



**MASSACHUSETTS BAY TRANSPORTATION AUTHORITY
DESIGN & CONSTRUCTION DIRECTORATE
CONSULTANT PERFORMANCE EVALUATION RATING SHEET**

PREAMBLE

The Consultant Performance Evaluation Rating Report (CPER) is required to be submitted a.) twice each year for the duration of the design contract and b.) upon contract closeout.

The report is divided into three (3) categories: Administration (20%); Procedural (20%); and Technical (60%). Each category is weighted and further subdivided to assist in rating each category.

Though the outline is fairly comprehensive, it should be noted that these criteria are only tools to assist the reviewer and that each project has its own special circumstances.

Again, this report should be completed on a semi-annual basis, thereby permitting the reviewer and the consultant additional opportunities to work together to provide plans and specifications that will satisfy all concerned parties.

CONTRACT NUMBER:

CONTRACT TITLE:

TASK NUMBER (IF APPLICABLE):

MBTA PROJECT MANAGER:

CONSULTANT NAME:

CONSULTANT PM:

CONTRACT CEILING PRICE:

RATING PERIOD:

INTERIM REPORT

or

FINAL REPORT

PERCENT (%) COMPLETE CURRENTLY:

_____ %

NUMERICAL RATING SCALE: (0-20%)

Excellent 18-20

Satisfactory 14-17

Unsatisfactory 0-13

1. ADMINISTRATION: (Weight = 20%)

a. Organization

Does the design team work well together?
Is the team well organized and focused?
Is a good work plan in place?
Is the project properly staffed?

b. Project Management

Does the Project Manager communicate well?
Is the PM responsive? In a timely manner?
Is progress reporting timely and informative?
Are meeting minutes accurate, complete and timely?
Is the MBTA informed of design and construction changes (time and fee) in a clear and timely manner?
Are project files organized and maintained properly?

c. Scheduling

Are schedules and Milestones being maintained?
Has the MBTA been kept informed of changes in schedule?
Are submissions complete, organized and correct?

d. Financial

Are invoices submitted on a regular basis that are complete and accurate? Is design level consistent with invoicing?
Are invoices for contract/amendments being segregated properly to allow for timely payments?

TOTAL

Average Rating for Category (Total of a thru d divided by 4)

Comments (required for unsatisfactory)

NUMERICAL RATING SCALE: (0-20%)

Excellent 18-20

Satisfactory 14-17

Unsatisfactory 0-13

2. PROCEDURAL: (Weight = 20%)

a. Knowledge

Application, understanding and implementation of federal, state, MBTA, AMTRAK and local policies, procedures, regulations, law, orders, decrees, etc., as required?
Are MBTA policies, procedures, and design standards being met? Are project goals fully understood?

b. Project Approach

Has the consultant been creative to project needs?
Has the consultant been innovative? Has the consultant been thorough? Has the consultant addressed constructability issues/concerns?
Has the design considered value engineering?

c. Coordination

Does the consultant cooperate with the MBTA and joint operating agencies (e.g. AMTRAK) and affected local communities and officials?

d. Subconsultants

Is work being coordinated and managed well? Does the prime address problems with their subs in a timely fashion?
Does the prime coordinate the "Exchange of Information" amongst the design team?

TOTAL

Average Rating for Category (Totals of a thru d divided by 4)

Comments (required for unsatisfactory)

NUMERICAL RATING SCALE: (0-60%)

Excellent 54-60

Satisfactory 42-53

Unsatisfactory 0-41

3. TECHNICAL: (Weight = 60%)

a. Expertise

Application and presentation of design information generated? Is the design(s) documented, complete and coordinated properly? Are reports clear and concise with recommendations well supported?

b. Budget Conformance

Have alternatives, if necessary, been considered to stay within the design and construction budget?

c. Quality of work

Is the data submitted accurately? Does work comply with governing standards? Are design issues identified and resolved before proceeding with additional work? Are design review comments being addressed/responded/resolved and incorporated into design documents?

d. Supervision Required

Does the consultant require excessive oversight? Does the consultant work cooperatively with the Authority? Does the consultant comply with MBTA's quality assurance?

TOTAL

Average Rating for Category (Total of a thru d divided by 4)

Comments (required for unsatisfactory)

TOTAL PERFORMANCE RATING

NUMERICAL RATING SCALE: (0-100%)

Excellent 90-100

Satisfactory 70-89

Unsatisfactory 0-69

(Sum of all Average Rating Categories - Maximum Rating = 100) _____ %

GENERAL COMMENTS (OPTIONAL)

Input has been received from those identified on the attached list in preparing this evaluation.

Prepared By:

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MBTA Project Manager Name	Signature	Date

Reviewed/

Concurred by:

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Director Name	Signature	Date

CONSULTANT RESPONSE (CONCURRENCE OR EXCEPTION):

Reviewed by:

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Consultant Project Manager Name	Signature	Date

Reviewed by:

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Consultant Principal Name	Signature	Date