

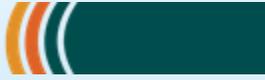
# Department of Finance & Administration Questionnaires

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## DFA Approach to Questionnaires



New Mexico  
Department of Finance  
and Administration



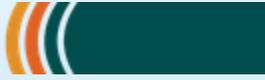
# Agenda

- **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 18<sup>th</sup>, 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\*

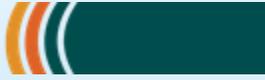
\*subject to enactment from Governor and/or vetoes





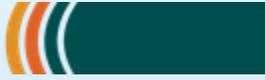
## Grantee Responsibilities

- 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

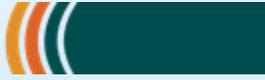
- Confirm receipt of questionnaire memo, links, and deadlines
- State agencies to notify their respective grantees
- Infrastructure Division and Board of Finance to review/approve questionnaires
- Follow up email to be sent for non-responsive grantees



## 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





# Contacts

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**ENOUGH SLIDES**



**LIVE DEMO**

