

Professional Service Provider Monitoring Tool

General Information

Advisor Name/
Firm Name
Contract Start Date
Contract Expiration Date
Lead Contact at Firm
Review Period
Staff Reviewer(s)

Service Delivery & Responsiveness

Evaluation Criteria	Rating (1-5) Comments/Examples
Timely delivery of reports and analysis	
Responsiveness to emails and calls	
Availability for meetings and consultations	
Ability to meet deadlines and commitments	

Technical Expertise & Strategic Guidance

Evaluation Criteria	Rating (1-5) Comments/Examples
Accuracy and clarity of data or financial projections	
Knowledge of municipal laws and regulations	
Quality of debt issuance support (financial advisor only)	
Usefulness of recommendations to staff and council	
Proactive identification of risks and opportunities	

Collaboration & Communication

Evaluation Criteria	Rating (1-5) Comments/Examples
Works well with internal staff and leadership	

Understands and supports the municipality's goals	
Communicates complex information clearly	

Compliance & Documentation

Evaluation Criteria	Rating (1-5) Comments/Examples
Adherence to contractual terms and deliverables	
Consistent record-keeping and reporting	
Disclosure of potential conflicts of interest	
Operate in a safe and ethical manner	

Benchmarking & Cost

Evaluation Criteria	Rating (1-5) Comments/Examples
Fees are reasonable compared to similar firms	
Demonstrates value for cost	
Services align with original contract scope	

Staffs Overall Comments and Recommendations

- What are the advisor's strengths?
- What areas need improvement?
- Do you recommend continuing the engagement? Why or why not?
- Should this service go out for RFP in the next cycle?

Reviewer Certification

I certify that the above evaluation is based on observed performance and documented interactions with the advisor during the stated review period.

Staff Signature_____

Date _____