are accurate and timely exceeding expectations; coordination is maintained at a greater than normal level; contract issues are addressed collaboratively and in a timely fashion	Invoicing, supplemental agreements, cost/schedule updates, etc. are accurate and timely; coordination is maintained to meet contract requirements; contract issues are addressed collaboratively and in a timely fashion	Some invoicing, supplemental agreements, cost/schedule updates, etc. are accurate and timely; coordination is maintained at a lower than normal level; contract issues are addressed as they arise	Invoicing, supplemental agreements, cost/schedule updates, billing preparation, etc. are inaccurate and delayed; coordination is not maintained; contract issues aren't addressed timely enough resulting in delays	
Issue Resolution	Project issues are addressed innovatively, collaboratively, in a timely fashion and far exceeds the needs of the project with major benefits to all stakeholders	Project issues are addressed collaboratively, and in a timely fashion, exceeds the expectations of the project	Project issues are addressed collaboratively, in a timely fashion, and meets the needs of the project	Some project issues are addressed collaboratively or in a timely fashion with some needs of the project met	Project issues are not addressed or are addressed too late	
Leadership	Key Personnel provides exceptional leadership and direction to the project; contract requirements are met and exceeds expectations; project is an overwhelming success to date	Key Personnel exceeds expectations in leadership and direction to the project; contract requirements are met; project is a success to date	Key Personnel provides appropriate leadership and direction to the project; contract requirements are met; project is a success to date	Key Personnel provided some leadership and direction to the project; some contract requirements are met; project will be completed	Key Personnel provides unacceptable leadership and direction to the project; contract requirements are not met; project is not a success to date	

Flexibility	Key Personnel shows exceptional leadership in adapting to changes in the project and scope of work, far exceeds expectations, with reasonable accommodation of the contract	Key Personnel is willing and adapts to changes in the project and scope of work with reasonable accommodation of the contract	Key Personnel adapts to changes in the project and scope of work with reasonable accommodation of the contract	Key Personnel adapts to some changes in the project and scope of work	Key Personnel is not willing or capable of adapting to changes in the project and scope of work	
MnDOT - Agency						
	5	4	3	2	1	NA
Deliverables	Are delivered in a timely manner; are complete, thorough, and clear; MnDOT has gone out of their way to provide as much information as possible		Are delivered in a timely manner; are complete, thorough, and clear		Are delivered late or never delivered; are incomplete, pieced together, unclear	
Project Knowledge	Fully understands project; demonstrates exceptional leadership in identifying issues and constraints; maintains outstanding level of collaboration with Consultant	Exceeds expectations in understanding of project issues and constraints; maintains appropriate level of collaboration with Consultant	Has a solid understanding of project issues and constraints to meet the contract requirements; maintains appropriate level of collaboration with Consultant	Some understanding of project issues and constraints, however not enough to meet contract requirements; very little collaboration with Consultant	Minimal understanding of project issues and constraints; no collaboration with Consultant	
Communication	Written and verbal communication is exceptional, professional, timely, clear, and easily understood; communication methods and level of formality are appropriate; project communication policies are always observed	Written and verbal communication exceeds the needs of the project; communication methods and level of formality are appropriate; project communication policies are observed	Written and verbal communication meets the needs of the project; communication methods and level of formality are appropriate; project communication policies are observed	Some written and verbal communication meets the needs of the project; occasionally, methods and tone are inappropriate; project communication policies are not observed consistently	Written and verbal communication does not meet the needs of the project, are ill-timed, confusing, and/or misleading; methods and tone are inappropriate; project communication policies are not observed	

Project Administration	Invoicing, supplemental agreements, cost/schedule updates, etc. are processed exceptionally fast and requires virtually no discussion; coordination is maintained at a high level to help the Consultant meet contract requirements; contract issues are anticipated and dealt with before they become an issue	Invoicing, supplemental agreements, cost/schedule updates, etc. are processed quickly exceeding expectations; coordination is maintained at a greater than normal level to help consultant meet contract requirements; contract issues are addressed collaboratively and in a timely fashion	Invoicing, supplemental agreements, cost/schedule updates, etc. are processed quickly; coordination is maintained to help Consultant meet contract requirements; contract issues are addressed collaboratively and in a timely fashion	Some invoicing, supplemental agreements, cost/schedule updates, etc. are accurate and timely; coordination is maintained at a lower than normal level; contract issues are addressed as they arise	Invoicing, supplemental agreements, cost/schedule updates, billing preparation, etc. are inaccurate and delayed; coordination is not maintained; contract issues aren't addressed timely enough resulting in delays	
Issue Resolution	Project issues are addressed innovatively, collaboratively, in a timely fashion and far exceeds the needs of the project with major benefits to all stakeholders	Project issues are addressed collaboratively, in a timely fashion, exceeding the expectations of the project	Project issues are addressed collaboratively, in a timely fashion, and meet the needs of the project	Some project issues are addressed collaboratively or in a timely fashion and meet some of the needs of the project	Project issues are not addressed or are addressed too late	
Leadership	MnDOT provides exceptional leadership and direction to the project; project is an overwhelming success to date	MnDOT exceeds expectations in leadership and direction to the project; project is a success to date	MnDOT provides appropriate leadership and direction to the project; project is a success to date	MnDOT provides some leadership and direction to the project; project will be completed	MnDOT provides unacceptable leadership and direction to the project; project is not a success to date	
Flexibility	MnDOT shows exceptional leadership in adapting to changes in the project and scope of work, far exceeds expectations, with reasonable accommodation of the contract	MnDOT is willing and adapts to changes in the project and scope of work with reasonable accommodation of the contract	MnDOT adapts to changes in the project and scope of work with reasonable accommodation of the contract	MnDOT adapts to some changes in the project and scope of work	MnDOT is not willing or capable of adapting to changes in the project and scope of work	

End of Contract Master Evaluation

Project Management (consulting firm)	5	4	3	2	1	NA
Project Knowledge	Quickly and fully understood project; demonstrated exceptional leadership in identifying issues and constraints	Exceeded expectations in understanding of project issues and constraints	Achieved a solid understanding of project issues and constraints to meet the contract requirements	Some understanding of project issues and constraints, however not enough to meet contract requirements	Minimal understanding of project issues and constraints; contract requirements not met	
Communication	Written and verbal communication was exceptional, professional, timely, clear, and easily understood; communications methods and level of formality were appropriate; maintained outstanding level of collaboration with MnDOT; project communication polices were always observed	Written and verbal communication exceeded the needs of the project; communication methods and level of formality were appropriate; maintained good level of collaboration with MnDOT; project communication polices were almost always observed	Written and verbal communication met the needs of the project; communication methods and level of formality were appropriate; maintained appropriate level of collaboration with MnDOT; project communication polices were usually observed	Some written and verbal communication did meet the needs of the project; occasionally, methods and tone were inappropriate; required greater than normal level of guidance by MnDOT; project communication polices were not observed consistently	Written and verbal communication did not meet the needs of the project, were ill-timed, confusing, and/or misleading; methods and tone were inappropriate; required extraordinary level of guidance by MnDOT; project communication polices were not observed	
Project Administration	Invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. were exceptional and required virtually no discussion; coordination was maintained at a high level; contract issues were anticipated and dealt with before they became an issue	Invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. were accurate and timely; exceeded expectations; coordination was maintained at a greater than normal level; contract issues were addressed collaboratively and in a timely fashion	Invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. were accurate and timely; coordination was maintained to meet contract requirements; contract issues were addressed collaboratively and in a timely fashion	Some invoicing, supplemental agreements, cost/schedule updates, sub consultant management, etc. were accurate and timely; coordination was maintained at a lower than normal level; contract issues were addressed as they arose	Invoicing, supplemental agreements, cost/schedule updates, billing preparation, sub consultant management, etc. were inaccurate and delayed; coordination was not maintained; contract issues weren't addressed timely enough resulting in delays	



Issue Resolution	Project issues were identified and addressed innovatively, collaboratively, in a timely fashion and far exceeded the needs of the project with major benefits to all stakeholders	Project issues were identified and addressed collaboratively, and in a timely fashion; exceeded the expectations of the project	Project issues were identified and addressed collaboratively, in a timely fashion, and met the needs of the project	Some project issues were identified and addressed collaboratively or in a timely fashion with some needs of the project met	Project issues were not identified and addressed or were addressed too late	
Leadership	Consultant team provided exceptional leadership and direction to the project; contract requirements were met and exceeded expectations; project was an overwhelming success	Consultant team exceeded expectations in leadership and direction to the project; contract requirements were met; project was a success	Consultant team provided appropriate leadership and direction to the project; contract requirements were met; project was a success	Consultant team provided some leadership and direction to the project; some contract requirements were met; project was completed	Consultant team provided unacceptable leadership and direction to the project; contract requirements were not met; project was not successful	
Budget Management	Consultant consistently reviewed the budget and communicated issues to MnDOT; outstanding budget management; recommendations/alternatives were provided when changes were necessary; demonstrated careful and precise planning regarding the budget and required little oversight by MnDOT	Consultant consistently reviewed the budget and communicated issues to MnDOT; good budget management; recommendations/alternatives were provided when changes were necessary	Consultant reviewed the budget and communicated issues to MnDOT; adequate budget management	Consultant did not consistently review the budget and communicate issues to MnDOT; lack of budget management at times	Consultant did not review the budget and communicate issues to MnDOT; no budget management	
Project Development						
	5	4	3	2	1	NA
Resources	Staff (including sub consultants if applicable) were exceptionally well-qualified to perform roles and responsibilities assigned; well equipped; performance met contract requirements and exceeded expectations	Staff (including sub consultants if applicable) were well-qualified to perform roles and responsibilities assigned; well equipped; performance met contract requirements	Staff (including sub consultants if applicable) were qualified to perform roles and responsibilities assigned; well equipped; performance met contract requirements	Some staff (including sub consultants if applicable) were not qualified to perform roles and responsibilities assigned; some equipment provided; performance met some contract requirements	Staff (including sub consultants if applicable) inexperienced to perform roles and responsibilities assigned; insufficient equipment provided; performance did not meet contract requirements	



Flexibility	Consultant team showed exceptional leadership in adapting to changes in the project and scope of work; far exceeded expectations, within reasonable accommodation of the contract	Consultant team was willing and adapted to changes in the project and scope of work within reasonable accommodation of the contract	Consultant team adapted to changes in the project and scope of work within reasonable accommodation of the contract	Consultant team adapted to some changes in the project and scope of work	Consultant team was not willing or capable of adapting to changes in the project and scope of work	
Schedule	Consultant team met the schedule requirements in the contract or turned in deliverables early; far exceeded expectations	Consultant team met the schedule requirements in the contract; exceeded expectations	Consultant team met the schedule requirements in the contract	Consultant team met the schedule requirements in the contract for some items, but not others	Consultant team was routinely late turning in deliverables not meeting the schedule requirements in the contract	
Project Approach	Work plan was streamlined and innovative in how project constraints and contract requirements were addressed; project constraints mitigated well; project risk reduced and managed well	Work plan exceeded expectations in how project constraints and contract requirements were addressed; project constraints mitigated; risk managed appropriately	Work plan applicable/appropriate to project constraints and contract requirements; project constraints mitigated appropriately; risk managed appropriately	Expectations were met in most areas of the work plan, however some project constraints and contract requirements were not addressed; some risk managed appropriately	Work plan unrelated/inappropriate to project constraints and contract requirements; project constraints not addressed; no management of risk	
Public Involvement/Stakeholder Coordination	Extraordinary approach in dealing with stakeholders' needs; made extra effort to work with other disciplines involved in developing the project; efforts yielded outstanding results; met contract requirements	Listened to stakeholders' needs and translated them into the work; made extra effort to work with other disciplines involved in developing the project; productive efforts; met contract requirements	Listened to stakeholders' needs and translated them into the work; collaborated with other disciplines involved in developing the project; productive efforts; met contract requirements	Some stakeholders were listened to, others were not; inconsistent collaboration with other disciplines involved in developing the project; some contract requirements met	Neglected stakeholders concerns either with no contact or not incorporating concerns into project; no contact with other disciplines	
Deliverables						
	5	4	3	2	1	NA
Preliminary Engineering	Provided thorough and innovative alternatives/deliverables that provided for excellent discussion and streamlined the decision-making process	Provided alternatives/deliverables that exceeded expectations that made the decision-making process easier	Provided alternatives/deliverables that met contract requirements	Provided alternatives/deliverables that met some contract requirements	Alternatives/Deliverables did not provide for project objectives and provided for undesirable situations	

QMP	QMP went above expectations; was revised appropriately when necessary; no quality issues arose; roles/responsibilities were clear; was thorough, accurate, applicable to the project, and followed appropriately	QMP was revised appropriately when necessary, quality issues were addressed immediately after discovery; required no iterations with MnDOT; was thorough, accurate, applicable to the project, and followed appropriately	QMP was thorough, accurate, applicable to the project, and followed appropriately; required some iterations with MnDOT	QMP required multiple iterations with MnDOT; was applicable to the project and sometimes followed	QMP was poorly written, incomplete, not used or inapplicable to the project	
Layout/Plan Quality	Layout/Plans contained outstanding quality; virtually error-free; innovative; clear and easy to read; showed appropriate details; balanced economy and constructability	Layout/Plans were professional, well developed and conformed to standards; complete; accurate; met contract requirements; minor or no mark ups on the submittal; showed appropriate details; balanced economy and constructability	Layout/Plans were professional and conformed to standards; met contract requirements; minor mark ups on the submittal; showed appropriate details; balanced economy and constructability	Layout/Plans required multiple iterations to conform to standards and meet contract requirements; many mark ups on the submittal; showed details; some aspects of economy and constructability balanced	Plans contained many errors and submittal package was incomplete; appropriate details not shown; economy and constructability not balanced	
Reports/Special Provisions	Reports/Special provisions went above and beyond contract requirements; was easily understood by all audiences; was presented in a way that was well organized, logical, addressed aspects that weren't expected or known	Reports/Special provisions exceeded contract requirements; were professional; easily understood; all information was accurately included and presented in a way that was well organized and logical	Reports/Special provisions were professional; easily understood; all information was accurately included and presented in a way that was well organized and logical; met contract requirements	Reports/Special provisions required multiple iterations to meet contract requirements; some information was missing	Reports/Special Provisions were incomplete and inaccurate; not organized or presented in a logical manner	
Calculations	Calculations went well above expectations, were well presented, streamlined, thorough, accurate, used applicable codes/standards, easy to read, descriptive and well referenced to design criteria	Calculations went above expectations, were thorough, accurate, used applicable codes/standards, easy to read, descriptive and well referenced to design criteria	Calculations were thorough, accurate, easy to read, used applicable codes/standards, descriptive, and well referenced to design criteria	Calculations required multiple iterations between the consultant and MnDOT to be thorough, accurate, use applicable codes/standards, easy to read, descriptive, and well referenced to design criteria	Calculations were incomplete, sloppy, and hard to follow with no references to design criteria	

Final Design	Design went well above expectations, was innovative, optimized, and reduced risk	Design went above expectations, was thorough, accurate; appropriate for the situation; constructible, economical, and managed risk	Design was thorough, accurate; appropriate for the situation; constructible, economical, and managed risk	Design met contract requirements, but required a lot of guidance from MnDOT to achieve the appropriate constructible design for the situation	Design was incomplete, inaccurate; design was expensive, inappropriate for the situation, resulted in many field design changes, and increased risk	
Deliverable (customizable)	Deliverable went above and beyond contract requirements; was easily understood by all audiences; was presented in a way that was well organized, logical, addressed aspects that weren't expected or known	Deliverable exceeded contract requirements; were professional; easily understood; all information was accurately included and presented in a way that was well organized and logical	Deliverable was professional; easily understood; all information was accurately included and presented in a way that was well organized and logical; met contract requirements	Deliverable required multiple iterations to meet contract requirements; some information was missing	Deliverable was incomplete and inaccurate; not organized or presented in a logical manner	
Deliverable (customizable)	Deliverable went above and beyond contract requirements; was easily understood by all audiences; was presented in a way that was well organized, logical, addressed aspects that weren't expected or known	Deliverable exceeded contract requirements; were professional; easily understood; all information was accurately included and presented in a way that was well organized and logical	Deliverable was professional; easily understood; all information was accurately included and presented in a way that was well organized and logical; met contract requirements	Deliverable required multiple iterations to meet contract requirements; some information was missing	Deliverable was incomplete and inaccurate; not organized or presented in a logical manner	
Consultant - PM & Key Personnel (Customizable)						
	5	4	3	2	1	NA
Project Knowledge	Quickly and fully understood project; demonstrated exceptional leadership in identifying issues and constraints	Exceeded expectations in understanding of project issues and constraints	Achieved a solid understanding of project issues and constraints to meet the contract requirements	Some understanding of project issues and constraints, however not enough to meet contract requirements; required greater than normal level of guidance by MnDOT	Minimal understanding of project issues and constraints not achieved; required extraordinary level of guidance by MnDOT	

Communication	Written and verbal communication was exceptional, professional, timely, clear, and easily understood; communications methods and level of formality were appropriate; project communication polices were always observed	Written and verbal communication exceeded the needs of the project; communication methods and level of formality were appropriate; project communication polices were observed	Written and verbal communication met the needs of the project; communication methods and level of formality were appropriate; project communication polices were observed	Some written and verbal communication did meet the needs of the project; occasionally, methods and tone were inappropriate; project communication polices were not observed consistently	Written and verbal communication did not meet the needs of the project, were ill-timed, confusing, and/or misleading; methods and tone were inappropriate; project communication polices were not observed	
Project Administration	Invoicing, supplemental agreements, cost/schedule updates, etc. were exceptional and required virtually no discussion; coordination was maintained at a high level; contract issues were anticipated and dealt with before they became an issue	Invoicing, supplemental agreements, cost/schedule updates, etc. were accurate and timely; exceeded expectations; coordination was maintained at a greater than normal level; contract issues were addressed collaboratively and in a timely fashion	Invoicing, supplemental agreements, cost/schedule updates, etc. were accurate and timely; coordination was maintained to meet contract requirements; contract issues were addressed collaboratively and in a timely fashion	Some invoicing, supplemental agreements, cost/schedule updates, etc. were accurate and timely; coordination was maintained at a lower than normal level; contract issues were addressed as they arose	Invoicing, supplemental agreements, cost/schedule updates, billing preparation, etc. were inaccurate and delayed; coordination was not maintained; contract issues weren't addressed timely enough resulting in delays	
Issue Resolution	Project issues were addressed innovatively, collaboratively, in a timely fashion and far exceeded the needs of the project with major benefits to all stakeholders	Project issues were addressed collaboratively, and in a timely fashion; exceeded the expectations of the project	Project issues were addressed collaboratively, in a timely fashion, and met the needs of the project	Some project issues were addressed collaboratively or in a timely fashion with some needs of the project met	Project issues were not addressed or were addressed too late	
Leadership	Key Personnel provided exceptional leadership and direction to the project; contract requirements were met and exceeded expectations; project was an overwhelming success	Key Personnel exceeded expectations in leadership and direction to the project; contract requirements were met; project was a success	Key Personnel provided appropriate leadership and direction to the project; contract requirements were met; project was a success	Key Personnel provided some leadership and direction to the project; some contract requirements were met; project was completed	Key Personnel provided unacceptable leadership and direction to the project; contract requirements were not met; project was not successful	

Flexibility	Key Personnel showed exceptional leadership in adapting to changes in the project and scope of work; far exceeded expectations, with reasonable accommodation of the contract	Key Personnel was willing and adapted to changes in the project and scope of work with reasonable accommodation of the contract	Key Personnel adapted to changes in the project and scope of work with reasonable accommodation of the contract	Key Personnel adapted to some changes in the project and scope of work	Key Personnel was not willing or capable of adapting to changes in the project and scope of work	
MnDOT - Agency						
	5	4	3	2	1	NA
Deliverables	Were delivered in a timely manner; were complete, thorough, and clear; MnDOT went out of their way to provide as much information as possible		Were delivered in a timely manner; were complete, thorough, and clear		Were delivered late or never delivered; were incomplete, pieced together, unclear	
Project Knowledge	Fully understood project; demonstrated exceptional leadership in identifying issues and constraints; maintained outstanding level of collaboration with Consultant	Exceeded expectations in understanding of project issues and constraints; maintained appropriate level of collaboration with Consultant	Had a solid understanding of project issues and constraints to meet the contract requirements; maintained appropriate level of collaboration with Consultant	Some understanding of project issues and constraints, however not enough to meet contract requirements; very little collaboration with Consultant	Minimal understanding of project issues and constraints not achieved; no collaboration with Consultant	
Communication	Written and verbal communication was exceptional, professional, timely, clear, and easily understood; communications methods and level of formality were appropriate; project communication polices were always observed	Written and verbal communication exceeded the needs of the project; communication methods and level of formality were appropriate; project communication polices were observed	Written and verbal communication met the needs of the project; communication methods and level of formality were appropriate; project communication polices were observed	Some written and verbal communication did meet the needs of the project; occasionally, methods and tone were inappropriate; project communication polices were not observed consistently	Written and verbal communication did not meet the needs of the project, were ill-timed, confusing, and/or misleading; methods and tone were inappropriate; project communication polices were not observed	

Project Administration	Invoicing, supplemental agreements, cost/schedule updates, etc. were processed exceptionally fast and required virtually no discussion; coordination was maintained at a high level to help the Consultant meet contract requirements; contract issues were anticipated and dealt with before they became an issue	Invoicing, supplemental agreements, cost/schedule updates, etc. were processed quickly; exceeded expectations; coordination was maintained at a greater than normal level to help consultant meet contract requirements; contract issues were addressed collaboratively and in a timely fashion	Invoicing, supplemental agreements, cost/schedule updates, etc. were processed quickly; coordination was maintained to help Consultant meet contract requirements; contract issues were addressed collaboratively and in a timely fashion	Some invoicing, supplemental agreements, cost/schedule updates, etc. were accurate and timely; coordination was maintained at a lower than normal level; contract issues were addressed as they arose	Invoicing, supplemental agreements, cost/schedule updates, billing preparation, etc. were inaccurate and delayed; coordination was not maintained; contract issues weren't addressed timely enough resulting in delays	
Issue Resolution	Project issues were addressed innovatively, collaboratively, in a timely fashion and far exceeded the needs of the project with major benefits to all stakeholders	Project issues were addressed collaboratively, in a timely fashion; exceeded the expectations of the project	Project issues were addressed collaboratively, in a timely fashion, and met the needs of the project	Some project issues were addressed collaboratively or in a timely fashion with some needs of the project met	Project issues were not addressed or were addressed too late	
Leadership	MnDOT provided exceptional leadership and direction to the project; project was an overwhelming success	MnDOT exceeded expectations in leadership and direction to the project; project was a success	MnDOT provided appropriate leadership and direction to the project; project was a success	MnDOT provided some leadership and direction to the project; project was completed	MnDOT provided unacceptable leadership and direction to the project; project was not successful	
Flexibility	MnDOT showed exceptional leadership in adapting to changes in the project and scope of work; far exceeded expectations, with reasonable accommodation of the contract	MnDOT was willing and adapted to changes in the project and scope of work with reasonable accommodation of the contract	MnDOT adapted to changes in the project and scope of work with reasonable accommodation of the contract	MnDOT adapted to some changes in the project and scope of work	MnDOT was not willing or capable of adapting to changes in the project and scope of work	

## Work Area Templates

### General Template

This is meant to cover everything that is not roadway, planning, bridge, environmental, or construction. It is basically a little more streamlined than the Master Evaluation template.

#### **Project Management - Consulting Firm**

- Project Knowledge
- Communication
- Issue Resolution
- Leadership
- Budget Management

#### **Project Development**

- Resources
- Flexibility
- Schedule
- Project Approach

#### **Deliverables**

- QMP
- Reports/Services

#### **Consultant – Project Manager and Key Personnel**

- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility

#### **MnDOT**

- Project Knowledge
- Communication
- Issue Resolution
- Leadership
- Flexibility

### Bridge Template

This is the summary of what to include in the bridge template (assumed final design scope of work).

#### **Project Management – Consulting Firm**

- Project Knowledge
- Communication
- Issue Resolution
- Leadership
- Budget Management

#### **Project Development**

- Resources
- Flexibility
- Schedule
- Project Approach

#### **Deliverables**

- QMP
- Layout/Plan Quality
- Reports/Special Provisions
- Calculations
- Final Design

#### **Consultant – Project Manager and Key Personnel**

- Project Knowledge
- Communication
- Project Administration
- Issue Resolution

- Leadership
- Flexibility

#### **MnDOT**

- Deliverables
- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility



## **Construction Oversight Template**

### **Project Management – Consulting Firm**

- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Budget

### **Project Development**

- Resources
- Flexibility
- Schedule
- Project Approach

### **Deliverables** (Switch out this entire section with Construction Oversight Services (customizable))

- Design Reviews
- Roadway Construction Inspection
- Bridge Construction Inspection
- Temporary Construction Items
  - Traffic Control
  - Temporary Drainage
- Specialty Construction Inspection (customizable)
  - Lighting
  - ITS
  - Landscaping
  - Painting
- Materials Testing, Inspection and Certification
- Bituminous and/or Concrete Plant Inspection
- Environmental Compliance Oversight
- Office Manager / Contract Administration
- Contractor CPM Schedule Review
- Risk Assessments
- Feedback and Lessons Learned

### **Consultant Project Manager and Key Personnel**

- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility

### **MnDOT**

- Deliverables
- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility



## Planning Template

### **Project Management – Consulting Firm**

- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Budget

### **Project Development**

- Resources
- Flexibility
- Schedule
- Project Approach
- Public Involvement

### **Deliverables (customized)**

- Data Collection/Background Information
- Needs Reports
- Concept Plans
- Innovation Solutions
- Stakeholder Involvement

### **Consultant Project Manager and Key Personnel**

- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility

### **MnDOT**

- Deliverables
- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility

## Road Design Template

### **Project Management – Consulting Firm**

- Project Knowledge
- Communication
- Issue Resolution
- Leadership
- Budget Management

### **Project Development**

- Resources
- Flexibility
- Schedule
- Project Approach

### **Deliverables**

- Preliminary Engineering
- QMP
- Layout/Plan Quality
- Reports/Special Provisions
- Final Design

### **Consultant – Project Manager and Key Personnel**

- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility

### **MnDOT**

- Deliverables
- Project Knowledge
- Communication
- Project Administration
- Issue Resolution
- Leadership
- Flexibility

## **Environmental Stewardship and Cultural Resources Template**

### **Project Management - Consulting Firm**

- Project Knowledge
- Communication

### **Project Development**

- Schedule
- Flexibility

### **Deliverables**

- Deliverables Reports/Special Provisions
- Customized Deliverable

### **Consultant Project Manager and Key Personnel**

- Project Knowledge
- Communication
- Leadership
- Flexibility

### **MnDOT**

- Deliverables
- Project Knowledge
- Communication
- Leadership
- Flexibility



## Working Team Meeting Minutes

Working Team Meeting  
4/30/12  
10a-12  
MnDOT

Action Items from 3/27:

Consultants will reach out to other firm members for eval system examples  
Brad will have Library do a search for other state eval examples  
Amber will bring DB materials to next meeting

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Working Team  
Performance Evaluations  
4/30/12

1. Chair Discussion  
Glenn and Amber

2. Establish Plan

What is ultimate time line?

Report at next year's consultant conference – what do we report? Recommendations or ultimate product?

Who needs to review – who do we need to get buy in from?  
PMs, MnDOT and ACEC leadership, DOA

Problem statement – Goal  
Measuring performance  
Improve performance  
Quality

What are weaknesses of current process?  
What is our goal?

What is the consultant post-project process or evaluation of project? It varies from firm to firm.

Two Reach out points – what are issues with current process? Goals for next process and recommendations.

Goals:

- Develop tools and processes that help both sides
  - o Specific useful feedback
  - o Improve mechanics of feedback process
  - o User friendly tool
  - o Provide tool to assist in future selections – what is MnDOT doing with the data? Pre-Qual status? Direct and competitive selections. How industry will use in pursuits of future work – how does MnDOT and consultants use data to improve – shelf life of information. How do we use that data – how does that impact what is collected and evaluated? Capture data that can be used by both parties for future use.
  - o Develop a flexible process that can be adapted to different types of work or size/complexity, etc.
  
- Transparency and Consistency in evaluation process
  - o Incorporate more than just a back and forth paper evaluation – success of project is MnDOT and consultant – evaluation tool should be a communication tool
  
- Define expectations of both sides – up front – establish and define criteria by which consultant and MnDOT will be measured/evaluated
  - o Integrate performance evaluation process with overall project performance/success – goes both ways.
  - o Post construction component
  
- Continue DOA requirement

Timeline Goal: Unveil New Evaluation Process at 2013 Annual Conference in March so final recommendations by December 2012

Reach out to broader group to ask what issues are there with current process?

Do we need to include a rating? Score?

Utilize tools or processes that are already in place – ie Val's group – plan quality

Process improvements

- Selection
- Evaluation
- PM training process
- Minimum ability/level
- Contracting Process
- Training for Evaluation Process
- Understand how New Process feeds other aspects
- Recommendation that MnDOT evaluate at the very end of project
- Feedback at bidding stage, construction and post construction
- Get root cause of issues
- Some type of formal FDC (field design change) process of recommendations

#### ACTION ITEMS:

- Committee should review materials from other States and Amber
  - Brad will check on SWIFT issues – what are restrictions and capabilities?
  - ACEC members will reach out to transportation committee for feedback on current process and what needs to be addressed
  - Brad will schedule next meeting – tentative 6/1 at 10am
  - Glenn, Amber and Rick will develop a draft schedule/timeline and have something ready for next meeting
  - Brad will check on any other initiatives out there – Jeff and Val
  - Brad will send out notes
- 

#### Working Team

#### Performance Evaluations

6/1/12

#### 1. Previous Action Items

- Enough background data from other states to use and eventually will be able to pull for our approach. Members are encouraged to look through data and come up with some “best practices”.
- SWIFT issues and capabilities are not known but the direction will be to keep going and SWIFT is not an obstacle at this point. There are no restrictions regarding SWIFT at this point.
- Feedback from other ACEC members (see action below)
- Draft schedules – Handouts (Rick and Glenn)
- Need a quick “white paper” that describes some background and what our goal is and why we are doing this.
- Need to develop a framework for “deliverables” for this group
- Discussion of how we are approaching this...consultant evaluation...MnDOT evaluation...or using as a tool to evaluate project even when there are no consultants.
- Discussion on what we are doing with the data eventually...what are repercussions of “bad” evaluations for consultants AND MnDOT? Perhaps use as a tool for improving teams, etc. rather than punishment...so many variables...
- How do we use past performance in selection?
- Flaw in current system is that we use firms and the evaluations should be about individuals
- Should be some accountability to evaluations
- Could this process roll into PQ process?
- Discussion on interim evaluations and/or informal check ins...communication tool
- Val and Jeff do not have any initiatives but are interested in our product as a project management tool

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#### - Main Ideas from discussion:

- Need interim evaluations/check-ins
- Evaluate firms based on scope/contract requirements– but find a way to address individuals
- Need to have some form of 360 degree evaluation

- Scalable evaluations as far as frequency of interim check-ins – time/money – require basic intervals but include flexibility for people to add more check-ins
  - Communication framework/tool as part of this process (ladder of communication for firms and MnDOT)
  - How do we use evaluations in future selections and PQ status?
  - Training component
  - User friendly to promote buy-in
  - Consistency between work types
  - Criteria – what does each score actually mean?
  - Comments need to be required for extremes
2. Discuss categories of types of projects and potentially form sub committees for each type  
Glenn- should be a different evaluation based on project type. Suggest going through examples with basic project types that should be evaluated...action item
3. Round Robin
- Mark suggested weaving in a construction component – quality of plans after the fact
  - Terry echoed Mark’s – some kind of plan rating
  - Glenn suggested a “project” rating some kind of system – system for lessons learned project improvement component for both sides
  - Amber – Glenn will have next agenda for meeting
4. Action Items
- ❖ (Glenn) ACEC members: Have ACEC TC get some feedback from other firms in ACEC as to what is working with evaluations now and what they would like to see in the future...keep all in the loop and allow for input
  - ❖ All team members review other state information!
  - ❖ Go through examples and come to next meeting with suggestions for basic project types that should be evaluated.
  - ❖ Combine schedule (Rick, Amber and Glenn)
  - ❖ Draft white paper (Brad) – send out before next meeting
  - ❖ Next meeting 6/28 12:30-3 (Glenn will do next agenda)

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June 28 2012

1. Previous Action Items update:

Don’t need additional information from ACEC. Have check in point within the schedule

2. Revised schedule update

Combined schedules. Based off of the white paper draft from Brad. Changes in end of September “X” was review by MnDOT staff. Thought that both MnDOT and ACEC could review at the same time. Meet in November to make changes. December present to Division Directors. Pilot test in January. Get some reaction.

3. Draft white paper

Need the introduction of why we are doing this.  
Paragraph instead of bullets.

Some of the items are above our current scope – make paragraph for future recommendations. Our group could assist with the future recommendations, but not by March 2013.

#### 4. Potential Working Group Types

Determined that we want to work through draft process first – then break it into working groups

Could use Texas example of high level categories

#### 5. State Processes

WisDOT – Human Relations questions – liked questions, but not ratings (unless it was only used for an interim review)

Area for suggestions for improvement, allows for face to face review. Comments at the end.

Liked the evaluation criteria at the end – gave directions for the evaluator

Kentucky – Defined ratings, no subjectivity.

Texas – primary work type – don't like rating. 1<sup>st</sup> page has the apparent option to animate

Arizona – liked the original \$ and final \$ (MnDOT's evaluation has that)

Liked the ones that had the ability to comment

Illinois – rating reviewed by another staff member

Florida – format was too wordy – not easy to get through. Showed multiple reviews during the project

Missouri – liked the comments and the status update. Like the summary at the end.

? – liked that they tied it into the prequal process

#### 6. Other

Evals are public: <http://www.mmd.admin.state.mn.us/PTEVals/ptevalreviewmain.asp>

Performance - Should we include Key Personnel on the evaluation form so that the people are recognized instead of just the firm?

Transparent with people involved – may be training component for how that is addressed with the review.

Invoice payment prompt for review? Ratings based off of 30/60/90% review? For short projects, maybe just one review.

Need to have interim review that is done prior to final – check in point.

#### 7. New Action Items:

1. Glenn - Flow Chart to show where the evals fall into the project as a whole.
2. Amber - Find out if there are any other review processes prior to the pre-letting review (besides CO review).
3. Mark - Find out how often Wisconsin has face to face reviews.
4. Brad - Ask Admin if they are firm on their questions or if there is guidance on the evaluation questions - evaluate the contractor's quality, etc. No guidance provided – useless. Contradictions between Admin question answers and scores below.
5. Brad – How many contracts are written for each of the 18 work types?
6. All - Create basic primary and secondary list of work types in conjunction with the prequal list (similar to Texas).
7. All - What criteria would you evaluate – all projects get X (i.e. quality management, etc). For those secondary list of work types – what you would evaluate? Send out prior to next meeting if possible
8. Amber to send out meeting notes - Next meeting – Monday, July 23 8:30 to 10:30 am
9. Amber and Brad – Revise white paper.

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Working Team  
Performance Evaluations  
7-23-12 Agenda - Notes

1. Flow Chart – Glenn

Glenn – Chart focuses on Project - intent is to show evaluation of project through each stage...maybe do not use the term enterprise – maybe eventually use a circular. Do not want to lose sight of this. (circles are input). Also need to focus on positive, not just what went wrong. This would be a recommendation for this process. This team will focus more on “Sheila’s Chart.”

Sheila – how are we going to accomplish improvement? Focus on improving consultant and MnDOT. Focuses on contract.

2. Other review processes – Amber

Pre-letting is only area that has reviews. Consultants might like to see these – they are public. Amber will send out form so people can see what they are doing.

3. Frequency of Wisconsin face-to-face reviews – Mark M.

This happens occasionally at the request of either party. Not routine.

This group is interested in creating a culture where these meetings would not just be when there are problems.

4. Admin information required or can we change? – Brad

Admin performance data cannot be altered. We must continue to do this. There is not guidance provided from Admin on eval. These questions will still be there. We will keep this and have it be separate entities.

5. How many contracts are written for each of the 18 work types? – Brad

Handout – number of contracts for all work types in CART database. How do we take this list and group work together?

6. Discuss basic primary and secondary work types

Do we include risk as a factor in what criteria is used? We need to make this as prescriptive as possible. We need to provide the information so the user does not have to make all the decisions.

Maybe a core list of ratings criteria/questions and then a list to pick from...

Need to be mindful on how this information is going to be used – feeding lessons learned to future PMs and future projects.

7. Discuss what primary criteria would be evaluated



8. Global (primary) items would be more project related– consultant and MnDOT should be evaluated.  
Contract specific (secondary) criteria– certain items must be evaluated.  
Global – primary is evaluated for EVERY contract  
Specific – questions for specific contract  
This group needs to create process for contract evaluation and then provide recommendation for further project evaluation.  
\*\*Amber will pull together a Master Form and the next meeting we will go through and start to customize.
9. Discuss what secondary criteria would be evaluated

Managing risk – how do we address this? Can we roll this up to ask how well was risk managed for a specific contract.

#### 10. Revised White Paper

This will be a “live” document that will be updated constantly and utilized as the final report along with flow charts, etc.

Preliminary recommendations need to be added.

#### 11. Round Robin

#### 12. Action Items for next meeting

Brad – pull Rating Source pilot project – Brad will email to group

Amber – Put together a mock-up of a Master Eval Form.

Amber will update white paper.\*\*\*GROUP – give Amber feedback when she sends out.

Glenn will update flow chart – make it circular

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## Performance Evaluation Working Team

### Notes

8/22/12

1. Review meeting minutes
2. Rating Sources Pilot – not much value to gather. Will look at scoring benchmarks.
3. Master Evaluation Form –  
Should we make it more specific to type of contract we are rating? Then how would that look?
  - Weighted?
  - Average?
  - Want to have a scalable standard – a number that can be understood at a glance
  - Maybe change Project Development to Project “Execution”

- Put Development section into Project Management
- Keep preliminary engineering as defined – talks about innovation – into deliverables
- Change plan quality to layout/plan quality
- Project constraints to project management
- Managing the work plan and managing risk...Amber will try to fit it in.
- Under Key Personnel: What do we combine? Need to evaluate the PM for consultant and MnDOT specifically.
- Overall Value – feels redundant...weave into other sections – take out
  
- 3 is base point – average - met

Amber already talked to Bridge Administrators about trying this on a few contracts.

As an additional item for the evaluation – a place for the PM to give an overview of the project...sum up the project – what type of job, what were the constraints? More of a cover sheet similar to Texas.

\*\*\*\*\*ACTION ITEMS:

\*\*\*Amber will use her sheet as a base and will make consensus changes from discussion today. She will send out a new sheet to all.

\*\*\*Rick will extend his work through rest of sheet

\*\*\*Keri will look at a streamlined version for smaller contracts.

\*\*\*Glenn will take lead at looking at math – possible weighting, etc. – will work with Mark M. and Sheila

\*\*\*WHOLE GROUP needs to look at master sheet so we can finalize Master at next meeting

4. White Paper – Amber will send out a update draft for comment and ACEC will share with members
5. Circular Char – handout

Right now we are focusing on consultant eval...we need to discuss how we evaluate MnDOT

Is there a way to have a total eval that combines and has a 50/50 aspect?

How do we address the issue if project is not going well – interim evals

Could have CS be an independent party and moderate or you could have MnDOT scorers and mediate/moderate.

Should the dual eval be non -personal for MnDOT?

6. On schedule with draft process – would like to submit for review by ACEC and MnDOT in September.

\*\*\*Brad will set up next meeting – WED 9/26

Performance Evaluation Working Team

Notes

10/16/12

Missing: Mark Maves, Rick Brown and Mark Dierling.

7. Amber went through the Master Evaluation form briefly. Amendment info is just so everything is in one place.
8. Weighted score info. Yellow are the main categories. Rate between 1 and 5. 20 points Consultant; 5 points MnDOT. Averaged numbers. Weighting was easy – equal rate so each add up to 100. Test Case was just to make sure formula was set up correctly. Then changed weighted score on a couple of examples to see what it did to the score. Could set all the same as a default and then allow the PM to change (would have to be significant change in order to see the difference in the score).
  - This may be used on larger contracts and not necessarily on all.
  - If you change the rating, the Consultant and MnDOT need to set down right away and discuss so that expectations are set right up front.
  - How does this correlate with the proposal weights and scoring? They may not be the same and may not tie at all since this is for the performance and not necessarily the selection process.
  - Would you allow different project types to have different default weightings?
  - Consistency/lack of consistency between different project managers is an issue.
  - Need a baseline on which to compare the score to.
  - How will score be used? Prequal, selection for other projects, etc.? Currently used as documentation if there is an issue or not, selection committee members are free to look at them if they want to. We can make recommendations on how they should be used.
9. Bridge office wants to use the new master evaluation on the Cayuga project (just the bridge design). Approaching it as a group. Consultant will also do the MnDOT one as well. Redid definition page. 3 categories for the consultant, 1 category for MnDOT. Pick list of these items, you do not need to rate every single one of them. These items will be selected from the MnDOT project manager with help from Consultant Services contract administrator. Picks should be turned in with requisition of the contract. Budget one – had a hard time figuring out score of 5. Every month it is important for the PM to document upcoming expenditures. Managing the budget versus contract amount. Budget Management approach is more liked. Expectation of formal change in contract – needs to be tightened up. Meeting to do evaluations on Monday, Oct 22.
10. Went over Mater Evaluation categories and determined that several could be moved within categories.
  - Need to have a “generic deliverable” for projects that do not have the deliverables listed.
  - Change it back to four main categories.
  - Subconsultants should be included – perhaps under firm Project Administration and Resources or create a separate category. Firms are teaming up more and more (subconsultants have a greater percentage of the job than previous years). The subconsultants would have to be on the rating form for tracking/search purposes.

- How are firm and PM ratings differentiated? Topic heading with definitions – evaluate key personnel or just PM? Potentially list key personnel positions – “PM and Task Leads” as example. Joint discussion on which positions should be listed between MnDOT and Consultant. Positions not by name. Could take the top 4 items (Project Knowledge, Communication, Project Administration, and Issue Resolution) and rate each key personnel on those items with the max score staying the same – or allow PM to make the decision on which of the items under Key Personnel - PM. Agency instead of MnDOT.
- If score less than 3, Corrective Action Report or some action taken.
- Lessons learned or room for improvement.
- Internal reviewer of ratings for consistency on both sides?
- Formal sign-offs?
- Technical support ratings – how to get them involved/merge the two?

Action items:

1. Recommendation on how the evaluations are used and placed into the White Paper – Marks and Rick.
2. Ideas on how to rate Budget Management; more thought needed on this topic – all
3. Research language for Budget Management for a starting point – Brad
4. Evaluation of subconsultants needs to be looked at and provide feedback – could go into our recommendations. Legally contract is with the Prime; not subconsultants.
5. Consultants look at MnDOT (Agency) ratings.
6. Amber to make corrections to Master Evaluation.
7. Glenn to make changes to Weighted score.
8. Present to ACEC/MnDOT prior to November meeting (Transportation committee meeting is Nov 15)? Get comments from Rick, Mark and Mark
9. Amber to talk to Jim Cownie about signatures.
10. Brad to schedule next meeting – tentatively 11/20 from 1 to 3.

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Action Items from December Meeting:

\*Brad will make changes to Pre-qualification / Dispute Resolution Document and then will email to group for comment – then Amber will update white paper

\*Sheila will take a look at Planning criteria

\*Amber will work on Budget Management criteria

\*EVERYONE: review templates and provide comments before next meeting

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ACEC/MN MnDOT Working Team

Performance Evaluations



MnDOT CO Conference Room 702

Thursday January 17, 2013

10:00 AM – Noon

Meeting Minutes

Missing: Terry

1. Review 12-19-12 meeting minutes

No comments on last meeting minutes

2. Action Item: Changes to Pre-qualification / Dispute Resolution Document – Brad

Brad added bullets to Dispute Resolution. Draft language. Brad had heard from Terry: Terry wondered if it was too one-sided; what do the Consultants think? Consultants felt with 360 eval communication would be there. Feel this is more for the prequalification program. Prequal list should be indicating that they are performing well. Will remain draft until thresholds are set for ratings.

3. Action Item: Review Planning criteria - Sheila

Project Management – planners thought that budget, leadership and communication were highest. Thought leadership and administration could be combined. Planners thought that it was a comprehensive review.

4. Action Item: Budget Management Criteria – Amber and All

If estimation of fees is an issue, should it be its own issue? Trying to combine right now and it's not working. Lower end ratings easy to turn cause and effect around. It could have been improperly estimated, but the consultant did an excellent job managing that budget and communicating with MnDOT on issues with the budget. Perhaps the estimating portion should just be removed. Amendment wouldn't have been approved without MnDOT agreeing to the reasonable cause. If there are issues with the estimate, PM should be providing comments. Amber to modify estimate language from eval criteria. Both Consultant and MnDOT agree on scope and cost is the base assumption for this category.

5. Action Item: Review Templates – All

May need to better define leadership. Proactive/work independent was the intent for leadership. Added bullets for additional deliverables. Templates should be provided – as few as possible. Also need a generic template. Add a general deliverable. Brad - IT gave estimation for automating this evaluation form. Consultant can do it and estimate is acceptable. The less customization needed by the end user, the better. Customizations would have to go to system administrator.

PMs should take the time to identify what Consultant would be rated on. Resources are limited. Currently one page with one template. Could you do it up front as an exhibit to the contract – yes, however, it will take a culture change.

MnDOT PM would have to choose the template and tell Contract Administration which ones do not apply. Our group needs to determine how many templates and what is on the templates.

IT can customize a wizard to allow a preview of the report prior to submittal.

General template should be brief, could base template criteria off of contract value.

6. Environmental Criteria – Keri

Intent for a minimum criteria evaluation was to have two ratings under each of the five headings.

7. Draft Process Statement – Brad and Glenn

8. White paper Revisions – Amber and Terry

Discussion of Terry's comments:

1. Do we include the plan quality review within our evaluation? Currently completely separate process and only used to generate data. Does it work time wise to tie together?
2. Have we addressed evaluation of individuals? Team captured in other areas with project. Beyond PM, considered team.
3. Dispute Resolution: Develop ladder part of this? Yes.
4. Training accomplished? No, but plan to.
5. Recommendation for construction feedback? Just recommendation from our working team.
6. Risk management incorporation? Could easily be added as a criteria.

For any of the above or more, provide comments to Amber.

9. Check-in with team progress and schedule – Glenn

10. MnDOT ACEC/MN Conference Presentations - Brad

Chairs presenting on March 5. Summary presentation almost of white paper. Have 15 to 20 minutes in general session. Agenda set for general session. If need more time than general session, they can add a breakout session which would be an additional 45 minutes. That would be the only 4th breakout session for the entire day. Or could present at a breakfast in June.

Instead of presentation, could just give time for feedback for breakout session.

Provide process one pager on when this will be implemented and other handouts.

11. Amber discussion regarding eval for Cayuga. Four engineers did evals using the new evaluation. Meeting this afternoon with them to get feedback. A couple of the engineers took initiative and are proposing a different format for the eval. Amber provided handouts of their proposal. Does not address consistency, other functional areas, no eval for MnDOT, no eval for Key Personnel. Does not address the goals that this evaluation committee had developed. Does tell us that people want simple and that they are recognizing the necessity for scoring criteria.

12. Round Robin

13. Action Items for next meeting

1. Set threshold for bullet 3, Use of performance evaluations in prequal program.

2. Amber – modify estimate language from Budget evaluation criteria.

3. All - Finish Templates prior to ACEC meeting

4. Brad - Talk to Chris Roy regarding plan quality rating and timing

14. Next Meeting

February 19, 1 to 3

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#### Working Team

#### Performance Evaluations

#### 02-19-13 Meeting Minutes

Shelia, Rick, Mark M, Terry, Amber, Keri, Brad, Glenn

1. Pre-Qual/Dispute Resolution Document – all; Need to set thresholds  
Average 3 projects at 10 and below, then subject to removal from prequal.

2nd bullet – change to a minimum of three consecutive final evaluations must be completed to form the basis of prequalification decisions.

3rd bullet – If, after the minimum number of final evaluations are completed, the average of three consecutive scores is 10 and below, the consultant....

2. Budget Management criteria – Amber

Amber revised – got away from notion of overrun/under-run as bad. Could change to proactive instead of consistently.  
2 - Only reviewed when prompted by MnDOT. 4 – Consistent and proactive. Do we want to add scope of work in text?  
Implied

3. Review Templates - all

Are we good with what we have?

Environmental – Keri

Bridge – Amber

General – Mark M.

Highways – Sheila and Rick



## Planning and Construction Oversight – Glenn and Terry

What about MnDOT Consultant Project Administrator rating? Likely already caught with discussions between Project Administrator and PM.

Brad wants to get content to IT people on templates so that they can start populating database. Content by April, Testing end June/July, Live August.

Could hide majority of text – only see it if roll over major headings. Would like to see entire ratings for each category. It would give summary before final submittal. Example from bridge to help guide some of the answers for evaluations. Could use it as an office tool.

### 4. Process Document – Brad and Glenn

Total score of 25 (5 points for MnDOT). If 3 is average, they would get 12 points. Propose if consultants score a 8 10 and below for an individual contract, that would trigger the review process/address prequal. See what happens. Proposing also that interim reviews are for project management tool and does not apply to final score.

4a – a portion of the final invoice is sometimes paid. It doesn't go to audit until final evaluation is completed. Close-out process going through LEAN event in March to try to speed process up.

MnDOT should also have an improvement process on our 5 points.

Could do a trial time (transition time) in which “penalty box” is not enforced and see how it goes.

Training with managing consultants and MnDOT project managers may be necessary/required. Training for both MnDOT and consultants in the same room. Culture change.

Add 4e. Improvement process for PM (documented in data base somehow).

Expectations up front – need to add to the document.

### 5. Tasks left to complete – Amber

Weighted Rating Spreadsheet – part of software  
Prequal/Dispute Resolution Document  
Others?

### 6. Revised White Paper and Presentation – Amber

Presentation outline. Need to get feedback.

ACEC – transportation committee – mass distribution up to you.

MnDOT – consultant contract team (Jon, Amr, Dawn, Chris R, Val, Brad). Think we should get some buy-in with a cross-section group of people; then deploy out.

10 to 15 minutes to present.

Major talking points:





Why doing this?

Benefits to all.

5 major categories, automated

Scoring

Timeframe and feedback

7. Round Robin
  8. Action Items for next meeting
  1. Change Use of Performance Evaluations in prequal program – Brad
  2. Change Performance Review/Evaluation process – Brad
  3. Add Criteria to process to set criteria up front. – Brad
  4. Presentation – Glenn and Amber
  5. Amber – double check master eval form is ready to go
  6. Next meeting – April 16 10:30 – 12:30
- 

## ACEC/MN MnDOT Working Team

### Performance Evaluations

MnDOT CO Conference Room 604

Tuesday April 16, 2013

11:00 AM – 1:00 PM

#### Agenda

Attendees: Terry, Shelia, Brad, Mark M, Amber, Keri, Glenn

1. Review 2-19-13 meeting minutes
2. Feedback from MnDOT ACEC Conference presentation

Did not hear much for feedback. Glad 360 review. White paper looks great. Wondering if Consultant and MnDOT will be honest with the evaluation. When do training, it should help with the issue of honesty and constructive criticism. It should force/encourage people to be more proactive.

Evolved into discussion about Task Force Members...

Future training for PMs that manage consultants. Having consultants be involved with this training. Have a few PMs go and see what consultants do, how they put together a proposal, etc.

Also, training for kick-off meetings and their importance. Issue resolution contacts.

Brad meeting on Friday to discuss PM training and hopes to incorporate the evaluation training into that training. Hope to have a 1 ½ day training. This is a high priority for MnDOT to get the PMs trained. Need to understand role of MnDOT, role of consultant, and teambuilding to make projects successful.

3. Action Item: Changes to Use of Performance Evaluations in prequal program – Brad  
It is ready to be final.

4. Action Item: Changes to Performance Review/Evaluation process – Brad  
Brad met with consultant to do automated system. Process was helpful to them. Question regarding 4e. It is an extra step that is really not necessary? If reviews are not acceptable to either party, they can go to f. Extra step = extra time. Concern on MnDOT's side vs Consultant's side.

When you do an evaluation with staff, you sit down and talk with them. Could you change the text to "Receive" instead of "Accept".

Consultant has not received evals in the past – gone to wrong person or upper level management didn't share it with the PM. With a receive notification, you would know that it is done.

Could you put a deadline on the acceptance part and if no comments, it auto accepts after a certain time?

4e forces a dialogue. Doesn't have to happen with every project, but is important.

Email – info with this is your eval; if you have issues, this is what you do. Hit "Receive" or if you don't hit anything, it auto accepts after 5 days.

After b and c, eval should go to the PM. 5 days after that, it goes to CART.

5. Action Item: Add Criteria to process to set criteria up front. – Brad  
3.a.1. language added

6. Action Item: Master evaluation form – Amber  
Sent to Brad last month for consultant to automate. Done.

7. Work Area Templates – Amber

Needs the list for all of the work areas. Believes that there were 5 or 6.

8. White Paper Revisions – Amber

Last revision was April 16 (Amber needs to send out)

9. Check-in with team progress and schedule – Glenn

Next steps – final report package. After final, send to ACEC and Division Directors. Then, it will be final. Anticipate testing in June/July. Anticipate involving us with the testing.

10. Action Items for next meeting – Are we done?????



1. Brad to fix process and email out to everyone.
2. All – email lists for templates to Amber and Cc: Glenn and Brad (do this ASAP)
3. Brad – put together final report – take white paper and all of the attachments as exhibits. Will put together an executive summary. Will also add “Next steps timeline”. Send out to all for comment.
4. Amber – send out last white paper revision.

11. Next Meeting if necessary

Anticipate that another meeting will be necessary after testing (sometime June/July – date to be determined).

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**Presentation from MnDOT – ACEC 3/5/13 Annual Conference**

# Performance Evaluation Improvements

MnDOT – ACEC/MN Annual Conference  
March 5, 2013  
Amber Blanchard, MnDOT  
Glenn Schreiner, ACEC/MN

*Your Destination...Our Priority*



## Current Process

How many of you like MnDOT's current P/T contract performance evaluation?

Describe any negative action taken during the Contract (i.e., termination, percent of completion, etc.)  
None

**Contract Services Evaluation Information**

Contract Administrator Name: Kelly Aarssen      Contract Administrator Email Address: Kelly.aarssen@dnr.state.mn.us


Project Manager, please rate Items 1 to 4 and submit the document as instructed above. Consultant services will obtain the Contract Administrator's rating information for Items 5-8.

Assign a rating score to the following specific areas:

\*NOTE: Comments are always encouraged, but if you provide a Rating of 1 or 2 on any of the rating items below, comments are **required** within the "Comments" section below.

PROJECT MANAGER				
	Above Average (4 Points)	Average (3 Points)	Below Average (2 Points)	Poor (1 Point)
1. Product Quality		X		
2. Work Performance		X		
3. Conformance with MnDOT Standards/Requirements	X			
4. Deliverables Complete and On Time	X			
5. Project related Cooperation	X			
6. QA/QC Plan/Compliance		X		
CONTRACT ADMINISTRATOR / AUTHORIZED REPRESENTATIVE				
7. Contract Administration Cooperation	X			
8. Revision and Progress Reports	X			
9. Cost estimation/Budget Management			X	
<small>Total Points Possible: 24</small>				
<small>Total Points Received: 13</small>				

Comments  
XXXXXX



## Current Process

How many of you don't like MnDOT's current P/T contract performance evaluation?

Describe any negative action taken during the Contract (i.e., termination, protest of suspension, etc.)  
None

**Contract Services Evaluation Information**

Contract Administrator Name: Kelly Aronson Contract Administrator Email Address: Kelly.aronson@mndot.gov

Project Manager, please rate Items 1 to 4 and submit the document as instructed above. Consultant Services will obtain the Contract Administrator's rating information for Items 5-8.

Assign a rating score to the following specific areas:  
\*NOTE: Comments are always encouraged, but if you provide a Rating of 1 or 2 on any of the rating items below, comments are **required** (after the "Comments" section below).

	Above		Below	
	Average (4 Points)	Average (3 Points)	Average (2 Points)	Poor (1 Point)
1. Product Quality		X		
2. Work Performance		X		
3. Compliance with MnDOT Standards/Requirements	X			
4. Deliverables Complete and On Time	X			
5. Program related Competence	X			
6. QAPP/Plan Compliance		X		

**CONTRACT ADMINISTRATOR - AUTHORIZED REPRESENTATIVE**

1. Contract Administration Competence	X			
2. Resource and Program Expertise	X			
3. Cost-effective Budget Management		X		
Total Points Possible: 16				
Total Points Received: 12				

Comments  
XXXXXX



## Current Process

How many of you know what happens to the evaluations?



## Performance Evaluation Improvements

- ▶ Purpose: Improve the processes for evaluating project performance
- ▶ Benefits:
  - Refined process that will give useful, consistent feedback
  - Offer chance to express concerns
  - Automated (ease of use)



## Performance Evaluation Improvements

- ▶ White Paper
  - Goals:
    - Develop tools and processes for performance evaluations that benefit MnDOT and the Consultant Community
    - Transparency and Consistency should be included in the evaluation process
    - Include the Department of Administration's evaluation requirements and incorporate into the process



## Performance Evaluation Improvements

- Goals (Cont.)
  - Define expectations of both sides up front. Establish and define criteria by which the consultant and MnDOT will be measured/evaluated

### Key points:

MnDOT and Consultant PM review performance metrics before the project begins

And Consultant will also be reviewing MnDOT Performance



## Contract Rating includes sum of Consultant and MnDOT Ratings

	Rating
Consultant	A
MnDOT	B
Contract	A+B



## Consultant Rating Based on Four Categories

- ▶ Project Management
- ▶ Project Development
- ▶ Deliverables
- ▶ PM (Key Personnel)



Each Category has Criteria scored from 1 to 5

- 1 - **Low** (Does not meet expectations)
- 3 - **Meets Expectations**
- 5 - **High** (Exceeds Expectations)





## Average Criteria Scores for Category Score

Criteria	Low	Meets Expectations	High
Project Knowledge	1	3	5
Communication	1	3	5
Administration	1	3	5
Issue Resolution	1	3	5
Leadership	1	3	5
Budget	1	3	5
Project Management	1.0	3.0	5.0



## Sum Category Scores for Consultant Rating

Criteria	Low	Meet Expectations	High
Project Management	1.0	3.0	5.0
Project Development	1.0	3.0	5.0
Deliverables	1.0	3.0	5.0
PM (Key Personnel)	1.0	3.0	5.0
Consultant Rating	4.0	12.0	20.0



## MnDOT Rating Based on Seven Criteria

- ▶ Deliverables
- ▶ Project Knowledge
- ▶ Communication
- ▶ Administration
- ▶ Issue Resolution
- ▶ Leadership
- ▶ Flexibility



## Average Criteria Scores for MnDOT Rating

Criteria	Low	Meets Expectations	High
Deliverables	1	3	5
Project Knowledge	1	3	5
Communication	1	3	5
Project Administration	1	3	5
Issue Resolution	1	3	5
Leadership	1	3	5
Flexibility	1	3	5
<b>MnDOT Rating</b>	<b>1.0</b>	<b>3.0</b>	<b>5.0</b>



## Sum Consultant and MnDOT Ratings for Contract Rating

Criteria	Low	Meets Expectations	High
Consultant Rating	4.0	12.0	20.0
MnDOT Rating	1.0	3.0	5.0
Contract Rating	5.0	15.0	25.0



## Consequences of Consistent Poor Ratings

- ▶ Ratings of 10 or less require Improvement Plans
- ▶ Non compliance with improvement plan could affect prequalification for a work type.



## Performance Evaluation Improvements

- ▶ Draft process reviewed with both MnDOT and ACEC/MN
- ▶ New evaluation software testing and training in June 2013
- ▶ Start using new evaluation software in July 2013



## Performance Evaluation Improvements

- ▶ Purpose: Improve the processes for evaluating project performance
- ▶ Benefits:
  - Refined process that will give useful, consistent feedback
  - Offer chance to express concerns
  - Automated (ease of use)



## Example/Sample of Evaluation Summary

	Low	Aver	High	Rating	Default Weight	Weighted Score	Test Case		
								Default Weight	Weighted Score
<b>Project Management</b>	<b>1</b>	<b>3</b>	<b>5</b>	<b>3.0</b>	<b>100.00</b>	<b>3.0</b>	<b>3.0</b>	<b>100.00</b>	<b>2.5</b>
Project Knowledge				3	16.67	0.50	3	16.67	0.50
Communication				4	16.67	0.67	4	16.67	0.67
Project Administration				5	16.67	0.83	5	5.00	0.25
Issue Resolution				2	16.67	0.33	2	16.67	0.33
Leadership				1	16.67	0.17	1	28.33	0.28
Budget				3	16.67	0.50	3	16.67	0.50
<b>Project Development</b>	<b>1</b>	<b>3</b>	<b>5</b>	<b>3.0</b>	<b>100.00</b>	<b>3.0</b>	<b>3.0</b>	<b>100.00</b>	<b>3.2</b>
Resources				3	20.00	0.60	3	20.00	0.60
Flexibility				4	20.00	0.80	4	20.00	0.80
Schedule				4	20.00	0.80	4	30.00	1.20
Project Approach				2	20.00	0.40	2	10.00	0.20
Public Involvement				2	20.00	0.40	2	20.00	0.40
<b>Deliverables</b>	<b>1</b>	<b>3</b>	<b>5</b>	<b>3.4</b>	<b>100.00</b>	<b>3.4</b>	<b>3.4</b>	<b>100.00</b>	<b>3.4</b>
Preliminary Engineering				3	12.50	0.375	3	12.50	0.375
QMP				4	12.50	0.500	4	12.50	0.5
Layout/Plan Quality				5	12.50	0.625	5	12.50	0.6
Reports/Special Provisions				3	12.50	0.375	3	12.50	0.375
Calculations				3	12.50	0.375	3	12.50	0.375
Final Design				3	12.50	0.375	3	12.50	0.375
Deliverable (Custom)				3	12.50	0.375	3	12.50	0.375
Deliverable (Custom)				3	12.50	0.375	3	12.50	0.375
<b>PM (Key Personnel)</b>	<b>1</b>	<b>3</b>	<b>5</b>	<b>3.7</b>	<b>100.00</b>	<b>3.7</b>	<b>3.7</b>	<b>100.00</b>	<b>3.7</b>
Project Knowledge				3	16.67	0.50	3	16.67	0.50
Communication				5	16.67	0.83	5	16.67	0.83
Project Administration				3	16.67	0.50	3	16.67	0.50
Issue Resolution				4	16.67	0.67	4	16.67	0.67
Leadership				4	16.67	0.67	4	16.67	0.67
Flexibility				3	16.67	0.50	3	16.67	0.50
<b>Consultant Rating:</b>	<b>4.0</b>	<b>12.0</b>	<b>20.0</b>	<b>13.1</b>		<b>13.1</b>	<b>13.1</b>		<b>12.8</b>

MnDOT	1.0	3.0	5.0	3.1	100.00	3.1	3.1	100.00	3.0
Deliverables				3	14.29	0.4	3	14.29	0.4
Project knowledge				3	14.29	0.4	3	14.29	0.4
Communication				2	14.29	0.3	2	14.29	0.3
Project Administration				4	14.29	0.6	4	5.00	0.2
Issue Resolution				2	14.29	0.3	2	23.57	0.5
Leadership				4	14.29	0.6	4	14.29	0.6
Flexibility				4	14.29	0.6	4	14.29	0.6

<b>Contract Rating:</b>	<b>5.0</b>	<b>15.0</b>	<b>25.0</b>	<b>16.2</b>		<b>16.2</b>	<b>16.2</b>		<b>15.8</b>
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