



ROAD DEVELOPMENT AGENCY

CONTRACTOR PERFORMANCE RATING TOOL KIT

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This document is a User's manual for the Road Development Agency on how to assess the performance of Contractors in relation to works.

Motivation
for High
Performance
Achievement
and
Attainment of
Quality

Volume 3

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1 Introduction

Background

This document is a motivational tool to be used by the Road Development Agency in order to assess the performance of the Contractor in relation to his works contract. The tool is expected to be used and read together with the main manual (Consultants' and Contractors' Vendor Rating System, RDA Policy and Procedures' Manual) and may also be ready with other volumes; that is, Volume 1 for the design Consultant and Volume 2-for the Supervising Consultant or the Engineer during the assessment period.

This is intended to implement regular Contractor performance evaluations as a routine component of project management. The performance is defined as "how a Contractor or anyone given the mandate to construct works for the client carries out the obligations of a contract." This includes all requirements stated in the contract scope of work and provisions, adherence to the budget or price and the provision of customer service. The tool kit is intended to help the Agency motivate Contractors improve in their quality of delivery. It is a framework for continuous improvement and will provide a consistent method of continuous performance measurement and assessment.

The document provides details on the areas of evaluating the past and current performance of the Contractor on the execution of his works. In case of a design and build contract, the evaluator should use volume 1 to carry out a detailed assessment of the design or review component. Non applicable items should be rated to zero. The design component and works component will be treated as separate projects.

The overall objective of this exercise is to encourage Contractors to seek continuous improvement in the execution of their works. The evaluation and assessments are expected to be carried out quarterly for ongoing works and a final evaluation done at the end of the contract.

2 General Information

(a) Documentation

The evaluation exercise shall be carried out based on the information gathered during the course of the contract and at the end of a contract period. The preliminary assessments are expected to be communicated to the Contractor being assessed. The details on the procedures are set out in the RDA policy and procedures manual on vendor rating. Documentations for evaluation shall include; reports, work plans and schedules, forecasts, invoices, correspondences electronic or non electronic, notes, other stakeholders concerns, minutes, site instructions, site photos and any contract or project related data and physical inspections of works. The information to be used is both hard and soft copies.

(b) Notification

The Contractor should be made aware of the evaluation process prior to starting. The notice shall be either electronic or by mail. However, the client can conduct the evaluation at its own discretion as all Contractors are bound for assessment.

(c) Evaluation Procedures

The evaluation procedures are provided for in the Main Manual- RDA policy and procedures manual on vendor rating. The application must be followed and their required forms must be used. The evaluations shall be carried out through out the term of an on going contract or project and the end of the contract at any time.

(d) Types of Evaluations

The evaluation shall be carried out quarterly for ongoing works and a final evaluation done at the end of the contract. Completed and terminated projects are also bound to evaluations. Therefore, number of the evaluations shall be detected by the contract/project period. The final evaluation will be carried out when the life of the contract/project ends and there are no possibilities of renewal. Moreover, Special Evaluations may be carried out independently by the Monitoring and Evaluation Unit at any time for projects which are experiencing serious performance challenges to guide management make informed decision on the way forward.

(e) Multiple Contracts/Projects

Contractors with multiple projects will be evaluated on all or any projects and their final performance rating will be the average of the projects rated irrespective of whether the project is construction only or it involves design and build.. Evaluators should notice that each contract is unique and shall carry out the evaluation impartially and exclusive of other contracts.

(f) Evaluation Process

The details on the procedures and processes to carry out the evaluation are set out in the RDA policy and procedures manual on vendor rating. The evaluation and detailed assessment forms are set out to reflect the true representation of the performance of the Contractor with regard to his execution of works.

(g) Weighted Scores

The following weights have been applied to the various aspects of measurements:

Table 1: Weights to Aspects of Measurements

Area	No.	Aspect of Rating	Weight
Critical Areas of Measurements (75%)	1	Project Scope Management	0.05
	2	Project Time Management	0.15
	3	Project Cost Management	0.1
	4	Project Quality Management	0.3
	5	Project Contract Administration	0.1
	6	Project Human resource Management	0.05
		Sub Total A	0.75
Other Areas of Measurements (25%)	7	Project Communications Management	0.05
	8	Project Environmental, Health and Safety Management	0.05
	9	Project Risk Management	0.05
	10	Project General Assessment	0.1
		Sub Total B	0.25
		Total	1.00

(h) Responsibilities of the Parties and key Stake Holders to this Tool Kit

The main responsibilities of the key stake holders are set out in the RDA policy and procedures manual on vendor rating. However, the general responsibilities on the evaluation and assessment are;

1. **The Client**-The client will evaluate works contracts in order to enhance and motivate the performance of the contractors. The client will also keep records and evidence to support the performance of the Contractor. The client will through its tender procurement committee apply final penalties for underperformers. The penalties are detailed in the main manual RDA policy and procedures manual on vendor rating.
2. **Client’s Evaluators and Assessors**; Are expected to evaluate and assess the Contractor impartially and professionally. They should carry out the evaluation in an open and transparent way. They are expected to give evidence especially on extreme low performances for the Contractor. Anything below the satisfactory mark shall be substantiated with evidence.
3. **The Contractor**-Is expected to cooperate and provide all supportive documents and information required by the client and clients’ assessors. The Contractor is also expected to perform his duties professionally. The Contractor can also appeal over an assessment and should provide evidence to support the appeal.

3 Categories and Aspects of Evaluation

The Road Development Agency will use ten (10) No. categories or aspects of evaluation to assess the performance of the Contractor during the contract period. These and the same method will be used to carry out a final assessment. The aspects or categories are as follows;

i. Project Scope Management

This category covers the issues involved in managing the scope of the works contracts following contract award. It generally evolves around how the Contractor is executing the works or executed the works, seeking performance improvements, and managing changes. The Contractor is expected to ensure that he carries out works in accordance with the scope of works and any changes to the scope are properly requested, authenticated and guidelines followed. Detailed aspects include **Contractor Executing Work within the specified Scope, Works done according to Specifications and within contract provisions and Scope Control on Works.**

ii. Project Time Management

This category covers the issues involved in managing the time in delivering the works in order to ensure that the contract is executed on time, with keeping the contract on schedule. Detailed aspects include **Meeting of targets as specified on Schedule, Doing it Right for the first time, Updating work schedules regularly, Reliability & Responsive to technical directions, Completion of Additional work and Contractors early Warning.**

iii. Project Cost Management

This category covers the issues involved in managing the costs of the works by keeping the cost within budget through planning and control in order to ensure that the contract is completed within the initial costs or extra costs or variations are minimised and or reasonable. Detailed aspects include **Budget Variance-Variations, Accuracy of IPCs (claims), Pricing of Contract Addendum, Demonstrable Use of Advance Payment and Cost Efficiency.**

iv. Project Quality Management

This category covers the issues involved in managing the quality of works and product provided in order to assure that the final deliverable is fit for purpose, i.e the deliverables are being used without fail. Detailed aspects include **Quality Assurance Plans for the execution for works, Quality assurance Plans Implementation, Quality Compliant, Quality of documented project files , Innovations and Alternate Options, Adherence to SATCC design codes and Standards or Best practices, Overall Quality of Product, Quality of product performance.**

v. Project Contract Administration

Although, generally, the all document is about project and contract administration and management, this category is general in nature. Detailed aspects include **Understanding the elements of contract administration, Contract Maintenance, Asset Management – (Availability & Reliability) and Management of Subcontractors.**

vi. Project Human Resource Management

This category covers the issues involved in managing the people involved in the project in order to bring out the best out of them. This involves how best the personnel resources are managed by the Contractor on the project. Detailed aspects include **Client Relations, Drive and Determination, Personnel Resource Management, Personnel Effectiveness, Technical Competence, Availability of Approved Staff or Original Staff on the Project, Employment and Support to Locals.**

vii. Project Communications Management

This category covers the issues involved in managing communication between parties and other stakeholders. It is about identifying who needs what information, how it is to be communicated and when they need to have it in ensuring that the right people get the right information for proper decision making. Detailed aspects include **Communication Management Plan, Response to instructions or enquiries and Knowledge and understanding of RDA project procedures.**

viii. Project Environmental, Health and Safety Management

This category covers the issues involved in environmental management and control, health of workers and other stakeholders and the general safety of the site. Detailed aspects include **Environmental Management Plan Documentation, Environmental Management Plans Implementation, HIV Aids program implementation, General Provision of PPEs, Work Signage Adequate and General Safety of site establishment.**

ix. Project Risk Management

This category covers the issues involved in identifying and evaluating risks, planning responses and ensuring that the plans translate into action if the risks crystallize. Detailed aspects include **Risk Identification, Risk Management Plan, Risk Monitoring and Control**

x. Project General Assessment

This category covers the issues which are of a general nature; some not directly related to the scope of the project but affects the performance of the project while

others are related to the execution of the project. Detailed aspects include **Problem Resolution and Customer Satisfaction, Appreciation of Government Requirements and Procedures/Local laws/ Standards, Public/Stakeholders relations/Corporate Social Responsibility, Relationship with other Contractors or Consultants, Integrity and Ethical Conduct of Contractor and Contractors' Personnel and Value for Money.**

4 Detailed Aspects of Evaluation

The Road Development Agency will use the detailed aspects of evaluation below as detailed in the specific areas of assessment, evaluation and monitoring forms. Each aspect has a maximum score of five (5) and the details of scoring are given in section 4 below and on the vendor rating matrix in **ANNEX A**. These aspects of measurement have been identified to measure and manage the performance of the Contractors. They are described to capture the entire contributions of the Contractor in relation to his performance of duties. In assessing the Contractor, the evaluator is expected to answer the questions set out in the detailed aspects of measurement. These detailed aspects of measurements should be graded according to the evaluator/assessors' judgement and observations on the performance of the Contractor.

4.1 Project Scope Management

(a) Contractor Executing Work within the specified Scope

- Did the Contractor well understand the required scope? **YES / NO**
- Where whole the studies carried out within the specified scope and are they sufficient? **YES / NO**
- Did the Contractors collect and review all relevant existing data relating to the Project and was the information well interpreted and presented to benefit the optimal out put of the project? **YES / NO**
- Has the Contractor conducted comprehensive research into relevant background and has he taken due account of the information and site conditions collected? **YES / NO**
- Did the contractor study the impacts of scope changes and were the requested changes thoroughly reviewed against the product scope before passing onto to the next process? **YES / NO**
- Was the Contractor familiar with social and economic background of the project? **YES / NO**

(b) Works done according to Specifications and within contract provisions

- Did the contractor carry out the works according to the SATCC specifications or any other criteria acceptable as best practices used? **YES / NO**
- Did the contractor carry out the works according to the contract provisions? **YES / NO**
- Were the designs made by the Contractor for the works usable? Did the outputs achieve technical compliance with the contract objectives as per the specifications? **YES / NO**
- Did the contractor's work meet the full requirements of the project without leaving variable and vital work items? **YES / NO**
- Has the contractor complied with the relevant statutory requirements? **YES / NO**

(c) Scope Control on Works

- Where all the solutions within the scope and if any changes, was there a process followed and approved by the Agency? **YES / NO**
- Where the changes reasonable and justifiable? **YES / NO**
- Where the changes to works contract, have a positive effect on output of the works? **YES / NO**
- Did the contractor follow a change control procedures by requesting for changes? **YES / NO**
- Was there any documentation on the changes and any assessments and orders? **YES / NO**
- Was any prioritisation and authorization considered in regard to scope change? **YES / NO**

4.2 Project Time Management

(a) Meeting of targets as specified on Schedule

- Has the Contractor met all the scheduled milestones in advance, meeting date for scheduled works and overcoming significant obstacles, resulting in additional benefits to the Agency? **YES / NO**
- Where deliverables being met continuously on revised dates? (Deliverables in respect include reports, plans and other submissions which are subjects of the project.) **YES / NO**

- Was the final output delivered on time and was not adversely delayed against the approved program or Contractors' program? **YES / NO**
- Was the Contractors average delivery time comparable to other Contractors in terms of time for the similar assignment? **YES / NO**

(b) Doing it Right for the first time

- Was there any minimal re-working of the Contractor's activities or outputs and with minimal impacts on the overall performance of the project? **YES / NO**
- Were there minimal defects on the overall output resulting in the Contractor reduction in re-working on it or double handling of activities? **YES / NO**
- Has the Contractor learnt from instances of re-working and amendments made as a lesson? **YES / NO**

(c) Updating work schedules regularly

- Where the activities well defined and sequenced and was the estimated time for each activity reasonable and attainable? **YES / NO**
- Was the Contractor adhering to the planned schedule on all activities? **YES / NO**
- Did the contractor provide any control to bring the delayed activities within the time frame, where the activities revised in the bar charts frequently? **YES / NO**
- Was the contractor timely updating the programs of works in accordance with the conditions of contract without many reminders from the Engineer/Supervisor? **YES / NO**

(d) Reliability and Responsiveness to Technical Directions

- Were the Contractors programming activities reliable and predictable? **YES / NO**
- Was the Contractor responsive to technical directions such as instructions/tasks? **YES / NO**
- When comments have been made by the supervisor or client with regards to technical documentations, did the Contractor take into account the comments in the proceeding works? **YES / NO**
- Was the contractor generally reliable and responsive to directions? **YES / NO**

(e) Completion of Additional Work

- Was the Contractor delivering any additional work from the client on time without any unnecessary additional delays? **YES / NO**
- Was the Contractor re-scheduling the additional time accurately without any multiple extensions to the contract? **YES / NO**
- Was the Contractor flexible to additional work or any other requirements from the client? **YES / NO**

(f) Contractors Early Warning.

- Was the Contractor demonstrating capabilities in problem identification so as to minimise them from happening? **YES / NO**
- Was he leading promptly in putting forward effective solutions in cases where problems had arisen? **YES / NO**
- Was the Contractor proactively resolving all significant obstacles resulting in additional benefits to the Agency? **YES / NO**
- Was the Contractor providing right recommendations or solutions to the identified problems? **YES / NO**
- Was the contractor giving early warnings and on time and were they communicated to the Agency or its representative in an effective manner? **YES / NO**

4.3 Project Cost Management

(a) Budget Variance-Variations

- Was the Contractor predicting any cost variances or additional cost on time? **YES / NO**
- Did the Contractor give the Agency advice and recommendations on time? **YES / NO**
- Was the final estimated cost of works within the original invoice; was the final assessment within the budget? **YES / NO**
- Did the Contractor give adequate and appropriate justification for the budget variances? **YES / NO**

(b) Accuracy of IPC's (claims)

- Were the Contractor's monthly IPCs accurately presented without any unnecessary additions resulting in non-processing by the client or delays in processing by the client due to the need for corrections? **YES / NO**
- Were the Contractor's monthly IPCs and forecasts/cash flows reliable and regularly revised and were they made on time? **YES / NO**
- Were the Contractor's IPCs well backed up with supporting documents such as measurements sheets, sketches, receipts for easy of audit or verification? **YES / NO**

(c) Pricing of Contract Addendum

- Were all additional costs reasonable and acceptable to the client? **YES / NO**
- Were the Contractor's rates justifiable? **YES / NO**
- Were all the requirements for variations or additional works submitted in complete forms, accurate and submitted within the required time frame to allow adequate decision making? **YES / NO**
- Were the Contractor's estimated costs for the works accurately predictable as compared to market forces? **YES / NO**

(d) Demonstrable Use of Advance Payment

- Was the advance payment solely used according to the contract conditions? **YES / NO**
- Was the Contractor efficient on the use of the advance payment by providing the expected resources on time without delays? **YES / NO**
- Did the contractor generally demonstrate the right use of the advance on the project? **YES / NO**
- Was the progress made on site corresponds to the amounts of the advance given to the contractor? **YES / NO**

(e) Cost Efficiency and effectiveness

- Was the Contractor efficient on cost control; was the output comparable to the cost involved? **YES / NO**
- Was the Contractor applying any cost efficient approaches in the use of the project funds? **YES / NO**

- Was the contingency used efficiently and effectively adding value to the project? **YES / NO**
- Did the Contractor consider adequately any alternative such as materials that could be used to reduce the cost of the project? **YES / NO**
- Were the Contractors payment records well kept and allocated to other subjects and components of works accurate and well documented? **YES / NO**
- Were any adopted options significantly adding value to the project or will it add value to the project? **YES / NO**
- Were the final preparation of financial reports including final accounts for payment within the agreed time scales and accurate? **YES / NO**

4.4 Project Quality Management

(a) Quality Assurance Plans for the execution of works

- Did the Contractor clearly identify the quality standards relevant to the project in the method statement? **YES / NO**
- Was there a quality assurance plan on the project? **YES / NO**
- Was the Contractor's assurance plans specific to the project deliverables? **YES / NO**
- Was the contractor's assurance plans helpful in achieving the required quality standards? **YES / NO**
- Was their any method of identifying, reporting and tracking non-conformances? **YES / NO**
- Was there evidence that the Contractor's staff are encouraged to contribute to quality? **YES / NO**
- Was there any formal process for communicating quality requirements and feedbacks? **YES / NO**

(b) Quality Assurance Plans Implementation

- Was there an internal quality assurance system within the Contractor's personnel through the use of quality assurance certificates signed at each work stage by various personnel? **YES / NO**
- Was the quality assurance plan strictly followed? **YES / NO**
- Was the contractor attending to defects on time? **YES / NO**

- Was the contractor using quality assurance certificates and other documents such as inspection requests for every work items? **YES / NO**
- Were the internal quality assurance certificates authenticated by the appropriate staff and sent for supervisor's approval timely and accordingly? **YES / NO**
- Did the contractor apply for every inspection on the works achieved through the use of quality assurance certificates? **YES / NO**
- Were there any periodic reviews to assess effectiveness of the quality system within the contractor with the help from the consultant? **YES / NO**

(c) Quality Compliant

- Was the contractor complying on quality for each work activity with minimal instructions from the supervisor? **YES / NO**
- Did the contractor comply on the quality of his resources (equipment) for the well being of the project? **YES / NO**
- Was the contractor compliant on the construction materials, equipment and the methodologies for the construction of works? **YES / NO**
- Was the final product submitted together with the Contractors' internal quality assurance certificates so as to assure quality for the works? **YES / NO**
- Was the quality of documented project files good and without errors? **YES / NO**
- Did the contractor have an independent laboratory for the execution of the works and was it adequately equipped for the works? **YES / NO**

(c) Quality of documented project files

- Were the contractor's inventories and records accurate and of high quality? **YES / NO**
- Was the consultant's inventory in an orderly manner and was accessing of files and other project documents quick? **YES / NO**
- Was the contractor recording all information on the project such as on OHS, accidents, claims, production rates for every work activity for any further investigations? **YES / NO**
- Were all vital records such as laboratory data, financial data compliance to design and specifications well recorded? **YES / NO**

- Was the quality of As-built drawings readable and clear and were they provided adequately? **YES / NO**

(d) Innovations and Alternate Options

- Has the Contractor exhibited any technical excellence through other unique activities or solutions to the successful performance of the contract? **YES / NO**
- Has the contractor exhibited any use of and or made any recommendations for the use of recycled or existing materials? **YES / NO**
- Has the contractor exhibited any use of innovative methods unique but applicable with value addition to the product deliverables? **YES / NO**
- Did the Contractor incorporate all the latest amendments such as new materials and testing specifications in the execution of the works and are they acceptable? **YES / NO**

(e) Adherence to SATCC design codes and Standards or Best practices

- Where works executed according SATCC standards or other best practices? **YES / NO**
- Were all the works acceptable according to SATCC acceptance criteria's or other best practices without reworking? **YES / NO**
- Did the contractor perform his works with minimal application of and all possible applications of payment reduction factors? **YES / NO**

(f) Did the Contractor make full application of the available SATCC standards or other best practices? YES / NO Overall Quality of Product

- Was the overall quality of the product compliant with the quality plans, agreement documents, and in conformity with best practices and other standards? **YES / NO**
- Are the working drawings, plans and figures presented legible and appealing to the readers? **YES / NO**
- Was the overall quality of the product acceptable and usable after completion and hand over of the works without adverse costs to the client or material delays, was it reliable and durable? **YES / NO**
- Did the Contractor achieve the desired outcomes with a minimum of avoidable errors and requirements? **YES / NO**

- Were the general works and help rendered to the client of acceptable standards? **YES / NO**

(g) Quality of product performance

- Has the product performed well within the design life with minimal defects? **YES / NO**
- Is the product performing well during the defects liability period with minimal defects? **YES / NO**
- Has the product lived its design life? **YES / NO**
- Has the quality of the product been generally accepted by the public? **YES / NO**

4.5 Project Contract Administration

(a) Understanding the elements of contract administration:

- Did the contractor understand and ensure that implementation of procedures are well defined? **YES / NO**
- Where the contractor's internal administrative and clerical functions smooth for the betterment of the contract? **YES / NO**
- Did the contractor have adequate understanding of the contract and conditions and were they well presented and interpreted? **YES / NO**

(b) Contract Maintenance:

- Was the contractor updating the contract documentation adequately as changes occurred? **YES / NO**
- Was the contractor proactive and bringing any shortfalls on the contract document (identifying all relevant documentation including contract clauses) through formal change control procedures and by mutual consent, in response to changing requirements? **YES / NO**
- Was the contractor keen in maintaining the contract by bringing and amicably resolving any arguments to the beneficial of all parties, attending to and respecting all concerns arising from key stakeholders? **YES / NO**
- Where appropriate authorities obtained and were any change control procedures followed, ensuring no changes were made without appropriate authorisation? **YES / NO**

- Did the contractor ensure timely delivery of security documents-Bonds? **YES / NO**

(c) Asset Management – (Availability & Reliability)

- Did the contractor ensure that there were updated asset registers on site? **YES / NO**
- Were the contractor's assets readily available? **YES / NO**
- Was the contractor's asset reliable through out the project with minimal break downs and ensuring that at least 85% efficiency was achieved on usability? **YES / NO**
- Did the contractor ensure there was adequate control of asset movements on the project by requesting timely and justifiably on any movements? **YES / NO**
- Was there any efforts carried out to optimize the output from the available assets? **YES / NO**
- Did the contractor take any effort to upgrade and replace any faulty assets so as to bring the project in line? **YES / NO**
- Was there any regular upkeep and maintenance of assets? Were the assets comprehensively insured? **YES / NO**
- Was there a timely delivery of the assets on the project in accordance with the contract schedules? **YES / NO**

(d) Management of Subcontractors

- Has the contractor managed the subcontractors well and effectively? **YES / NO**
- Has the contractor supervised the subcontractor's work according to standards and ensured that they deliver within the stipulated time schedules? **YES / NO**
- Has the contractor given the client or supervisor adequate information in relation to the behaviour and works done by nominated subcontractors? **YES / NO**
- Has the contractor coordinated the activities of sub contractors effectively, thereby minimising delays or any adverse effects on the project? **YES / NO**
- Has the contractor responded promptly and efficiently to any clarifications or queries relating to the performance of the sub-consultants? **YES / NO**

- Has the contractor attended promptly to the grievances of the subcontractors, thus avoiding unnecessary delays on site? **YES / NO**

4.6 Project Human Resource Management

(a) Client Relations

- Was the Contractor/client relationship during execution of the contract formally interactive and professional? **YES / NO**
- Were the Contractor and his personnel cooperative with the client in responding to client's concerns involving the assignment? **YES / NO**
- Did the Contractor not engage in any unnecessary arguments with the client or clients' representatives resulting in any adverse negative impacts on the project such as delays in flow of information and project delivery? **YES / NO**
- Has the Contractor's claim attitude been reasonable? **YES / NO**

(b) Drive and Determination

- Did the Contractor show any drive and determination to complete the contract within time and according to specifications? **YES / NO**
- Did the Contractor's personnel had the zeal and drive to move the project forward for the benefit of the client? **YES / NO**
- Did the Contractor's personnel show interest in their work attitude to optimally achieve the project goals? **YES / NO**
- Did the Contractor show any determination in bringing any matters affecting or expected to affect the project to the attention of the client and clients' representative? **YES / NO**

(c) Personnel Resource Management

- Was there an effective and efficient project organisation structure and project team on the project? **YES / NO**
- Was the project team adequately managed? **YES / NO**
- Was there any leadership demonstrated by the project teams' top personnel in coordinating and managing all project areas, overcoming significant obstacles without much assistance from the client or client's representative? **YES / NO**
- Was the Contractor arranging and organising his work force timely on the project and in accordance with the approved schedules? **YES / NO**

- Was the Contractor acquiring and sequencing his staff timely on work items? **YES / NO**

(d) Personal Effectiveness,

- Was the right personnel applied at the right time to undertake a specified assignment? **YES / NO**
- Was the Contractor's and support staff personnel adequate and effective on the requirements of the client? **YES / NO**
- Was the contractor releasing staff from the project without affecting project deliverables and was he requesting for changes timely? **YES / NO**

(e) Technical Competence

- Were the Contractor's personnel technically qualified, where they competent in the delivery of the works? **YES / NO**
- Did the Contractor's personnel fully understand the project requirements and applied themselves well in delivering the product, proactively overcoming all obstacles and challenges within their control? **YES / NO**
- Did they apply the available latest resources and technology efficiently and consistently? **YES / NO**

(f) Availability of Approved Staff or Original Staff on the Project

- Did the Contractor provide and maintain the original and or approved personnel from the staff? **YES / NO**
- Were all the Contractors personnel on the project exclusively on the project? **YES / NO**
- Were the Contractor's personnel physically available on the assignment through random checks? **YES / NO**
- Did the Contractor's personnel actively devote the necessary time and effort to the assignment? **YES / NO**
- Were any changes made to the personnel and were they made with the full knowledge and approval of the client or client's representative? **YES / NO**

(g) Employment and Support to Locals

- Was the Contractor's work force well represented by the local personnel from the surrounding communities? **YES / NO**

- Was the staff on the Contractor team knowledgeable or respectful of the local conditions and customs? **YES / NO**
- Was the Contractor's work force gender sensitive; was there adequate female representation on the Contractor's project team in accordance with government policies and guidelines? **YES / NO**

4.7 Project Communications Management

(a) Communication Management Plan

- Was there any communications plan on the project? **YES / NO**
- Was the Contractor actively, continually and timely keeping the Agency updated on the project and on any other factors that would have adversely affected the delivery of the project outputs? **YES / NO**
- Was the Contractor proactively communicating all information /data to the other team members and stake holders? **YES / NO**
- Did the Contractor make any follow ups well in advance on matters that could affect the delivery of the project? **YES / NO**
- Was the Contractor's information accurate and clear to the requirements? **YES / NO**
- Were Contractor's communication well coordinated making decision making faster and easier? **YES / NO**

(b) Response to instructions or enquiries

- Did the Contractor appropriately incorporate all recommendations and feedbacks from the client and any other project stakeholders on matters relating to the project? **YES / NO**
- Did the Contractor and his project team provide responses to orders and or/change request submissions provided in a timely manner with appropriate level of detail and justification which were accepted as presented? **YES / NO**
- Was the Contractor approachable, helpful and ready to consult frequently with the client department? **YES / NO**
- Was the Contractor flexible to enquiries? **YES / NO**
- Was the Contractor approachable to enquires and any matters that are not directly related to the project, did he provide or respond to RDA inquiries promptly within tight timelines and where all responses clear and complete? **YES / NO**

(c) Knowledge and understanding of RDA project procedures

- Did the Contractor demonstrate extensive knowledge of all applicable RDA guidelines? **YES / NO**
- Did the Contractor demonstrate knowledge on RDA procedures? **YES / NO**
- Did the contractor demonstrate knowledge of Regional practices to all and any matters relating to the project? **YES / NO**

4.8 Project Environmental, Health and safety

(a) Environmental Management Plan

- Did the contractor provide an Environmental Management Plan (EMP) on the project? **YES / NO**
- Was the EMP provided adequate and specific to the project? **YES / NO**
- Did the Contractor assign qualified staff to monitor the implementation of the Environmental Management Plan? **YES / NO**
- Did the contractor ensure that Material extraction sites (MES) (Borrow pits/Quarries) were all legally approved? **YES / NO**
- Did the contractor provide a schedule for opening and rehabilitating MES (available and adhered to/rehabilitation conducted)? **YES / NO**

(b) Environmental Management Plan-Implementation

- Did the Contractor implement the project activities in conformity with the country's environmental laws and international environmental best practices? **YES / NO**
- Did the Contractor fully implement the provisions of the Environmental Management Plan? **YES / NO**
- Did the Contractor ensure that dust was minimised at all times during the project implementation phase? **YES / NO**
- Did the Contractor show proactiveness in addressing environmental and social concerns that arose during the project implementation phase? **YES / NO**
- Did the Contractor rehabilitate all material extraction sites at the close or during the course of the project? **YES / NO**

(c) HIV Aids Program Implementation

- Was the HIV program provided adequate and specific to the project? **YES / NO**
- Did the Contractor put in place an HIV/AIDS/STIs programme as part of project implementation? **YES / NO**
- Did the Contractor engage a Service Provider and provide adequate support to activities of HIV/AIDS/STIs among the workforce? **YES / NO**
- Did the contractor implement the HIV Plan in place? **YES / NO**
- Did the contractor adequately supervise the awareness sessions? **YES / NO**

(d) General Workers Provided with PPE-Occupational Health and Safety

- Did the Contractor provide the workers with adequate personal protective clothing? **YES / NO**
- Did the Contractor put in place measures to ensure that all workers wore personal protective clothing during working hours? **YES / NO**
- Did the Contractor provide the PPE without regular reminders from the Consultant/Client? **YES / NO**
- Did the contractor take any actions on workers who did not wear the PPE while they were on duty? **YES / NO**

(e) Work Signage Adequate

- Did the Contractor ensure that there was adequate traffic signage and control; during the project implementation to allow for the smooth flow of traffic?) ? **YES / NO**
- Did the Contractor receive minimal reminders from the Consultant/Client to on matters of traffic signage? **YES / NO**
- Did the Contractor provide adequate and appropriate signages? **YES / NO**

(f) General Safety of the Site Arrangement

- Did the Contractor provide readily available First Aid Kits at the camp site and in usable condition? **YES / NO**
- Did the Contractor provide a trained first Aid officer on the project? **YES / NO**

- Did the Contractor ensure that Fire Extinguishers were available at the camp site and in usable condition? **YES / NO**
- Did the Contractor ensure that accidents and their types and causes were reported and discussed among workers and brought to the attention of other stakeholders/client? **YES / NO**
- Did the Contractor ensure that the camp site and plant equipment were in habitable and good conditions respectively without spillages, unsanitary conditions? **YES / NO**
- Did the Contractor keep the camp site in in general good condition without loose electrical wires and or without any object that could be harmful to the human beings? **YES / NO**

4.9 Project Risk Management

(a) Risk Identification

- Did the Contractor identify any risks timely? **YES / NO**
- Was the contractors' foresight in risk identification adequate? **YES / NO**
- Were the risks identified appropriate and quantifiable? **YES / NO**

(b) Risk Management Plan

- Was there a risk management plan? **YES / NO**
- Did the risk management plan include a full back plan to mitigate the anticipated risks? **YES / NO**
- Was the risk management plan effectively and efficiently applied? **YES / NO**
- Were the risks and all issues analysed thoroughly well in advance, overcoming unforeseen obstacles? **YES / NO**

(c) Risk Monitoring and Control

- Was Contractor managing and controlling any risks that had arisen on the project? **YES / NO**
- Were risks brought within control without them affecting the costs, quality, and scope and time delivery of the project? **YES / NO**
- Did the Contractor understand all risks identified, were they registered, did the Contractor do the right thing? **YES / NO**

- Did the Contractor apply the right techniques in controlling any risks on the project? **YES / NO**

4.10 Project General Assessment

(a) Problem Resolution and Customer Satisfaction

- Was the Contractor taking the lead promptly in putting forward effective solutions in cases of problems? **YES / NO**
- Was the Contractor effective in solving problems? **YES / NO**
- Were the Contractor solutions to problems effective and final without any complaints from affected stakeholders? **YES / NO**
- Was the Contractor resolving minor problems with minimal input from the client/supervisor? **YES / NO**
- Were the general public generally satisfied with the performance of the Contractor, Contractor's work and personnel? **YES / NO**

(b) Appreciation of Government Requirements and Procedures/Local laws/ Standards

- Was the Contractor familiar with government requirements? **YES / NO**
- Was the Contractor adhering to latest policies, procedures and other legal and technical documentations? **YES / NO**
- Was the Contractor familiar with local laws/ custom laws and adhered to them in the execution of the project? **YES / NO**
- Was the Contractor active in notifying the client timely on any impediments regarding local rules and customs and the effects they may have on the project? **YES / NO**

(c) Public/Stakeholders relations/Corporate Social Responsibility

- Was the contractor providing appropriate adequate material presentation and appropriate staff to attend meetings with other stakeholders? **YES / NO**
- Was the Contractor approachable to other stakeholders, was he liaising well with relevant public bodies, the community and community organisations and the general public? **YES / NO**
- Was the Contractor generous to the community through his professional contributions? **YES / NO**

- Was the Contractor's relation with other stakeholders appropriate and without conflicts between the Contractor public bodies, the community and community organisations and the general public? **YES / NO**

(d) Relationship with other Contractors or Consultants

- Did the Contractor provide adequate professional behaviour towards other stakeholders on site? **YES / NO**
- Was the contractor paying courtesy to other contractor's and or consultants on site or near the site? **YES / NO**
- Was the contractor corporative to other stake holders on site? **YES / NO**
- Was the contractor helpful to other stakeholders on site? **YES / NO**

(e) Integrity and Ethical Conduct of Contractor and Contractors' Personnel

- Was the Contractor and his personnel's integrity acceptable and within code of ethics applicable to local regulations and other bodies' requirements? **YES / NO**
- Has the Contractor put in place a well documented code of practice or ethics for his staff? **YES / NO**
- Was there any conflict of interests in the execution of his assignment? **YES / NO**
- Was the Contractor or his personnel involved or reported to be engaged in malpractices or corrupt practices in the execution of their assignment? **YES / NO**

(f) Value for Money.

- Was the Contractor's overall output comparable to the cost of the project acceptable? **YES / NO**
- Was there any improvement on the cost of the project through quality delivery and timely delivery of the project? **YES / NO**
- Are the works rendered by the Contractor stand the test of time? **YES / NO**
- Are the works rendered appreciated by key stakeholders of the project? **YES / NO**

5 Marking and Grading Systems

5.1 Marking System

- (1) The areas of performance measurement identified for both consultancy services and works contracts have been categorized into two: that is, Critical Areas of Measures (CAM) and Other Areas of Measures (OAM). The CAM will carry a weighted score of 70 to 80 percent while the OAM will carry 20 to 30 percent for both the consultancy services and works contracts. The maximum scores and scores are reduced to 100% by application of weights and weight factors. The factors are a divisible of the weights by the respective scores and then multiplied by multiplied by 100. These obtained factors are multiplied by the scores to finally reduce the scores to 100% which is the highest obtainable value in the assessment. With this, the Contractor and Consultant's performance are measured from 100%. The maximum scores and scores in the respective detailed assessment forms are not and will not necessarily add to 100as they depend on the number of available detailed CAM.
- (2) The scoring system used for each aspects under areas of measures is a 5 grade system as stipulated below:
 - 5 – **Very Good** for aspects rated *totally satisfactory* by the evaluator,
 - 4 – **Good** for aspects rated *highly satisfactory* by the evaluator,
 - 3 – **Satisfactory** for aspects rated *satisfactory* by the evaluator,
 - 2 – **Poor** for aspects rated *unsatisfactory* by the evaluator,
 - 1 – **Very Poor** for aspects rated very unsatisfactory by the evaluator.
- (3) Furthermore, 0 denotes **Not Applicable**. The minimum **acceptance performance** score for both consultancy services and works contracts is 60%. The score below 40%, Contractor or Consultant should be declared technically incompetent, and the implications of such a performance rating are clearly dealt with in section 4 of the RDA policy and procedures manual.
- (4) The evaluator is expected to mark an appropriate box of performance (i.e VG, G, S, P, VP) for each applicable item with "X". If an item is not applicable, put "X" in the NA column. The scoring is purely the evaluator's decision and observation.

The scoring schedule is as shown in the table below;

Table 2: Schedule of Scores

Score	Definition	Score Description	Abbreviation
5	Very Good	All aspects have been met and completed to entire satisfaction and the Assessors is <u>totally satisfied.</u>	VG
4	Good	Most aspects have been met to entire satisfaction, but some aspects were only nearly satisfactory. The assessor is <u>highly satisfied.</u>	G
3	Satisfied	A few aspects have been met to satisfaction, but some aspects were only nearly satisfactory and some unsatisfactory. The assessor is <u>just satisfied.</u>	S
2	Poor	Most aspects have not been met to satisfaction. But one or two were just satisfactory. The assessor is <u>slightly dissatisfied.</u>	P
1	Very Poor	All aspects have not been met to satisfaction. The assessor is <u>totally dissatisfied.</u>	VP
0	Not Applicable	The aspects are not expected to be expedited by the Contractor. The assessor cannot assess this aspect.	NA

5.2 Grading System

Once the Contractor or contractor's marks are entered into the excel program, then they are graded as shown in the table below:

Table 3: Schedule of Grading

Performance Score range %	Description of Grade Obtained	Recommended Actions / Comments
>89%	Totally Satisfactory Performance	Acceptable
80%-89%	Highly Satisfactory Performance	Acceptable
60%>79%	Acceptable Satisfactory Performance	Acceptable
40>59%	Slightly Poor Performance	Warning Letters
<40%	Very Poor Performance-Technically Incompetent	Exclusion from Future tenders

As shown above, performances of 60% and above are accepted and however, have no remunerations as Contractors and Consultants have an obligation to provide the

services at 100%. A slightly Poor performance Grade will attract warning letters and penalties will be applied in accordance with the guidelines in the main manual.

1. A grade of less than 40% is technically incompetent and the actions or recommendations should be that the Contractor or contractor be excluded for future procurements with the agency for a year.
2. Underperformances and low marks from the Contractor or contractor are expected to be substantiated with evidence and or proof for records.

5.3 Contractors Performance Score on Multiple or Multi stage Contracts

In cases where a Contractor has more than one project or his project involves multiple stages such as design and supervision, the services shall be treated as one project and assessed separately. However, the Contractor’s performance score shall be adjusted according to percent progress contributed by each project at each stage. The percent progress shall be the physical progress or time progress or financial progress whichever produces the lowest performance score value. The last two can only be used where it is difficult to calculate the physical progress. However, the rule of averages may apply. An example is given in **ANNEX B**.

5.4 Calculation of Individual Contractors Current Past Performance Rating (PPR)

The contractor’s Past Performance Rating shall be calculated on a three year projects period for those who have been in business with the client for the more than three years after effectuation of the vendor rating system. This will be from the latest project with the client. The following factors shall apply for subsequent years as shown in the table below:

Table 4: Schedule of Factors for various years

Grading- Years in Business with client	Factor			
	Y1	Y2	Y3	Y4
Years				
1	1	0	0	0
2	0.6	0.4	0	0
3	0.5	0.3	0.2	0
above 3	0.5	0.3	0.2	0

Example of calculation:

From the table above, it implies that if a contractor has the factored scores in Y1 (2009);68, Y2 (2007);72, Y3 (1976);45 and Y4(1977)55, then his PRR is calculated as $0.5*68+0.3*72+0.2*45=64.6$

Y1 stands for latest/current year of projects

Y2 stands for second latest/current year of the projects

Y3 stands for the third year or third last year of the project

1 ANNEX A-Works-Detailed Assessment Forms

Summary Consultant's Performance Report-Contractor

Part I

Summary of Performance

1 Department/office

Stage Period

Consultant's % Score

Performance Rating

Date & Signature

2 Remarks by Reporting officer at a rank of Principal Engineer

3 If the performance of the consultant in any respect is poor or very poor, indicate actions taken to draw the consultant's attention to their performance and the consultant's responses

Date & Signature

4 Counter Signing by (SMR/Head of Department/Unit) and any remarks

Date & Signature

5 Supplementary if any-Vendor Rating review Committee Chairperson

CONTRACTOR	
CONSTRUCTION WORKS	
Name of the Firm	
Project/Contract Name	
Date of Assessment	
Scope of Works	
Assessed by	Road Development Agency- Monitoring & Evaluation Unit
Checked by	
Approved by	

Part II-Detailed Assessment of Performance										
1.0 Project Scope Management										
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
1.1	Contractor executing work within the specified scope					x		5.00	1	1
1.2	Works done according to specifications and within contract provision.					x		5.00	1	1
1.2	Scope Control-Works.					x		5.00	1	1
Sub Total 1								15.00	3.00	3.00
2.0 Project Time Management										
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
2.1	Meeting of targets as specified on schedule					x		5.00	1	1
2.2	Doing it right for the first time (avoid double handling)					x		5.00	1	1
2.3	Updating work Schedules regularly					x		5.00	1	1
2.4	Reliability & Responsiveness to technical direction					x		5.00	1	1
2.6	Completion of additional work					x		5.00	1	1
2.7	Contractors early warning					x		5.00	1	1
Sub Total 2								30.00	6.00	6.00

4.0	Project Quality Management									
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
4.1	Quality Assurance Plans for the execution of works					x		5.00	1	1
4.2	Quality assurance Plans Implementation					x		5.00	1	1
4.3	Quality Compliant					x		5.00	1	1
4.4	Quality of documented project files.					x		5.00	1	1
4.5	Inovations, alternate options.					x		5.00	1	1
4.6	Adherance to SATCC design codes and standards or Best practices.					x		5.00	1	1
4.7	Quality of Product					x		5.00	1	1
4.8	Quality of Product performance					x		5.00	1	1
	Sub Total 4							40.00	8.00	8.00
5.0	Project Contract Administration									
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
5.1	Understanding Elements of contract administration					x		5.00	1	1
5.2	Contract Maintenance					x		5.00	1	1
5.3	Asset Management - availability and reliability					x		5.00	1	1
5.4	Management of Subcontractors					x		5.00	1	1
	Sub Total 5							20.00	4.00	4.00

6.0	Project Human resource Management									
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
6.1	Client Relations					x		5.00	1	1
6.2	Drive and Determination					x		5.00	1	1
6.3	Personnel Resource Management					x		5.00	1	1
6.4	Personnel Effectiveness					x		5.00	1	1
6.5	Technical Competance					x		5.00	1	1
6.6	Availability of approved or original personel on the project					x		5.00	1	1
6.7	Employment and Support to locals					x		5.00	1	1
Sub Total 6								35.00	7.00	7.00
7.0	Project Communications Management									
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
7.1	Communication Management Plan					x		5.00	1	1
7.2	Response to Instruction or Inquiries					x		5.00	1	1
7.4	Knowledge and Understanding of RDA project procedures					x		5.00	1	1
Sub Total 7								15.00	3.00	3.00
8.0	Project Environmental,Health and Safety Management									
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
8.1	Environmental Management Plan documentation					x		5.00	1	1
8.2	Environmental Management Plan Implementation					x		5.00	1	1
8.3	HIV Aids Programm implementation					x		5.00	1	1
8.4	General Workers provided with PPE					x		5.00	1	1
8.5	Work signage adequate					x		5.00	1	1
8.6	General Safety of site establishment					x		5.00	1	1
Sub Total 8								30.00	6.00	6.00

9.0 Project Risk Management										
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
9.1	Risk Identification					x		5.00	1	1
9.2	Risk Management Plan					x		5.00	1	1
9.3	Risk and Monitoring Control					x		5.00	1	1
Sub Total 9								15.00	3.00	3.00
10.0 Project General Assesment										
Item	Aspects of Performance	VG	G	S	P	VP	NA	Max. Score	Applicable Max. Score	Contractor's Score
10.1	Problem Resolution and Customer Satisfaction					x		5.00	1	1
10.2	Appreciation of Government requirements and procedures, local laws, standards					x		5.00	1	1
10.3	Public/Stakeholders Relations / Corporate Social Responsibility					x		5.00	1	1
10.4	Relationship with other contractors & Consultant									
10.5	Integrity and ethical conduct of contractor and contractor's personel					x		5.00	1	1
10.6	Value for money					x		5.00	1	1
Sub Total 10								25.00	5.00	5.00

Summary Contractor-Works

		Aspect of Rating	Max Score	Score	Weight	Factors	Max Aplicable Score	Weighted Score
Critical Areas of Measurement (75%)	1	Project Scope Management	15.00	3.00	0.05	0.33	5.00	1.00
	2	Project Time Management	30.00	6.00	0.15	0.50	15.00	3.00
	3	Project Cost Management	5.00	5.00	0.1	2.00	10.00	10.00
	4	Project Quality Management	40.00	8.00	0.3	0.75	30.00	6.00
	5	Project Contract Administration	20.00	4.00	0.1	0.50	10.00	2.00
	6	Project Human resource Management	35.00	7.00	0.05	0.14	5.00	1.00
		Sub Total A	145.00	33.00	0.75		75.00	23.00
Other Areas of Measurement (25%)	7	Project Communications Management	15.00	3.00	0.05	0.33	5.00	1.00
	8	Project Environmental,Health and Safety Management	30.00	6.00	0.05	0.17	5.00	1.00
	9	Project Risk Management	15.00	3.00	0.05	0.33	5.00	1.00
	10	Project General Assesment	25.00	5.00	0.1	0.40	10.00	2.00
		Sub Total B	85.00	17.00	0.25		25.00	5.00
Total Performance Score								6.00

General Notes

From the above assessment, is the Contractor technically competent? (please tick as appropriate)

If the performance of the Consultant is in any respect "Poor" or "Very Poor", Please indicate what actions have been taken to draw the Consultant's attention to their shortcomings and the poor performance

General Notes:

Mark appropriate box of performance (i.e. VG, G, S, P, VP) for each applicable item with "x"

Put "x" in the "NA" column for inapplicable items

Fill in "stage period" in months (to one decimal place) for the stage(s) in the quarter.

The performance scores displayed are rounded to 2 decimal places

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Max. Scores are predetermined weightings assigned to the item (could not be changed)

For applicable items, applicable max. score = max. score For "NA" item, applicable max. score. = 0

VG (Very Good) G (Good) S (Satisfactory) P (Poor) VP (Very Poor)

Acceptable performance score limit is 60 which is 60%

2 ANNEX B- Example on Score on Multiple or Multi stage Contracts

For Instant, we assume that:

Adjusted Contractor's Performance Score (CPS)-Physical progress

Project	CPS (a)	% Progress (b)	Adjusted Score (c _i)
1	80	80	15.46
2	60	100	14.49
3	50	77	9.30
4	40	89	8.60
5	30	68	4.93
Sum	414 (d)		52.78 (e)

Adjusted Contractor's Performance Score (CPS)-Time progress

Project	CPS	Stage (Months) (b)	Adjusted Score (c _i)
Design 1	40	4	9.41
Design 2	60	8	28.24
Supervision	20	5	5.88
Sum		17 (d)	43.53 (e)

e.g from Tables above Design project No.1

Adjusted Score=CPS x Stage -months / (Sum Stages-Months)=40*4/17=9.41%. The overall Contractors score is the sum of the adjusted scores.

$$C_i = a \times b / d; e = \sum C_i$$

The above method shall also be used for quarterly and yearly assessments; otherwise the rule of averages should be applied.

The Contractors current past performance shall be the average of the performances in a year and shall be limited to the last three years.

3 ANEEX C-Other Reporting and Records Forms

4 Summary Records for Contractor's Projects

Consultant / Contractor's Name: _____														
Quarterly Records														
Assignment		Consultant's Adjusted Scores												
Item	Project Title	2009				2010				2011				Responsible Officer
		Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	
Report Records														
No. of reports in Y 1														
No. of reports in Y 2														
No. of reports in Y 3														
Performance Records														
1	Assignment A													
2	Assignment B													
3	Assignment C													
4	Assignment D													
5	Assignment E													
Consultants' Adjusted Score														
Average Year Score		#DIV/0!				#DIV/0!				#DIV/0!				
Consultant/Contractor's Current Past Performance Score												#DIV/0!		

ANNEX D- Referenced Documents

References

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5. UK vendor rating tool kit.
6. Motivating Success ,A Toolkit for Performance Measurement,- Asset Management, Framework Contracts, Version 1.02.