

CBIC RFP

Appendix D

Offeror Information, Experience, and Reference Form

Prepared By: Office of Temporary and Disability Assistance
Division of Operations and Program Support
Bureau of Information Technology

OFFEROR or SUB-CONTRACTOR INFORMATION

1. Offeror's or Sub-Contractor's Name and Address:
2. Address of corporate headquarters if different than address provided in Item #1 above:
3. Date the firm was established:
4. Please provide the name of the firm when established, dates of name changes, and the reasons for the changes (e.g. merger, reorganization):
5. Organization type (e.g. proprietorship, partnership, corporation):
6. Nature of the business:
7. State of Incorporation:
8. Name(s) and Title(s) for corporate officers/directors, executive and division managers:
9. Federal Employer Tax ID Number:
10. Complete the Experience & Reference Information Template provided below for each engagement or project that will support the Offeror's or the Sub-contractor's prior experience which meets or exceeds the experience requirements specified in this RFP.

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OFFEROR OR SUB-CONTRACTOR
EXPERIENCE & REFERENCE TEMPLATE**

Complete this template for each engagement or project that will demonstrate the Offeror's or Sub-contractor's prior experience.

a. Provide the Name of the Engagement or Project:
b. Provide the Beginning and End Dates of the Engagement or Project:
c. Provide the Name of the Client Company:
d. Provide a detailed description of the nature of the Engagement or Project. The description must include the size and scope of the engagement or project.
In addition, please provide details on the following:
1. Total volume of cards produced for this customer. Include monthly or daily volumes as they relate to the delivery schedule.
2. What percentage of cards produced were photo cards?
3. Delivery schedule (monthly, daily etc.) and required timeframes.
4. Delivery method (mailed, OTC etc.).
5. Hardware and software used to produce cards.
6. Medium by which card-specific data was communicated from the customer to your company.
7. Were cards produced financial transaction cards (debit, credit, or EBT) and required to conform to all appropriate ISO standard 7813?
8. Did you maintain and administer a database for this customer?
9. Describe inventory control procedures.
10. Did you maintain an administrative system for this customer?
11. Did you handle returned mail for this customer? If so, how was that handled?
e. Describe the services the Offeror provided to the client company for this Engagement or Project:

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REFERENCE CONTACT INFORMATION

The contact person provided in this section must be currently employed with the Client Company. He/she cannot be employed by the Offeror.

The Offeror is responsible for ensuring that all the addresses and telephone numbers for the Reference Contact Person are current and that the Reference Contact Person provided is available and willing to provide prompt response to OTDA inquiries.

f. Provide the Name and Title of the Client Company Reference Contact Person:

g. Provide the Address for the Client Company Reference Contact Person:

h. Provide the Telephone Number for the Client Company Contact:

i. Provide the Email Address for the Client Company Contact:
