

## Performance Evaluation Details

<b>ID</b>	E1
<b>Project</b>	Financial Advisory Services
<b>Project Number</b>	21RFP1108C-MH
<b>Supplier</b>	Raymond James & Associates, Inc.
<b>Supplier Project Contact</b>	TOM OWENS (preferred language: English)
<b>Performance Program</b>	Professional Services
<b>Evaluation Period</b>	04/01/2022 to 06/30/2022
<b>Effective Date</b>	09/19/2022
<b>Evaluation Type</b>	Formal
<b>Interview Date</b>	09/06/2022
<b>Expectations Meeting Date</b>	09/06/2022
<b>Status</b>	Completed
<b>Publication Date</b>	09/19/2022 09:42 AM EDT
<b>Completion Date</b>	09/19/2022 09:42 AM EDT
<b>Evaluation Score</b>	91

### 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

<b>Outstanding:</b> 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

*Not Specified*

### SCHEDULE

20/20

Rating

<b>Outstanding:</b> 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

*Not Specified*

### QUALITY OF DESIGN, REPORTS AND DELIVERABLES

17/20

Rating

<b>Excellent:</b> Deliverables exceed requirements in some areas and remainder of items delivered are high quality.

Comments

*Not Specified*

### COMMUNICATIONS AND CO-OPERATION

17/20

Rating

<b>Excellent:</b> Co-operative and timely response to the User Department concerns.

Comments

*Not Specified*

### OVERSIGHT OF CONTRACTOR COMPLIANCE WITH CONTRACT DOCUMENTS

17/20

Rating

<b>Excellent:</b> Proactive approach to oversight of Contract compliance. Compliance issues are resolved in a timely manner to the User Department's satisfaction and exceeds expectations in some areas.

Comments

*Not Specified*

### GENERAL COMMENTS

Comments

*Not Specified*