
Requirements / Instructions

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PURPOSE

The Facilities Management Department (FMD) is committed to continuous improvement in the performance of project delivery. To ensure we are providing the best quality of project delivery, FMD has developed the Project Assessment process. Project Assessments are an opportunity to measure the performance of our Vendors and Project Delivery process and are required to be completed for all projects.

Evaluations are completed for each of our Professional Services contracts (A/E, Construction Manager, Other) and Construction Contracts. Through the evaluations we can assess not only vendor performance but also discover opportunities to improve how vendors are managed by Capital Projects and Facilities Operations staff. Evaluations are required for all projects using external vendors.

Professional Services firms will be evaluated at the completion of the design phase and again at project completion. Construction contractors will be evaluated at project completion.

Customers will also evaluate all members of the project team as applicable, after project completion.

DEFINITIONS

FMD – Facilities Management

PM – Project Manager

A/E – Architect/Engineering

AC – Administrative Coordinator

POLICY GUIDELINES

Professional Service Evaluations

Upon moving a project to the Close-Out/ Completion Phase of Step 7, the Planner/PM will complete the **Professional Services Evaluation Form**. The Planner/PM will use this form for all professional service contracts and note whether they are evaluating them on Architectural Services, Engineering Services or Other Services. If Other Services were utilized in the project the Planner/PM must list the type of services evaluated.

The Planner/PM will then score the vendor on the criteria list on the form. Scores will be between 1 and 5 with a total score out of 70. The Planner/PM can also add additional comments to support his/her evaluation. If a score is under 80%, comments as to what caused the score are required.

Construction Contractor Evaluations

Upon moving a project to the Close-Out/Completion Phase of Step 7, the Planner/PM will complete the **Construction Contractor Evaluation Form**. The Planner/PM will use this form for all Construction contracts and note whether they are evaluating them as a General Contractor or as a specialty such as Flooring/Glazing, Electrical, Plumbing, etc.

The Planner/PM will then score the vendor on the criteria list on the form. Scores will be between 1 and 5 with a total score out of 55. The Planner/PM can also add additional comments to support their evaluation. If a score is under 80%, comments as to what caused the score are required.

Customer Evaluations

Upon confirmation of a project moving to the Close-Out/Completion Phase of Step 7, the Planner/PM will issue a **Project Close Out and Reporting Form** to the Administrative Coordinator (AC). The AC will issue the customer a "**Project Management and Project Delivery Customer Survey**" form. This form will be emailed to directly to the customer. This form is a series of questions for the Customer to evaluate the handling of the project. The scores will range between 1 and 5 for each question with a total score 80.

All completed forms will be returned to the AC for reporting purposes. The AC will keep track of all submitting evaluations and forward them to the Director of Capital Projects or other supervisors as required. The results of the surveys will be reviewed by the Director of Capital Projects on a monthly basis and the FMD Leadership team on a quarterly basis.

Submittal Process

The Planner/PM will be responsible for submitting a Project Close Out and Reporting Form to the AC once the project has been completed. The AC will initiate distribution of the appropriate Evaluation Form(s) to the customer/department contact. A total of five (5) business days will be given to the Customer to complete evaluation form. The AC will be responsible for distribution and receipt of all completed evaluations. Once the completed forms are received, the AC will input evaluation ratings and comments into the Vendor/PM Evaluation database for reporting purposes. The input evaluations and ratings will be submitted to the Director of Capital Projects for review.

Reporting Process

Upon review of the evaluation by the Director of Capital Projects, the evaluations will be submitted to the FMD Leadership Team. The AC will be responsible for reporting and submitting the rating information monthly to the Director of Capital Projects and quarterly to Asst. Vice Chancellor, Asst. Dean of Facilities Management.

Reporting

The summary report should reflect the averages of the various items on the **Project Management and Project Delivery Customer Survey** with notation on number of evaluations received and number of customers evaluated.