

## QUESTIONNAIRE – SERVICES

This form must be completed by the subject matter expert and submitted with the Request/DA1.

*Please use as much space as you need to provide full, detailed information.*

Agency	
Purchasing Representative	(name and email)
Subject Matter Expert(s)	(name and email)
Services Being Purchased	
Suggested Solicitation Type	(RFQ, ITB, RFP or ITN)

### Section 1 – Background

1. Provide a short description of the services to be purchased.
2. What is the problem you are seeking to solve with this contract? What is the desired outcome of this solicitation?
3. Have you purchased these types of services before? If so: When? Any lessons learned? Vendors? Please provide previous solicitation and contract number.
4. What information do you have about the industry?
  - a. Is the vendor pool small or large/ local or national?
  - b. What prices are other government entities paying for these services? (Suggest checking against contract pricing in Ada County, State of Utah, NASPO ValuePoint, and other government entities).
  - c. What is the typical implementation time for these services?
5. What is the agency's desired timeline for this solicitation? Are there any time constraints (e.g. deadline for funding, end date of current services, etc.)?
6. Provide the billing information for this purchase, including billing frequency, invoice/report requirements, agency contact information, etc.
7. If this purchase involves IT, did you get approval from ITS (if required)? If so, attach approval.
8. Are there any terms/acronyms that should be defined in the solicitation?
9. Are there any attachments that need to be included with the solicitation?

### Section 2 – Requirements/Evaluation

10. Attach your scope of work (or include at the end of the questionnaire)- be sure to include (at a minimum):
  - a. Service location(s)
  - b. Restrictions on when/how services can be provided
  - c. Required deliverables
  - d. Describe everything the contractor must do to meet the business needs (do not make assumptions)
  
11. What is your current budget for this purchase?
  - a. Do you anticipate any additional funding that might result in the agency wishing to add or enhance services?
  
  - b. Are there federal/grant funds involved?
  
  - c. Are there any restrictions on the funds (e.g. actuarial soundness, administrative costs vs. direct services, etc.)?
  
12. What criteria do you want/plan to evaluate? (Consider: What are you willing to pay more for? What will differentiate vendors? What are the agency's priorities?)
  - a. Business Information: What do you want to know about the bidding company? Do you want to require any mandatory minimum requirements? Anything else you want to evaluate about the company?
  
  - b. Organization and Staffing: What key people do you want to know about (e.g. Project Manager)? Do you want to require any mandatory minimum requirements? Anything else you want to know about the people? Are subcontractors allowed?
  
  - c. Scope of Work: (Note: questions may be developed in Jaggaer or as an attachment). What questions do you want to ask about how the vendor would accomplish the SOW? Do you want vendors to submit any samples/documents/etc.? Are there any additions or changes that you can foresee in the life of the contract?
  
  - d. Do you want to invite vendors in for oral presentations? In person or remote? (Note: agency will be required to develop evaluation criteria/scripts for oral presentations).
  
  - e. How should the cost proposal be structured?
  
13. Is there an implementation period associated with these services? Do vendors (or awarded contractors) need to submit any documents related to implementation?
  
14. What type of training is required (if any)?
  
15. Are there any reports the contractor will have to submit? To whom? At what frequency? Describe the requirements.

16. Are there any federal/state/local requirements or agency policies with which the Contractor must comply?
17. Are there any other requirements the Contractor must meet?
18. Attach any additional documents (appendices) that should be included in the solicitation.

### **Section 3- Terms and Conditions**

19. Term: What is your desired start date? Desired length of initial term? Total desired term?
20. Performance Expectations:
  - a. Are there specific performance expectations to be measured? Please describe.
  - b. How does the Agency intend to monitor the contract? Who will be responsible for contract monitoring?
21. Damages: What problems could occur if the performance expectations (or any other requirements) are not met? What will be the damage to the state? Are there any specific remedies you wish to include?
22. Insurance: What insurance types/levels should be required?
23. Other: Are there any other risks that should be addressed in the terms and conditions?

### **Miscellaneous**

24. Is there any other information you want to share?