

## QUESTIONNAIRE – SOFTWARE

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)
Software Being Purchased	
Suggested Solicitation Type	(RFQ, ITB, RFP or ITN)

### Section 1 – Background

1. Provide a short description of the software to be purchased.
2. Are you seeking an off-the-shelf solution or a customized solution? Are you seeking an on-premise solution or a software-as-a-service?
3. What problem will this software solve? What is the business need that will be met?
4. What is the desired outcome of this solicitation?
5. Have you purchased this type of software before? If so: When? Any lessons learned? Vendors? What worked well and what didn't? Please provide previous solicitation and contract number.
6. What information do you have about the industry?
  - a. Is the vendor pool small or large?
  - b. What prices are other government entities paying for this software? (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 this software?
7. What is the agency's desired timeline for this solicitation? Are there any time constraints (e.g. deadline for funding, end date of current contract, etc.)?
8. Provide the billing information for this purchase, including billing frequency, invoice/report requirements, agency contact information, etc.
9. Did you get approval from ITS? If so, attach approval.
10. Are there any terms/acronyms that should be defined in the solicitation?

## Section 2 – Requirements/Evaluation

11. Attach your technical requirements/scope of work (or include at the end of the questionnaire)- be sure to include any compatibility requirements (hardware, other software, browser requirements, etc.)
12. 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 functionality?
  - b. Are there federal/grant funds involved?
13. 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 diagrams/documents/etc.? Are there any additional features/functionality you want to consider (now or in the future)?
  - d. Do you want to invite vendors in for demonstrations? In person or remote? (Note: agency will be required to develop evaluation criteria/scripts for demonstrations).
  - e. How should the cost proposal be structured? Do you have a timeline for milestone payments?
14. Implementation:
  - a. What is the anticipated/desired implementation timeline?
  - b. Do vendors (or awarded contractors) need to submit any documents related to implementation?
  - c. Identify the agency employee responsible for working with the Contractor during implementation and describe any relevant experience (e.g. previous software implementations, project management experience, etc.)
15. What type of training is required (if any)?

16. Are there any federal/state/local requirements 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 Go Live date? Desired length of initial term? Total desired term?
20. Performance Expectations: Are there specific performance expectations to be measured?
21. Damages: What problems could occur if the performance expectations (or any other requirements) are not met (or if Go Live is delayed)? 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?