



**THE NORTHWEST SEAPORT ALLIANCE
REQUEST FOR PROPOSALS
No. 070384**

**THE NORTHWEST SEAPORT ALLIANCE
STATE LOBBYING SERVICES**

Issued by
Port of Tacoma
One Sitcum Plaza
P.O. Box 1837
Tacoma, WA 98401-1837

RFP INFORMATION	
Contact:	Heather Shadko, Procurement
Email Addresses:	procurement@portoftacoma.com
Phone:	(253) 428-8697
Submittal Date	AUGUST 5, 2016 @ 2:00 PM (PST)

**PLEASE SUBMIT ALL CORRESPONDENCE AND PROPOSALS
VIA E-MAIL DIRECTLY TO THE PROCUREMENT CONTACT LISTED ABOVE
AND INCLUDE 'NWSA STATE LOBBYING SERVICES' IN THE SUBJECT LINE**

NORTHWEST SEAPORT ALLIANCE
Request for Proposals (RFP) 070384
NWSA STATE LOBBYING SERVICES

The Northwest Seaport Alliance (the Alliance) is soliciting proposals from firms qualified and interested in providing state lobbying services and strategic direction and oversight regarding issues of importance to the Alliance. The Alliance is a marine cargo operating partnership of the ports of Seattle and Tacoma. The Alliance is seeking the contract to begin October 1, 2016 for two years with one two-year options at the sole discretion of the Port, for a possible total of four years.

A. BACKGROUND

The Alliance is partnership of the ports of Seattle and Tacoma. Combined, the ports are the third-largest container gateway in North America. Regional marine cargo facilities also are a major center for bulk, breakbulk, project/heavy-lift cargoes, automobiles and trucks.

To learn more about The Northwest Seaport Alliance, visit www.nwseaportalliance.com.

The Alliance's Standard Terms and Conditions are included as Attachment B to this RFP.

By submitting a Proposal, the Proposer represents that it has carefully read and agrees to be bound by the Alliance's Standard Terms and Conditions. Identify, during the question submittal and response period, any sections you consider onerous, clarify why you consider these sections onerous, propose alternative language and describe why it is in the Alliance's best interests to adopt the alternative language.

B. SCOPE OF SERVICES

Provide strategic advice and planning in the development of a comprehensive state government affairs strategy for The Northwest Seaport Alliance, including but not limited to:

- Contribute proactive and creative suggestions for state policy and funding opportunities to advance the Alliance's Strategic Business Plan and legislative/business priorities, fully utilizing the firm's staff resources in strategic brainstorming on proactive initiatives.
- Developing implementation plans for how to advance strategic priorities.
- Assist in the drafting of legislative language.

Implement the Alliance's state government affairs strategy, including but not limited to:

- Collaborate with government relations staff to advance state priorities and interests.
- Proactively engaging with state lawmakers, staff and agencies in pursuit of the Alliance's state priorities and interests.
- Identify key legislative and state agency relationships for the Alliance and assist in creating opportunities to build and strengthen.
- Strategically contacting Washington state legislative officials and the administration, and provide notes from meetings.

Communicate regularly with the Alliance, including but not limited to:

- Regular calls with the Alliance government relations team on firm's activities in Olympia on behalf of the Alliance.
- Track key state legislation and state agency regulations relevant to the Alliance.
- Monitor and/or participate in meetings of Olympia-based port groups (e.g. Washington Public Ports Association, Association of Washington Business, etc.).

Be knowledgeable of how state activities impact the Alliance:

- Understand how state activities impact operations and competitiveness.
- Develop ability to communicate the Alliance's views with state audiences effectively and accurately both orally and in writing.
- Write correspondence for state audiences including letters, briefing materials, testimony, public comments, or other items as requested.

Conduct other work as assigned, such as assisting with meetings for Alliance officials or staff.

C. QUALIFICATIONS

The Alliance is seeking an aggressive, proactive, creative firm that has read the Alliance's Strategic Plan and who has:

- At least six years of experience representing client interests before the Legislature or serving in a senior policy staff capacity in the Legislature or state agency, or a combination thereof.

- Public sector experience.
- Maritime sector experience.
- Demonstrated ability to develop positive working relationships; the ability to communicate through modern technologies.
- General knowledge and understanding of state issues and how they may relate to the Alliance's strategic plan and goals.
- Relationships with key state decision makers of importance to the Alliance.
- Record of delivering legislative or regulatory results on behalf of clients.
- Ability to effectively advise, communicate and collaborate with the Alliance and on behalf of the Alliance.

D. DELIVERABLES:

The selected consultant will:

- Regularly (weekly unless otherwise directed) communicate in person or by phone with the Alliance's designee describing the work and activities completed on part of each of the tasks included in the Scope of Services
- Provide a semi-annual written summary that describes the work and activities completed over the last six months, with a focus on progress made towards furthering the Alliance's government affairs strategy and strategic plan.
- Make themselves available for an annual in-person briefing of the Alliance's Managing Members should it be requested.

D. PROPOSAL ELEMENTS & EVALUATION CRITERIA:

Proposals should present information in a straightforward and concise manner, while ensuring complete and detailed descriptions of the proposing team (to include the prime, key team members and major sub-consultants) and the team's ability to meet the requirements and provide the requested services of this RFP. The written proposals should be prepared in the same sequential order of proposal criteria as outlined below.

Proposals are limited to 8 numbered pages (8 ½ by 11 inch) **excluding** the cover letter, compensation information and all appendices. All pages shall be in portrait orientation with 1 inch (1") margins. Font size shall be 11 point or larger. Proposals that do not follow this format may be rejected.

The cover letter shall include the RFP Title and Number, Name, Title, Email Address, Phone Number and current Address of the submitting firm's main contact and include the following information:

- Describe any claim submitted by any client against the prime firm within the past two years related to the professional services provided by the firm or its key personnel. For purposes of this request, “claim” means a sum of money in dispute in excess of 10% of the firm’s fee for the services provided.
- Any real or perceived conflicts of interests for team members, inclusive of the prime, sub-consultants and key team members.
- The selected Consultant will be required to submit a L-1 Lobbyist Registration and a Certification Regarding Debarment, Suspension, Proposed Debarment and Other Responsibility Matters, within two (2) business days following notification of Consultant selection.

Proposals are to address, and will be evaluated upon, the following criteria:

INITIAL EVALUATION PHASE

1. Specialized Knowledge & Experience 35 PTS

Identify the proposed team (to include working titles, degrees, certificates and licenses) and demonstrate the team’s experience in performing the requested services by describing the following:

- The team’s relationships and accomplishments working with:
 - The Washington State Legislature, with an emphasis on lawmakers representing King and Pierce counties.
 - Briefly describe 1-2 examples of how the team has successfully acted to prevent an action that would have proven harmful to a client.
 - House and Senate leadership; Senate committees of Energy Environment & Telecommunications, Government Operations and Security, Rules, Trade and Economic Development, Transportation, and Ways & Means; and House committees of Appropriations, Capital Budget, Environment, Finance, Labor & Workplace Standards, Local Government, State Government, and Transportation.
 - Describe 2-3 examples of how the team has successfully advanced legislative policy through the Legislature.
 - Describe 1-2 examples of how the team has successfully secured state funding for a client project.
 - State Agencies, such as the Department of Transportation, Freight Mobility Strategic Investment Board, Department of Ecology, Department of Natural Resources and Department of Revenue.
 - Describe 1-2 past examples of how the team has successfully changed the outcome of state regulation and/or rulemaking on behalf of a client.

- Summarize the team’s relationships and accomplishments working with the various state advocacy associations of which The Northwest Seaport Alliance is a member as well as other stakeholder groups with whom the Alliance might often partner.

Resumes of the key individuals, if submitted, shall be included as an appendix and are not included in the total page count. Resumes are to be limited to one single-sided, letter-size page. Resumes exceeding this limit will not be reviewed.

2. Project Approach Narrative.....25 PTS

Outline the team’s knowledge and understanding of the key issue areas concerning The Northwest Seaport Alliance.

- What state actions do you see as most impactful to the successful execution of The Northwest Seaport Alliance’s strategic plan over the next 5 years?
- What strategy would you advise the Alliance to adopt in order to advance one goal contained in The Northwest Seaport Alliance’s strategic plan?
- Provide a list of existing clients and description of how the firm would handle any conflicts of interest that might arise between clients.

3. Communications.....15 PTS

The Alliance will evaluate the team’s ability to represent the Alliance, orally and in writing, to provide clear, concise, and accurate communications on Alliance issues to external parties, and provide effective communications to Alliance representatives on emerging issues, strategies and action plans.

- Provide two relevant sample documents showcasing your ability to both effectively communicate to external parties on the Alliance’s behalf, and effectively communicate to Alliance representatives. (The sample documents shall be included in the appendix)
 - Samples of external communications should be examples of the team’s ability to write clear, concise, and accurate testimony, letters, public comments, briefing papers, or other state communications.
 - Samples of communications to Alliance representatives should be examples of documents or updates provided to a client to keep them informed on emerging issues or other areas of the client’s concern.

4. Compensation 25 PTS

Compensation information MUST be provided separately from the proposal, in an individual document.

All rates quoted shall be:

- a) Fully burdened, including, but not limited to, per diem, administrative overhead, travel, lodging, and transportation (all direct/indirect expenses included);**
- b) Quoted in US Dollars;
- c) Full cost inclusive of sales tax and other government fees, taxes and charges; and
- d) Valid throughout the contract period unless otherwise amended and agreed to by both parties in writing.

Proposed Price & Value

- Present detailed information on the firm's proposed fee structure for the services proposed. Specify any additional fees, charges, expenses, etc. that are, or may be, billable to the Alliance.
- An estimated number of hours per month the team would work on Alliance issues.

NOTE: THE ALLIANCE RESERVES THE RIGHT TO AWARD A CONTRACT FROM THE INITIAL EVALUATION PHASE. IF THAT IS NOT POSSIBLE, THE ALLIANCE WILL INTERVIEW THE TOP THREE RANKED FIRMS AND SCORE THE REFERENCES AND INTERVIEWS AS INDICATED BELOW IN THE FINAL EVALUATION PHASE.

FINAL EVALUATION PHASE (if applicable)

5. Interviews (as requested by the Alliance).....100 PTS

If an award is not made based on the written evaluations alone, interviews may be conducted with the top-ranked proposers. Failure to participate in the interview process will result in the Proposer’s disqualification from further consideration. Travel costs will not be reimbursed for the interview.

6. References (as requested by the Alliance).....50 PTS

If an award is not made based on the written evaluations and interviews, reference checks may be performed on the selected firm. The Alliance may evaluate the reference checks to assess the proposed team’s overall performance and success of previous, similar work. Reference checks may also be utilized to validate information contained in the proposal.

ATTACHMENT A – INSTRUCTIONS FOR PROPOSING

ATTACHMENT B – PERSONAL SERVICES CONTRACT TEMPLATE & TERMS AND CONDITIONS

ATTACHMENT C – REFERENCE QUESTIONNAIRE

PROCUREMENT PROCESS

SOLICITATION TIMELINE:

Issuance of RFP	JULY 15, 2016
Last Day To Submit Questions	JULY 29, 2016
Proposal packets due	AUGUST 5, 2016 @2:00PM (PST)
Short List Consultants*	AUGUST 16, 2016
Interviews (if required)*	WEEK OF SEPTEMBER 5, 2016
Final Selection*	SEPTEMBER 12, 2016
Execute Contract*	OCTOBER 2016

*Dates are tentative.

All status updates on the above solicitation timeline will be announced on the [Port's website for this solicitation](#).

VENDOR OBLIGATION

Port of Tacoma Requests for Bids, Requests for Proposals and Requests for Qualifications can be accessed on the Port's website, www.portoftacoma.com under 'Contracts'; 'Procurements'.

When viewing the details page for this procurement on the Port's Website firms have the option of subscribing to the Holder's List.



By subscribing to the Holder's List, firms will automatically be notified when new documents or changes relating to this procurement occur.

***Only those who have subscribed to the Holder's List will receive notifications throughout the procurement process, up until a firm is selected.**

COMMUNICATION / INQUIRES

Proposers who, relative to this scope of services, contact any individuals or Commission members representing the Port, other than the Procurement Representative listed on the RFP may be disqualified from consideration.

Written questions about the meaning or intent of the Solicitation Documents shall only be submitted to the Procurement Department, procurement@portoftacoma.com (**Solicitation Name** in the subject line).

Proposers who may have questions about provisions of these documents are to email their questions by the date listed above. The Port will respond to all written questions submitted by this deadline.

ADDENDA

The Port may make changes to this Solicitation. Oral or other interpretations, clarifications or submittal instructions will be without legal effect. Any information modifying a solicitation will be furnished in a formal, written addendum. If at any time, the Port changes, revises, deletes, increases, or otherwise modifies the Solicitation, the Port will issue a written Addendum to the Solicitation. Addenda will be posted to the Port's web site and conveyed to those potential submitters who have requested to be placed on the Holder's List.

SUBMITTAL PROCESS

Proposals must be received via email on or before the date and time outlined on the front page of this RFP. Send your electronic submittal to:

procurement@portoftacoma.com.

Name of Firm, RFP Title (Subject Line)

Please submit proposal, including all appendices and compensation in separate Adobe Acrobat PDF format. Submittals need to be limited to **9 MB in total email size**. It is the Consultant's responsibility to verify the receipt of the submittal. Electronic verification will be provided upon request.

***Late proposals will not be accepted by the Port. Proposals received after the stated date and time will not be reviewed and shall be deemed non-responsive.**

All proposals submitted shall be valid and binding on the submitting firm for a period of ninety days following the Proposal submittal deadline and for any extension of time granted by the submitting firm.

EVALUATION AND AWARD PROCESS

An evaluation team will review each proposal and evaluate all responses received based upon the criteria listed herein. The Port may request clarifications or additional information, if needed. After the evaluation team individually scores each proposal, the scores are tallied and the firms are ranked based on the scores.

A selection may be made based on the proposals and initial evaluation criteria alone. Alternatively, the evaluation team may create a short list of the top ranked firms and invite the short listed firms in for interview and/or check references. Scores for reference checks and interviews will be tallied and added to the short listed firm's initial evaluation scores. Final selection will be based on reference checks and interviews.

The Port intends to select the Proposer who represents the best value to the Port and begin the negotiation and award process based on the evaluated scores.

The selected Consultant will be invited to enter into contract negotiations with the Port. Should the Port and the selected firm(s) not reach a mutual agreement, the Port will terminate negotiations and move to the next highest ranked firm and proceed with negotiations.

The Port reserves the right to accept or reject any or all information in its entirety or in part and to waive informalities and minor irregularities and to contract as the best interest of the Port may require. The Port reserves the right to reject any or all Proposals submitted as non-responsive or non-responsible.

Procedure When Only One Proposal is received

In the event that a single responsive proposal is received, the Proposer shall provide any additional data required by the Port to analyze the proposal. The Port reserves the right to reject such proposals for any reason.

GENERAL INFORMATION

News releases pertaining to this RFP, the services, or the project to which it relates, shall not be made without prior approval by, and then only in coordination with, the Port.

COSTS BORNE BY PROPOSERS

All costs incurred in the preparation of a Proposal and participation in this RFP and negotiation process shall be borne by the proposing firms.

SMALL BUSINESS AND DISADVANTAGED BUSINESS OPPORTUNITIES

The Port of Tacoma encourages participation in all of its contracts by MWBE firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation/invitation or as a subcontractor to a Bidder/Proposer. However, unless required by federal statutes, regulations, grants, or contract terms referenced in the contract documents, no preference will be included in the evaluation of bids/submittals, no minimum level of MWBE participation shall be required as a condition for receiving an award and bids/submittals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply. The selected firm will be required to show evidence of outreach.

PUBLIC DISCLOSURE

Proposals submitted under this Solicitation will be considered public documents and, with limited exceptions, will become public information and may be reviewed by appointment by anyone requesting to do so following the conclusion of the evaluation, negotiation, and award process. This process is concluded when a signed contract is completed between the Port and the selected Consultant.

If a firm considers any portion of its response to be protected under the law, the vendor shall clearly identify each such portion with words such as "CONFIDENTIAL," "PROPRIETARY" or "TRADE SECRET" on each page for which the protection is sought. If a request is made for disclosure of such portion, the Port will notify the vendor of the request and allow the vendor not less than ten (10) days to seek a protective order from the Courts or other appropriate remedy and/or waive the claimed confidentiality. Unless such protective order is obtained and provided to the Port by the stated deadline, the Port will release the requested portions of the Proposals. By submitting a response the vendor assents to the procedure outlined in this paragraph and shall have no claim against the Port on account of actions taken under such procedure.

Northwest Seaport Alliance Terms And Conditions Personal Services Agreement

In consideration of the mutual covenants, obligations, and compensation to be paid by the NWSA to Consultant, it is agreed that:

1. Key Personnel

The Consultant and/or its subconsultants' key personnel, as described in its Consultant selection submittals, shall remain assigned for the duration of the Project unless otherwise agreed to by the NWSA.

2. Relationship of the Parties

Consultant, its subconsultants and employees, is an independent Contractor. Nothing contained herein shall be deemed to create a relationship of employer and employee or of principal and agent.

3. Conflicts of Interest

Consultant warrants that it has no direct or indirect economic interest which conflicts in any manner with its performance of the services required under this Agreement. Consultant warrants that it has not retained any person to solicit this Agreement and has not agreed to pay such person any compensation or other consideration contingent upon the execution of this Agreement.

4. Compliance with Laws

Consultant agrees to comply with all local, state, tribal and federal laws and regulations applicable to the project, including building codes and permitting regulations existing at the time this Agreement was executed and those regarding employee safety, the work

place environment, and employment eligibility verifications as required by the Immigration and Naturalization Service. Consultant shall obtain all professional licenses and permits required to complete the scope of work as defined.

5. Records and other Tangibles

Until the expiration of six years after the term of this Agreement, Consultant agrees to maintain accurate records of all work done in providing services specified by the Agreement and to deliver such records to the NWSA upon termination of the Agreement or otherwise as requested by the NWSA.

6. Ownership of Work

The services to be performed by Consultant shall be deemed instruments of service for purposes of the copyright laws of the United States. The NWSA has ownership rights to the plans, specifications, and other products prepared by the Consultant. Consultant shall not be responsible for changes made in the models, programs, reports or other products by anyone other than the Consultant. Consultant shall have free right to retain, copy and use any tangible materials or information produced but only for its own internal purposes. Use of models, programs, reports or other products prepared under this Agreement for promotional purposes shall require the NWSA's prior consent.

7. Disclosure

All information developed by the Consultant and all information made available to the Consultant by the NWSA, and all analyses or opinions reached by

the Consultant shall be confidential and shall not be disclosed by the Consultant without the written consent of the NWSA.

8. Compensation

As full compensation for the performance of its obligations of this Agreement and the services to be provided, the NWSA shall pay Consultant as specified in the Agreement.

9. Payment Schedule

Consultant shall submit detailed numbered invoices showing contract number, description of work items being invoiced, title of project, total authorized, total current invoice, balance of authorization, hours, hourly rate by the 10th of the month to be paid by the end of the current month, unless other terms are agreed to by the parties.

10. Costs and Disbursements

Consultant shall pay all costs and disbursements required for the performance of its services under this Agreement.

11. Insurance - Assumption of Risk

a) As a further consideration in determining compensation amounts, the Consultant shall procure and maintain, during the life of this Agreement, such commercial general and automobile liability insurance as shall protect Consultant and any subconsultants performing work under this Agreement from claims for damages from bodily injury, including death, resulting there from as well as from claims for property damage which may arise under this Agreement, whether arising from operations conducted by the Consultant, any subconsultants, or anyone directly or indirectly employed by either of them.

b) With respect to claims other than professional liability claims, Consultant and its subconsultants agree to defend, indemnify and hold harmless the NWSA, its appointed and elective officers and its employees from and against any and all suits, claims, actions, losses, costs, penalties and damages of whatever kind and nature, including attorney fees and costs by reason of any and all claims and demands on it, its officers and employees, arising from the negligent acts, errors or omissions by the Consultant in the performance of the Consultant's professional services.

c) With respect to professional liability claims only, Consultant and its subconsultants agree to indemnify and hold harmless the NWSA, its appointed and elective officers and its employees from and against any and all suits, claims, actions, losses, costs, penalties and damages of whatever kind and nature, including attorney fees and costs by reason of any and all claims and demands on it, its officers and employees, arising from the negligent acts, errors or omissions by the Consultant in the performance of the Consultant's professional services.

12. Standard of Care

Consultant shall perform its work to conform to generally accepted professional standards. Consultant shall, without additional compensation, correct or revise any errors or omissions in such work.

13. Time

Time is of the essence in the performance by the Consultant of the services required by this Agreement.

14. Assignability

Consultant shall not assign any interest in this Agreement and shall not transfer any interest in the Agreement to any party without prior written consent of the NWSA.

15. Term of this Agreement

The effective dates of this Agreement are as specified. This Agreement may be terminated by the NWSA for cause when the NWSA deems continuation to be detrimental to its interests or for failure of the consultant to perform the services specified in the Agreement. The NWSA may terminate this Agreement at any time for government convenience in which case it shall provide notice to the Consultant and reimburse the Consultant for its costs and fees incurred prior to the notice of termination.

16. Disputes

If a dispute arises relating to this Agreement and cannot be settled

through direct discussions, the parties agree to endeavor to settle the dispute through a mediation firm acceptable to both parties, the cost of which shall be divided equally. The NWSA reserves the right to join any dispute under this Agreement with any other claim in litigation or other dispute resolution forum, and the Consultant agrees to such joinder, so that all disputes related to the project may be consolidated and resolved in one forum. Venue for any litigation shall be the Pierce County Superior Court of the state of Washington and the prevailing party shall be entitled to recover its costs and reasonable attorney's fees.

17. Extent of Agreement

This Agreement represents the entire and integrated understanding between the NWSA and Consultant and may be amended only by written instrument signed by both the NWSA and Consultant.

Attachment “A”

HOURLY RATES

**Consultant
Project Name**

Personnel

Hourly Rates

Sr. Consultant 2	\$
Sr. Consultant 1	\$
Consultant 2	\$
Consultant 1	\$
Project 2	\$

All other fees will be paid per the Port of Tacoma Terms & Conditions.

ATTACHMENT C
REFERENCES QUESTIONNAIRE

INSTRUCTIONS TO THE PROPOSER:

Proposers are allowed three (3) completed reference questionnaires. The completed references questionnaires must be from individuals, companies, or agencies with knowledge of the proposer's experience that is similar in nature to the products or services being requested by this RFP, and are within the last four (4) years from the date this RFP was issued.

If more than three (3) qualifying references are received, the first three (3) fully completed references received will be used for evaluation purposes. References will be averaged.

1. Proposers must complete the following information on page 2 of the "Reference's Response To" document before sending it to the Reference for response.

- a. Print the name of your reference (company/organization) on the "**REFERENCE NAME**" line.
- b. Print the name of your company/organization on the "**PROPOSER NAME**" line.
- c. Enter the RFP Closing date and time in Instruction 5 (see the INSTRUCTIONS block.)

2. Send the "Reference's Response To" document to your references to complete.

NOTE: It is the proposer's responsibility to follow up with their references to ensure timely receipt of all questionnaires. Proposers may e-mail the Procurement Representative prior to the RFP closing date to verify receipt of references.

**REFERENCE QUESTIONNAIRE
REFERENCE'S RESPONSE TO:
RFP Number: 070384
RFP Title: NWSA Stare Lobbying Services**

REFERENCE NAME (Company/Organization): _____

PROPOSER NAME (Company/Organization): _____ has submitted a proposal to the Port of Tacoma, provide the following services: Financial Audit Services. We've chosen you as one of our references.

INSTRUCTIONS

1. Complete **Section I. RATING** using the Rating Scale provided.
2. Complete **Section II. GENERAL INFORMATION** (*This section is for information only and will not be scored.*)
3. Complete **Section III. ACKNOWLEDGEMENT** by manually signing and dating the document. (*Reference documents must include an actual signature.*)
4. E-mail **THIS PAGE** and your completed reference document, **SECTIONS I through III** to:

Procurement: Heather Shadko

E-mail: procurement@portoftacoma.com
5. This completed document **MUST** be received no later than **August 5, 2016 @ 2:00 p.m.** (Pacific Time). Reference documents received after this time will not be considered. **References received without an actual signature will not be accepted.**
6. DO **NOT** return this document to the Proposer.
7. In addition to this document, the Port may contact references by phone for further clarification if necessary.

Section I. RATING

Using the Rating Scale provided below, rate the following numbered items by circling the appropriate number for each item:

Rating Scale

Category	Score
Poor or Inadequate Performance	0
Below Average	1 – 3
Average	4 – 6
Above Average	7 - 9
Excellent	10

Circle **ONE** number for each of the following numbered items:

1. Rate the overall quality of the firm's services:

10 9 8 7 6 5 4 3 2 1 0

2. Rate the response time of this firm:

10 9 8 7 6 5 4 3 2 1 0

3. Rate how well the agreed upon, planned schedule was consistently met and deliverables provided on time. *(This pertains to delays under the control of the firm):*

10 9 8 7 6 5 4 3 2 1 0

4. Rate the overall customer service and timeliness in responding to customer service inquiries, issues and resolutions:

10 9 8 7 6 5 4 3 2 1 0

5. Rate the knowledge of the firm's assigned staff and their ability to accomplish duties as contracted:

10 9 8 7 6 5 4 3 2 1 0

6. Rate the accuracy and timeliness of the firm's billing and/or invoices:

10 9 8 7 6 5 4 3 2 1 0

7. Rate the firm's ability to quickly and thoroughly resolve a problem related to the services provided:

10 9 8 7 6 5 4 3 2 1 0

8. Rate the firm's flexibility in meeting business requirements:

10 9 8 7 6 5 4 3 2 1 0

9. Rate the likelihood of your company/organization recommending this firm to others in the future:

10 9 8 7 6 5 4 3 2 1 0

Section II. GENERAL INFORMATION

1. Please include a brief description of the services provided by this firm for your business:

2. During what time period did the firm provide these services for your business?

Month: _____ Year: _____ to Month: _____ Year: _____

Section III. ACKNOWLEDGEMENT

I affirm to the best of my knowledge that the information I have provided is true, correct, and factual:

Signature of Reference

Date

Print Name

Title

Phone Number

Email Address