REFERENCE FORM

Client References: Offeror is required to fill out Section 1 for a minimum of three (3) references to customers who received services similar to those called out in this RFP. Offeror shall then complete Section 2 for each reference and email to referenced customer to complete Section 3.

Section 1. To be completed by the Offeror and submitted with offer.

Customer Name #1: _____
Address: _____
Reference Name: _____
Current Phone: _____

Customer Name #2: _____
Address: _____
Reference Name: _____
Current Phone: _____

Customer Name #3: _____
Address: _____
Reference Name: _____
Current Phone: _____

Customer Name #4: _____
Address: _____
Reference Name: _____
Current Phone: _____

Customer Name #5: _____
Address: _____
Reference Name: _____
Current Phone: _____

The State may contact all of the references listed to inquire about Offeror's equipment, services, performance, and degree of customer satisfaction. Full points for references will not be awarded unless Section 2 and 3 are emailed from referenced customers in accordance with Section 3.8.10

Section 2. To be completed by the Contractor – Offeror or Sub-contractor

Contractor Name:	Contractor Contact/Name:
Project Dates:	Contractor Contact Phone:
Customer Organization:	Customer Contact Name:
	Customer Phone:
Customer Address:	Customer Fax:
Operating Budget of Organization:	
Project included implementation in which of the following procurement categories (Check all that apply): ☐ Equipment Acquisition ☐ Equipment Installation ☐ Solicitation and Award ☐ Project Management ☐ Completion & Closeout ☐ Other Services	
Project included implementation of procurement categories listed above in a government and/or education organization: ☐ Yes ☐ No	
Scope of Project:	
Number of employees staffed for this project:	
Total One-Time Cost of Project (Estimated/Actual):	

Reason for Change in Total One-Time Cost of Project, if applicable:				
Scope of Contractor/Offeror's Involvement in this project:				
Number of employees Contractor/Offeror staffed for this project:				
Original Value of Contractor/Offeror's Contract:		Actual Total Contract Value:		
Reason(s) for Change in Value:				
Estimated Start & Completion Dates:	From:	Click here to enter a date.	To:	Click here to enter a date.
Actual Start & Completion Dates:	From:	Click here to enter a date.	To:	Click here to enter a date.
Reason(s) for Difference Between Estimated and Actual Dates:				

Section 3. To be completed by the Customer Organization

[This section is an example only. Adjust to your requirements]

Contractor Name (maybe subcontractor to Offeror):

Customer Organization:
Contractor Name:

Customer Organization:

A. Validation of Referenced Project Data Provided by Offeror in Section 2

Comments from the Customer Organization

B. Past Performance Reference

RATING GUIDELINES

Selection	Rating
5	Significantly exceeded your expectations.
4	Somewhat exceeded your expectations.
3	Met your expectations.
2	Somewhat below your expectations.
1	Significantly below your expectations.

Please explain ratings of 1, 2, or N/A in the Comments section below.

Criteria	Rating	Not Applicable
1. The Contractor provided sufficient project resources with appropriate skill sets to meet all project goals and objectives.	Choose an item.	☐
2. The Contractor effectively managed its project staff to achieve project goals and objectives.	Choose an item.	☐
3. The Contractor met all required tasks and deliverables timely and satisfactorily.	Choose an item.	☐
4. The Contractor provided effective training and knowledge transfer to meet project goals.	Choose an item.	☐
5. The Contractor satisfactorily managed project scope and risk to adhere to project schedule, control costs, and meet project goals.	Choose an item.	☐
6. The Contractor provided effective post-implementation maintenance and operations support.	Choose an item.	☐

Comments:
For Criteria with Ratings of 1, 2, or N/A:
General Comments:

As a representative of the Customer Organization listed above, I approved the responses to the previous statements about the performance of the Contractor listed above on the project identified in Section 2 of this Offeror Experience Reference Form.	
Printed Name:	Printed Title:
Signature:	Date: