

Organization	City of Edmonton	Alberta Infrastructure	City of Ottawa	Infrastructure Ontario	Metrolinx (Ontario)	Public Services & Procurement Canada
Performance Evaluation	- 4 to 5 KPIs for Consultants, Contractors or other Suppliers	- 5 KPIs for Consultants and Contractors	-6 KPIs for Design consultants, studies & assessments; -8 KPIs for Contract administrators, inspectors & technical support consultants -8 KPIs for Contractor -KPIs are weighted to contribute to an overall score	- 3 KPIs for Consultants, Study - 7 KPIs for Contractor - Pass / Fail infractions	-4 KPIs with up to 5 KPIs for each; -plus "corporate performance" which measures risk to Metrolinx (e.g. financial/corporate stability, sustainable /ethical practices such as child labour, modern slavery)	- 4 Indices
KPIs	Quality, Delivery, Financial, Relationship Management, Health, Safety and Environment	Quality, Management, Schedule, Safety	Project Management, Supervision, Health & Safety, Schedule, Budget/Cost control, Quality, Issue and Risk management, Site Management, Communication and Cooperation	Quality (contract compliance, cost management,schedule), Partnership (general mgmt, design, construction, close out), Value for Money, HHealth Safety, Communication	Quality and Process, Financial Management, Customer Satisfaction, Corporate Performance	Cost, Quality, Schedule, Management
Scales	Percentage scale from 30% to 100% where: - 'Always meet' is 100%, - 'Usually meet' is 80%, - 'Occasionally meet' is 60%, - 'Never meet' is 30% .	- Scale 1-5 with "1" minimum standard pass / fail - Default score of 3	-5 performance levels -90-100% =Outstanding <50% = Not satisfactory	-0-5 with "5" being fully compliant;	-0-5 with "0" indicating no work has been done at all; -scores are converted to a %; - Initial score of 5	- Scale 0-5
Rating	- All contract interim and final evaluations - 3 years rolling average, more weight to current year	- All contract interim and final evaluations - 3 years rolling average, more weight to current year	- All contract final evaluations - 3 years rolling average, more weight to current year - Looking for a minimum of three performance evaluation scores	- All contract final evaluations - 2 years rolling average	- All contract applicable interim and final evaluations - 3 years rolling average including contract spend, more weight to current year - if no VPR, starter => average of all contracts in that classification	- All contract applicable interim and final evaluations - 5 years rolling average including number of contracts for that year, more weight to current year - if no VPR, starter =>score of 3, if the avg vendor performance rating of other bidders is higher than 3, the bidders average
Thresholds	All contracts, standing arrangements and call-ups deemed as high risk and at/above \$100K	- All contracts at or above \$100K - Opt-in/Opt-out options	- All consulting contracts over \$15K - All contractor (construction) contract over \$100K	- All contracts over \$100K	>\$10K -consideration being given to raising the \$ threshold for high complexity contracts to >\$50K	- All contracts \$100K and above or threshold for a specific Commodity Group

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Commodities / Contracts Type	<ul style="list-style-type: none"> - Construction Services - Goods & Services - Information Technology (IT) - Infrastructure Professional Services - Standing Arrangements, Call-Ups (Construction) - Standing Arrangements, Call-Ups (Non Construction) 	<ul style="list-style-type: none"> - Construction contractors; -Consultants 	<ul style="list-style-type: none"> -Design consultants, studies & assessments; -Contract administrators, inspectors & technical support consultants; -Contractors 	<ul style="list-style-type: none"> - Construction contractors; -Consultants (e.g. engineers & architects); -“Studies” 	<ul style="list-style-type: none"> - Design Engineering* - Construction Administration (CA)* - Design Engineering and Construction Administration* - Construction Services - General Goods and Equipment (Non-I&IT) - Maintenance, Repair and Operations Services (Non-I&IT) - Professional and Consulting Services (Non-Engineering) - IT Managed Systems and Services (Enterprise Level) - IT Software, Licensing and Maintenance 	TBD - Pilot planned for 2020
Frequency	<ul style="list-style-type: none"> - Contract < 6 months final evaluation only - Contract < 1y interim & final evaluations - Contract > 1y interim / every 6 months or key milestones & final evaluation <p style="color: red; margin-top: 10px;">TBD - Interim evaluations doesn't count toward the final supplier score and cannot be appealed</p>	<ul style="list-style-type: none"> - One interim and final evaluation for contracts <6 months; - Contracts >1 year interim every 6 months & final evaluatios 	<ul style="list-style-type: none"> - Contract < 6 months final evaluation only - Contract < 1y interim & final evaluation - Contract > 1y interim per calendar year & final evaluation <p style="margin-top: 10px;">Interim evaluations doesn't count toward the final vendor score and cannot be appealed</p>	<ul style="list-style-type: none"> -End of contract; -Upon completion of key milestones - Annual evaluations for contracts >12 months 	<ul style="list-style-type: none"> - Annually or every 6 months at Metrolinx's discretion for contracts > 12 months; - For contracts <12 months, an interim & final evaluation 	<ul style="list-style-type: none"> - Contract < 6 months final evaluation only - Contract > 6 months every 6 months - interim and final evaluations

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Past Performance Information use in Procurement	<ul style="list-style-type: none"> - Procurement SPR are used as a weighted criteria (5 -25% of total score) determined by Business Owner - If no valid SPR, default rating of 70% or if the SPR average SPR of the other bidders is lower than 70%, the bidders Supplier Performance Rating average. 	<ul style="list-style-type: none"> - Procurement - For value-based, the Overall Vendor Performance Rating up to a plus or minus 10% adjustment to the procurement evaluation final score. - For price based , the Overall Vendor Performance Rating up to a plus or minus 5% adjustment to the bid submission for evaluation and ranking purposes only - If not OVPR default score of 3 	<ul style="list-style-type: none"> - Procurement - VPRs are used as a weighted criteria (initially worth 10% in 2018 but scheduled to increase to 20% in 2019) when evaluating Construction Consultant Design/Contract Admin: <ul style="list-style-type: none"> - 2 stage, 10% of technical weighing at RFQ stage - 1 stage, 4% of technical weighting - If no VPR use the industry average for that category, vendor can not win the bid if outranked other bidders in using the industry average 	<ul style="list-style-type: none"> - Procurement – mandatory minimum weight of 15% for VPR but can be increased to up to 25% - The “Global average”, used for Suppliers without a valid VPR, is the average of all VPRs 	<ul style="list-style-type: none"> - Procurement (5% of total score) -only most recent evaluations per contract are considered when developing a VPR for bid evaluation purposes; -possible for a vendor to have multiple VPRs (i.e. commodity specific); -VPRs based on weighted average of scores within past three years; -starter VPRs based on average scores within a commodity group -VPRs used in two ways: to identify an effective bid price (bid price/VPR as %) or as a weighted score. 	<ul style="list-style-type: none"> - Procurement (5-25% of total score) determined by Business owner
Appeals	<ul style="list-style-type: none"> - Suppliers have 10 days to appeal; - Suppliers must provide rationale for appeal, can also provide additional documentation - Supplier Management Appeal Committee (3 - City Branch Managers) 	<ul style="list-style-type: none"> - Suppliers have 10 days to appeal; - Suppliers must provide rationale for appeal, can also provide additional documentation - Vendor Performance Committee (Senior Leader - Infrastructure) 	<ul style="list-style-type: none"> -Suppliers have 20 days to appeal; -Considered to have been accepted after 20 days; -Cannot appeal interim scores; -Suppliers must provide rationale for appeal, can also provide additional documentation & make a short presentation; - Single opportunity to appeal - Appeal Body 	<ul style="list-style-type: none"> -Suppliers appeal must be received within 10 business days of receiving scores - Considered to have been accepted after 20 days; 	<ul style="list-style-type: none"> - Preliminary review meeting after a written request 2-level appeal process -level 1 appeal (5 days to appeal after review meeting) to sr. manager of client and vendor relationships team; -level 2 appeal (within 5 days of level 1 decision) to Vendor Relationship Management Committee – looks at process or new information); -scores are not appealable if vendor has a VPR of >70% -VRM Committee 	<ul style="list-style-type: none"> - Office of the Procurement Ombudsman
Correctives Measures, Probation & Suspension	<ul style="list-style-type: none"> - Probation (6 months / duration of the contract), Suspension (up to 1 year or more) - Administration Executive Leadership Committee 	<ul style="list-style-type: none"> Corrective Measures and Suspension Warning Letter - bidding privileges suspension 18 months / corrective action plan Second suspension - bidding privileges suspension 3 years 	<ul style="list-style-type: none"> City can reject a bid based on past poor performance. Debarment 	<ul style="list-style-type: none"> - Suspension - Executive VP or Procurement and Program Mgmt - up to 2 years - 15 days to appeal 	<ul style="list-style-type: none"> - Sanction: penalties may impact VRM 	<ul style="list-style-type: none"> Corrective Measures (Policy) for future contracts, Debarment (6-36 months)
Others		<ul style="list-style-type: none"> - 360 Review Self Assessment and Supplier Feedback Survey - Performance-based references 				

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References:

Alberta Infrastructure VPMP Preview Presentation 2019-11-29, Vendor Performance Management Program 2019-12-02
 City of Ottawa - Vendor Performance Management (VPM) Business Process Guide, City of Ottawa, Version 8.5, February 6, 2019
 Infrastructure Ontario - Infrastructure Ontario Vendor Performance Program
 Metrolinx, Vendor Relationship Management Procedures & Guidelines, Version 1.1, November 7, 2016
 Public Services and Procurement Canada, Vendor Performance Management Policy - Draft - October 2019
 Environmental Scan on Vendor Performance Management, Prepared by the Strategic Policy Development Team, Acquisitions Program, Public Services and Procurement Canada, Last updates: August 2019