

{Agency Name}

CONTRACT MONITORING TOOL

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:

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

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 ____]

Quarterly Contract Performance Rating By BU Contract Manager	Rating Scale				
	Above Average	Average	Below Average	Poor	N/A
	4 Points	3 Points	2 Points	1 Point	0 Points
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.

	Strongly Agree			Strongly Disagree	
	5	4	3	2	1
	1.				
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					

Business Unit

Date

Comments

