

## CONSULTANT EVALUATION FORM

- Use this form when choosing among candidate consulting organizations and/or consultants (hereinafter candidate).
- Fill out one of these forms per candidate.
- Numerical scores on this form should be entered into the Consultant Evaluation [Summary Worksheet](#).

<b>Project Name:</b>	
<b>Prepared by:</b>	
<b>Date (MM/DD/YYYY):</b>	

### Candidate Information

<b>Organization Name</b>	
<b>Organization Address</b>	
<b>Contact Name</b>	
<b>Contact Phone</b>	
<b>Contact E-mail</b>	

For each category below, enter narrative information in the text boxes provided and numerical scores in the spaces provided (Example: **Score [ 3 ]**) using the following scale:

- 1 = Very Dissatisfied (*Candidate fails to meet most or all expectations*)
- 2 = Somewhat Dissatisfied (*Candidate fails to meet some expectations*)
- 3 = Satisfied (*Candidate meets expectations*)
- 4 = More than Satisfied (*Candidate exceeds some expectations and meets the rest*)
- 5 = Extremely Satisfied (*Candidate exceeds most expectations; Candidate is everything we hoped for and more*)

#### 1. Prior Experience: (obtain résumé) **Score [   ]**

- Has candidate worked with other comparable organizations?  
 Yes       No

If Yes, list here:

- Does candidate have prior experience with relevant technologies or products?  
 Yes       No

- How recent?

- How extensive?

**2. Quality Assurance:      Score [   ]**

- What is the candidate's process to ensure accurate delivery of project requirements?

- What steps does the candidate take to ensure that what they deliver is actually what its customer needed?

**3. Staffing w/ Direct Experience: (obtain résumés)      Score [   ]**

- Will the individual consultants whose resumes we have been given actually be assigned to our project?  
[   ] Yes      [   ] No

- Does the consulting staff assigned to our project have experiences that are relevant and recent as it relates to our requirements?

**4. References:      Score [   ]**

- Can the candidate cite examples of comparable projects they have done that were actually implemented and used by its customer?

- Did the customers consider these projects successful?

- List reference names:

•
•
•

5. **Fee Structure:** (obtain sample contract) **Score [ ]**

- Does the proposed fee cover the entire scope of services that are required?  
 Yes  No
- Is the fee within our estimates?  
 Yes  No
- Does the candidate agree to a deliverables-based payment schedule?  
 Yes  No

Comments:

6. **Impartiality:** **Score [ ]**

- Does the candidate have any partnerships or other allegiances that could compromise its impartiality with respect to this project?

7. **Team Management ability:** (Where relevant) **Score [ ]**

- Can the candidate document the effectiveness of their team management skills? Give examples here:

8. **Project Management Ability:** **Score [ ]**

- What does the candidate provide as evidence of effective Project Management practice?
- By what means will the candidate determine and then communicate project status?
- Does the candidate provide effective issue management and change control processes?

How does the candidate deal with project risk?

**9. Availability of Resources:** Score [ ]

- Does the candidate have sufficient staffing and infrastructure to support the project?  
[ ] Yes [ ] No
- Will the candidate team be doing other work concurrently that might distract it from this project?  
[ ] Yes [ ] No
- Will the same individuals be working on the project from start to finish (per role, for example, will the same business analyst(s) gather and document all requirements?)  
[ ] Yes [ ] No
- If candidate staff will be working off-site, will they be available via phone? E-mail? IM? Other means?

**10. Office Location:** Score [ ]

- What is the distance from the candidate organization's office to the relevant work location?
- Will individual consultants be traveling from distant locations? If Yes, will that affect availability?

**11. Code of Ethics:** (obtain a copy, if available) Score [ ]

- Does the candidate adhere to a formal Code of Ethics?  
[ ] Yes [ ] No
- Can the candidate offer evidence that it adheres to an ethical practice?