

Department of Finance & Administration Questionnaires

DFA Approach to Questionnaires



Agenda

- **Overview of the Questionnaire Process**
- **Questionnaire Types**
 - Appropriations in Previous Years
 - Reauthorizations
 - Current Year Appropriations
- **Questionnaires**
 - Grantee Responsibilities
 - State Agency Responsibilities
- **Live Demo of Questionnaire System (Qualtrics)**
- **Post-Questionnaire to Budget Upload Process**





Questionnaire Overview

- Questionnaires serve as the legal certification of need for projects
- Applies to several funding sources
 - General Fund
 - General Obligation Bonds
 - Severance Tax Bonds
- Demonstrating project readiness
- Opportunity to resolve any potential anti-donation concerns
- Must respond to questions from Infrastructure Division, Board of Finance, or legal counsel and resubmit
- If successful throughout the process, grant agreements can be expected as early as July 2025



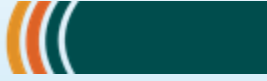


Questionnaire Types

- General Obligation Bond *in progress*
 - House Bill 308 (2024); 136 total project questionnaires
- Appropriations from previous years *due April 18th, 2025*
 - House Bill 505 (2023); 51 total project questionnaires
 - Senate Bill 275 (2024); 107 total project questionnaires
- Reauthorizations from current and previous years (*due date TBD*)
 - Senate Bill 246 (2024); 8 total project questionnaires
 - Senate Bill 425 (2025); 423 total project questionnaires*
- Appropriations from current year (*due date TBD*)
 - House Bill 450 (2025) General Fund - 1,425 total project questionnaires*
 - House Bill 450 (2025) Severance Tax Bond- 20 total project questionnaires*

*subject to enactment from Governor and/or vetoes

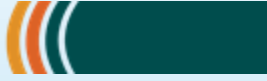




Grantee Responsibilities

- Complete questionnaires no later than the specified due date of that funding source
- Utilize resources
 - Instruction for accessing the Capital Project Questionnaire System
 - FAQs related to submitting your questionnaire
 - Instructions for the review process
 - Watch YouTube videos from State Board of Finance
- Attach lease/operating agreements (if applicable)
- Respond to questions/concerns from Infrastructure Division, Board of Finance and/or DFA legal counsel
- For current year STB's additional documentation to provide evidence of project readiness (design documents, project status (%), bid letting schedule, project certifications, possible contractor, etc.) will likely be required





State Agency Responsibilities

- Confirm receipt of questionnaire memo, links, and deadlines
- State agencies to notify their respective grantees
- Infrastructure Division and Board of Finance to review/approve questionnaires
- Follow up email to be sent for non-responsive grantees





State Agency Responsibilities (continued)

- Review lease/operating agreements, if applicable
- Review 2024 audits and determine Uniform Funding Criteria and any special conditions, if applicable
- Issue grant agreements after budget is established
- Process notice of obligations and reimbursements



Infrastructure Planning and Development Division & State Board of Finance Division



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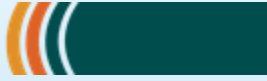
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