

OSD presents...



# Back to Basics

Serving Public Buyers and Vendors of the Commonwealth of Massachusetts  
*A streamlined approach to OSD Policies and Procedures*



# Agenda

Background

Why Back to Basics?

The **New** OSD Best Value Procurement and Procedure Handbook

Policy and Procedure

Revised RFR Templates and Related Forms

Demonstration of the New Online Handbook

# Background

Given the many department personnel shifts since last fiscal year, OSD saw the need to simplify, clarify, update and consolidate the various sources of procurement policy and guidance available on our website

## Why This is Important:

OSD-delegated procurement authority requires department adherence to all OSD policies and procedures

Updating and improving the presentation of procurement policy and procedure helps ensure departments meet their delegated authority obligations

Creating a better organized and streamlined information source allows easier searching for particular guidance when you need it

# Why Back to Basics?

Back to basics means making sure all Commonwealth procurement staff have the clear, fundamental information needed to do their job properly and well

## Existing Procurement Guidance:

Old

Original guidance information is almost 20 years old

Unclear

Concepts and premise of “Best Value” have stood the test of time, but text is dated and sometimes scattered, contradictory, inaccurate or confusing

Disorganized

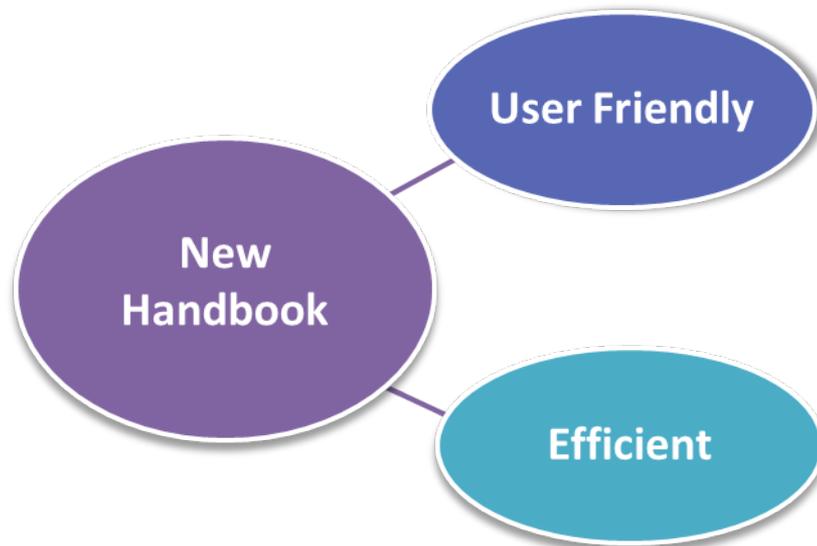
Website organization of key information is difficult and broken up, making searches frustrating

Confusing

Policies, forms and guidance have been tacked on as they evolved, making the page even more difficult to navigate or find the right answer, disrupting the reader’s ability to understand the policy

# The New OSD Best Value Procurement and Policy Handbook

## Handbook Approach

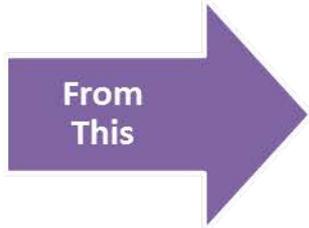


- A single procurement policy and procedure guidance document in HTML
- Organized logically with a table of contents linked to relevant pages; Highly searchable
- Provides references and links to more detailed and related but distinct guidance (e.g. SDP, CTR)
- Incorporates previously separate policy information, such as the COMMBUYS Policy
- Eliminates extraneous and redundant guidance (previously 6 separate sections with 26 separate links)

# Simplified Website



OPERATIONAL SERVICES DIVISION



From This



To This

# Policy and Procedure

## Reminders

Agency Responsibility			
Delegation of Procurement Authority by OSD to Executive Departments	Executive Agencies must use statewide contracts and COMMBUYS for purchasing and procurement activity	All Bidders must respond electronically on COMMBUYS	Completion of the 5- day Strategic Sourcing Certificate Program is <b>required</b> for all Chief Procurement Officers and strongly recommended for all Agency procurement staff

# Policy and Procedure Slide 1

## Changes

- **New Policy:** In exceptional circumstances, if a department is considering accepting late vendor responses, it requires OSD approval
  - Department heads must make request via email:  
[purchasing.agent@massmail.state.ma.us](mailto:purchasing.agent@massmail.state.ma.us)
  
- **New Policy:** Pilot programs now require a full procurement (RFR) process
  
- **Policy Update:** Procurement File on COMMBUYS **must** contain at least the following documents:
  - RFR, Bidder Q&A, Amendments, bid responses, evaluation criteria and final scores, and awarded vendor list

***OSD recommends putting as much procurement file information as possible on*** 

# Policy and Procedure Slide 2

## Changes and Updates

- **Policy Update:** Small Business Program: You must check off the **SBPP box** in COMMBUYS when you post a small bid (\$150K or less)
- **New Policy:** Bid cancellations: Note the cancellation as an Amendment and in the Notes for at least 30 days to effectively alert vendors of the change.
- **Policy Update:** No Overrides on PCs

# Policy and Procedure Slide 3

## Changes

- **Policy Update:** When requesting OSD Approvals (e.g. for waivers):

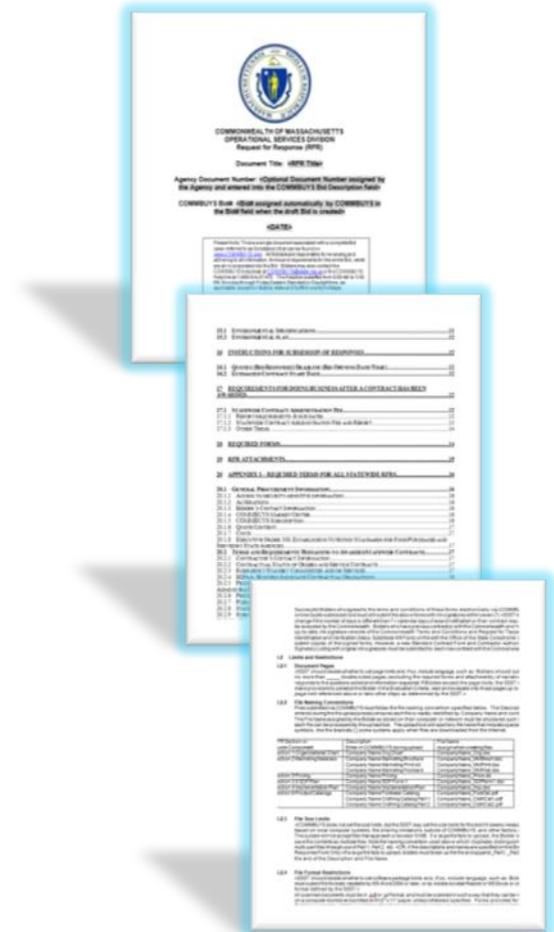
OSD will respond within 3 business days

All requests must be referenced as a “Due Diligence Posting Request.” The type of waiver is no longer needed in the document title.



# List of forms that have been updated

- Due Diligence Posting Template
- EPP Policy
- EPP Specifications
- Full Recommended Department RFR Template
- Instructions for Vendors Responding To Bids
- Minimum Recommended Department RFR Template
- Other Specifications
- PO for Commodities/Services
- Required Specifications
- Sample Business Reference Form
- Sample Reference Review Form
- SDP Plan Form 1
- SDP Plan Form 2
- SDP Plan Form 3



# Questions?

Email OSD with any additional questions you may have at:

[OSDhandbookpolicy@massmail.state.ma.us](mailto:OSDhandbookpolicy@massmail.state.ma.us)

Go to the [\*\*BEST Value Procurement Handbook\*\*](#) on OSD's website

# Additional Resources

## **Operational Services Division**

[www.mass.gov/osd](http://www.mass.gov/osd)

Phone 617-720-3300

[osdtraining@state.ma.us](mailto:osdtraining@state.ma.us)

## **COMMBUYS Helpdesk**

[commbuys@state.ma.us](mailto:commbuys@state.ma.us)

## **Handbook Questions**

[OSDhandbookpolicy@massmail.state.ma.us](mailto:OSDhandbookpolicy@massmail.state.ma.us)

# Thank You!