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**Procurement Needs Assessment Worksheet**

*Completing this worksheet allows your team to map out what you need to procure and why. This information can then be used to present the business case to internal stakeholders, identify outstanding questions, and gather consensus. Ultimately, your team’s answers to these questions should closely inform the solicitation for this procurement. See the reverse side for example responses.*

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| **Scope the need for this procurement** | **Explore potential solutions** | **Prepare the vendor community** |
| 1. (a) Consider your agency’s mission and the larger program of which the product or service you’re procuring will be a part. Name at least three long-term goals this program is trying to achieve.   (b) How will the product or service you’re procuring contribute to achieving these goals? | 1. (a) What strategies are you using to search for potential solutions that could bring about the results you described in question 2?   (b) Based on your search, what different approaches exist? Are there any new or innovative methods worth considering? | 1. How are you closing the information gap between your department and vendors regarding the goals you described in question 1, the desired results you listed in question 2, and the problems you identified in question 3? |
| 1. Imagine your department in the future, reflecting upon a completely successful implementation of the product or service you’re procuring. What are the most important results you’ll be celebrating? | 1. (a) How are you determining which of the solutions you identified in question 4 are most appropriate for your context and most likely to bring about the desired results? (I.e., research, evidence, stakeholder interviews.)   (b) Based on this work, what appear to be the most promising strategies? | 1. What tactics are you using to expand the number of vendors who are likely to respond to your solicitation, and also to get new ideas from existing vendors? |
| 1. Consider the product or service that’s currently in place, or the way in which your department imperfectly addresses these goals today. Name at least three things that are going well with this approach that you’d like to continue, and name at least three things that *are not* going well and need to change. | 1. How are you testing the approaches that you identified in question 5 (b), and checking your assumptions, to validate which strategies will work? |

***Example Responses*** *(for illustrative purposes only)*

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| **Scope the need for this procurement** | | **Explore potential solutions** | | **Prepare the vendor community** | | |
| 1.  (a)  (b) | *The Department of Aging’s mission is to preserve the independence, dignity, and capacity for choice of seniors in our state.*  *Program Goals:*   1. *Reduce costly ER interventions for seniors* 2. *Reduce moves into long-term residential nursing facilities* 3. *Improve the quality of life for our elderly*   *Providing short-term home-based support services for elderly individuals experiencing a crisis will help avoid emergency room visits and decrease transitions into nursing homes, thus improving quality of life.* | 4.  (a)  (b) | * *RFI to ask provider community which approaches would best support the mission articulated in Q1* * *Consulting Neighboring State X, a leader in this space, on strategies they’ve used to reduce ER visits and long-term residential care among their elderly population.* * *Neighboring State X contracts with providers to provide short-term, home-based support services for elderly individuals experiencing a crisis* * *Some approaches allow providers to make referrals to other community-based and in-home service providers* * *Other approaches have the contracted providers deliver all the services themselves.* | 7. | * *RFI prompting bidders to recommend alternative solutions to the state’s current approach.* * *Town Hall for vendors to discuss and ask questions about the agency’s priorities, vision, and current challenges.* * *Pre-bid conference for potential vendors to ask specific questions about this RFP.* * *Internal partners who are unfamiliar with this program will review the RFP in order to ensure the RFP is easy to understand and respond to.* |
| 5.  (a)  (b) | * *RFI asked providers to present compelling evidence on how their program(s) will have a meaningful and observable impact on the elderly.* * *Consulting with an academic expert about her research on promising elder care approaches.* * *Intern conducted a literature review and broad market research on elder care best practices.* * *Assess people within set geographic areas to identify all those in need, rather than only those in the ER* * *Use industry-accepted “healthy aging” indicators in risk assessments to match individuals to services* * *Use web-based platforms for enrollment and assessment to allow for ease of data use* * *Re-assess clients when they complete services* |
| 2. | *Compared to today, in three years:*   * *Reduce nursing home population by 20%* * *30% fewer preventable ER visits* * *20% improvement in “healthy aging” indicators in every district in our state* * *40% fewer complaints* | 8. | * *We designed and sent out a survey to ask providers about their experiences responding to prior state solicitations (or their decisions not to respond). Insights from this survey will inform changes to the RFP to lower barriers to responding.* * *We are organizing the scope of work into a 4 different functional components, and allowing vendors to bid on one or all of these. This will allow smaller or more specialized vendors to respond.* * *In addition to sending the RFP to a list of the current providers, we will market it on national and local list-servs for the provider associations in the elderly affairs space.* |
| 3. | *Currently going well:*   * *Collaborative data-sharing among nursing homes to track admittance & stay data* * *Well-liked marketing campaign to teach caregivers safe home practices for seniors* * *Seniors get good care in Emergency Rooms*   *Not currently going well:*   * *Elderly individuals arrive at the ER with preventable illnesses and injuries* * *Can’t identify seniors at risk for ER visits* * *Funding only used for responding to, rather than preventing, incidents* |
|  | 6. | * *“Assumption buster” exercise with agency staff to get feedback on the need is for this procurement and which approaches seem most promising.* * *A one-day meeting with vendors to do a proof-of-concept challenge where potential vendors design a better assessment algorithm, based on sample data.* |  |