

CITY OF SAN DIEGO
ADMINISTRATIVE REGULATION

PERFORMANCE EVALUATIONS FOR ARCHITECTURAL AND ENGINEERING CONSULTANTS	Number 25.75	Issue 3	Page 1 of 4
	Effective Date January 18, 2019		

1. PURPOSE

- 1.1. To establish the procedures and guidelines for the performance evaluation of consultants providing Architectural and Engineering (A&E) services and other related services to assist in the selection of A&E Consultants.

2. SCOPE

- 2.1. This A.R. describe the process for performance evaluations for *A&E Consultants*.

3. DEFINITIONS

- 3.1. *Architectural and Engineering Consultants (A&E Consultants)* – Includes, but is not limited to, engineering professionals engaged in the practice of civil, structural, mechanical, traffic, corrosion, electrical, and geological engineering; landscape architects licensed by the State Board of Landscape Architects; and architects licensed by the State Board of Architects, land surveyors, and professional consultants in the archeological, biological, and environmental disciplines.
- 3.2. *Managing Department* – The department that administers an *A&E Consultant* contract. The *Managing Department* may assign a Project Manager to act as the point of contact with the *A&E Consultant*.

4. POLICY

- 4.1. The *Managing Department*, through its Project Manager, shall evaluate the performance of all *A&E Consultants* using a Consultant Performance Evaluation (CPE) [Attachment 1]. For as-needed consultant contracts, *Managing Department* shall track the performance of each Task Order and evaluate performance upon completion of the as-needed contract.
- 4.2. The Public Works Contracts Division will keep the CPEs for five (5) years from the date of the CPE in order for the CPE to be used as a factor when selecting an *A&E Consultant* for future projects.

Supersedes Administrative Regulation 25.75, Issue 2, effective September 1, 1991

Authorized

Signature on File

CHIEF OPERATING OFFICER

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- 4.3. The CPE will state in writing that the *A&E Consultant* has the right to appeal the contents of the final CPE pursuant to SDMC 22.0811(a).

5. RESPONSIBILITY

5.1. Public Works Contracts Division (PWCD)

5.1.1. PWCD is responsible for collecting and keeping the CPE(s) on file for five (5) years.

5.1.2. PWCD will provide the *Managing Department's* Project Manager with any CPEs on file for any *A&E Consultant* whose qualifications are being evaluated for a new contract award.

5.2. *Managing Department* (Director, Deputy Director and Project Manager)

5.2.1. Prior to the interviews, the Project Manager will review all previously completed CPEs that are less than 5 years old, and they shall be considered when the Project Manager is evaluating an *A&E Consultant's* qualifications. In addition, the Project Manager shall make all previously completed CPEs that are less than 5 years old available to the selection panel. The interview panel may consider past City work at the interview upon discretion of the Project Manager.

5.2.2. If the Project Manager proposes to award a contract to an *A&E Consultant* who has received a CPE with a rating of "Unsatisfactory" within the last five (5) years, then the Project Manager will provide a memorandum to the *Managing Department's* Director documenting justification for the selection.

5.2.3. During the negotiation phase, the Project Manager will explain the CPE form and the associated procedures to the *A&E Consultant*, including use of performance data in future selection processes as described herein.

5.2.4. After completion of the contract, the Project Manager shall complete Sections I, II, III, & IV of the CPE form in Attachment 1 as follows:

- a. Project Manager shall complete Section I - Item 1 "Project Data": The information listed should be consistent with the Capital Improvement Program (CIP) budget book, if applicable. If there were significant alterations made to the project, Project Manager will describe the alterations in Section III "Supplemental Information."

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- b. Project Manager shall complete Section I - Item 2 “Consultant Data”: The information should include the *A&E Consultant*-assigned project manager. If the *A&E Consultant* changes its project manager, please note this change in Section III, “Supplemental Information.”
 - c. Project Manager shall complete Section I - Item 3 “City Department Responsible”: The information should include the City Department Responsible for the project (*i.e., Managing Department*), along with the City-assigned Project Manager. If the City-assigned Project Manager changes, please note this change in Section III, “Supplemental Information.”
 - d. Project Manager shall complete Section II “Specific Ratings.” When the Project Manager notes a rating of “Excellent” or “Unsatisfactory,” the Project Manager must explain and document the reasons for the rating on Section III “Supplemental Information.” When the Project Manager notes a rating of “Satisfactory,” comments are not mandatory, but strongly encouraged for documentation purposes. Attach additional sheets as needed.
 - e. Project Manager shall complete Section IV - Item 4 “Overall Rating.”
- 5.2.5. At each stage of contract deliverable completion, the *Managing Department* will discuss with the *A&E Consultant* its performance thus far. If performance improvement is needed then the *Managing Department* will meet with the firm’s Principal to discuss and implement a plan to improve contract performance.
- 5.2.6. If the CPE results in an Overall Rating of “Unsatisfactory,” the Project Manager will meet with his or her supervisor and the *A&E Consultant’s* Principal to review the final CPE. If the evaluation remains unchanged after the meeting, then the *A&E Consultant’s* Principal shall be given 60 days to appeal its rating in writing to the City Engineer pursuant to SDMC § 22.0811(c).
- 5.2.7. After the CPE has been completed and signed by all parties, the Project Manager will submit it to PWC in PDF format.

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APPENDIX

Legal References

Administrative Regulation 25.60 (Selection of Consultants for Work Requiring Licensed Architect and Engineering Skills)

San Diego Municipal Code Chapter 2, Article 2, Division 8 (Debarment)

Council Policy 300-7 (Consultant Services Selection)

Forms

Attachment 1 - Consultant Performance Evaluation Form

Subject Index

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Managing Department

Public Works Department