

EVALUATION FORM FOR FINANCIAL ADVISORY SERVICES

Firm Name:		Evaluated by:		Date:	
CRITERIA TO BE RATED		COMMENTS	RATER'S SCORE	WEIGHING FACTOR	WEIGHTED SCORE
Firm Qualifications, Experience and References	How long has the company been in business? Has the company done similar work? Level of expertise in subject matters areas?			5	
Project Organization, Personnel and Staffing	Qualification and experience of proposed personnel for requested services? On-site availability of team and project manager? Locally based firm or team?			6	
Rates, Fees and Budget Control	Competitive rates and fees proposed? Are proposed fees and staff hours proposed and clearly defined?			4	
Quality and Responsiveness of the Proposal	Is the proposal clear and understandable? Does the proposal meet all of the RFP requirements?			5	
TOTAL Weighted Score should be ≤ 100					