

APPENDIX V
SAMPLE REFERENCE WORKSHEET

Customer References

Provide an overview/summary of your firm’s completed projects of a similar scale to HHA, implementation success rate and timelines for successful implementation. Detail past performance in terms of a demonstrated prior record of experience, successful implementation of the recommended software system(s) at agencies comparable in size, scale and mission to HHA. Identify also two prior implementations of a similar solution that were not successful or took longer or went substantially over budget and describe the reasons and lessons learned.

Not less than three (3) recent professional references from clients demonstrating that your company has provided similar systems and services (including a similar solution) as described in the “Scope of Services.” Also provide two references for a project that was not successful either because it was not completed or because it did not complete on time and on budget. Include for each reference name, address, and telephone number, description of work performed and the date completed. The contact person should be someone at a management or executive level with experience working directly with the Respondent’s project team and the challenges and successes of the project and experience with the Respondent’s post go live maintenance and support services and service levels. At least two of the references from successful projects must have used the Respondent’s services to assist substantially with data conversion and migration.

1. Agency Name:
2. Contact Name:
3. Title:
4. Contact Phone:
5. Contact Email Address:
6. Number of Public Housing Units Supported by Software System:
7. Number of Market Rate Units Supported by Software System:
8. Number of Housing Choice Voucher Units Supported by Software System:
9. Number of Waiting Lists Supported by Software System:
10. Number of RAD Units Supported by Software System:
11. Number of PBV Units Supported by Software System:
12. Number of Tax Credit Units Supported by Software System:
13. Number of Users:
14. List of Modules Implemented:
15. Project Start Date:
16. “Go Live” Date:
17. Software Release Version