Evaluation worksheets for government institutions, developers, general contractors and others evaluating tenders

**Grounds Management Contractor Rating System**

**Use this system to strengthen your bidding process**

The tender process is intended to provide the project owner with a reliable and equitable method of determining a fair market price for the successful contractor for the work designated. Whether the process is open to public tender or private invited tenders, the tendering system allows the project owner or his consultant to determine a competitive price for specified construction or maintenance projects and/or services.

Even the best written contract, however, does not provide the owner with an indication as to the ability of a bidding contractor to complete the project as specified, regardless of whether or not there is an obligation on the part of the owner for project management to give first consideration to the low price tender.

The tender process is intended to provide the project owner with a reliable and equitable method of determining a fair market price for specified construction or maintenance projects and/or services.

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The following rating system provides worksheets to assist you in the most important aspect of the bidding procedure — the prequalification process. The value of each criterion is weighted (as per the numbers shown in brackets) and the total value is used to rank the tenderer. The project owner or his consultant uses this system to determine whether a contractor has the ability to successfully complete the project as specified, regardless of whether or not there is an obligation on the part of the owner or project manager to give first consideration to the low tender price.

These criteria should be used as guides to identify important information and then determine the relative values of each contractor based upon that data. Compare the sums to determine an objective indication of which contractors will likely provide the highest level of satisfaction and long-term value.

Please note that this system is not intended to favour any size of contractor. Owners should be aware that a small contractor may be more appropriate to the project, or alternatively, the job may require the services of a larger firm.

The prequalification of contractors is the most important part of the tender process; we hope you find these evaluation worksheets to be useful in establishing an appropriate bidder’s list for your project(s).

### Rating worksheet: Landscape contractors

Numbers in brackets are the suggested weighted values for each selection criterion

<table>
<thead>
<tr>
<th>Financial resources</th>
<th>Human resources</th>
<th>Company profile</th>
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<tbody>
<tr>
<td>Proof of good standing with W.S.I.B. (mandatory)</td>
<td>7 or 9</td>
<td>5</td>
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<td>Proof and level of insurance carried (mandatory)</td>
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<tr>
<td>Support reference</td>
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<td>5</td>
</tr>
<tr>
<td>Ability to perform within specified time</td>
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<td>5</td>
</tr>
<tr>
<td>Availability of letters of credit</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Subtotal (30 possible points)</td>
<td></td>
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</tbody>
</table>

### Subtotal (30 possible points)

### Human resources (applicable to the project at hand)

| Total number of employees | 5 | 5 |
| Per cent of project managers on staff | 5 | 5 |
| Per cent of supervisors in workforce | 5 | 5 |
| Per cent of trade specific objective on staff | 5 | 5 |
| Per cent of professional management on staff | 5 | 5 |
| GHT certification | 2 | 2 |
| Union affiliation (on good standing) | 7 or 9 | 5 |
| Subtotal (25 possible points) | | |

### Subtotal (25 possible points)

### Company profile

| Number of years in business under current name | 6 |
| Percentage of gross sales that is subcontracted | 5 |
| Love/unprofessional references for projects of similar size and scope | 5 |
| Active membership in trade associations | 2 |
| Gross sales (broken down by consumer segments: associated/related companies (disclosure) | 2 |
| Subtotal (22 possible points) | | |

### Subtotal (22 possible points)

### Physical resources

| Facility location(s) | 5 |
| Net book value of leased/owned equipment | 5 |
| Area of operations | 5 |
| Subtotal (7 possible points) | |

### Total (69 possible points)

### Rating worksheet: Grounds management contractors

Numbers in brackets are the suggested weighted values for each selection criterion

<table>
<thead>
<tr>
<th>Financial resources</th>
<th>Human resources</th>
<th>Subtotal</th>
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<tr>
<td>Proof and level of insurance carried (mandatory)</td>
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<td>Subtotal (42 possible points)</td>
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### Physical resources

| Facility location(s) | 5 |
| Net book value of leased/owned equipment | 5 |
| Area of operations | 5 |
| Administrative resources and capability | 5 |
| Subtotal (10 possible points) | |

### Total (57 possible points)

See over for discussion and explanation of specific criteria
Use this system to strengthen your bidding process

The tender process is intended to provide the project owner with a reliable and equitable method of determining a fair market price for the purchase of contract services. Whether the process is in an open public tender or private invited tender, the tendering system allows the project owner or his consultant to determine an objective indication of which contractors will likely provide the highest level of satisfaction and long-term value.

The following rating system provides worksheets to assist you in the most important aspect of the bidding procedure — the prequalification process. The value of each criterion is weighted (as per the numbers shown in brackets) and the total value per criterion is multiplied by the suggested weighted values for each selection criterion (applicable to the project at hand). Compare the sums to determine an objective indication of which contractors will likely provide the highest level of satisfaction and long-term value.

Please note that this system is not intended to favour any size of contractor. Owners should be aware that a small contractor may be more appropriate to the project, or alternatively, the job may require the services of a large firm. The prequalification of contractors is the most important part of the tender process; we hope you find these evaluation worksheets to be useful in establishing an appropriate bidder's list for your project.

**Rating worksheet: Landscape contractors**

Numbers in brackets are the suggested weighted values for each selection criterion

<table>
<thead>
<tr>
<th>Financial resources</th>
<th>Subtotal</th>
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<th>Company profile</th>
<th>Subtotal</th>
<th>Physical resources</th>
<th>Subtotal</th>
<th>Rating worksheet: Grounds management contractors</th>
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<td>Per cent of trade specific expertise on staff</td>
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</table>
Number of years in business under current name

The number of years in business is an important element in determining whether a contractor is a reliable, long-term player on the landscape field and should be viewed as a primary consideration. Each year of experience adds another layer of accountability.

Availability of letters of credit

As they may be issued by a financial institution, letters of credit are letters of credit that may be used to guarantee that money will be issued to a contractor. A letter of credit is a financial instrument that is issued by a bank and guarantees that a contractor will fulfill their obligations under a contract. It is a legal document that the bank guarantees as long as the contractor adheres to the terms of the contract.

Bonding availability

Performance, labour and material payment and maintenance bonds are used to secure the performance of work on a project. These bonds are a great deal of value in a contract. The cost of such bonds usually is borne by the contractor and not necessarily the owner. They may not be necessary or appropriate in many instances, as the fact that a company can provide a Bond Agreement to Bond, through a registered insurance company, is an indicator that they have satisfied some stringent qualifying criteria, including in most cases, personal financial guarantee and risk of the contractor firm.

Specific criteria: Landscape contractors

- **Availability of letters of credit**
- **Bonding availability**
- **Ability to perform**
- **Specific projects similar in size and scope**

Availability of letters of credit

As they may be issued by a financial institution, letters of credit are letters of credit that may be used to guarantee that money will be issued to a contractor. A letter of credit is a financial instrument that is issued by a bank and guarantees that a contractor will fulfill their obligations under a contract. It is a legal document that the bank guarantees as long as the contractor adheres to the terms of the contract.

Bonding availability

Performance, labour and material payment and maintenance bonds are used to secure the performance of work on a project. These bonds are a great deal of value in a contract. The cost of such bonds usually is borne by the contractor and not necessarily the owner. They may not be necessary or appropriate in many instances, as the fact that a company can provide a Bond Agreement to Bond, through a registered insurance company, is an indicator that they have satisfied some stringent qualifying criteria, including in most cases, personal financial guarantee and risk of the contractor firm.

Ability to perform

The ability of the contractor to perform within a specific timeframe and maintain the required quality of services and work is an important consideration. This includes the ability of the contractor to meet project deadlines, ensure that the work is completed to the owner’s satisfaction, and maintain a consistent level of performance.

Specific projects similar in size and scope

This is a useful guide for the contractor’s level of experience on the type of project. It provides an indication of the level of experience and success the contractor has achieved on similar projects, as well as the level of experience and success the contractor has achieved on similar projects that are used to assess the contractor’s qualifications and past performance, including the level of experience and success the contractor has achieved on similar projects that are used to assess the contractor’s qualifications and past performance.
Explanations of rating criteria common to both contractor types

Proof of good standing with Workers Safety and Insurance Board (mandatory)

This is traditionally verified through the provision of a ‘Certificate of Good Standing’ by the Workers Safety Insurance Board (WSIB) of Ontario for all contractors (both general and sub-contractors) who are registered and are current with their contributions.

Landscape construction and landscape management work is unique in that there may be more than one sub-contracted trade, such as water spraying, which may fall under other codes.

The owner of a construction project is held to be responsible under law for any injury that may occur as a result of a person working on that project where the employer is not in good standing with the WSIB. The contractor’s board will verify this with the WSIB and issue a current good standing certificate.

Number of years in business under current name

The number of years in business is an important factor. It may be assumed that the landscape-field are short-lived. Longevity will give the contractor a greater depth of experience in an area and a greater service level to commitment to professionalism.

Evidence of frequent name changes is an effective monitor of future problems.

Gross sales

broken down into consumer segments

The ability of the contractor to perform within a specific trade area will be a function of the uncertainty of their recorded sales volume over the past few years. In turn, those figures should be further defined in terms of:

- Residential: Single-family, multi-family, high-rise
- Commercial: Small (under $50,000), medium (between $50,000 and $250,000), large (over $250,000)
- Institutional: Small (under $50,000), medium (between $50,000 and $250,000), large (over $250,000)

Per cent of gross sales

usually sub-contracted

There are two distinct sales segments which are most effectively completed sub-contracted by the sub-contractor, the ability of a contractor to perform may be greatly influenced by the availability of their own skilled trade people. A higher level of sub-contracted work would require the company to be very strong in project scheduling and management. The more work sub-contracted, the greater the risks in terms of accountability.

Associated/related companies (Disclosure)

The owner may wish to ensure there are no conflicts of interest between the sponsoring contractor’s relationship with another company. On the other hand, there may be some advantage to intercompany relationships that complement each other (e.g. through control of a trade company, etc.).

Client/professional references for projects similar in size and scope

This is a very useful guide to the contractor’s level of experience and also to his/her financial ability to see the job through. This is particularly important on larger projects.

Active members in a trades association

Membership in a trades association reflects the firms commitment to professionalism in the industry and their willingness to do more for the industry itself. Membership also indicates a contractor’s realistic attitude towards the advancement of the profession.

CHT designation

The Certified Horticultural Technician program is a non-profit organization that provides a range of educational material to professionals in the landscape industry. The CHT designation is designed to acknowledge the value of applied knowledge, experience or a combination of experience and education and indicates a contractor liable to participate under the CHT program designation proves a specific level of skill of the individual in all areas of landscape contracts and credits management. The CHT designation indicates a commitment to promote professionalism on the part of both the employer and employee.

Location

Depending on the job may have an effect in that one provider of the contractor increases in proportion to distance from the jobs. Close proximity to the site may be an advantage.

Net book value of leased/owned equipment

This criterion gives the client/contractor an idea of the physical capacity of the operation.

Area of operations

Many contractors choose to work in areas relatively close to their operational headquarters, from a service/maintenance aspect, this may be a more beneficial consideration.

Other contractors, however, have organized their companies across decentralized, flexible, mobile crews, who are trained in the proper planning and process techniques that facilitate execution of remote projects.

Specific criteria: Landscape contractors

Bonding availability

Performance, labor and material payment and maintenance bonds are a great deal of value in a contract. The cost of such bonds are ultimately borne by the owner and not the contractor. They may not be necessary or appropriate in many instances, but that the fact a company can provide an Agreement to Bond, through a nationally recognized agency (an insurance company), is an indicator that they have satisfied some stringent qualifying criteria, including, in most cases, personal qualifications (proof of service/maintenance) of the owner/contractor.

Per cent of project managers on staff

The supervisory staff are key to getting the job done and the proper scheduling, field instructions and prevents costly mistakes. The owner or general contractor, may have collective bargaining agreements with a project manager or supervisor on that particular project. Those individuals should be considered as part of landscape architecture, engineering, property management or landscape maintenance.

Ratio of supervisors to crew foreperson(s)

The supervisory staff are key to getting the job done and the proper scheduling, field instructions and prevents costly mistakes. The owner or general contractor, may have collective bargaining agreements with a project manager or supervisor on that particular project. Those individuals should be considered as part of landscape architecture, engineering, property management or landscape maintenance.

Per cent of gross sales by market segment

Indicates current fields in which company has experience.

Per cent of employees who, by their nature of work and labour seasonal full time, are the average experience of each professional enhances the level of professionalism between the client, consultant and service provider. The higher the average, the more experience within the company.

Per cent of supervisors in work force

The supervisory staff are key to getting the job done and the proper scheduling, field instructions and prevents costly mistakes. Some supervisors have the ability to see the job through. This is particularly important on larger projects.

Specific criteria: Grounds management contractors

These selected criteria provide an overview of a grounds maintenance company’s skill level and crew makeup.

Labour: Year round

These are generally the key people around which the company’s seasonal operations revolves.

Labour: Seasonal full-time

Some of the most important people around which the seasonal operations revolves. In certain areas of the landscape industry, the strong seasonality can be a barrier to workforce commitment.

Average years experience for field personnel

For a larger company, the length of time a project may be held is more meaningful than the number of years of experience of the individual. The higher the average, the more experienced is the workforce within the company.

Per cent of crew foreperson(s) to labour

Indicates average crew size and direct ‘on-the-job’ supervision responsibility.

Ratio of supervisors to crew foreperson(s) in larger companies, indicates senior management’s involvement in quality and service control.

Administrative resources and capability

The following are all indications of resources available to the customer to communicate with the company:

- General office hours
- Bids or proposals availability during office hours
- Off-hours or non-business hours

Union affiliation (in good standing)

The owner, or general contractor, may have collective agreements with one or more trade unions which include us, all, of the work under consideration. In this case, the contracting firm that is awarded the work may be a union shop that will structure their work activities in accordance with collective agreements or hire subcontractors who are.

Union affiliation (in good standing)

The owner, or general contractor, may have collective agreements with one or more trade unions which include us, all, of the work under consideration. In this case, the contracting firm that is awarded the work may be a union shop that will structure their work activities in accordance with collective agreements or hire subcontractors who are.
Explanations of rating criteria common to both contractor types

Proof of good standing with Workers Safety and Insurance Board (Ontario)
This is traditionally verified through the provision of a Certificate of Clearance issued by the Workers Safety Insurance Board (WSIB) of Ontario for employers (contractors, in this case) who are registered and are current with their contributions.

Landscape construction and landscape management work experience
Depending on the scope of the job, one may expect the owner to have some sub-contracted services, such as landscaping. The owner of a construction project is held to be responsible under the law for any injury that may occur as a result of a person working on that project, where the employer is not in good faith, liable for their actions. The board can and will address their claim to the owner and, if necessary, to the property itself.

Proof of level of insurance carried (mandatory)
Personal liability and property damage insurance is required. The following are the most typical types of insurance provided.

General liability insurance (G/L)
This insurance protects the contractor from a claim of liability for damage to property or injury to persons (bodily injury) caused by the contractor’s negligence. The policy is subject to dollar limits and may contain exclusions.

Commercial general liability (CGL)
This policy is designed to protect the contractor against suits for Death, bodily injury, or property damage where the injury or damage is caused by the contractor’s negligence or the breach of contract. It does not protect against the insured’s own property damage or to the insured’s personal property.

Worker’s compensation insurance
This policy protects the contractor from claims of injury to workers employed or engaged in the contractor’s business. The policy protects against failure to provide worker’s compensation and for the reimbursement of claims from the WSIB, if such claims are incurred. The WSIB, a government agency, is a “no-fault” system for the protection of injuries to workers.

Supplementary contractor’s insurance (optional)
The owner of a construction project is held to be responsible under the law for any injury that may occur as a result of a person working on that project, where the employer is not in good faith, liable for their actions. The board can and will address their claim to the owner and, if necessary, to the property itself.

Supplier reference
Good supplier references give proof of the contractor’s financial stability and creditworthiness. The WSIB may request reference letters from unpaid accounts. Generally, references should be obtained from suppliers who have had dealings with the contractor on a regular basis.

Total number of employees
This gives the owner an idea of the size of the company. Depending on the scope of the job, size may or may not be a factor.

Number of years in business
The number of years in business is an important criterion. Generally, it is not unusual to consider companies in the landscape industry that have been in business for more than 10 years. The minimum requirement is five years. The company’s financial records should be reviewed to verify the number of years in operation.

Active members in a trades association
Membership in a trades association reflects the firm’s commitment to professionalism in the industry and it gives the owner the confidence that the firm has the ability to deal with all problems that may arise. The owner may be more confident if an association has been established and its members have a common interest in their profession.

Client/professional references
They are a good source of information about the contractor. The owner may be required to know the company supervisors to field staff reflects the ability of the company’s supervisory staff to communicate.

Labour: Year round
These are the general people around which the company’s seasonal operations revolve. Usually, they include supervisors to field staff that will be on hand during peak periods or whose services are needed during peak periods.

Part-time/student labour
These are the people on which a company may depend for the winter season. Many are part-time employees who may be seasonal workers. Often, they replace seasonal employees who leave for the summer months.

Labour: Seasonal
The number of labourers will depend on the season of the year. This is one of the key criteria in selecting a contractor, especially if the project is on a fixed schedule.

Availability of letters of credit
As they must be issued by a financial institution, letters of credit are an effective means to ensure that the contractor will fulfill its commitment to the owner. Should a contractor fail to perform, the letter of credit allows the owner the right to do the work at a much lower level of access than other securities.

Per cent of project managers on staff
Firms with the availability of project managers on staff will enable the firm to perform better than firms without such personnel. Project managers have the experience of such professionals enhance the contract between the client, consultant and contractor. They are key people around which the project managers will develop. They ensure that the project delays in correspondence, change orders, contract modifications and any other design or construction problems are resolved by the contractor.

Per cent of supervisors in work force
Client foreperson(s) to labour
The supervisory staff are key to getting the job done properly according to specifications. The ratio of crew foreperson(s) to labour reflects the ability of the firm to do the job.

Per cent of trade-specific expertise
A higher profile can be achieved with a firm that has its own qualified trades people in all landscape construction skills, i.e., stone masons, carpenters, tree planters, etc. Firms that predominantly sub-contract all aspects of a project cannot exercise the same quality control and expertise of their own qualified trades people.

Specific criteria: Landscape contractors

Specific criteria: Grounds management contractors

Union affiliation (in good standing)
The owner, or the general contractor, may have collective agreements with one or more trade unions which include, for all, the work under consideration. In this case, the contract firm that is awarded the work may be under a collective agreement that requires all workers in the firm's bargaining unit to be union members.

Number of staff
This is the number of people that the firm will employ. It is important to know how many people will work on the project.

Per cent of gross sales by market segment
Indicates current fields in which company has experience.

Ratio of supervisors to crew foreperson(s)
In larger companies, indicates senior management’s involvement in quality control and service.