# REFERENCE QUESTIONNAIRE PACKAGE INFORMATION AND FORMS

**Instructions to Offeror/Subcontractor for sending Reference Questionnaire Forms:**

## Offerors must prepare and send a reference questionnaire package for each project listed in the Design Build Entity Qualifications Statement (DBQ). A minimum of three (3) references must reflect the experience of the Offeror and a minimum of two (2) references must reflect the experience of the design team (or, contractor if the Offeror is a design firm). For Government contracts, send to Contracting Officer or Technical Representative. For commercial references send to personnel with duties similar to those for Government contracts. It is your responsibility to follow-up and to encourage your references to send in their questionnaire. Your questionnaire package should contain the following.

Cover Letter (See attached SAMPLE)

Past Performance Evaluation Questionnaire

Complete Part 1 (To Be Completed by Firm Requesting Reference) of each Questionnaire before sending it to the individual who will be providing the reference.

**PLACE THE NAME OF THE DB ENTITY MAKING THE SUBMITTAL TO CDB AND THE CDB PROJECT NUMBER IN THE HEADER** SO THEY APPEAR ON EACH QUESTIONNAIRE PAGE

## OFFEROR SHOULD DELETE THESE INSTRUCTIONS BEFORE SENDING OUT QUESTIONNAIRES

SAMPLE TRANSMITTAL LETTER

Your Company Letterhead

Date:

To:

We have listed you as a reference for work we have performed for your firm as noted on the attached questionnaire. Our firm intends to submit a proposal under a project advertised by the Illinois Capital Development Board (CDB) for *Campus Boiler Replacements*. In accordance with CDB’s Rules and Regulations, they will evaluate our firm's past performance. Your candid response to the attached questionnaire will assist the evaluation team in this process. We understand that you have a busy schedule and your participation in this evaluation is greatly appreciated. Please complete the enclosed questionnaire as thoroughly as possible. Space is provided for comments. Under CDB Rules, your response will be available for review by the firm requesting the reference.

Please send your completed questionnaire to the following address to arrive NOT LATER THAN *Monday, May 17, 2021*.

*Brent Lance*

Email: *CDB.822-010-127@Illinois.gov*

Questionnaires should be emailed to the above address.

If you have questions regarding the attached questionnaire, or require assistance, please contact the individual named above. Thank you for your assistance.

Signature and Title

**PAST PERFORMANCE EVALUATION QUESTIONNAIRE**

Part 1 (To Be Completed by Firm Requesting Reference)

1. Name/Title, Firm Name & Address (City and State):
2. Title of Project/Contract Number: Design-Bid-Build or Design-Build
3. Description of Project for Which Reference is Requested (Include type of work/trades performed):
4. Complexity of Work: High Mid Routine
5. Location of Work:
6. Role on Project: Prime Subcontractor/Sub-consultant
7. Contract Amount:
8. Date of Award:
9. Status: Percent complete

Project Completion Date: Scheduled Actual

Part 2 (To Be Completed by Person Providing Reference)

Reference is provided by:

Company/Agency: Business Address;

Telephone Number:

Email Address: Relationship to Contract:

If the information provided in Part 1 is not accurate, please indicate and correct.

To obtain an electronic version of the form (Design-Build Reference Questionnaire) please go to the Reference Library on [www.cdb.state.il.us](http://www.cdb.state.il.us/)

Return completed questionnaire (pages 1-4) via FAX (*\*number*), or via email to *\*email address*, or forms may be mailed to: *\*Name, Address* . Mark cover sheet of fax/subject line of email/outside of envelope: Attention: Project Number *\*999-999-999* “Reference Questionnaire”

1. QUALITY OF WORK: WAS THIS EFFORT DESIGN BUILD? Yes No Evaluate performance in complying with contract requirements, quality achieved and overall technical expertise demonstrated.

Excellent Quality
Above Average Quality Average Quality

Below Average Quality

Unsuccessful or Experienced Significant Quality Problems

Remarks:

2 TIMELINESS OF PERFORMANCE:

To what extent were contract performance requirements met? Consider also such things as; contract performance period requirements; provided submittals in a timely manner; timely completion of punch-list items; timely submission of close out documents, i.e., “as builts”. Was timely and satisfactory response to warranty issues after project completion provided?

Completed Substantially Ahead of Schedule Completed on Schedule with no Time Delays

Completed on Schedule with Minor Delays Under Extenuating Circumstances OTHER (explain) Remarks:

1. **DOCUMENTATION**

To what extent were reports, submittals and other required documentation accurate, complete? Excellent Quality

Above Average Quality Average Quality

Below Average Quality

Unsuccessful or Experienced Significant Quality Problems

Remarks:

1. **COORDINATION**

How well were subcontractors, sub-consultants, suppliers, and/or the labor force managed and coordinated? Or, if firm was a subcontractor, how well did they respond to coordination efforts and work with other subs? Were there any problems and, if so, how were they handled?

Excellent
Above Average Average

Below Average Unsuccessful

Remarks:

1. **GENERAL MANAGEMENT PRACTICES**

How well managed were the firm’s general business practices? Consider such things as ; provided quality, experienced managers, technical and administrative personnel throughout the project; was promptly available when needed, and responded in a prompt and acceptable manner to resolve problems, provided accurate price proposals.

Excellent
Above Average Average

Below Average Unsuccessful Remarks:

1. **MBE/FBE PROGRAM**

Did the contractor utilize MBE/FBE subcontractor/suppliers? Were MBE/WBE goals (if any) met? Did the contractor have a good relationship with the MBE/FBE firms on the project?

Excellent
Above Average Average

Below Average Unsuccessful Not Applicable Remarks:

1. **OVERALL SAFETY PROGRAM**

How well did the contractor manage the construction as it relates to safety? Discuss any Safety issues that arose during the course of the construction.

Excellent
Above Average Average

Below Average Unsuccessful

Remarks:

1. **BUDGET**

How well did the firm conform to the project budget? Did the applicant initiate unwarranted change orders or change order requests?

Excellent
Above Average Average

Below Average Unsuccessful

Remarks:

1. **CLAIMS/LITIGATION**

Was the applicant involved in any claims or litigation surrounding the project?

Yes No *If “Yes”, please explain*

Remarks:

1. **CUSTOMER SATISFACTION:**

To what extent were the end users satisfied with: Quality? Cost? Schedule? Exceptionally Satisfied Q C S

Highly Satisfied Q C S

Satisfied Q C S

Somewhat Dissatisfied (please explain) Q C S Remarks:

If given the opportunity, would you work with this firm again? Yes No Not Sure Remarks:

OTHER REMARKS:

Use the space below to provide other information related to the contractor's performance. This may include selection of subcontractors/sub-consultants, flexibility in dealing with contract challenges, payment issues, their overall concern for the client's interest (if applicable), project awards received, etc.