

# Project Administration Instructions

PAI No. 2.07  
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## CONSULTANT PERFORMANCE EVALUATION

### A. Introduction

1. This Project Administration Instructions (PAI) provide policies and procedures for evaluating consulting firms' and individual consultants' performance. Also read PAI 2.06 and PAI 5.09, which provide guidelines on supervising consulting services contracts, including handling consultants' performance problems; and PAI 6.08 (Appendix 2, para. 4), which provides guidelines on preparing technical assistance (TA) completion reports.

### B. Consulting Firms

#### a) Policy

2. After a consulting firm contracted by ADB completes an assignment (upon submission of the final report), the user unit evaluates the consultant's performance. This requirement applies to all the consulting firms ADB recruits for TA and staff consulting assignments.

#### b) Preparatory Actions

3. During contract negotiations with a consulting firm, the Procurement, Portfolio and Financial Management Department (PPFD) gives the consultant a copy of ADB's performance evaluation report (PER) form (see Appendix 1) and a post assignment questionnaire (PAQ) (see Appendix 2) for reference. Completion of the PAQ by the consultant shall be done through the ADB Consultant Management System (CMS) at the end of their assignment by accessing the URL link in the corresponding e-mail notification. Thereupon, the completed PAQ will be automatically forwarded to PPFD. The PPFD officer chairing the negotiation explains the evaluation procedures to the consultant. When the contract negotiations are conducted through correspondence, a copy of the forms is sent via courier together with the signed contract. This is important, since it puts the evaluation in context and may include factors that will affect the overall rating.

#### c) Procedures for Evaluation by ADB

4. The CMS-PER enables the user unit officer to commence online recording of the consultant's performance at anytime during the assignment period. The user unit should complete the evaluation of the consultant's performance within 2 months from the date on which: (i) the consultant submits the final report as scheduled in ADB's TA Information System (TAIS)<sup>1</sup>; or (ii) or ADB terminates the consultant's contract. Any expert replaced during the assignment period because of unsatisfactory performance will require detailed evaluation within 2 months from the replacement date using the PER form for individual consultants. If the assignment will last 12 months or more, the consultant's performance should also be evaluated at the midpoint of the services. PERs not evaluated at the end of the 2-month period will be automatically classified as 'Not Rated.' Once a PER is classified as "Not Rated," the PER rating cannot be changed.

5. At the expected date of the final report submission or at the midpoint of an assignment lasting for 18 months or more, the CMS-PER system sends an e-mail message to the staff member indicated as the user unit officer in PPFD's records. The message includes guidelines for completing the evaluation with a link to the PER URL. PPFD also provides an electronic copy of the form in the "Consulting Services

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<sup>1</sup> The user unit is required to ensure that TAIS is updated to reflect all current due dates for consultant reports and other deliverables.

Reference” database in Lotus Notes and in the PPFDP portal in the intranet, and on the ADB website as reference documents (see Appendix 1). If the staff member who receives the e-mail message is not the current user unit officer, the staff member may re-assign it to the officer concerned (the evaluator).

6. The evaluator, in preparing the report, seeks comments from other ADB staff who were involved in the implementation of the consultant's services and, if the assignment involves an executing agency (EA) in one of the ADB's developing member countries, the evaluator seeks comments from the EA on the consultant's performance.

7. The evaluator completes the evaluation form by choosing one of five ratings (excellent, satisfactory, generally satisfactory, unsatisfactory, or not applicable) for each performance criterion. In doing so, the evaluator refers to the narrative descriptions of the performance criteria shown in Appendix 3. If some criteria do not apply accurately to the assignment, a 'not applicable' rating may be given.

8. The evaluator first evaluates the consultant's overall performance in the Firm/Organization Tab of the form (Appendix 1). All the factors that affected the overall performance, including the extent to which the consultant achieved the assignment's objectives, completed the terms of reference, and complied with its other contractual obligations; the experts' field performance and behavior; and the amount of assistance the EA provided are considered.

9. Next, the evaluator explains his/her ratings in the "Comments" column for each criterion of the form, particularly any ratings that are less than satisfactory (i.e. generally satisfactory, or unsatisfactory) or for a not applicable rating. The explanations are mandatory before the evaluator can proceed to the next step of the process. It is also important because, if ADB later finds the firm's overall performance to be unsatisfactory, it will use the PER to support any restrictions it imposes or other action it takes against the consultant.

10. Third, the evaluator evaluates each individual core/ key expert, international and national, in the Team Members Tab of the form. The evaluator has to evaluate the team leader and team members who were identified as core/ key experts in the contract and who made significant contributions. Any expert with unsatisfactory rating will require detailed evaluation using the PER form for individual consultants.

11. After the evaluator completes the PER form, it should be forwarded to the user unit director for endorsement to complete the process. Unendorsed PERs will be classified as 'Not Rated' if the director objects to the rating given by the evaluator and fails to ensure that an amended PER form has been completed and re-submitted by the evaluator within 30 days of expiry of the applicable 2-month period. In cases where the director fails to endorse the PER rating given by the evaluator within the specified period, such rating will be deemed final and included for PER purposes. PPFDP will record cases where directors have failed to endorse or have objected to PER ratings and periodically update the user department head concerned. Completed PERs will be forwarded to PPFDP.

12. PPFDP reviews the PER and decides whether follow-up action with the consultant is needed. Follow-up action is always taken when the consultant's overall performance and/or any expert is rated unsatisfactory. When PPFDP decides to take follow-up action, the concerned PPFDP director, after consulting with the user unit director, writes to the consultant listing the weaknesses identified in the PER and invites the consultant to comment. The consultant is given 21 days to reply in writing to PPFDP.

13. After PPFDP receives the consultant's reply, a special consultant selection committee (SCSC) meeting reviews the PER; the consultant's comments; and past PERs, if any. The SCSC is chaired by the concerned PPFDP director (or a PPFDP professional staff representing him/her) as chairperson, the concerned user director or the user unit officer (evaluator) who coordinated the performance evaluation, and another user unit director (or his/her designated professional staff) chosen from a roster that PPFDP

maintains. The third member usually has a background in a similar technical area as the user unit officer. If deemed necessary, the chairperson may invite a representative from the Office of the General Counsel to attend the SCSC meeting as an observer to provide legal advice, if required.

14. Depending on the circumstances, the SCSC may decide that the proposed suspension will stand or will be modified. If the proposed suspension will stand, the SCSC will next decide whether ADB will exclude the consultant and/or any of the individual experts in the consultant's team from short-listings for ADB-financed assignments for a specified period effective from the date of the SCSC meeting. The SCSC follows PPFD's latest "Guidelines on Unsatisfactory Rating and Suspension of Consultants" (which is shared with committee members prior to the meeting) in deciding whether to suspend a consultant and for how long the suspension should last. The SCSC's decision is final, and PPFD advises the consultant in writing of the decision. If the SCSC decides to exclude the consultant and/or any of the individual experts from short-listings for ADB-financed assignments, the Director General, PPFD signs the letter to the consultant. Otherwise, the concerned PPFD director signs the letter.

15. PPFD maintains the files on the consultant's and its experts' performance evaluation. When a consultant or any of its experts is proposed for a short list by an EA or ADB, or if a consultant or any of its experts is included in a winning firm's technical proposal, PPFD confers its files on performance evaluation for the purpose of taking into account in the evaluation process the performance evaluation ratings of the consultant or its experts within the last five (5) years, as well as to determine whether or not the consultant or any of its experts is under a suspension to undertake a contract with ADB.

### **C. Individual Consultants**

#### **a) Policy**

16. After an individual consultant contracted by ADB completes an assignment (contract termination date), the user unit evaluates the consultant's performance. This requirement applies to all the individual consultants ADB recruits for TA, staff, training, and resource person assignments.

#### **b) Post Assignment Questionnaire**

17. Completion of the PAQ (see Appendix 4) by the consultant shall be done through the CMS portal at the end of their assignment by accessing the URL link in the corresponding e-mail notification. Thereupon, the completed PAQ will be automatically forwarded to PPFD.

#### **c) Procedures for Evaluations by ADB**

18. The CMS-PER enables the user unit officer to commence online recording of the consultant's performance at anytime during the assignment period. The user unit should complete evaluation of the consultant's performance within 2 months from the contract termination date or from the date ADB terminates the consultant's contract. If the assignment will last 12 months or more, the consultant's performance is also evaluated at the midpoint of the services. PERs not evaluated at the end of the 2-month period will be automatically classified as 'Not Rated.' Once a PER is classified as "Not Rated," the PER rating cannot be changed.

19. At contract termination or cancellation date or at the midpoint of an assignment lasting for 12 months or more, the CMS-PER system sends an e-mail message to the staff member who originally requested PPFD to recruit the consultant. The message includes guidelines for completing the evaluation with a link to the PER URL. PPFD also provides an electronic copy of the form in the "Consulting Services Reference" database in Lotus Notes and in the PPFD portal in the intranet, and on the ADB website as

reference document (see Appendix 5) If the staff member who receives the e-mail message is not the current user unit officer, the staff member may re-assign it to the concerned officer (the evaluator).

20. The evaluator, in preparing the report, seeks comments from other ADB staff who were involved in the implementation of the consultant's services. If the assignment is under a TA with an EA, the evaluator seeks comments from the EA on the consultant's performance.

21. The evaluator completes the PER form by choosing one of five ratings (excellent, satisfactory, generally satisfactory, unsatisfactory, or not applicable) for each performance criterion. In so doing, the evaluator refers to the narrative descriptions of the performance criteria shown in Appendix 6. If some criteria do not apply accurately to the assignment, a 'not applicable' rating may be given. In cases when there is an additional criterion to be included, the evaluator may specify this under the "Others" criterion section.

22. The evaluator explains his/her ratings in the "Comments" column for each criterion of the form, particularly any ratings that are less than satisfactory (i.e. generally satisfactory, or unsatisfactory) and not applicable. The explanations are mandatory before the evaluator can proceed to the next step of the process. It is also important because, if ADB later finds the consultant's overall performance to be unsatisfactory, it will use the PER to support any restrictions it imposes or other action it takes against the consultant.

23. After the evaluator completes the PER form, it should be forwarded to the user unit director for endorsement to complete the process. Unendorsed PERs will be classified as 'Not Rated' if the director objects to the rating given by the evaluator and fails to ensure that an amended PER form has been completed and re-submitted by the evaluator within 30 days of expiry of the 2-month period; in cases where the director fails to endorse the PER rating given by the evaluator within the specified period, such rating will be deemed final and included for PER purposes. PPFD will record cases where directors have failed to endorse or have objected to PER ratings and periodically update the user department head concerned. Completed PERs will be forwarded to PPFD.

24. PPFD reviews the PER and decides whether follow-up action with the consultant is needed. Follow-up action is always needed when the consultant's overall performance is rated unsatisfactory. When PPFD decides to take follow-up action, the concerned PPFD director, after consulting with the user unit director, writes to the consultant listing the weaknesses identified in the PER and invites the consultant to comment. The consultant is given 21 days to reply in writing to PPFD.

25. After PPFD receives the consultant's reply, a SCSC meeting reviews the PER; the consultant's comments; past PERs, if any; terms of reference for the assignment and consultant's report, if applicable; and the consultant's CV. The SCSC is chaired by the concerned PPFD director (or a PPFD professional staff representing him/her) as chairperson, the concerned user director or the user unit officer who coordinated the performance evaluation, and another user unit director (or his/her designated professional staff) chosen from a roster that PPFD maintains. The third member usually has a background in a similar technical area as the user unit officer. If deemed necessary, the chairperson may invite a representative from the Office of the General Counsel to attend the SCSC meeting as an observer to provide legal advice.

26. Depending on the circumstances, the SCSC may decide that the overall performance rating will stand or will be modified. If the overall performance rating of unsatisfactory is maintained, the SCSC will next decide whether ADB will exclude the consultant from short-listings for ADB-financed assignments, for a specified period effective from the date of the SCSC meeting. The SCSC's decision is final, and PPFD advises the consultant in writing of the decision. If the SCSC decides to exclude the consultant from short-listings for ADB-financed assignments, the Director General, PPFD signs the letter to the consultant. Otherwise, the concerned PPFD director signs the letter.

27. PPFD maintains the files on the consultant's performance evaluation. When a consultant or any of its experts is proposed for a short list by an EA or ADB, or if a consultant or any of its experts is included in a winning firm's technical proposal, PPFD confers its files on performance evaluation for the purpose of taking into account in the evaluation process the performance evaluation ratings of the consultant or its experts within the last five (5) years, as well as to determine whether or not the consultant or any of its experts is under a suspension to undertake a contract with ADB.

## Part I. Consulting Entity PER Firm/Organization Tab

**Consultant Management System**

[Diagnosis](#)
[Home](#)
[Logout](#)
[Preferences](#)

**Performance Evaluation of Consulting Entity**  
 Current Status      Last Update Date      [Save](#) [Reassign](#) [Forward](#) [Back](#)

Name      CMS Number      [View Details](#)

**Project Information**  
 Project Name  
 Contract No  
 Period  
 Div/Office  
 Duration  
[Hide Project Details](#)  
 Commencement  
 Termination  
 FR Expected  
 Cancellation Date  
 Variation No.  
 Variation Date  
 Contract Amount  
 Project Officer  
 Original Duration  
[Hide Associate Firms](#)

Previous 5      Next 5

Mainframe ID Number	CMS Number	Firm Name

**Evaluation (End of Assignment)**  
☒ TIP Ratings are Excellent (E), Satisfactory (S), Generally Satisfactory (GS), Unsatisfactory (U), or Not Applicable (N/A). If you give a GS, U or N/A rating, please include a corresponding comment. Not Rated (NR) is system generated.

[Firm/Organization](#)    [Team Members](#)    [Executing Agency](#)

Criteria	Rating					Comments
	E	S	GS	U	N/A	
<b>A. Technical</b>						
1. Analysis of Background Data	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2. Appropriateness of Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
3. Initiative, Flexibility, Innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
4. Design Solutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
5. Performance on Procurement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<b>B. Economical and Financial</b>						
1. Cost Estimates Reliability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2. Economic Analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
3. Financial Analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<b>C. Project Specific</b>						
1. Technology Transfer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2. Training Functions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
3. Advisory Functions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
4. Institutional/Management Analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<b>D. Project Management</b>						
1. Understanding of Procedures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2. Adherence to Terms of References	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
3. Compliance with Work Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
4. Presentation of Results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
5. Quality of Results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
6. Personnel Stability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
7. Team Leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
8. Competence/Conduct of Experts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
9. Relations with Executing Agency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
10. Contract Administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<b>OVERALL PERFORMANCE</b>						<b>Overall Comments</b>

[Firm/Organization](#)    [Team Members](#)    [Executing Agency](#)

## Part II. Consulting Entity PER Team Member Tab

Firm/Organization   Team Members   Executing Agency									
International									
<div>Previous 1-5 Next 5</div>									
Details	Name	Position	Rating					Comments	
			E	S	GS	U	NR		
▼ Hide			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
	CMS No. Nationality	Firm Start Date						Source End Date      Remarks Duration	
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
National									
<div>Previous 1-5 Next 5</div>									
Details	Name	Position	Rating					Comments	
			E	S	GS	U	NR		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
▶ Show			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Firm/Organization   Team Members   Executing Agency									

## Part III. Consulting Entity PER Executing Agency Tab

Firm/Organization   Team Members   Executing Agency	
<b>Executing Agency Information</b>	
Agency Name	State/Region
Street Address	Country
	Postal Code
City/Town	
Principal EA Officer	
Name	Designation
<b>Narrative Comments</b>	
1. Timely supply of all data requirements	
2. Capability and enthusiasm of counterpart staff	
3. Capability and performance of supporting staff	
4. Transport arrangements	
5. Office accommodation and facilities	
6. Communication arrangements	
7. Reaction and response time to consultant's requests	
8. Supply of equipment	
Firm/Organization   Team Members   Executing Agency	

## Part IV. Consulting Entity PER Final Section

Evaluator Endorser	Date Evaluated Date Endorsed
<b>Further Team Member Evaluation</b>	
<input checked="" type="checkbox"/> <b>TIP</b> If a Team Member is replaced due to Unsatisfactory Performance please email the PER Administrator at <a href="mailto:cosoper@adb.org">cosoper@adb.org</a> to request for creation of Individual PER for your evaluation.	
<div><div></div><div></div></div>	<div>Create Individual PER</div>
<b>Comments</b>	
<input checked="" type="checkbox"/> <b>TIP</b> When returning or reassigning this PER, please include a corresponding workflow comment.	
<div></div>	
<a href="#">▶ Process History</a>	
<div>Save Reassign Forward Back</div>	

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ADB

Consultant Management System

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[Diagnosics](#)

[Notification](#)
[Profile Management](#)
[PAQ](#)

Post Assignment Questionnaire

Current Status

Last Update Date

NOTE: Save your data every 15 minutes to avoid losing your changes.

Save

Submit to ADB

Back

Name

CMS Number

Project Information

Project Name

Contract Number

Position

Period

Dir/Office

Category

Duration

I. Background Information

TIP: If you answered "Inadequate" in any of the following items, please elaborate in the box provided.

1. Supplied by ADB

Adequate

Inadequate

2. Available Locally

Adequate

Inadequate

3. What other preparatory action do you think may have been possible or helpful in this case?

II. Support Received During Implementation

TIP: If you answered "Inadequate" in any of the following items, please elaborate in the box provided.

1. Access to Information

Adequate

Inadequate

Not Applicable

2. Counterpart Staff

a. Training

Adequate

Inadequate

Not Applicable

b. Experience

Adequate

Inadequate

Not Applicable

c. Time spent

Adequate

Inadequate

Not Applicable

3. Decision-making by Local Authorities

Adequate

Inadequate

Not Applicable

4. Guidance from ADB Staff

Adequate

Inadequate

Not Applicable

5. Office accommodation

Adequate

Inadequate

Not Applicable

6. Transport facilities

Adequate

Inadequate

Not Applicable

7. Communications

Adequate

Inadequate

Not Applicable

III. Clarity of Terms of Reference and Overall Objectives of the Assignment

TIP: If you answered "Needed further elaboration", please elaborate in the box provided.

Was very clear

Was sufficient

Needed further elaboration

IV. Other actions, if taken, that may have facilitated the assignment

V. General Comments (if any)

Workflow Comments

TIP: When returning this PAQ, please include a corresponding workflow comment.

No results found.

Show Process History

Save

Submit to ADB

Back

## **NARRATIVE DESCRIPTIONS OF THE PERFORMANCE EVALUATION CRITERIA**

### **A. Technical**

#### **1. Analysis of Background Data**

Did the consultant collect all the relevant background data, organize them properly, and analyze them with sufficient depth? Did the consultant consider all the available data, or did it omit or overlook some? Did the consultant competently investigate all the necessary issues and produce usable results? Did the consultant establish the integrity of the data it assembled? Were the consultant's assumptions realistic and satisfactory?

#### **2. Appropriateness of Methodology**

Was the consultant's methodology or proposed methodology appropriate or too sophisticated? Did the methodology recognize the local people's abilities and standards?

#### **3. Initiative, Flexibility, Innovation**

Did the consultant demonstrate initiative when dealing with problems and flexible methods of obtaining data and analyzing incomplete data? Give a higher rating if the consultant showed innovation in carrying out the assignment, analyzing data that were not readily available, simplifying the design, increasing the project's benefits, or reducing the costs.

#### **4. Design Solutions**

Did the consultant's design solutions show a proper appreciation of the methods, materials, and equipment available to, and used by, local contractors? Consider the technical competence of the contractors.

#### **5. Performance on Procurement**

Were the consultant's tender documents simple and comprehensive? Were the specifications adequate and fair to all the prospective bidders? Were the evaluation criteria appropriate for thorough and equitable bid evaluations?

### **B. Economic and Financial**

#### **1. Cost Estimates Reliability**

Were the consultant's cost data accurate and comprehensive? Did the consultant identify and state the local allowances, charges, and taxes? Were the costs estimated or actual? Did the consultant state the sources and dates of the data?

#### **2. Economic Analysis**

Was the consultant's economic analysis comprehensive and was the standard satisfactory? Did the consultant properly assess all the benefit and cost streams and include all the relevant items?

### **3. Financial Analysis**

Assess the quality and completeness of the consultant's analysis. Did the consultant include all the investment and operating charges? Did the financial analysis develop any questions for the economic analysis? If the consultant studied tariffs and prepared recommendations, were they soundly based?

#### **C. Project Specific**

##### **1. Technology Transfer**

Did the consultant effectively transfer all the required technology, including any required manuals, hardware, and software, to the counterpart staff and executing agency? Did the consultant fully explain all the methodologies, and was the transfer untied?

##### **2. Training Functions**

Did the consultant fully train the counterpart staff as required in the terms of reference? Did the consultant assess and evaluate the training to gauge its success? Were the counterpart staff fully competent and capable of operating any system or program the consultant transferred?

##### **3. Advisory Functions**

Was the consultant's advice practical, appropriate and effective? Did the executing agency accept it?

##### **4. Institutional/Management Analysis**

Did the consultant adequately consider all the relevant factors, including local protocols and sensitivities, and develop practical solutions to problems? Give a lower rating if the consultant only adapted practices from elsewhere.

#### **D. Project Management**

##### **1. Understanding of Procedures**

Did the consultant adequately understand ADB's and the executing agency's procedures? Did it handle all the correspondence, reports, claims, and other procedural matters in a timely manner?

##### **2. Adherence to Terms of Reference**

Did the consultant fully comply with all of the terms of reference or only with some of them?

##### **3. Compliance with Work Program**

Did the consultant complete all the tasks and achieve all the deadlines in the work program? Did the consultant give sound reasons for any deviations? Give a lower rating for erratic programming.

**4. Presentation of Results**

Were the consultant's reports written in clear, succinct English and free of jargon? Were they grammatically and mathematically correct? Were they adequately organized and properly indexed?

**5. Quality of Reports**

Were the consultant's reports comprehensive, logical, and persuasive? Were the reports useful, e.g., for a project preparatory TA assignment, did the final report enable ADB staff to proceed directly to project appraisal?

**6. Personnel Stability**

Did the consultant give adequate reasons for personnel changes, such as long-term illness or death?

**7. Team Leadership**

Was the team leader's leadership effective? Was the team cohesive, cooperative, and productive?

**8. Competence/Conduct of Experts**

Summarize your evaluations of the experts in Part III of the form. You may omit less important team members if you are not familiar with them.

**9. Relations with Executing Agency**

Were the consultant's relations with the executing agency cordial and cooperative, resulting in good working arrangements and supply of data, frank exchanges of views, and open discussions of sensitive issues?

**10. Contract Administration**

Did the consultant ask for too many variations or variations that were too expensive? Did the consultant justify its requests for contract variations? Give a lower rating if the consultant, rather than ADB, proposed to vary the work plan.

ADB

Consultant Management System

[Home](#)
[Logout](#)
[Preferences](#)
[Diagnosis](#)

[Notification](#)
[Profile Management](#)
[PAQ](#)

Post Assignment Questionnaire

Current Status

Last Update Date

NOTE: Save your data every 15 minutes to avoid losing your changes.

Save

Submit to ADB

Back

Name

CMS Number

Project Information

Project Name

Contract Number

Position

Period

Div/Office

Category

Duration

I. Background Information

TIP If you answered "Inadequate" in any of the following items, please elaborate in the box provided.

1. Supplied by ADB

Adequate

Inadequate

2. Available Locally

Adequate

Inadequate

3. What other preparatory action do you think may have been possible or helpful in this case?

II. Support Received During Implementation

TIP If you answered "Inadequate" in any of the following items, please elaborate in the box provided.

1. Access to Information

Adequate

Inadequate

Not Applicable

2. Counterpart Staff

a. Training

Adequate

Inadequate

Not Applicable

b. Experience

Adequate

Inadequate

Not Applicable

c. Time spent

Adequate

Inadequate

Not Applicable

3. Decision-making by Local Authorities

Adequate

Inadequate

Not Applicable

4. Guidance from ADB Staff

Adequate

Inadequate

Not Applicable

5. Office accommodation

Adequate

Inadequate

Not Applicable

6. Transport facilities

Adequate

Inadequate

Not Applicable

7. Communications

Adequate

Inadequate

Not Applicable

III. Clarity of Terms of Reference and Overall Objectives of the Assignment

TIP If you answered "Needed further elaboration", please elaborate in the box provided.

Was very clear

Was sufficient

Needed further elaboration

IV. Other actions, if taken, that may have facilitated the assignment

V. General Comments (if any)

Workflow Comments

TIP When returning this PAQ, please include a corresponding workflow comment.

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**Performance Evaluation of Individual Consultant**

Current Status:      Last Update Date:     
 

Save   Reassign   Forward   Back

Name:      CMS Number:      [View Details](#)

**Project Information**

Project Name  
 Contract No  
 Position  
 Period

Div/Office  
 Category  
 Duration

[Hide Project Details](#)

Commencement  
 Termination  
 Cancellation Date  
 Contract Amount

Variation No  
 Variation Date  
 Project Officer  
 Original Duration

**Evaluation (End of Assignment)**

☒ **TIP** Ratings are Excellent (E), Satisfactory (S), Generally Satisfactory (GS), Unsatisfactory (U), or Not Applicable (N/A). If you give a GS, U or N/A rating, please include a corresponding comment. Not Rated (NR) is system generated.

Criteria	Rating					Comments
	E	S	GS	U	N/A	
1. Practical knowledge of and experience in the field concerned	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2. Ability to adapt knowledge and experience to assigned tasks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
3. Initiative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
4. Productivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
5. Ability to work with others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
6. Adherence to Bank's and Executing Agency's working regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
7. Quality of work completed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
8. Others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Overall Comments						
<b>OVERALL PERFORMANCE</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Evaluator:      Date Evaluated:

**Comments**

☒ **TIP** When returning or reassigning this PER, please include a corresponding workflow comment

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## **NARRATIVE DESCRIPTIONS OF THE PERFORMANCE EVALUATION CRITERIA**

### **1. Practical Knowledge of and Experience in the Field Concerned**

Did the consultant demonstrate practical knowledge and experience in the claimed areas of expertise? Were gaps apparent in the consultant's knowledge, or did the consultant lack experience in one or more areas? Did the consultant demonstrate a professional appreciation of the problems that arose?

### **2. Ability to Adapt Knowledge and Experience to Assigned Tasks**

Did the consultant thoroughly investigate, understand, analyze, and report on all the aspects of the assignment? Were the ADB staff involved confident that the consultant would competently complete the assignment?

### **3. Initiative**

Did the consultant propose any sound innovations? Was the consultant's method of searching for data practical? Did the consultant need more or less assistance than usual with the arrangements?

### **4. Productivity**

Did the consultant complete all the tasks in the terms of reference? Were the consultant's tables, calculations, and other written outputs complete?

### **5. Ability to Work with Others**

Did the consultant maintain cordial relations with ADB staff and counterpart officials? While on mission, did the consultant work cooperatively with the group? Did the consultant respect the local culture?

### **6. Adherence to ADB's and Executing Agency's Working Regulations**

Did the consultant work within ADB's and the executing agency's normal procedures and regulations?

### **7. Quality of Work Completed**

Assess whether the quality of the consultant's outputs was fully satisfactory. Was the consultant's report or contribution to the team's report well organized, clearly and simply written, without jargon? Did the consultant present his/her conclusions logically and convincingly, with adequate references? Were the consultant's inputs and outputs complete, covering all the requirements in the terms of reference? Did the consultant's report cover all the issues raised?