

PSPE Criterion List


City of Toronto – Sample Only

Professional Services Performance Evaluation Criterion

This document contains a sample Professional Services Performance Evaluation (PSPE) with all criterion fields ranked. A [long description](#) for this image and the corresponding list of the criterion in this image is found at the end of this document.

Sample of Completed PSPE

Figure 1: A completed Professional Services Performance Evaluation with ranked criterion fields.

 Professional Services Performance Evaluation <small>Version 1.2 - November 8, 2024</small>		<input type="checkbox"/> Final <input type="checkbox"/> Interim # 		DATE: Apr 2021
Consultant Co./ Project Manager: Consultant ABC - John Doe		<input type="checkbox"/> Design <input type="checkbox"/> Contract Administration <input type="checkbox"/> Other: Study		
Project Name/ Description: Made up Project EXAMPLE				
Project Category: Water/Wastewater Plant	Project Phase: Contract Tender	Ranking		
Purchase Order No.: 123456	START DATE: Jan 01/19	<small>For definitions refer to Page 2</small>		
Agreement Value: \$1,000,000	COMPLETION DATE: Jun 01/22	U	I	ME
		EE	EX	N/A
A. Health & Safety		sub-score	60%	Weight 12.6%
1. Did the consultant comply with OHSA, Regulations and other legal H&S requirements?				✓
2. Did the consultant comply with agreement-specific H&S requirements and other legal requirements such as WSIA, Environmental Laws, Employment Standards, AODA, OTM Book 7, By-Laws, Industry Best Practices, Standards (i.e. CSA)?				✓
3. Was the consultant effective at documenting and reporting observed contractor H&S issues?				✓
B. Quality of Deliverables		sub-score	60%	Weight 26.9%
1. Did the consultant provide appropriate QA/QC for their project deliverables?				✓
2. Was all documentation clear, concise, technically correct and complete?				✓
3. Were designs completed in compliance with all project requirements, standards, specifications & regulations?				✓
4. Was the project constructable as-tendered?				✓
5. Were cost estimates within the accuracy range for the prescribed Estimate Class?				✓
C. Organization		sub-score	77%	Weight 18.0%
1. Did the consultant submit a satisfactory baseline schedule of their activities in compliance with their agreement?				✓
2. Did the consultant regularly update their baseline schedule?				✓
3. Did the consultant set up and maintain appropriate issue-decision tracking logs for their assignment?				✓
4. Did the consultant provide the project team proposed, and was there continuity in staffing during their work?				✓
5. Did the consultant effectively coordinate and manage the work of its employees and sub-consultants?				✓
6. Did the consultant, acting as the City's agent, effectively represent the City's interests?				✓
D. Execution		sub-score	58%	Weight 26.9%
1. Did the consultant complete their project as per their agreed schedule?				✓
2. Did the consultant complete their work for the agreed price?				✓
3. Did the consultant appropriately address technical comments from City staff & other stakeholders during the project?				✓
4. Did the consultant's contract administrator and/or site inspector effectively review and report on the construction?				✓
5. Were the following services/deliverables accurate, complete and delivered in a timely manner:				
5.1 Response to RFIs from the contractor, City staff and other stakeholders		✓		
5.2 Meeting management and meeting minutes			✓	
5.3 Contractor's change directives/orders and payment certificates			✓	
5.4 Commissioning Services - Such as Disinfection, Startup, Work Management System, Training, etc			✓	
5.5 Did the consultant conduct timely review of shop drawings during the project?			✓	
5.6 Project close out Services - Such as As-builts, manuals, training and other close out documentation			✓	
5.7 Third Party Permits and Approvals			✓	
E. Administration		sub-score	60%	Weight 15.6%
1. Did the consultant communicate, cooperate, collaborate with City lead, all stakeholders, and public?				✓
2. Did the consultant cooperate in resolving non-technical problems and display initiative to implement solutions?				✓
3. Did the consultant demonstrate accountability for issues for which they were responsible?				✓
4. Did the consultant submit accurate, complete invoices in a timely manner?				✓
5. Did the consultant submit their own timely, supportable change order requests?				✓
6. Did the consultant accept responsibility for the full scope of the consultant assignment for which they are responsible?				✓
Did the consultant coordinate to minimize disruption to the public and City operations? Including review of and addressing issues related to the contractor's Traffic Management Plan / Traffic Control Plan (including protecting pedestrians and those with disabilities)				✓
		63%	Total Score (weighted)	
Name (Print or Type)		Signature and Date		
Project Manager:	Jane Doe	Apr 20/21		
Manager:	John Smith	Apr 20/21		
Director: <small>(required for Final only)</small>				

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Long Description and Criterion

The Professional Services Performance Evaluation contains various fields to document the consultant, or the Supplier's name, and key details about the contract the consultant is working on. Beneath this information is a list of criteria that can be ranked with certain letter values. The rankings correspond to percentage scores as described on [the City of Toronto's website](#). The list of criteria, separated into five sections, can be found below in this document.

A. Health and Safety

1. Did the consultant comply with OHSA, Regulations and other legal H&S requirements?
2. Did the consultant comply with agreement-specific H&S requirements and other legal requirements such as WSIA, Environmental Laws, Employment Standards, AODA, OTM Book 7, By-Laws, Industry Best Practices, Standards (i.e. CSA)?
3. Was the consultant effective at documenting and reporting observed contractor H&S issues?

B. Quality of Deliverables

1. Did the consultant provide appropriate QA/QC for their project deliverables?
2. Was all documentation clear, concise, technically correct and complete?
3. Were designs completed in compliance with all project requirements, standards, specifications & regulations?
4. Was the project constructable as-tendered?
5. Were cost estimates within the accuracy range for the prescribed Estimate Class?

C. Organization

1. Did the consultant submit a satisfactory baseline schedule of their activities in compliance with their agreement?
2. Did the consultant regularly update their baseline schedule?
3. Did the consultant set up and maintain appropriate issue-decision tracking logs for their assignment?
4. Did the consultant provide the project team proposed, and was there continuity in staffing during their work?
5. Did the consultant effectively coordinate and manage the work of its employees and sub-consultants?

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6. Did the consultant, acting as the City's agent, effectively represent the City's interests?

D. Execution

1. Did the consultant complete their project as per their agreed schedule?
2. Did the consultant complete their work for the agreed price?
3. Did the consultant appropriately address technical comments from City staff & other stakeholders during the project?
4. Did the consultant's contract administrator and/or site inspector effectively review and report on the construction?
5. Were the following services/deliverables accurate, complete and delivered in a timely manner:
 - 5.1. Response to RFIs from the contractor, City staff and other stakeholders
 - 5.2. Meeting management and meeting minutes
 - 5.3. Contractor's change directives/orders and payment certificates
 - 5.4. Commissioning Services - Such as Disinfection, Startup, Work Management System, Training, etc.
 - 5.5. Did the consultant conduct timely review of shop drawings during the project?
 - 5.6. Project close out Services - Such as As-builts, manuals, training and other close out documentation
 - 5.7. Third Party Permits and Approvals

E. Administration

1. Did the consultant communicate, cooperate, collaborate with City lead, all stakeholders, and public?
2. Did the consultant cooperate in resolving non-technical problems and display initiative to implement solutions?
3. Did the consultant demonstrate accountability for issues for which they were responsible?
4. Did the consultant submit accurate, complete invoices in a timely manner?
5. Did the consultant submit their own timely, supportable change order requests?
6. Did the consultant accept responsibility for the full scope of the consultant assignment for which they are responsible?

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7. Did the consultant coordinate to minimize disruption to the public and City operations? Including review of and addressing issues related to the contractor's Traffic Management Plan / Traffic Control Plan (including protecting pedestrians and those with disabilities)