



**SCHEDULE L-1  
CITY OF OAKLAND  
CONSULTANT PERFORMANCE EVALUATION FORM**

**Consultant Name & Address:** Lake Merritt Institute

568 Bellevue Avenue, Oakland, CA 94611

**Type of Services/Work Provided:** Professional Services

**Project Complexity (Standard or Difficult):** Difficult

**Consultant Lead Project Manager:** James Robinson

**Project Name:** Clean Lake Contract

**City Project No:** 1001514

**Final Value of Consultant Contract:** \$780,000

**Duration of Consultant Contract (Start & end dates):** 7/1/2019 - 6/30/2023

**Final Value of Construction Contract:** \_\_\_\_\_

**City Construction Resident Engineer (with phone #):** \_\_\_\_\_

**Date of Evaluation:** 3/22/2023

**City Project Manager/Evaluator (with phone #):** Mark Arniola, (510) 238-7371

**Reviewed and Approved By (with phone #):** Derek Lee, (510) 238-6981

**Ratings Guidelines:**

- **Poor - Work required extensive revisions, included numerous & significant errors; consultant was unable or unwilling to perform consistently, required an inordinate amount of supervision, and/or failed to meet professional standards/project objectives.**
- **Needs to Improve – Performance was marginal; work required more review and included more errors than would normally be anticipated; level of service or expertise below average.**
- **Average – Performance and work were satisfactory; services provided were at least of industry standard; no significant errors or problems; professional service objectives met.**
- **Excellent – Performance was clearly above standard; expectations exceeded; objectives were met with an added level of service and/or with a higher level of professional expertise.**

**Please rate the Consultant on the following topics by checking the appropriate box:**

<b><u>QUESTIONS</u></b>	<b><u>Poor</u></b>	<b><u>Needs to Improve</u></b>	<b><u>Average</u></b>	<b><u>Excellent</u></b>	<b><u>Not Applicable</u></b>
1. Quality of Design/Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Ability to meet the Project Objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Knowledge, Expertise, and State-of-the Art Technologies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Innovation of Design/Work	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Thoroughness of Design/Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Quality Control of Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Ability to React and Respond to Problems/Issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8. Ability to Maintain to the Project Schedule and to Time Commitments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9. Ability to Maintain to the Project Budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10. Accuracy of Cost Estimating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11. Constructibility of the Design/Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12. Quality of Construction Support Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13. Accuracy and Timeliness of Billings and other Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14. Sufficient and Appropriate Staffing of the Project by the Consultant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15. Ability to Manage and Coordinate Sub-Consultants	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Consultant Performance Evaluation

<b>QUESTIONS</b>	<b>Poor</b>	<b>Needs to Improve</b>	<b>Average</b>	<b>Excellent</b>	<b>Not Applicable</b>
16. Ability and Ease of Communicating with City Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17. Ability to Communicate with the Community and to Make Presentations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18. Willingness, Flexibility, and Attitude in Working with the City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19. Ability to Follow City Directives (i.e. Architectural Design Concept, other Requirements, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>OVERALL RATING</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional Comments (attach additional information, as necessary): Lake Merritt Institute has been a consistent  
longtime contractor since 2013. Lake Merritt Institute staff have met all terms of their contract including cleanup,  
maintenance, monitoring, volunteer coordination, technical assistance, and public outreach services related to  
Lake Merritt. The services provided by the Lake Merritt Institute have helped the City to comply with state and  
federal regulations related to trash and low dissolved oxygen which impacts the quality of aquatic life in  
the lake.

Note: The Project Coordinator/Manager shall complete this evaluation form for each primary consultant within 60 days upon the completion of an individual project or assignment. Interim evaluations shall also be prepared for projects of a long duration (i.e. over one year) or if the consultant's performance merits notification of any deficiencies.

Information is to be submitted to and kept on file by the PWA Contract Administration Division for five (5) years. A copy of the evaluation shall also be provided to the consultant. These forms may be used, in part, as a reference to evaluate the consultant for future City professional services contracts.

Consultants with an overall evaluation of "Poor" or "Needs to Improve" are given an opportunity to 1) appeal the evaluation to the Assistant Director of Public Works, or his designee, and/or 2) append the evaluation with a one-page statement that explains or refutes the City's finding.

To the extent permitted by law, the City shall treat the evaluations as confidential information.