



# STATE OF CONNECTICUT

## OFFICE OF POLICY AND MANAGEMENT

TO: Agency Fiscal Officers, Contract and Procurement Staff

FROM: Kimberly E. Kennison *Kimberly Kennison*  
Executive Financial Officer

DATE: February 9, 2022

SUBJECT: Contractor Performance Evaluations for Purchase of Service and Personal Service Agreement Contracts

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### **Executive Summary**

The Office of Policy and Management (OPM) has partnered with The Department of Administrative Services (DAS) to create a new process for agencies to submit contractor performance evaluations for Purchase of Service (POS) and Personal Service Agreement (PSA) contracts. **Starting February 9, 2022**, agencies may begin to submit contractor performance evaluations on the State contracting portal, CTsource.

**Effective February 28, 2022**, agencies will be required to submit contractor performance evaluations exclusively via CTsource, and the existing SharePoint submission process will be discontinued. This transition to CTsource is the first step in standardizing contractor performance evaluation across the state. The goal of this policy is to advance OPM's procurement reform agenda by improving reporting processes and encouraging agencies to incorporate performance data into contracting decisions. This memo will reiterate State policy on completing contractor performance evaluations, provide an overview of the new process for submitting evaluations, and share resources to assist agencies in using the new system.

### **Contractor Evaluation Policies**

According to [OPM's Procurement Standards](#), an agency must prepare a written evaluation of a contractor's performance no later than 60 days after the completion of a POS or PSA contract. There are several conditions to be aware of that determine when this is necessary:

- The "completion of a POS or PSA contract" is defined as the end date of the contract's term.
- If the end date is modified by an extension option or an amendment, an evaluation must be completed within 60 days of the modified end date.

Evaluations should be completed by agency staff with management and oversight knowledge of the contract and services provided.

### **New Contractor Evaluation Submission Process**

Starting February 9, 2022, agencies will submit contractor performance evaluations via CTsource on a supplier's "Supplier Information" page. The CTsource evaluation form is formatted like an online survey. Agencies will provide basic information such as contract number and contracting agency, and then will rate the contractor on several criteria based on their performance on the specific contract.

Agencies are encouraged to include comments for each evaluation category (Quality, Timeliness, Responsiveness, Compliance) explaining how they arrived at their rating. OPM will distribute a template set of evaluation criteria to help staff arrive at final ratings, which agencies may customize to meet their needs and contracting approach. OPM staff are available to work with agencies to customize these scoring approaches.

Agencies will then be able to find these completed evaluations on the “Supplier Information” page for a contractor on CTsource. Agencies may wish to use these scores to inform future procurement decisions.

In order to submit a contractor performance evaluation on CTsource, the supplier will need to be registered in CTsource. Please direct your suppliers to [this link](#) to get them registered in CTsource as soon as possible.

As a reminder, according to CSG Sec. 4e-13, all State agencies must post all their contracts on CTsource. The transition to this new contractor evaluation process is an excellent opportunity to ensure that your agency is in compliance with this statute.

The existing SharePoint website for submitting contractor evaluations will sunset effective February 28, 2022. OPM/Finance will be downloading all contractor evaluation data from the SharePoint site to keep on file for audit purposes. OPM/Finance will provide agencies with copies of this data upon request.

### **Resources for Transition to New Contractor Evaluation Process**

OPM will provide the following resources prior to the release of the new contractor evaluation system:

- 1) A **job aid (attached with this memo)** detailing the process for submitting an evaluation on CTsource. The job aid will include screenshots to help users navigate the pages to submit new evaluations and review existing ones.
- 2) Support in developing **agency-specific evaluation criteria** to guide users in determining ratings for contractors, as well as a template evaluation criteria document.
- 3) A list of each agency’s CTsource **System Administrator** who can add new users to submit the performance evaluations (attached with this memo and in the appendix of the job aid).

### **Contacts for Assistance**

The OPM procurement team will continue to be available to answer questions about when and how to submit contractor performance evaluations, while DAS’ CTsource help desk will also continue to field questions about the functionality of CTsource and any technical issues.

OPM POS/PSA performance evaluation standards and process support: [lars.benson@ct.gov](mailto:lars.benson@ct.gov)

DAS CTsource help desk: [das.ctsource@ct.gov](mailto:das.ctsource@ct.gov)

CTsource account assistance: [webprocure-support@proactis.com](mailto:webprocure-support@proactis.com)