**CONSULTANT PERFORMANCE EVALUATION - REAL ESTATE**

**FULL SERVICE/GENERAL** Wisconsin Department of Transportation

RE1023 Updated 01/2013 Ch. 84 Wis. Stats.

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| Instructions: Complete within 30 days of service. Save to PDF format *(using dashes, name file: ‘last-first-project ID’)* and send copies email to WisDOT/[Sherry Miner](mailto:sherry.miner@dot.wi.gov), Consultant Svcs Evaluations, and provide a copy to consultant being evaluated. Evaluations are used by WisDOT to ensure an appropriate level of competency and quality work product from consultants. Performance conferences will be held, when appropriate, to enable improvements and consistency of work products. Note: You must use form RE2127 if doing fee appraiser evaluation. | | | | | |
| Project ID | Master contract ID | | Work order no. | | | |
| Region & bureau | County | | Project year | | | |
| Highway | | Project name | | | | |
| Consultant project manager | Area code - phone | | Sub-consultant(s) | | | |
| Email | |
| Consultant name, address, phone, email | Briefly describe work performed (e.g., relocation svcs, to include…) | | | | | |
| Evaluation period  From       To | | Project complexity | | | |
| high | medium | low | |
| WisDOT supervisor/team leader | WisDOT project manager | | Explain | | | |
| **TOTAL/COMBINED OVERALL AVERAGE PERFORMANCE RATING:** | | | | | | |
| RATING / EVALUATION CRITERIA  |  |  | | --- | --- | | **5** = exceeded MOST expectations/outstanding | **2** = failed SOME expectations/below average | | **4** = exceeded SOME expectations/above average | **1** = failed ALL expectations/unacceptable | | **3** = met ALL expectations/satisfactory | **0** = Failed ALL expectations | | **NA** = not applicable | |  * Evaluations should be completed at least annually for on-going contracts, more often if needed, and must be complete within 30 days of project completion. * Rate each item in the performance areas of Project Management, Human Relations, Other Skills, Work Quality, Cost Control, and Timeliness by entering a value of either: 5, 4, 3, 2, 1 or 0 (see rating/evaluation criteria above). If “NA,” don’t include in average calculation for sub-totals or overall total. * Enter “Comments” in each performance area to explain unique issues and for any ratings below “3.” * Calculate average rating for each area and enter sub-total (i.e., Project Management = 3.5, Human Relations = 3, etc.). * From the sub-totals, calculate and enter the Total/Combined Overall Average Performance Rating in area above. * Additional pages/more space may be used as needed. * Evaluations are kept on file for use in future selection processes. * Evaluation of sub-consultant should be completed by prime consultant and may be required at WisDOT’s option. | | | | | | |

**REAL ESTATE CONSULTANT PERFORMANCE EVALUATION**

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| **1. PROJECT MANAGEMENT** *- Enter rating of 5, 4, 3, 2, 1, 0 or N/A (see rating/evaluation criteria above)* | **RATING** |
| 1. Did consultant minimize staffing when possible? |  |
| 1. Did consultant project manager/leader assign appropriate staff to services? |  |
| 1. Was communication between consultant project manager/leader and WisDOT adequate? |  |
| 1. Was consultant project manager/leader in control of services provided to WisDOT? |  |
| 1. Was coordination with WisDOT, sub-consultants and others involved in project adequate? |  |
| 1. Was staff available when needed? |  |
| **Average Rating** (this section) |  |
| Comments (required if any rating is below “3”): | |
| **2. HUMAN RELATIONS** - *Enter rating of 5, 4, 3, 2, 1, 0 or N/A (see rating/evaluation criteria above)* | **RATING** |
| 1. Did consultant promote a good working relationship with WisDOT? |  |
| 1. Did consultant properly represent WisDOT? |  |
| 1. Did consultant react well to criticism? |  |
| 1. Was consultant cooperative? |  |
| 1. Was consultant courteous and helpful in dealing with property owners and general public? |  |
| 1. Was consultant responsive to requests from WisDOT? |  |
| 1. Was it easy to work with consultant? |  |
| **Average Rating** (this section) |  |
| Comments (required if any rating is below “3”): | |
| **3. OTHER SKILLS** - *Enter rating of 5, 4, 3, 2, 1, 0 or N/A (see rating/evaluation criteria above)* | **RATING** |
| 1. Did consultant demonstrate adequate eminent domain knowledge? |  |
| 1. Did consultant demonstrate a good understanding of overall role, responsibilities, and obligations? |  |
| 1. Did consultant demonstrate sound judgment of public safety? |  |
| 1. Did consultant perform adequate research and/or inspection work? |  |
| 1. Did consultant use sound judgment in adhering to specifications or taking corrective actions? |  |
| 1. Did consultant work require more than necessary WisDOT assistance? |  |
| 1. Did research and/or inspection work reflect adequate level of experience and training? |  |
| **Average Rating** (this section only) |  |
| Comments (required if any rating is below “3”): | |
| **4. WORK QUALITY** - *Enter rating of 5, 4, 3, 2, 1, 0 or N/A (see evaluation/rating criteria above)* | **RATING** |
| 1. Does work reflect compliance with WisDOT procedures, manuals and requirements? |  |
| 1. Were errors or omissions numerous, serious, significant or costly? |  |
| 1. Were project records (diaries, reports, finals, etc.) accurate, complete and easy to follow? |  |
| **Average Rating** (this section) |  |
| Comments (required if any rating is below “3”): | |

**PERFORMANCE EVALUATION** *(con’t)*

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| **5. COST CONTROL** - *Enter rating of 5, 4, 3, 2, 1, 0 or N/A (see evaluation/rating criteria above)* | **RATING** |
| 1. Did consultant minimize overruns and/or change orders when possible? |  |
| 1. Did project result in an expenditure of reasonable time as defined or scoped? |  |
| 1. Was consultant creative in controlling costs and developing efficiencies? |  |
| **Average Rating** (this section) |  |
| Comments (required if any rating is below “3”): | |
| **6. TIMELINESS** - *Enter rating of 5, 4, 3, 2, 1, 0 or N/A (see rating/evaluation criteria above)* | **RATING** |
| 1. Did consultant coordinate their services with WisDOT’s work in a timely manner? |  |
| 1. Did consultant effectively work with WisDOT in coordinating utility and work by local agencies? |  |
| 1. Did consultant keep WisDOT informed of project work? |  |
| 1. Did consultant make decisions in a timely manner? |  |
| 1. Did consultant submit complete finals and materials reports within timeframe specified in contract? |  |
| 1. Did consultant submit reports, pay estimates and contract change orders in a timely manner? |  |
| **Average Rating** (this section) |  |
| Comments (required if any rating is below “3”): | |

*Remember: Enter ‘TOTAL/COMBINED OVERALL AVERAGE PERFORMANCE RATING’ on page 1*

Was this evaluation done at a face-to-face meeting?

Yes  No, if not explain:

Would you have reservations selecting this firm again for this type of project?

No  Yes, if so explain:

Describe strengths/weaknesses, and provide suggestions for improvement where appropriate:

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| WisDOT Evaluator *(type or sign name)* |  | Date |