

Recommendation re: use of CPE Scores in Evaluative Solicitations (RFSQ/RFP)

1. We recommend that when assessing Experience in an evaluation for construction related work the following approach be taken that will allow consideration of the CPE for Contractors with City experience, as well as other referenced projects from other entities. The approach will also allow a fair assessment of those contractors with no prior City experience.

Breakdown of scoring: Total marks assumed for Experience = 30

Contractor with CPE history:

20 marks – CPE (based on average FINAL CPE scores over last 5 years)

10 marks – Other references

Contractor with no CPE history:

30 marks – Other references

2. For CPE scoring a sliding scale will be used to tie back to the average FINAL CPE scores in the City's CPE database (decimals will be rounded up). Scale would be as follows:

Table 1: Average Final Score and Corresponding CPE Database Score

Average Final CPE Score	City's CPE Database Score
2.0 or less	0
2.1	2
2.2	4
2.3	6
2.4	8
2.5	10
2.6	12
2.7	14
2.8	16
2.9	18
3.0	20

For those contractors that have an average FINAL CPE score above 3.0 the recommendation is to award them BONUS points for achieving above Meets Expectation (ME) so our better CPE performers are rewarded and this sends clear message to incentivize the contractor community. Consequently the following would apply:

Table 2: Average Final CPE Scores Above 3.0 and CPE Database Scores

Average Final CPE Score	City's CPE Database Score
3.1	21
3.2	22
3.3	23
3.4	24
3.5	25
3.6	26
3.7	27
3.8	28
3.9	29
4.0 & over	30

- As far as "Other" references are concerned we would recommend use of template that is standardized in format. The City would require references to score a contractor project based on a scale of 0-5 on established questions. (See suggested template at end of this document). A PM may amend / add certain questions based on specific scope of the call, but must be reasonable based on that scope. Regardless of the total score available on the questionnaire the average total score of "other references" received will be prorated to a score out of 10 for contractors with CPE history, and a score out of 30 for a new supplier. We do not perceive an issue with allowing the "other" references to also be City projects.

We are further recommending that the questionnaire is provided with the RFX and the Contractor is responsible to have it completed by their selected reference contact. The reference sheet(s) would be due at time of close with remainder of proposal package. The City's role would be to validate that the contact did in fact provide the score, only.

- Examples using this approach (utilizing assumed score of 7/10 or equivalent for "other references" for comparison purposes are below)

Table 3 Sample Contractor Scores

Contractor Status	Contract Score	Other References
incumbent	Contractor A - average final score = 2.8	other references = 7/10
incumbent	Contractor B - average final score = 2.5	other references = 7/10
incumbent	Contractor D - average final score = 3.5	other references = 7/10
new vendor	Contractor C - no CPE scores	other references = 21/30

Table 4: Sample Contractor Percentage Scores

Contractor	CPE	Other Ref	Total	Percentage
Contractor A	16	7	23	77%
Contractor B	10	7	17	57%
Contractor C	25	7	32	107%
Contractor D	0	21	21	70%

5. We would recommend that when developing an evaluation matrix for construction related solicitations that EXPERIENCE receive weighting of 30 to tie into this overall scoring, but depending on the other areas of evaluation the overall score out of 30 can be prorated.

For example an overall score (using methodology above) of 23/30 would equate to a score of 19/25 if experience is given a weighting of 25, and so on.

Screenshot of Sample Scored Reference Sheet for Consideration

SAMPLE SCORED REFERENCE SHEET FOR CONSIDERATION

PROPONENT NAME:

Reference Company Name:

Contact Name interviewed:

Q#	Phone Interview Questions	Rating (1 being poor, 5 being high)					Comments
		1	2	3	4	5	
1	Can you confirm the details of the referenced project, project scale and value, work provided by the contractor and their role? <i>(scope of project) - City will score this based on relevance to the Project/work described in the RFX.</i>						
2	Was the project completed on time per the most recent agreed to schedule?						
3	Was the project delivered within the tendered value plus any approved changes?						
4	Were issues addressed and resolved in a timely and acceptable manner?						
5	Did the project manager, site superintendent, and crews conduct themselves in a professional manner throughout the duration of the contract?						
6	Were subcontractors used, and if so how well were they managed by the general contractor?						
7	Was your organization satisfied with the quality of the completed work?						
8	If you had a choice would you engage this company to do similar work again?						

Proponent Interviewed by:
(name & signature)

Witnessed By:
(name & signature)