EXHIBIT C
QUESTIONNAIRE

(RESPONDENT SHALL USE QUESTIONNAIRE NUMBERING IN ITS PROPOSAL)

General Questions

1. Who will serve as the primary contact for this Bid?

2. Please provide a company overview.

3. Where is your company located?

4. How long have you been in business?

5. Please provide your company's mission and/or vision statement.

6. Describe the company structure. (Private, public, partnership, etc.)

7. How many full-time, part-time, and contract employees do you have? (Please provide a breakdown)

8. What awards or recognition has your company received in the last three years?

9. Is your company affiliated with any industry or professional associations?

10. What licenses or certifications does your company hold?

11. Please provide a description and overview of your knowledge management and taxonomy consulting services.

12. Describe your plans for growth over the next 3 years.

13. Is the team available to begin the project upon award?

Customer Questions

1. What is your target customer base?

2. How many customers do you currently serve?

3. What is your customer retention rate?

4. Who are your five biggest customers?

5. What percentage of your revenue comes from the top three accounts?

6. How long is your average customer relationship?

7. Please provide contact information for three customer references.

Functionality and Deliverables Questions

1. Please indicate your ability to meet our requirements.

2. Provide a sample timeline for our outlined deliverables.

3. How are you going to develop a knowledge base implementation plan or solution architecture plan for LACERA?

4. Please provide detailed samples of past projects of how you identified and developed a taxonomy or ontology for one of your past clients.

5. What process do you use to identify and fix deficient knowledge assets?

6. Please provide samples of taxonomy governance plans or policies that you have developed for one of your clients.

Technology Questions

1. Describe your experience and involvement in a knowledge management vendor selection process.

2. Please explain how you evaluate the vendors.

3. Please provide a list of knowledge management solution vendors you have worked with previously.

Experience and Approach Questions

1. What experience do you have working with a pension plan or government entity?

2. Please provide at least three relevant case studies.

3. What resources will be dedicated to our account?

4. Provide brief biographies and project experience for primary contacts assigned to our account.

5. How often will you report our progress and results?

6. What technology do you leverage to ensure excellent customer communication and experience?

7. Provide a list of the standard report options, what each includes, and available formats.

8. How are usage and performance reports provided?

9. What KPIs do you track and report?

10. Describe your approach to continuous process improvement.

11. What methodology or research tools will you use to identify LACERA's knowledge assets.

12. How will you capture implicit/institutional knowledge?

Customer Success Questions

1. How long does it take to implement an organization wide taxonomy/ontology plan for similarly situated organizations?

2. Describe your training and onboarding process.

3. Do you provide training for development and maintenance of knowledge assets?

4. If yes, what training resources do you provide?

5. What is required from a customer to ensure success?

6. Do you have a change management process?

7. What is a successful customer journey from your perspective?

8. Do you conduct quarterly business reviews with customers?

9. How do you provide updates, track progress, and ensure our success?

10. Please provide a list of self-service tools or resources that are available after onboarding.

11. How do you manage customer requests, complaints, concerns, and feedback?

12. Do you use in-house or outsourced resources for customer support?

Pricing Questions
1. Provide a pricing estimate based on the scope described.

2. Please describe your current pricing model/methodology.

3. What are the itemized one-time, startup costs, recurring annual/monthly costs, and billing rates for key team members or classifications?

4. Please list all services and features included in the proposed pricing.

5. What limits are imposed upon users, training hours, professional services, and data storage?

6. At what level do you provide volume discounts?

7. Describe your upgrade process if we need to increase our scope.

8. What are your cancellation and renewal terms?

9. How do you ensure your pricing remains competitive?

10. If you decide to use a third-party vendor, is the cost of the third-party vendor included in your pricing estimate? Please explain and include third-party vendor costs where applicable.

Risk Management Questions

1. Regarding data and privacy, is your organization compliant with the General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA)?

2. Describe your regulatory compliance process.

3. Are you providing a SOC-2 as part of this submittal?

4. Are there any pending legal issues or complaints against your company?

5. Share statistics about technology stability/reliability and downtime.

6. Please provide your business continuity and emergency preparedness plan.

7. How often does the company update and test the continuity and preparedness plans?

8. Is your organization equipped to work remotely?

9. How do you manage price volatility with your suppliers?

10. Describe your approach to staff retention.

11. What is the average turnover rate for the last five years?