**Exhibit A**

**REFERENCE CHECK INSTRUCTIONS, FORM, AND SAMPLE LETTER**

**The attached Performance Evaluation Form is to be provided to the agencies or entities for which your firm has recently provided services similar to those requested for this project. Provide the evaluation form to the Owner, or the Owner’s representative directly responsible for oversight of the project to complete and include with your proposal.**

**The first three references submitted will be accepted and the scores utilized as part of the evaluation process. Each reference check is worth up to 16.6 points for a total of up to 50 points available.**

**Also attached is a sample performance evaluation cover letter that may be used when sending the reference check request.**

**Sample Contractor Performance Evaluation Cover Letter**

Sample Cover Letter

Contact Name

Address of Reference

(Your Name) is responding to a Request for Qualifications (RFQ) from the City of Phoenix Employees Retirement System (COPERS).

COPERS is requesting reference information related to our past performance. As a part of the response submittal process, COPERS is requesting performance evaluations from agencies that our firm has performed services for either in the past or is currently receiving services.

I would appreciate your cooperation in completing the attached Performance Evaluation form and return by email the completed form by **XX:XX x.m. XXXX time** on ***{Month\_\_\_\_\_\_\_ Day\_\_\_, Year\_\_\_\_}*** to:

Attention:

Contact:

Email Address:

Telephone Number:

Failure to submit the Performance Evaluation form by the above date will have a negative impact on the proposal we submit for this service. Your cooperation in submitting this form by this date is appreciated.

If you have any questions regarding this request, please contact (your name) at (your telephone number).

Sincerely,

**INSTRUCTIONS FOR COMPLETING THE PERFORMANCE EVALUATION**

Evaluate the contractor’s contract performance in each of the rating areas listed below. On the Performance Evaluation form, circle the rating from 1 to 4 that most closely matches your evaluation of the contractor’s performance. Comments are not required but appreciated. **Every rating area must be scored.**

The evaluation panel will use the information from this form to evaluate firms competing for contract award. **This completed form will become public record and upon request, will be released to the contractor or any other entity.**

Please submit the completed form to the address indicated on the bottom of the Performance Evaluation form. Thank you for your time and your cooperation.

{Project Title \_\_\_\_\_\_\_\_\_\_\_\_ and Project Number \_\_\_\_\_\_\_\_\_\_\_\_}

**PERFORMANCE EVALUATION FOR \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

(firm name)

**In the box below, provide the project title, contracted services provided by the firm, and start and completion date of services. This form is to be completed by the Owner, or the Owner’s representative directly responsible for oversight of the project. The project services evaluated must be relevant to the services of this project. Every rating area must be scored.**

|  |
| --- |
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**RATINGS: Summarize the Contractor’s performance and circle the number below that corresponds to the performance rating for each category. Please see the rating scale.**

1 = Unsatisfactory (.25 pt.); 2 = Poor (.50 pt.); 3 = Good (.75 pt.); 4 = Excellent (1.0 pt.)

|  |  |  |
| --- | --- | --- |
| HOW WOULD YOU RANK THE BUSINESS RELATIONSHIP BETWEEN THE OWNER AND THE FIRM? | 4  3  2  1 | Comments: |
| WAS THE TEAM PRESENTED IN THE PROPOSAL THE TEAM THAT WORKED ON THE PROJECT TO COMPLETION? | 4  3  2  1 | Comments: |
| WAS STAFF PROACTIVE IN SOLVING PROBLEMS THAT MAY HAVE OCCURRED ON THE PROJECT? | 4  3  2  1 | Comments: |
| WAS THE CONTRACTED SCOPE OF SERVICES COMPLETED ON TIME AND WITHIN BUDGET? | 4  3  2  1 | Comments: |
| HOW WOULD YOU RATE THE QUALITY OF WORK PERFORMED BY THIS FIRM ON YOUR PROJECT? | 4  3  2  1 | Comments: |
| DID THE FIRM RECOMMEND EFFICIENCIES OR PROVIDE INNOVATIVE IDEAS OR SUGGESTIONS? | 4  3  2  1 | Comments: |
| WOULD YOU BE WILLING TO CONTRACT WITH THIS FIRM AGAIN? (YES = 1 point) | YES  NO | Comments: |
| TOTAL SCORE |  | (MAXIMUM 50 POINTS) |

Reference Evaluation Provided By:

Name and Title: ­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency/Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email completed form by **{Month\_\_\_\_\_\_ Day\_\_, Year\_\_\_\_}** by **XX:XX x.m. XXXX time** to:

**\*EMAIL SUBJECT LINE SHOULD REFERENCE RFQ NUMBER**

**The document should reference the project number and firm for which the reference check is being submitted. If no project number is available, reference the service and firm for which the reference check is being submitted.**