Asking for References

Which option do I choose?

Now that I’ve decided to include gathering information from references, how do I pick which option best meets my needs?

There are three ways you can receive reference information

- Example 1

Reference sends completed reference form (Attachment F) to SPC

***NOTE** – this must be done before proposal closing*

  - Pro – Reduces Agency time and effort gathering the information, puts responsibility for completion on Proposer
  - Con – Agency may not receive all reference forms prior to proposal closing

There are three ways you can receive reference information

- Example 2

Reference returns completed reference form to Proposer, Proposer submits form with Proposal

***NOTE** – this must be done before proposal closing*

  - Pro – Virtually eliminates Agency time and effort gathering the information, puts responsibility for completion on Proposer
  - Con – Risk of invalid or untruthfully obtained data

There are three ways you can receive reference information

- Example 3

SPC contact references, each reference provides input

  - Pro – Agency controls process of receiving reference information
  - Con – More Agency time and effort to gather information

So I’ve decided how I’m going to gather the reference material. Now how do I score them?

There are two ways to obtain reference scores for your RFP

- Option 1

Reference is asked questions and assigns a score

  - Pro - This option puts the responsibility for rating the Vendor on the reference entity.
  - Con - Their opinions on what they felt was important may or may not coincide with the current Agency needs or expectations.

There are two ways to obtain reference scores for your RFP

- Option 2

Reference is asked questions and Agency evaluation team assigns score

- Pro – This option allows the Agency evaluation team to determine if the comments are applicable to the current needs or expectations.
- Con – This requires the Agency evaluation team to interpret what the reference entity was trying to say and could be taken out of context.

Now I know how the scores will be obtained, what’s next?

Step 1

- **Edit section 3.4.4** with the applicable example you wish to use. Delete all other examples. Edit the wording, as needed, to meet your needs. To help ensure you get a better quality reference, try stipulating what type of position the reference must hold or have held. This can help you gain perspective on why a question was scored a particular way. It can also increase the chances of you getting a perspective that is more in line with the needs of your Agency. REMEMBER, Examples 1 and 2 require Attachment F to be submitted PRIOR to the closing date!!

NO EXCEPTIONS

Step 2

- **Edit Attachment F**. Choose Option 1 or Option 2. Edit the questions and scoring criteria to meet your needs. The simpler and quicker it is to fill out or answer, increases the chances of you getting information back. Don’t make it so easy that the information isn’t useful, though! Work with your customer to determine what questions you could ask that would provide you with meaningful answers. To help, think of asking a teenager a question. What questions would you ask that would MAKE them give you an answer other than “Ya”, “Nope”, or “Meh.”

Step 3

- **Table of Contents shows Attachment F** (if you're using it). If you've chosen to use Attachment F to list your questions, make sure that your TOC shows it as an Attachment. It's also good to go through your RFP one more time to make sure all references to Attachment F are there…. Or not, if you've decided on a different method.

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Congratulations on your reference methodology selection!

With careful planning and strategy we're sure you will be able to find the best Vendor for your Agency needs!