

Performance Evaluation Details

ID	E2
Project	Financial Advisory Services
Project Number	21RFP1108C-MH
Supplier	Raymond James & Associates, Inc.
Supplier Project Contact	TOM OWENS (preferred language: English)
Performance Program	Professional Services
Evaluation Period	07/01/2022 to 06/30/2023
Effective Date	09/13/2023
Evaluation Type	Formal
Interview Date	Not Specified
Expectations Meeting Date	Not Specified
Status	Completed
Publication Date	09/13/2023 12:49 PM EDT
Completion Date	09/13/2023 12:49 PM EDT
Evaluation Score	100

Related Documents

There are no documents associated with this Performance Evaluation

OVERALL RATING GUIDE - PROFESSIONAL SERVICES

- Evaluation Score Range
- Outstanding = 90-100%
- Excellent = 80-89%
- Satisfactory = 70-79%
- Needs Improvement = 50-69%
- Unsatisfactory = -50%

PROJECT MANAGEMENT

20/20

Rating Outstanding: Project Management practices that exceed in the areas of scope, schedule, budget, quality of work and risk/issue management. Complete understanding of project objectives, risks and Contract requirements.

Comments Tom Owens does a great job with the overall process for the County's Tax Anticipation note, from evaluations as to financing vehicle, timing, and interactions with other vendors and professionals.

SCHEDULE

20/20

Rating Outstanding: Delivered ahead of original completion date with significant effort by Consultant to exceed project milestone dates or ahead of schedule with increased scope. Proactive approach to monitoring and forecasting of project schedule.

Comments Tom provides a timeline early in the process and is great at notifying all of upcoming task deadlines.

QUALITY OF DESIGN, REPORTS AND DELIVERABLES

20/20

Rating Outstanding: Extraordinary quality of deliverables that exceeds requirements in all areas and finished product presents a degree of innovation in work.

Comments *Not Specified*

COMMUNICATIONS AND CO-OPERATION

20/20

Rating Outstanding: Co-operative and proactive response to User Department concerns at all times. Innovative communication approaches with the User Department's team.

Comments Always very responsive to County questions, inquiries and provides solid information.

OVERSIGHT OF CONTRACTOR COMPLIANCE WITH CONTRACT DOCUMENTS

20/20

Rating Outstanding: Outstanding oversight of the Contractor and ability to bring the Contractor into compliance in an expedited manner.

Comments *Not Specified*

GENERAL COMMENTS

Comments *Not Specified*