# **Client Reference Forms**

NOTE TO AGENCIES: These forms are examples. Choose the best form for your application and tailor it to fit your needs.

**SAMPLE 1**

* A complete and separate Client Reference Form must be completed for each reference.
* Offeror must complete the first part of the Client Reference Form, filling in the information for Company (Offeror)Name, Company (Offeror) Address, and the project's name.
* The person providing the reference must sign and date the form.
* The Client Reference Form(s) must be submitted with the Offeror’s proposal.
* The State reserves the right to contact the reference to verify information provided within the Client Reference Form and the proposal. If the State finds erroneous information, points may be deducted, or the proposal may be rejected.
* If the Client Reference Form is not completed in entirety, points may be deducted, or the proposal may be rejected.
* If a proposal is submitted without a Client Reference Form, points may be deducted, or the proposal may be rejected.
* The State reserves the right to use other known references for the project other than those provided on the Client Reference Form.

**Client Reference Form**

|  |
| --- |
| **Company Name** (Offeror): |
| **Company Address** (Offeror): |
| **Name of Project:** |

**Client Information**

|  |
| --- |
| **Organization Name:** |
| **Organization Address:** |
| **Individual Providing this Reference:** |
| **Title:** |
| **Phone Number:** |
| **Email Address:** |
| **Reference Signature and Date:**  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

The person providing the reference as identified above must provided the following information. This person must be a responsible party of the organization for which the work was performed. This person should have a comprehensive knowledge about the project and the company’s (Offeror) role and responsibilities within the project.

Your response will be used as part of the Offeror’s response. A maximum of [insert points] points are available based on your ratings.

1. Briefly describe the services provided by the company identified above.
2. Rate each of the following concerning this company’s performance using the ratings from 1-5:

5-Strongly Agree/ Very Positive

4- Agree

3-Neutral

2-Disagree

1-Failed

Rating

|  |  |
| --- | --- |
|  | 1. This company ensured the project deliverables were completed on time and within the agreed budget. |
|  | 1. This company provided the appropriate resources to the project. |
|  | 1. This company was knowledgeable in providing the services. |
|  | 1. The business relationship with this company was positive and cooperative, versus negative and adversarial. |
|  | 1. The company provided open, and timely communications, and was responsive to our needs and requirements. |
|  | 1. I would choose to work with this company again. |

**Sample 2**

**Client Reference Form**

|  |
| --- |
| **Company Name** (Offeror): |
| **Company Address** (Offeror): |
| **Name of Project:** |

**Client Information**

|  |
| --- |
| **Organization Name:** |
| **Organization Address:** |
| **Individual Providing this Reference:** |
| **Title:** |
| **Phone Number:** |
| **Email Address:** |
| **Reference Signature and Date:**  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |
| --- | --- |
| Rate each of the following concerning this company’s performance using the ratings from 1-5.  5-Strongly Agree/ Very Positive, 4- Agree, 3- Neutral, 2- Disagree, 1-Failed | **Rating** |
| 1. Overall, you are very satisfied with the Offeror’s products and services. |  |
| 1. Overall, you are very satisfied with the Offeror’s staff |  |
| 1. Overall, the Offeror’s technical support unit is knowledgeable, competent, and responsive. |  |
| 1. Overall, you are very satisfied with the Offeror’s on-site training regarding operation of the installed system. |  |
| 1. The Offeror communicated issues and trouble areas early and managed them well. |  |
| 1. The Offeror implemented their system in and effective and timely manner. |  |
| 1. The Offeror implemented their system on schedule, and in accordance with the contract. |  |
| 1. The Offeror implemented their system within budget and in accordance with the contract. |  |