APPENDIX 56

REFERENCE CHECK FORM (SAMPLE)

For [Title of Solicitation]: ______________________________________________________________

Respondent Name: _________________________________________________________________

Company to be contacted as a Reference: _______________________________________________

Name and Title of Designated Reference: ______________________________________________

Contact Number for Designated Reference: _____________________________________________

Point of Contact Information for Individual Responding to Reference Check, if different than Point of Contact Designated in the Response: _______________________________________

Introduction:

Hello, my name is [caller’s name] with [agency name]. We are currently evaluating vendor proposals for [solicitation title] and checking vendor references. Your name and number were provided to us as a reference for [vendor name]. Do you have a few minutes to answer some questions?

Questions:

1. Has the vendor provided [description of products/services] to your organization in the past 3 years?
   [ ] Yes   [ ] No

2. How long has the vendor provided [description of products/services] to your organization?

3. What is the approximate annual value of the vendor’s contract? _________________

4. Did the vendor stay within budget?
   [ ] Yes   [ ] No

5. On a rating scale of 0 to 3 – where (0) Unsatisfactory, (1) Marginally Satisfactory, (2) Satisfactory, (3) Exceeds Expectations, and (N/A) Not Applicable – please provide answers to the following questions:

   a. How satisfied was your organization with the timeliness of the vendor’s delivery of products or performance of services under the contract?

      1  2  3  NA  Declined to Respond

   b. How satisfied was your organization with the skill, knowledge, cooperativeness, and professional manner of the personnel assigned by the vendor?
c. How satisfied was your organization with the vendor’s ability to resolve problems?

| 1 | 2 | 3 | NA | Declined to Respond |

d. How satisfied was your organization with the vendor’s customer service?

| 1 | 2 | 3 | NA | Declined to Respond |

6. Overall, how satisfied was your organization with the vendor’s performance?

| 1 | 2 | 3 | NA | Declined to Respond |

7. Do you have any comments?

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

Reference check activities were unsuccessful for the following reason(s):

Designated point of contact declined to answer any questions.

Designated point of contact information provided in response was incorrect.

Designated point of contact was determined to be “unavailable” after _____ unsuccessful attempts on the following dates and times: ________________

Other: _____________________________________________________________

Reference Check Conducted By: ________________________________

Date & Time: ________________________________________________

Signature: _________________________________________________