# Bidder reference check: Email template

**Objective**: References should be checked to help determine if the top-scored bidder(s) are responsible prior to proceeding to the announcement of apparent successful bidders. References are a good way to determine the bidder’s ability to meet the solicitation requirements.

**Instructions:** Work with the sourcing team to confirm a list of questions/criteria to check via references. References can be done over the phone or via email, but via email should be the preferred and default approach. Start with the *Email Reference Template* below and modify the list of questions/criteria as applicable to your commodity.

**Email Reference Template:**

Good afternoon:

I’m the procurement coordinator for the Washington [AGENCY] and I’m making a reference check for [insert bidder name]. [insert bidder name] has submitted a bid for a competitive solicitation to procure [insert commodity/scope] and has provided your organization as a reference.

Thank you for your time and assistance. Please respond by \_\_\_\_\_\_\_\_\_\_.

**Background and scope**. Please provide the following background information about the products and/or services your organization procured from [insert bidder name].

* When did you work with this company and for how long:
* Briefly describe the type of products and/or services:
* Provided estimated value of the products and/or services:

Please provide a score and a brief explanation for each criteria below using the following scoring guide:

|  |  |  |
| --- | --- | --- |
| **Rating** | **Assessment** | **Definition** |
| 100% | Excellent | Company fully met or exceeded the requirements and business needs. |
| 75% | Good | Company fully met the requirements and the business needs, but there was room for improvement. There was a minor deficiency not in a key area. |
| 50% | Acceptable | Company sufficiently met the requirements and the business needs. There were no critical deficiencies, but products and/or services had numerous weaknesses in key areas. |
| 25% | Poor | Company only partially met the requirements and the business needs. There were critical deficiencies in key areas. |
| 0% | Unacceptable | Company did not meet the requirements and business needs. |

1. Level of communication and customer service (i.e., responsiveness and issue resolution).
	* Rating:
	* Brief explanation:
2. Invoicing accuracy and billing process.
	* Rating:
	* Brief explanation:
3. Adherence of products/services to the company’s assured specifications/qualifications:
	* Rating:
	* Brief explanation:
4. Delivery lead times:
	* Rating:
	* Brief explanation:
5. Quality of implementation planning.
	* Rating:
	* Brief explanation:
6. Adherence to project schedule and budget:
	* Rating:
	* Brief explanation:
7. System performance (i.e., performance issues, uptime).
	* Rating:
	* Brief explanation:
8. Overall satisfaction
	* Rating:
	* Brief explanation:
9. Additional Information you would like to bring to the attention of the Department of Enterprise Services about your business relationship with the bidder: