



Office of State Procurement

Performance Evaluations (PE's)

Agency Training



Objectives

At the end of this course, you will be able to:

- Understand the purpose of performance evaluations
- Understand the importance of performance evaluations
- Know when performance evaluations are required
- Know how and where to submit performance evaluations





Performance Evaluations

- Performance evaluations are Contractor Report Cards



- Required for Purchasing Contracts
- Required for Professional Services Contracts



CONTRACT PERFORMANCE EVALUATION

The Office of State Purchasing is requesting agency feedback to determine if contracts with approaching expiration dates should be renewed or new bids solicited. If you can provide input as to the performance of the vendor, quality of the merchandise, the effectiveness of the contract, or modifications needed, please complete this form and submit it on-line. List suggestions and any additional comments on how we can improve the contract in the Comments space provided below. Your feedback is very important to us and we appreciate your assistance in determining the future of the contract(s).

This form is designed to collect information prior to bidding or renewing and not to report deficient performance. Report all deficient performance on a Deficiency/Complaint form for immediate action. We also have a "Contract Suggestions" form which can be submitted on-line at any time to convey your needs to us as they relate to changes needed or new contract suggestions.

*Agency Name: _____ *Name & Title of Evaluator: _____

*Email Address _____ *Evaluator's Telephone No.: _____

*Contract No.: _____ Expiration Date: _____ *Vendor(s) : _____

INSTRUCTIONS:
Review each element and indicate if the contract meets your agency's needs by responding with a Yes, No, or N/A (not applicable). Comments are requested on all "No" responses. For additional assistance, contact the Office of State Purchasing.

RESPONSE:
Check the appropriate box

Contract Usage

		Yes	No	N/A
Usage	1. Contract Used by your Agency? If "no", not necessary to complete this form unless existing contract can be altered to meet your needs. If so, please provide comments.			
	2. If "yes", is contract used to fulfill all of your needs for this type of commodity?			

Contractor Performance Elements

		Yes	No	N/A	
Customer Service	3. Adequate accessibility – phone orders, fax lines, e-mail, etc.				
	4. Customer service support staff availability				
	5. Vendor representative knowledgeable of contract items or service				
	6. Customer service is courteous and professional				
	7. Phone calls returned timely				
	8. Support on technical matters provided				
	9. Vendor acceptance of State procurement card (if agency applicable)				
	Delivery	10. Meets delivery time			
		11. Delivers specified items			
12. Delivers packaging units specified					
13. Frequent backorders					
14. Proper notification of backorders					
15. Timely delivery of backorders					
16. Delivers proper quantities					
17. Delivery discrepancies resolved in a timely manner					
18. Product delivered undamaged					
Product Quality	19. Product documentation included (instructions, tech. literature/manuals, MSDS)				
	20. Products are reliable and durable				
Billing	21. Accuracy of billing (cost and item)				
	22. Accuracy of packing slip				
	23. Prompt billings				
	24. Prompt credits				
	25. "Bill to" proper agency/customer with required reference numbers (CRO, etc.)				

Overall Contractor Performance Rating Very Satisfactory___ Satisfactory___ Needs Improvement___ Pool___

Contract Content Elements

		Yes	No	N/A
Content	26. Delivery requirements on current contract meet agency's needs			
	27. Products currently specified meet agency's needs			
	28. Specifications, as written, meet agency's needs			
	29. Additional items needed? Add on back of form or an attachment			

Comments:

Submit



New Fillable PE Form

CONTRACT PERFORMANCE EVALUATION

Check the appropriate box for the type of contract you are evaluating and this form will display the appropriate options for the contract:

- Purchasing Contract
- Professional Services Contract
- Contract from RFP





Purchasing PE's



- Performance Evaluations are required for any renewals.
- Agency feedback needed on the performance of contractor, quality of the merchandise or service, effectiveness of the contract, and suggested modifications.
- OSP will use the feedback to determine if a contract should be renewed or if a new bid needs to be solicited.



Form

CONTRACT PERFORMANCE EVALUATION

Check the appropriate box for the type of contract you are evaluating and this form will display the appropriate options for the contract:

- Purchasing Contract
 Professional Services Contract
 Contract from RFP

The Office of State Procurement is requesting agency feedback to determine if contracts with approaching expiration dates should be renewed or new bids solicited. Please describe the performance of the vendor, quality of the merchandise, effectiveness of the contract, or modifications needed.

Deficient performance should be reported on the [Complaint Form](#).

Agency Name:		Name & Title of Evaluator:	
Email Address:		Evaluator's Telephone Number:	
Contract Number:	Expiration Date:	Vendor:	
Contract Title:			



Information needed

- Agency contact information
- Overall Performance Rating
- *Very Satisfactory, Satisfactory, Needs Improvement, Poor*
- Contract information
- Unlimited space to list the description of services, list the deliverables, quality of deliverables, problems encountered and opportunities for improvement





Form

INSTRUCTIONS: Review each element and indicate if the contract meets your agency's needs by responding with a Yes, No, or N/A (not applicable). Comments are requested on all "No" responses. For additional assistance, contact the Office of State Procurement.

Overall Contractor Performance Rating							
<input type="checkbox"/>	Very Satisfactory	<input type="checkbox"/>	Satisfactory	<input type="checkbox"/>	Needs Improvement	<input type="checkbox"/>	Poor
RESPONSE: Check the appropriate box (check only one box per row)				Yes	No	N/A	
Customer Service	1. Adequate accessibility – phone orders, fax lines, e-mail, etc.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	2. Customer service support staff availability			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	3. Vendor representative knowledgeable of contract items or service			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	4. Customer service is courteous and professional			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	5. Phone calls returned timely			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	6. Support on technical matters provided			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	7. Vendor acceptance of State procurement card (if agency applicable)			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Delivery	8. Meets delivery time			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	9. Delivers specified items			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	10. Delivers packaging units specified			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	11. Frequent backorders			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	12. Proper notification of backorders			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	13. Timely delivery of backorders			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	14. Delivers proper quantities			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	15. Delivery discrepancies resolved in a timely manner			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	16. Product delivered undamaged			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Product Quality	17. Product documentation included (instructions, tech. literature/manuals, SDS)			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	18. Products are reliable and durable			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Billing	19. Accuracy of billing (cost and item)			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	20. Accuracy of packing slip			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Office of State Procurement
Last Revised: February 2020

Contract Performance Evaluation Form
CMP-F2
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	21. Prompt billings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	22. Prompt credits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	23. "Bill to" proper agency/customer with required reference numbers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	24. Additional items needed? Include additional information in the sections below.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Form

Deliverables (list):

Quality of Deliverables:

Problems Encountered:

Opportunities for Improvement:

Submit (all fields will be locked)

*If you are unable to use the Submit button due to software limitations, please send a copy of the completed form to DOA-OSPHelpdesk@la.gov with "Contract Performance Evaluation" in the subject line.





Statewide and Agency Term Contract PE Requirements

- Statewide Contracts - At renewal time, OSP SPA will email Performance Evaluation form link to the top 80% of agency contract users.
- Agency Term contracts - At renewal time, Agency must complete Performance Evaluation and submit to OSP.





Statewide and Agency Term Contract PE Requirements

- Agency Term Contract evaluations are due from agencies to OSP prior to requesting renewals.
- Statewide and Agency Term Contracts will not be renewed without a completed PE.





Emergency Contingency Contract PE Requirements

Emergency Contingency contracts shall have an evaluation performance submitted three (3) months after an emergency declaration which resulted in usage on that contract.

EMERGENCY



Professional Services Contract Performance Evaluation Purpose

After completion of performance under a professional, personal, consulting, or social service contract (PC), the using agency shall prepare a final report on the contract which shall include an evaluation of contract performance and an assessment of the utility of the final product.





PC Form

Check the appropriate box for the type of contract you are evaluating and this form will display the appropriate options for the contract:

- Purchasing Contract
- Professional Services Contract
- Contract from RFP

Complete this form in compliance with R.S. 39:1569.1. After completion of performance under a professional, personal, consulting, or social service contract, the using agency shall prepare a final report on the contract which shall include an evaluation of contract performance and an assessment of the utility of the final product.

This report shall be included in LaGov or ProAct within 60 days after completion of performance.

The agency shall submit final evaluation reports for contracts \$250,000 or greater to the Legislative Auditor. Using agencies will be unable to contract with any vendor for which a delinquent final evaluation report is outstanding.

Agency Name:		Name & Title of Monitor:	
Email Address:		Monitor's Telephone Number:	
LaGov Number:		Vendor:	
Contract Title:			

Overall Contractor Performance Rating

Satisfactory

Unsatisfactory

Contract Amount:		Contract Cost Basis:	
Contract Begin Date:		Actual Begin Date:	
Contract End Date:		Actual End Date:	

Contract Modifications/Amendments

Description of Services:

Deliverables (list):

Quality of Deliverables:

Problems Encountered:

Opportunities for Improvement:

Save Final Version (all fields will be locked)



PC Form Information

- Enter agency contact information
- Overall Performance Rating
- Contract information
- Unlimited space to list the description of services, list the deliverables, quality of deliverables, problems encountered and opportunities for improvement





PC Evaluation Due Dates

Professional services contract evaluations are due within sixty (60) days after the completion of the services.

Contract term 7/1/2019 through 6/30/2020.

PE is due within 60 days of end date.

- July (31 days) 31
- August +29
- 60 days

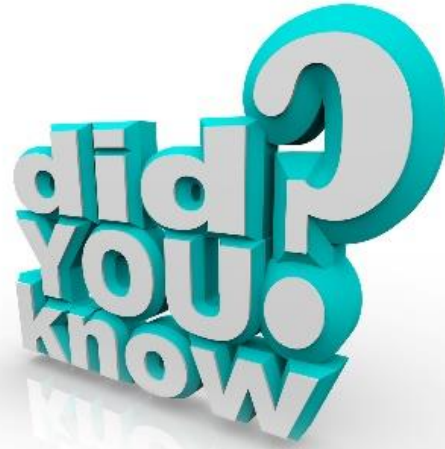


Due date is by August 29, 2020.

If services are completed prior to contract end date, PE is due within 60 days of that early completion date.



PC Auditor Requirements



If performance evaluation reports for contracts are \$250,000 or greater, you must submit a copy to the Legislative Auditor's Office by email to: dmelancon@lla.la.gov

See, LA R.S. 39:1569.1. C

<https://legis.la.gov/Legis/Law.aspx?d=920555>



PC Contract Terminations

Professional services contracts which are terminated early - before the contract end date - will require a Complaint form to be submitted to OSPLegal@la.gov.

The information on the **Complaint** form could be used to help other agencies determine if they would like to contract with the vendor or not.





PC Terminations

- Terminations will require the agency to submit an amendment, a copy of the termination letter, the complaint form and a BA-22 reducing the amount of the contract.
- All documents will need to be submitted for review and approval.
- Ensure the termination letter gives the agency thirty (30) days before ending date.





PC Complaint Form

- The Complaint form includes:
 - Agency contact information
 - Nature of complaint
 - Reason for termination
 - Form will be electronically submitted to OSP Legal.
 - Agency must upload complaint form into ProAct or LaGov.



RFP Contracts PEs

- Contract from RFP
- Complex Services
- Professional Services

Complete this form in compliance with La. R.S. 39:1595.B.(11)(a). After completion of performance under a complex service contract awarded by RFP, the using agency shall prepare a final report on the contract which shall include an evaluation of contract performance and an assessment of the utility of the final product.

This report shall be submitted to the DOA-OSPhelpdesk within 120 days after completion of performance and shall be retained in the original contract file.



RFP Contracts PEs

- Contract from RFP
- Complex Services
- Professional Services

Complete this form in compliance with R.S. 39:1569.1. After completion of performance under a professional, personal, consulting, or social service contract, the using agency shall prepare a final report on the contract which shall include an evaluation of contract performance and an assessment of the utility of the final product.

This report shall be included in LaGov or ProAct within 60 days after completion of performance, including in the case of early termination.

The agency shall submit final evaluation reports for contracts \$250,000 or greater to the Legislative Auditor. Using agencies will be unable to contract with any vendor for which a delinquent final evaluation report is outstanding.



Location of Forms



Where can I find the forms that have been introduced to me today?

The forms can be found on OSP's website, under Purchasing/Agency Center/ Agency Forms.

<https://www.doa.la.gov/osp/agencycenter/forms/submit/deficiencycomplaint.pdf>

OR under Professional Services/Agency Center/Forms and Formats

<https://www.doa.la.gov/pages/osp/PC/agencies.aspx>



OSP Website – Agency Center

Welcome to the Office of State Procurement

Director:

Paula Tregre

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Mailing Address:

P.O. Box 94095

Baton Rouge, LA 70804-9095

Help Desk Email Addresses:

Purchasing:

[DOA-OSP HELP DESK](#)

Professional Contracts:

[DOA-PC HELP DESK](#)

Vendor Inquiries: [VENDR_INQ](#)

The Office of State Procurement (OSP) serves the agencies and people of Louisiana by ensuring that the state's contracting and purchasing activities are conducted legally, fairly, and efficiently.

OSP is responsible for maintaining standards, and for conducting the review and technical approval of professional, personal, consulting and social services contracts needed by state agencies. The office verifies that the competition process for each contract is fair, that funding has been appropriated to pay for services, and that the proposed services are reasonable and advisable in relation to the agency's mission and the state's priorities.

OSP also manages the purchasing of equipment, goods, supplies and operating services needed by state agencies. The office researches, develops and issues both statewide and agency-specific contracts and competitively bids items not covered under annual contracts. In all of its purchasing activities the office strives to reduce costs to the state by harnessing the purchasing power of the entire state to obtain the best pricing for all agencies, large and small.

OSP strives to ensure a fair, competitive bidding environment for all vendors, while also ensuring that vendors have performed well in their contractual duties to state agencies and the public. It also manages the Hudson and Veterans Initiatives for Small Entrepreneurships to ensure that agencies give due consideration to contracting with local small businesses.

New Information





OSP Website Agency Forms

Purchasing -Agency Center

Contact Information

New Information

Agency Forms

Agency Questions

Employee Purchase Program

Excluded Parties List System

Featured Contracts

LaCarte Procurement Card

LA eCat - Louisiana's Electronic Catalog

LaPAC - Online Solicitations & Award Information

UNSPSC Product Categories (Commodity Codes)

Legal Information

Louisiana's Hudson (Small Entrepreneurship) and Veteran Initiatives

Hudson Initiative (SE) Certified Vendors from LaPAC - Quick List

Veteran Initiative (LaVet) Certified Vendors from LaPAC - Quick List

OSP Help Desk

OSP Memos

ProAct - Procurement

Procurement Links

Procurement Support Team (PST)

Publications

Purchasing Complex Services - Request for Proposals (RFPs)

Training Center

State Agency Retail Discount Program



OSP Website Agency Forms

Agency Forms

[Request For Training](#)  

Agency purchasing personnel use this online form to request procurement training.

[Agency Blanket Order Tracking & Renewal Request Form](#) 

State Agencies are required to complete this form when requesting a renewal on a Blanket Order PO that was issued by the Office of State Procurement

[Authorized Dealer Certification](#) 

Certification form for authorized dealer repair purchases. Form to be printed and submitted to State Procurement after completion

[Change Order Form](#) 

State Agencies are required to complete this form when requesting a Change Order on a Purchase Order issued by the Office of State Procurement

[Contract Performance Evaluation](#)  

An online form used by state agencies to relay comments on the performance evaluation of state contracts.



OSP Website Agency Forms



LOUISIANA DIVISION OF ADMINISTRATION

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[State Agencies](#)

[State Employees](#)

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Welcome to the Office of State Procurement



OSP Website Agency Forms

Professional Contracts - Agency Center

About Us with Contact Information

New Information

Forms & Formats

Memos

Publications

Important Legislation

Legal Information

Executive Orders

Training Center

PROACT

Guidelines for Contract Preparation, Submitting Contracts & Requesting Payment

Accountability for Line Item Appropriations

Attorney Case Handling & Billing Guidelines

Emergency Procedures for Conducting State Business

Energy Savings Performance Contracts

Frequently Asked Questions



Agency Forms

Professional Contracts - Forms and Formats

The following are sample forms and sample letters prepared by the Office of State Procurement as a guide for using agencies who issue RFPs for Consulting and Social Services contracts. These forms and letters are for illustration purposes only.

- **Professional Services Contract Guidelines** *(Revised 6/25/2020)*
- **BA-22**
- **Board Resolution**
- **Justifications**
- **Contract Performance Evaluation**
- **Model RFP** *(Revised 8/20/2020)*
- **RFP Submission Form**
- **RFP Award Concurrence**
 - **Intent to Award Concurrence**
 - **Steps in Award Recommendations via RFPs – LaGov**
 - **Steps in Award Recommendations via RFPs – ProAct**
 - **FY 18 – Changes in the ProAct System**
- **Sample Agency Transmittal Letter** *(Revised 10/13/17)*
- **Sample Certification Letter** *(Revised 6/6/17)*
- **Sample Contracts/Amendments**
 - **Sample Generic Contract** *(Revised 7/25/2019) - For Attorney contracts, please use Legal Services Contract Template.*
 - **Additional Clauses for Contracts**
 - **Legal Services Contract Template** *(Revised 7/25/2019)*
 - **Sample Information Technology/Data Processing Contract** *(Revised 7/29/2019)*
 - **Sample Amendment**
 - **Sample Generic RFP Contract**



Office of State Procurement

OSP Phone Number:

225-342-8010

Purchasing Helpdesk:

DOA-OSPhelpdesk@la.gov