Conducting a reference check for service procurements is an important part of the evaluation process.  Reference checks can be **conducted through a telephone call or by a personal visit**.  The Reference Score Sheet contains **example questions**. Add, delete, or edit the questions to best fit your procurement and evaluation process. During the reference checks, an agency can obtain information on how the vendor performed for the organization, the extent and type of claims filed, problems that occurred during the contract term, how they were resolved, and the vendor’s reliability and level of professionalism.

This Reference Score Sheet template may be used with an IFB, RFP, RFQ, or RFA as it is **objectively** scored, meaning the results are simply a pass or fail score.

An agency may use this optional Procurement Reference Score Sheet template, if applicable. To customize this template for agency use, go to all fields highlighted in green, insert the requested information in place of the green field, and save the customized document to your computer.  Please note that all instructional paragraphs should be deleted from your final customized document.  If you have any questions, please contact your OPSCR contract analyst at 601-359-3422.

**ATTACHMENT [Insert Attachment Number/Letter]**

**[Insert Type of Procurement and Number] (Example: IFB Number 2019-01)**

**[Insert Type of Procurement] for [Insert Services Title]**

**Procurement Reference Score Sheet**

**TO BE COMPLETED BY AGENCY STAFF ONLY**

**Company Name:** [Insert Name of Company or Bidder or Offeror]

**Reference Name:** [Insert Name of Reference]

**Person Contacted, Title/Position:** [Insert Reference Contact Person, Title/Position]

**Date/Time Contacted:** [Insert Date/Time Contacted]

**Service From/To Dates:** [Insert Dates of Service]

|  |  |  |
| --- | --- | --- |
| Able to provide [Insert Services] services when you called? | Yes | No |
| Satisfied with the [Insert Services] services provided? If no, please explain. | Yes | No |
| Vendor easy to work with in scheduling [Insert Services] services? | Yes | No |
| Was the [Insert Services] services completed on time and within budget? | Yes | No |
| Vendor listened when you had an issue and readily offered a solution?  (If never had an issue, please check here \_\_\_.) | Yes | No |
| Would you enter into a contract with them again? | Yes | No |
| Would you recommend them? | Yes | No |

[Bidder or Offeror] must have a minimum of 6 “yes” answers on the questions above from two references (total of 12 “yes” answers) to be considered responsible and for its [bid, proposal, or qualification] to be considered.

**Score:** Pass/Fail

|  |  |  |
| --- | --- | --- |
| Do you have any business, professional or personal interest in the vendor’s organization? If yes, please explain. | Yes | No |

A “yes” to the above question may result in an automatic disqualification of the provided reference; therefore, resulting in a score of zero as responses to previous questions become null and void.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Called by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Title Date