This form has been developed to aid business unit contract managers to monitor current contracts and vendor performance. Please submit this form to Purchasing’s Contract and Vendor Management unit on an annual basis. This monitoring tool may be used in future vendor performance tracking.

**SECTION 1 – CONTRACT INFORMATION:**

Vendor Name: ____________________________ Contract No: ______________

Contract Title / Type of Service: __________________________________________

Dept. Requesting Services: __________________________

Contract Manager: ____________________________ Contact Phone #: __________

Contract Manager: ____________________________ Contact Phone #: __________

Vendor Point of Contact: ____________________________ Contact Phone #: __________

Contract Term: ____________________________

Renewal Options Available: ________________ Total Contract Cost: ________

**SECTION 2 - CONTRACT DELIVERABLES, MILESTONES AND DUE DATES:**

<table>
<thead>
<tr>
<th>ACTION/CONTRACT REQUIREMENTS</th>
<th>DUE DATE/TIMEFRAME</th>
<th>STATUS, DATE RECEIVED, PROVIDED, INITIATED OR COMPLETED (as appl.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Insert Tasks and Deliverables from Contract and contract documents)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer/Client/Agency Issues.</td>
<td>Annual review</td>
<td>YR 1 YR2</td>
</tr>
<tr>
<td>Contract Manager issues.</td>
<td>Annual review</td>
<td>YR 1 YR2</td>
</tr>
<tr>
<td>Purchasing/CVM/CA issues.</td>
<td>Annual review</td>
<td>YR 1 YR2</td>
</tr>
<tr>
<td>Business Unit contract file up to date.</td>
<td>Annual review</td>
<td></td>
</tr>
</tbody>
</table>
CONTRACT REFERENCES

(Insert references mentioned above needing additional clarification or too large for table)
SECTION 3 – CURRENT CONTRACT PERFORMANCE RATING:

Contract Review Date: _________________________________

[1st Year ___ 2nd Year ___]

<table>
<thead>
<tr>
<th>Quarterly Contract Performance Rating By BU Contract Manager</th>
<th>Rating Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Above Average</td>
</tr>
<tr>
<td></td>
<td>4 Points</td>
</tr>
</tbody>
</table>

1. Product Quality (work products):

2. Work Performance (staff performance):

3. Conformance with Agency Contract Requirements:

4. Deliverables and Tasks Completed on time:

5. Vendor exhibits strong project related cooperation:

6. QA/QC Conformance:

7. Contract administration cooperation:

8. Invoices and supporting documentation are accurate and supplied on time:

9. Other: ____________________________

Quarterly rating for this vendor/contract: Total Points: __________ (out of maximum points of ____)

BU Contract Manager: Please provide comments and activities to cure deficiencies for any rating of below average or poor.

Comments and/or Corrective Actions Required:

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________
Definitions:

**Above Average:**
- Products/Service delivered correctly, efficiently, timely and without excessive assistance or direction from Agency.
- Contractor performs beyond expectations.
- Services exceed standards.
- Project Manager is informed of project status regularly.
- Contractor resolves any problems that occurred.
- Contractor needs little or no direction.
- Contractor responsive to requests.
- Contractor suggests improvements.

**Average:**
- Contractor fulfills terms of contract; no more, no less.
- Services meet standards.
- Project is on time and within budget.
- Project Manager is informed of key milestones.

**Below Average:**
- Contractor minimally or does not meet contract terms.
- Deliverables below standard or needs rework to comply.
- Project is behind schedule or over budget.
- Product/service required direction or assistance by Agency to produce.

**Poor:**
- Contractor requires excessive guidance or direction.
- Contractor is unresponsive to requests.
- Contractor unable or unwilling to resolve minor setbacks.
- Services do not follow standards or does not meet requirements or expectations.
- Project is not on time or budget through no fault of Agency.

**N/A:**
- Activity not applicable to this specific contract.
(INSERT CONTRACTED SERVICE)

CUSTOMER SATISFACTION SURVEY

Please indicate your level of agreement or disagreement with the following statements.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5</td>
<td>4</td>
</tr>
</tbody>
</table>

1.  
2.  
3.  
4.  
5.  
6.  
7.  
8.  
9.  

_________________________  ____________________________
Business Unit  Date

Comments
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________