

Commonwealth of Massachusetts
**DEPARTMENT OF HOUSING &
COMMUNITY DEVELOPMENT**

Charles D. Baker, Governor ♦ Karyn E. Polito, Lt. Governor ♦ Jennifer D. Maddox, Undersecretary

**Community Investment Tax Credit
Program**

NOTICE OF FUNDING AVAILABILITY

BID # BD-22-1076-OCDD-OCDD01-69963; Agency DOC ID DHCD2022-36

Issued:
Response due:

January 11, 2022
February 8, 2022

NOTICE OF FUNDING AVAILABILITY

Community Investment Tax Credit Program

I. INTRODUCTION

The Community Investment Tax Credit Program (CITC Program) was created by Chapter 238 of the Acts of 2012 and is entering its ninth program year. The Department of Housing and Community Development (DHCD) is the administering agency for this Program and is responsible for managing the process by which the tax credits are allocated. The Department regulations for the program are found at 760 CMR 68.00.

The CITC Program is designed to enable local residents and stakeholders to work with and through community development corporations (CDCs) to partner with nonprofit, public, and private entities to improve economic opportunities for low and moderate income households and other residents in urban, rural, and suburban communities across the Commonwealth. CDCs accomplish this through adoption of Community Investment Plans (CIP) to undertake community development programs, policies and activities.

Under the program, Community Development Corporations (CDCs) certified under the provisions of M.G.L Ch. 40H and Community Support Organizations (CSOs) are eligible to apply to DHCD for selection as a Community Partner and receipt of an allocation of tax credits. Allocation awards may be based on DHCD's determination of the quality of the adopted CIP (in the case of a CDC) or Capacity Building Proposal (in the case of a CSO) and/or DHCD's determination that a previously awarded Community Partner is making adequate progress on utilizing previous credit award(s) and on implementing its CIP or Capacity Building Plan. Credits are allocated to Community Partners and they, in turn, provide credits to donors in exchange for qualified investments made to the Community Partner.

In calendar year 2022, the Department has \$10,000,000 available for credit allocations to eligible applicants.

CITC allocations will be available through calendar year 2025.

II. ELIGIBLE APPLICANTS

CDCs certified by DHCD under the provisions of MGL Ch.40H and CSOs are eligible applicants. CDCs seeking certification must submit a complete package of materials and request DHCD certification no later than January 24, 2022, to be eligible for selection under this NOFA. CSOs are nonprofit organizations that are not CDCs but have a focus on, and track record of providing capacity building services to CDCs. See Exhibit 2 for a list of all currently certified CDCs and the two CSOs.

III. USE OF CREDIT ALLOCATIONS

Tax credit allocations awarded to a CDC selected as a Community Partner are available for use by the CDC to facilitate any authorized activity of the CDC and implementation of its Community Investment Plan.

Tax credit allocations awarded to a CSO selected as a Community Partner are available for use by the CSO to facilitate any authorized activity of the CSO and implementation of its Capacity Building Proposal. DHCD may require a selected CSO to assist DHCD-identified CDCs most in need of capacity building experience.

IV. CREDIT ALLOCATION AMOUNT

Eligible CDCs and CSOs seeking a 2022 tax credit allocation may make a tax credit allocation request between \$50,000 and \$250,000. DHCD reserves the right to waive this cap if determined necessary to fully allocate available credits. The amounts awarded to individual Community Partners may vary. DHCD reserves the right to reduce the amount of the award from the requested amount. DHCD reserves the right to make conditional allocations. Additionally, DHCD reserves the right to reject any applications submitted.

The Department reserves the right to hold subsequent allocation rounds if there remains a credit availability after initial awards. Alternatively, if less than 100% of available 2022 credits are initially allocated in this funding round, DHCD also reserves the right to make additional allocations during calendar year 2022 on a rolling basis to CDCs/CSOs that are allocated credits through this round or to make initial allocations on a rolling basis to CDC's/CSO's that did not receive an allocation through this round. Provided that, in both instances, respective CDC's/CSO's must meet the submission requirements of this NOFA and have demonstrated adequate utilization of prior credit allocations, if appropriate.

Under the CITC program, pursuant to M.G.L. c. 63, Sec. 38EE, DHCD is required to ensure that minimum assistance levels are provided to Community Partners located in or serving Gateway municipalities (as defined at M.G.L. c. 23A, Sec. 3A) and rural areas (a municipality with a population of less than 7,500 or a group of municipalities, 75% or more of which have populations of less than 7,500).

V. APPLICATION PROCESS

All applicant organizations must submit materials to DHCD comprised of the following, as applicable:

A. Submission Materials

1. Cover Sheet

All applicants must submit a completed cover sheet (Exhibit 1) with an electronic signature of the CEO of the applicant organization. DHCD and CITC applicants agree that the electronic signatures included in this submission are intended to authenticate this writing and have the same force and effect as wet signatures. Please ensure that your cover sheet is dated and that all items are completed. Missing information can impact approval of an award.

2. Community Investment Plan (CDCs) or Capacity Building Proposal (CSOs)

This section is applicable to all first-time tax credit applicants and select Community Partners as referenced in Exhibit 2.

Community Investment Plan (CDCs)

Format of all CIP submissions must conform to the outline included in this NOFA

(Exhibit 3). First-time CDC applicants which have not previously received a tax credit allocation, must submit a completed Community Investment Plan (CIP). CDC applicants previously selected as a Community Partner in program year 2019 or earlier that have not submitted an updated CIP may need to submit a complete and updated CIP (Exhibit 2). *Specific updates and accomplishments must be noted for each element. Updates may be listed in a separate document, as prescribed in Section 5(A)(3) of this NOFA.*

A CIP is an organizational business plan that details a CDC's goals, outcomes, strategies, programs and activities for a 3 to 5 year period and its financial plans for supporting its strategy. The CIP will be valid, for CITC application purposes, for three years beginning January first of the year for which credits are being applied. A CIP must be designed to engage local residents and businesses to work together to undertake community development programs, projects and activities which develop and improve urban, rural or suburban communities in sustainable ways that create and expand economic opportunities for low and moderate income households.

The CIP serves to summarize, in nine elements, the overall community development approach taken in the CDC service area and benefitting the organization's constituencies. The CIP can reference various documents approved by the organization's Board, but *it is important that the CIP reflect a comprehensive, coherent approach to the CDC's community development priorities.*

The CIP may reference or incorporate findings of relevant plans and analyses that have been completed and used for decision-making purposes by the CDC. Such plans may include but are not limited to, strategic plans (economic development, housing, or neighborhood revitalization), market studies, needs assessments, and community organizing, leadership development or empowerment strategies.

Community development is defined as physical development, including affordable housing and commercial real estate development and preservation; community planning pertaining to physical and economic development; economic development, including business assistance and development; and asset development to build the economic capacity, mobility, and stability of low-income persons (e.g., homeownership assistance, financial education, foreclosure prevention, Individual Development Accounts (IDAs) and savings programs, and job training and creation programs).

CITC applications must document that a CIP was discussed and adopted by the Board of Directors of the applicant CDC. If at the time of application, the Board has not yet acted, the application must indicate on the cover sheet that adoption of the CIP will occur after submission of application but within 30 days of said application. Compliance with this requirement must be documented, either at the time of application or, if adoption occurs within the 30 day post application period, within 30 days from adoption, by copies of meeting agendas, attendance lists and minutes. Minutes must reflect that the CIP was presented and discussed by the Board.

Capacity Building Proposal (CSOs)

Format of all Proposal submissions must conform to the outline included in this NOFA (Exhibit 4). First-time CSO applicants which have not previously received a tax credit allocation, must submit a completed Capacity Building Proposal.

The Proposal serves to summarize, in four elements, the ability of the CSO to provide effective capacity-building services to CDCs.

3. Community Partner Statement of Progress

This section is applicable to all previously selected Community Partner applicants and includes those who are also submitting an updated CIP or Capacity Building Proposal.

Previously selected Community Partners, including CDCs and CSOs, must submit a Community Partner Statement of Progress which includes a (Part 1) progress response and (Part 2) demonstration of adequate utilization of previous credit awards. The Statement of Progress Part 1 requires a response to four scored questions for CDCs and three scored questions for CSOs. Refer to Exhibits 6 and 7, respectively, for the correct format and for scoring details. The questions are the same for CDCs and CSOs, however CSOs do not respond to question four:

1. Restate goals from the most recently updated CIP/Capacity Building Proposal. Include the original projected timeline for activities in support of goals, along with actual progress covering only the past year. You may present this information in either chart or narrative form.
2. Provide an explanation if there is a discrepancy in the projected versus actual activities/goals and what creative problem-solving steps the organization is taking to ensure goals are reached with the period of the plan/proposal.
3. Describe one accomplishment over the past year of which your organization is proud.
4. [For CDCs only:] Describe your engagement/outreach to stakeholders and residents over the past year. Identify the activities and quantify the events.

Part 2 of the Statement of Progress pertains to credit utilization and CITC financing details. Adequate utilization **(Part 2 of application completed as reflected in DHCD's Community Partner Tracking Totals Excel sheet)** of previous credit awards may be demonstrated by reporting the amount of credits utilized versus awarded (information subject to verification by DHCD), discussion of funds raised, to-date, as a result of CITC, discussion of donor pipeline and/or changes in the Community Partner's donor pool. Specific donor lists should not be included in the response.

4. Other Materials

Applicants who are required to submit an updated CIP or Capacity Building Proposal may submit additional materials – press coverage, maps, charts, budgets and exhibits in support of an application as attachments. No more than ten (10) additional pages of attachments may be submitted. No additional documents, other than those providing written responses to the required question prompts, may be submitted with the Community Partner Statement of Progress.

VI. Scoring Criteria

1. First-Time CDC & Select Community Partner Applicants

DHCD will review the submitted CIP and its individual elements to determine the overall quality of the Plan including completeness, whether the combined set of elements provides a coherent Plan document, and the history and track record of the CDC in accomplishing its goals and performing activities.

Maximum points that may be awarded for each element of the plan are listed below. CIPs scoring less than fifty (50) points will be determined not to meet the minimum threshold and will not receive a credit allocation.

Section 1

Community or Constituency (ies) to be served by the organization 5 points

Section 2

Involvement of community residents and stakeholders 20 points

Section 3

Plan goals 7 points

Section 4

Activities to be undertaken 7 points

Section 5

How success will be measured and/or evaluated 10 points

Section 6

Collaborative efforts to support implementation 12 points

Section 7

Integration of activities/consistency with community strategy and vision 7 points

Section 8

Financing strategy 20 points

Section 9

History and track record 12 points

Community Investment Plan Total 100 points

2. First-Time and Select CSO Applicants

CSO proposals will be evaluated on the extent to which responses address the following criteria. Maximum points that may be awarded for each element of the proposal are listed below. See Exhibit 4 for additional detail regarding content of the Elements. Capacity Building Proposals scoring less than fifty (50) points will be determined not to meet the minimum threshold and will not receive a credit allocation.

Section 1

Proposed Workplan 25 points

Section 2

Effectiveness of the proposed activities 25 points

Section 3

Feasibility of proposed activities 25 points

Section 4

Availability of staff expertise to accomplish the workplan 25 points

Capacity Building Proposal total 100 points

3. Community Partner Applicant Criteria (seeking subsequent year credit allocation)

DHCD will review the CDC's or CSO's submission to determine that the Community Partner (1) has demonstrated adequate progress implementing its CIP or Capacity Building Proposal, (2)

demonstrated adequate progress utilizing past credit awards, (3) is in full compliance with its CITC program requirements and (4) has requested an allocation amount that does not exceed the maximum allowable amount of \$250,000 in 2022. Community Partners required to submit an updated Community Investment Plan (CIP) or Capacity Building Proposal with this application, must also receive a minimum score of fifty (50) to be considered for a 2022 credit allocation. Statements of credit utilization are subject to verification by DHCD and will be based on completed Part 2 applications and issuance of CITC certificates at the time allocations are determined.

VII. Allocation Determinations

Allocations for Applications with Updated CIP/Capacity Building Proposal

Tax credit allocations will be awarded in varying amounts based on DHCD's determination of the quality of the submitted CIP (CDCs) or Capacity Building Proposal (CSOs) and the track record of the CDC or CSO. DHCD's allocation decisions will reflect the Department's determination that investment of tax credits in an organization is supported by the application materials submitted. The CIP or Capacity Building Proposal score will count towards 50% of the overall allocation score. 50% of the score will be based upon prior utilization. If a Community Partner is required to submit an updated CIP, the Progress Statement will not be scored for that award round, however, it will still remain as a threshold requirement and therefore must be submitted as well.

Allocation amounts greater than the minimum amount will generally be based on the range of scores received, such that:

- applications receiving at least 50 and up to 65 points may receive allocations of up to \$100,000
- applications receiving at least 66 and up to 80 points may receive allocations of up to \$150,000
- applications receiving at least 81 and up to 90 points may receive allocations of up to \$200,000
- applications receiving at least 91 and up to 100 points may receive allocations of up to \$250,000

First Time Allocations

First time CDC and CSO applicants must receive at least fifty (50) percent of the available points on their CIP or Capacity Building Proposal to qualify for selection as a Community Partner and a maximum \$100,000 allocation of tax credits. DHCD reserves the right to make an additional rolling award should the new Community Partner demonstrate adequate utilization of the initial award and if there is an adequate reserve of 2022 credits.

Subsequent Year Allocations without Updated CIP/Capacity Building Proposal

Subsequent year allocations will be made in varying amounts to previously selected Community Partners and will be dependent, in part, upon the total amount of credits requested and their availability. Individual allocation amounts will be determined based upon the quality of the Community Partner's responsiveness to the requirements in this NOFA including, but not limited to, a clear and verified demonstration of adequate utilization of past credit amounts. Community Partners that have demonstrated a stronger, consistent ability to utilize credit amounts over time will have an advantage over other Community Partners in the allocation of credits. Additionally, demonstration of adequate progress in achieving plan goals as described in

a Community Partner's Statement of Progress will be considered in determining allocation of tax credits. The Progress Statement will count towards 30% of the overall allocation score. 70% of the award will be based upon prior utilization.

DHCD reserves the right to make conditional credit allocations to previously selected Community Partners not meeting the requisite Community Partner Applicant criteria at the time of their 2022 application. Conditional awards will only be considered for applicants with a demonstrated track record of making adequate progress towards meeting the requisite applicant criteria.

VIII. Application Submission Procedures

Application and 2022 credit requests submitted by 5:00 PM on February 8, 2022, will be reviewed for credit allocation.

1. The completed application cover page (Exhibit 1) with the electronic signature of the applicant's chief executive officer should be emailed to kathryn.mcnelis@mass.gov as a separate attachment and should also be submitted through COMMBUYS along with the application.
2. Only electronic quotes submitted via COMMBUYS will be accepted in response to this NOFA. Applications must be sent via the "Create Quote" functionality in COMMBUYS. For instructions concerning how to submit a Quote, please see Exhibit 8. There is also an instructional webcast at the following link <https://www.screencast.com/t/GMJLKKilF12>. Any submission that fails to meet the submission requirements of the NOFA will be found non-responsive without further evaluation unless the evaluation team, at its discretion, determines that the non-compliance is insubstantial and may be corrected. In these cases, the evaluation team may allow the vendor to make minor corrections to the submission.
3. It is the responsibility of the applicant to ensure that its application is received in COMMBUYS.
4. Applications submitted by first-time CDC applicants and Community Partner CDCs required to submit an updated CIP (see Exhibit 2), must be typed in 12 point font and contain a maximum eighteen (18) page CIP. A maximum of ten (10) pages of other attachments, adoption documentation, and the cover page should be attached separately from the main CIP document. The CIP must be paginated and the footer should include the date range covered. Applications may not be considered if these directions are not followed.

Applications submitted by first-time CSO applicants and select Community Partner CSOs required to submit an updated Capacity Building Proposal (see Exhibit 4), must be typed in 12 point font and contain a maximum eight (8) page Capacity Building Proposal. A maximum ten (10) pages of other attachments, and the cover page should be attached separately from the main CSO document. Applications may not be considered if these directions are not followed.

Applications from Community Partner applicants must be typed in 12 point font and contain a Community Partner Statement of Progress, which includes a maximum five (5) page Part 1 progress response, one (1) page Part 2 demonstration of credit utilization, and the cover page. No additional attachments should be included along with the Statement of

Progress. Select Community Partners (see Exhibit 2) submitting an updated CIP or Capacity Building Proposal must also submit a Community Partner Statement of Progress, which includes a maximum five (5) page Part 1 progress response and one (1) page Part 2 demonstration of credit utilization.

5. DHCD reserves the right to request additional information from applicants during the review process and to use other available information as may be necessary in order to complete its review.
6. Applicants are encouraged to consult with DHCD's Community Development staff to discuss their proposals in advance of application submission. Kathryn McNelis, CITC Program Coordinator, at Kathryn.McNelis@mass.gov if you have any questions.

IX. General

DHCD reserves the right to use other available information regarding an applicant's history, experience and past performance as a DHCD grantee or borrower (as applicable) when evaluating applications, including whether the applicant has:

- Met prior work plan objectives in a timely and proper manner in accordance with an approved budget, and otherwise performed effectively;
- Complied with the Terms and Conditions of previous contracts;
- Conducted due diligence, closed loans and constructed projects in accordance with applicable requirements;
- Maintained compliance with applicable programmatic and legal requirements for any required period of affordability, and;
- Has a significant balance of unutilized credits.

**Massachusetts Department of Housing and Community
Development
2022
Community Investment Tax Credit Program
Community Partnership and Tax Credit Allocation Application**

Application Information

Organization Name:	Organization Name
Address:	Address Line 1 Address Line 2
Contact Name:	Contact Name
Contact Email:	Contact Email
Contact Phone:	Contact Phone

Amount of 2022 Credit Allocation Requested:	\$Dollar Amount
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Community Investment Plan (CIP) Adoption Status**Adopted: Date**


(Signature below attests the adoption has occurred; attach documentation)

Scheduled for Adoption: Date

(Scheduled Adoption and submission of documentation must be within in 30 days of application)

Set-Aside Applicants (select one)

<input type="checkbox"/>	Application for selection as a Community Partner serving a Gateway Municipality
<input type="checkbox"/>	Application for selection as a Community Partner serving a Rural Area (attach documentation)

Name:	Name
Title:	Title
Signature:	
Date:	Date

DHCD and **Applicant** agree that the electronic signatures included in application are intended to authenticate this writing and have the same force and effect as manual signatures. This statement confirms that I, **Signee**, have placed my electronic signature on this document with the intent of signing the document. Electronic signature means any electronic sound, symbol, or process attached to or logically associated with a record and executed or adopted by a person with the intent to sign application.

List of Organizations (CDCs and CSOs)	
<i>*Please note – if your organization is highlighted and bolded with an asterisk, you must complete an updated CIP or Capacity Building Proposal.</i>	
ACT Lawrence* + □	OneHolyoke CDC + □
Allston Brighton CDC +	Pittsfield Economic Revit. Corp.
Asian CDC +	Quaboag Valley CDC +
Brookline Improvement Coalition	Quincy Geneva Housing Corp.
CDC of South Berkshire + ∞	Revitalize CDC* + □
CEDC + □	SMOC +
Chinatown Community Land Trust	Somerville Community Corp. +
Coalition for a Better Acre + □	South Boston NDC +
Codman Square NDC +	Southwest Boston CDC +
Community Development Partnership + ∞	Springfield NHS* + □
Community Teamwork + □	The Neighborhood Developers + □
Domus Inc.	Urban Edge +
Dorchester Bay EDC +	Valley CDC +
Downtown Taunton Foundation + □	VietAID +
Dudley Neighbors Inc.* +	WATCH CDC +
Fenway CDC +	Way Finders Inc. +
Franklin County CDC + ∞	Wellspring Cooperative + □
Groundwork Lawrence* + □	WHALE + □
Harborlight Community Partners + □	Worcester Common Ground + □
HAC of Cape Cod + □	Worcester Community Housing Resources + □
Hilltown CDC + ∞	Worcester East Side CDC + □
Homeowner's Rehab. Inc.	
Housing Corp. of Arlington +	
Housing Nantucket + ∞	
Inquilinos Boricuas en Acción* +	
Island Housing Trust Corp. + ∞	
JPNDC +	
Just-a-Start Corp. +	
Lawrence Community Works + □	
Lena Park* +	
LISC + φ	
MACDC + φ	
Madison Park CDC +	Symbol Key: + Community Partner φ Community Support Organization * Updated CIP/ Required if applying for this CITC allocation round □ Gateway Community Partner ∞ Rural Community Partner
Main South CDC + □	
Metro West Collaborative Dev. +	
Mill Cities Community Investments + □	
Mission Hill NHS	
NeighborWorks Housing Solutions + □	
NewVue Communities + □	
NOAH +	
North Shore CDC + □	
Nuestra Comunidad +	

Massachusetts Department of Housing and Community Development Community Investment Tax Credit Program CDC Community Investment Plan (CIP)

A complete CIP must address each of the following nine (9) elements. The Plan may reference other documents and summarize their content but must present complete responses to the required information indicated in the Section descriptions. The adopted Plan may not exceed eighteen (18) pages, not including the cover page. The CIP must be paginated and the footer should include the date range covered.

Section 1

Community or Constituency (ies) to be served by the organization

This section must clearly identify the neighborhoods, towns and/or cities to be served including population, demographics and geographic characteristics and/or identify the particular constituency (ies) to be served – population, demographics and geographic characteristics. Provide map of service area if the organization is place-based and/or tables, charts and graphs for constituencies.

Section 2

Involvement of community residents and stakeholders

This section must provide a description and evidence of resident and stakeholder engagement in the organization. Describe the degree to which residents and stakeholders were engaged in the development of the Plan. Include examples of specific engagement activities, numbers of events, participation figures, and other quantified measures.

Describe the role residents and stakeholders have in monitoring and implementing Plan activities. Include examples of current and projected roles to be played, number and type of opportunities for involvement and the mechanisms for monitoring progress.

Section 3

Plan goals

This section must clearly identify the goals of the CIP. It must identify how low and moderate income households and other constituencies will benefit from achieving each of the goals, and identify how the entire community will benefit from achieving each of the goals.

Section 4

Activities to be undertaken

This section must clearly describe the activities to be undertaken under the Plan including community development activities consistent with the Program definition of community development activities (see Submission Content, Section II.). The materials must clearly identify the expected impact the activities will have on the identified goals and the community/constituency (ies) to be served. Activities should be directly related to the achievement of the stated goals.

Section 5

How success will be measured and/or evaluated

This section must identify the evaluation process, the participants in the process and the role(s) they will play. Describe the tools and methodologies to be used to measure the impact/outcomes associated with undertaking each of the goals, programs and policies and activities in the Plan. Tell us how you measure success in your goals, policies and activities, including benchmarks and both quantitative and qualitative outcome achievements.

Section 6

Collaborative efforts to support implementation

This section must identify existing and proposed collaborative relationships with other stakeholders, such as nonprofits, other Community Partners, businesses, state and municipal government. Identify known collaborators when possible and provide details surrounding collaborative efforts. Clearly identify the role of existing and proposed collaborations in supporting implementation of the Plan including the financing strategy, as applicable.

Section 7

Integration of activities/consistency with community strategy and vision

This section must describe how Plan activities fit together in addressing plan goals and how the Plan fits into a larger vision or strategy for the entire community. It must describe how the Plan is consistent with other specific neighborhood, community or regional plans. Please be advised, a listing of other plans that the Plan is aligned with is not sufficient, an explanation of the correlation of specific goals and activities should be noted.

Section 8

Financing strategy

This section must describe how the CDC will finance implementation of the Plan's activities. It must demonstrate an understanding of the availability of financing sources and their applicability to implementation of the Plan. It must describe the CDC's past experience in using the proposed financing sources.

The Section should identify the level of commitment of other funding sources to implement the Plan including capacity and strategies related to donations that result from available investment tax credits. Include chart to show budget breakdown of funding sources and where funds are being allocated.

Section 9

History, Track Record and Sustainable Development

This section must address two additional topics. It must provide a record or listing of examples demonstrating the CDC's history and track record of past practices and approaches implementation of proposed activities in the Plan. It must also provide narrative and examples of the Plan's consistency with the Commonwealth's Sustainable Development Principles (see Exhibit 5).

Massachusetts Department of Housing and Community Development Community Investment Tax Credit Program CSO Capacity Building Proposal

A complete Capacity Building proposal must address each of the following four (4) elements. The Proposal may reference other documents and summarize their content but must present complete responses to the required information indicated in the Section descriptions. The Proposal may not exceed eight (8) pages, not including the cover page.

Section 1

Proposed Workplan

This section must identify the existing and proposed range of services available to assist CDCs. Describe the applicability of the services to the needs of CDCs. Identify a typical services schedule during which the CSO will provide services.

Section 2

Effectiveness of the proposed activities

This section must provide evidence that the proposed activities will result in increased CDC capacity to plan and implement community development activities and attract donors. Provide evidence that the proposed capacity-building activities have proven effective for past recipients.

Section 3

Feasibility of proposed activities

This section must describe how activities will be accomplished within the proposed timeframe. Provide justification for a determination that the proposed costs are reasonable and that the organization has funding and resources sufficient to perform the proposed tasks and activities.

Section 4

Availability of staff and/or expertise to accomplish the workplan

This section must provide documentation that the CSO has sufficient staffing, with the required skills, knowledge and experience to provide capacity-building services, and/or the management ability and demonstrated experience to oversee consultants to accomplish the proposed tasks.

Sustainable Development Principles

The Commonwealth of Massachusetts shall care for the built and natural environment by promoting sustainable development through integrated energy and environment, housing and economic development, transportation, public health and safety, and other policies, programs, investments, and regulations. The Commonwealth will encourage the coordination and cooperation of all agencies; invest public funds wisely in smart growth and equitable development; and give priority to investments that will deliver good jobs and wages, transit access, housing, and open space, in accordance with the following Sustainable Development Principles. Furthermore, the Commonwealth shall seek, through incentives and assistance, to advance these Principles in partnership with regional and municipal governments, non-profit organizations, businesses, and other stakeholders.

1. Concentrate Development and Mix Uses

Support the revitalization of city and town centers and neighborhoods by promoting development that is compact, conserves land, reduces infrastructure and service costs, protects historic resources, integrates uses, enables pedestrian and bicycle access, and connects to transit. Encourage remediation, restoration, and reuse of existing sites, structures, and infrastructure rather than new construction on farm, forest, or other undeveloped land. Create pedestrian and bicycle friendly districts and neighborhoods that mix commercial, civic, cultural, educational, and recreational activities with open spaces and homes. Promote the creation of vibrant public spaces that facilitate strong civic and social engagement, through deliberate planning, design, construction, and management.

2. Advance Equity

Promote, through plans, regulations, and investments, equitable sharing of the benefits and burdens of development including access to housing, recreational opportunities, and transportation choices. Provide technical and strategic support for inclusive community planning and decision making to ensure social, economic, and environmental justice. Ensure that the interests of our most vulnerable populations and future generations are not compromised by today's decisions.

3. Make Efficient Decisions

Make state and local regulatory, investment, and permitting processes clear, predictable, coordinated, and timely. Ensure that zoning and other development guidelines and regulations result in projects that align with the goals of smart growth, environmental stewardship, and healthy communities. Set goals and track performance to enhance consistency with these Principles.

4. Protect Land and Ecosystems

Protect and restore environmentally sensitive lands, natural resources, productive forest and agricultural lands, critical habitats, wetlands and water resources, and cultural and historic landscapes. Increase the quantity, connectivity, quality and accessibility of open spaces and recreational opportunities.

5. Use Natural Resources Wisely

Site, design, construct, and promote developments, buildings, and infrastructure that conserve natural resources by reducing waste and pollution through efficient use of land, energy, water, and materials. Operate fleets, facilities, and other assets in a manner that reduces greenhouse gas emissions, costs, and resource consumption. Advance the use and reuse of durable, sustainable materials considering their production, transportation, use, and disposal. Protect, enhance, and restore natural infrastructure and promote ecological design.

6. Expand Housing Opportunities

Support the construction and rehabilitation of homes to meet the needs of people of all abilities, income levels, and household types. Build homes near jobs, transit, and where services are available. Encourage energy-efficient design, the use of sustainable materials, and consideration of resiliency to climate change and extreme weather. Foster the development of housing, particularly multifamily and smaller single-family homes, in a way that is compatible with the community's character and vision, while providing new housing choices for people of all means.

7. Provide Transportation Choice

Maintain and expand transportation options to enhance mobility, maximize access, promote healthy and active lifestyles, reduce congestion, minimize fuel consumption, improve air quality, reduce greenhouse gas emissions, and ensure the safety of those traveling by all modes. Prioritize rail, bus, boat, rapid and surface transit, shared-vehicle and shared-ride services, bicycling, and walking in order to increase travel by these modes. Consider climate change impacts in transportation planning, project selection, and prioritization, ensuring infrastructure resilience and provision of transportation options during extreme weather events. Distribute resources equitably. Invest strategically in existing and new passenger and freight transportation infrastructure that supports sound economic development and housing construction consistent with smart growth objectives.

8. Increase Job and Business Opportunities

Encourage businesses to locate near housing, infrastructure, and transportation options. Promote economic development through policies and programs intended to enhance the business climate in Massachusetts across industry sectors. Expand access to education, training, and entrepreneurial opportunities. Support the growth of local businesses, including sustainable natural resource-based businesses, such as agriculture, forestry, clean energy technology, and fisheries. Protect and enhance the basis of natural resource economies.

9. Mitigate and Adapt to Climate Change

Endeavor to limit and prepare for climate change. Reduce greenhouse gas emissions from buildings, electricity generation, transportation, and other sources through decreased consumption of fossil fuels. Maximize energy efficiency and renewable energy opportunities. Support energy conservation strategies, local clean power generation, distributed generation technologies, and innovative industries. Encourage ecological siting and design before mechanical solutions. Protect against hazards in order to enhance resilience and decrease vulnerability to climate change and natural disasters in the natural and built environment. Promote redundancy of critical systems and coordinated regional, state, and local resilience planning in response to climate change and extreme weather events.

10. Plan Regionally

Support the collaborative development and implementation of local, regional, state, and interstate plans that are consistent with these Principles. Foster development projects, land and water conservation, transportation and housing that have a regional or multi-community benefit. Consider the long-term ecological, economic, and social costs, benefits, and impacts to the residents and natural resources of the Commonwealth.

Community Partner Statement of Progress - CDCs

Part 1:

1. Restate goals from the most recently updated CIP. Include the original projected timeline for activities in support of goals, along with actual progress covering only the past year. You may present this information in either chart or narrative form. (30 points)
2. Provide an explanation if there is a discrepancy in the projected versus actual activities/goals and what creative problem-solving steps the organization is taking to ensure goals are reached with the period of the plan/proposal. (15 points)
3. Describe one accomplishment over the past year of which your organization is proud. (10 points)
4. Describe your engagement/outreach to stakeholders and residents over the past year. Identify the activities and quantify the events. (15 points)

Part 2:

1. Adequate utilization (Part 2 of application completed) of previous credit awards may be demonstrated by reporting the amount of credits utilized versus awarded (information subject to verification by DHCD), discussion of funds raised, to-date, as a result of CITC, discussion of donor pipeline and/or changes in the Community Partner's donor pool. Specific donor lists should not be included in the response. (30 points)

Community Partner Statement of Progress – CSOs

Part 1:

1. Restate goals from the most recently updated Capacity Building Proposal. Include the original projected timeline for activities in support of goals, along with actual progress covering only the past year. You may present this information in either chart or narrative form. (40 points)
2. Provide an explanation if there is a discrepancy in the projected versus actual activities/goals and what creative problem-solving steps the organization is taking to ensure goals are reached with the period of the plan/proposal. (20 points)
3. Describe one accomplishment over the past year of which your organization is proud. (10 points)

Part 2:

2. Adequate utilization (Part 2 of application completed) of previous credit awards may be demonstrated by reporting the amount of credits utilized versus awarded (information subject to verification by DHCD), discussion of funds raised, to-date, as a result of CITC, discussion of donor pipeline and/or changes in the Community Partner's donor pool. Specific donor lists should not be included in the response. (30 points)

Job Aid:

Creating a Quote in COMMBUYS: How to Respond to Bid Solicitations

This Job Aid shows how to:

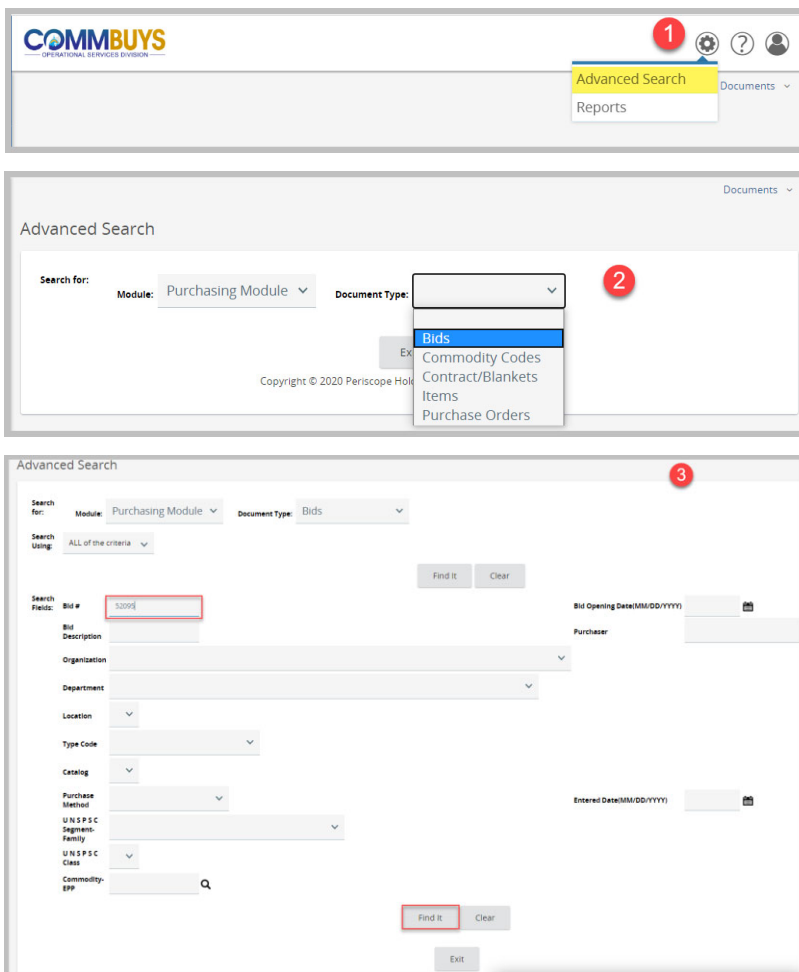
- Create a quote in response to a bid solicitation posted in COMMBUYS

Of Special Note:

- Only users with the Seller role can create a quote in COMMBUYS. This Job Aid begins from the Seller Home Page. For guidance on how to get to the Seller Home Page, consult the Job Aid “Basic COMMBUYS Navigation for Vendors.”
- The Items Tab of a quote response is especially important. Be sure to carefully review the Bid Documents (RFR, RFQ, Bid Response form, etc.) for specific guidance. Skipping the Items Tab may result in a “No Bid” response.


Screenshot

Directions

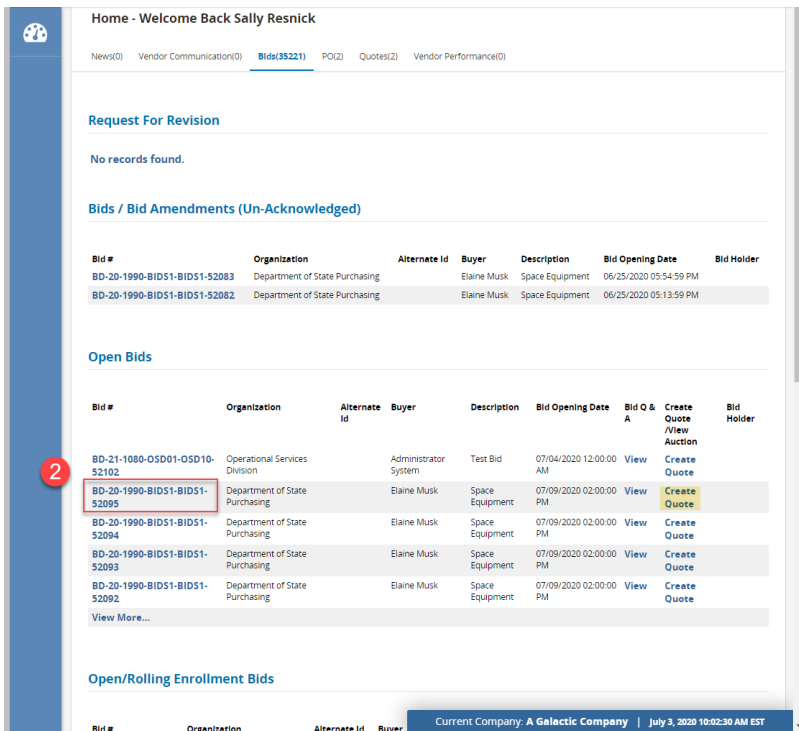
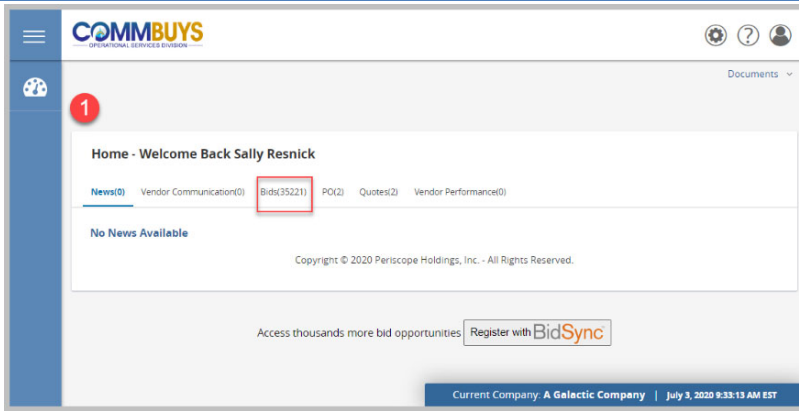


The screenshots illustrate the steps to access the Advanced Search functionality in COMMBUYS. The first screenshot shows the user interface with the 'Advanced Search' link highlighted in the top navigation bar. The second screenshot shows the 'Document Type' dropdown menu with 'Bids' selected. The third screenshot shows the full search form with the 'Bid #' field highlighted.

Step 1: Accessing the Bid - Advanced Search

1. Click on the **Settings** icon  and select the **Advanced Search** option.
2. Select **Bids** from the **Document Type** dropdown menu. It may take a few moments for COMMBUYS to generate a search form.
3. Type a search term into a field.

The example show here uses the last 5 digits of a bid number in the **Bid #** field. This search works well since the result probably will be only the bid you are searching for. Click **Find It** or hit the Enter key on your keyboard.
4. From the search results (not shown), click on the hyperlinked Bid Solicitation number (displays on the left side of the screen) to open and review details.



Acknowledge Receipt and View Solicitation

Bid # BD-20-1990-BIDS1-BIDS1-52095
Bid Description Space Equipment

Click **Yes** to acknowledge the download of the bid. When you acknowledge a bid, you may receive any future correspondence regarding this document. If you do not want to acknowledge click **No**, and the bid will be displayed. Do you want to continue?

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Step 1a: Accessing the Bid – Bids Tab

1. From the Seller Homepage click on the **Bids** tab.
2. Select a bid of interest from the **Bids/Bid Amendments (Unacknowledged), Open Bids, or Open/Rolling Enrollment Bids** section. Click the blue hyperlinked **Bid Number** to open and review the Bid Solicitation.

Note: If you have already reviewed and acknowledged the Bid Solicitation, downloaded attachments, and are ready to initiate a quote, click the **Create a Quote** hyperlink highlighted here, then skip to Step 5.

Step 2: Acknowledge Receipt

1. Click the **Yes** button to acknowledge the download of the bid *or* click **No** to proceed to the Bid Details without acknowledging.

Note: With acknowledgement, you agree to receive any future correspondence regarding the bid solicitation including amendments.

If you select **No** you may still view the bid and submit a quote but will not receive notifications regarding updates or amendments.

Bid Solicitation: BD-20-1080-OSD03-OSD03-50290

Header Information

Bid Number:	BD-20-1080-OSD03-OSD03-50290	Description:	PRF70 Advertising, Marketing and Event Planning Services	Bid Opening Date:	07/23/2020 03:00:00 PM
Purchaser:	Ann Maria Bennett	Organization:	Operational Services Division		
Department:	OSD03 - OSD - Strategic Sourcing	Location:	OSD03 - OSD Strategic Sourcing		
Fiscal Year:	20	Type Code:	SS - Statewide Solicitation	Allow Electronic Quote:	Yes
Alternate Id:		Required Date:		Available Date:	06/15/2020 02:55:32 PM
Info Contact:		Bid Type:	OPEN	Informal Bid Flag:	No
Purchase Method:	Open Market				
Pre Bid Conference:	Pre-bid conference will be held June 25, 2020 @ 10am EDT Here's a link to join the conference: https://global.gotomeeting.com/join/878522429				
Bulletin Desc:	Bid will be posted for the provision of Advertising, Marketing and Event Planning Services for the Commonwealth of Massachusetts				

Ship-to Address:	Strategic Sourcing 1 Ashburton Place, rm 1017 Boston, MA 02108 US Email: sss03osd@massmail.state.ma.us Phone: (617)720-3300	Bill-to Address:	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: Grace.McLaughlin@mass.gov Phone: (617)720-8862	Print Format:	Bid Print
-------------------------	---	-------------------------	---	----------------------	-----------

File Attachments:

- Intent to Post Advertising, Marketing and Events Services Contract
- Standard Contract Form
- Bidders' Submission Checklist
- Request for Response (RFR)
- Bidders' Response Form
- Contractor Authorized Signatory Listing
- Certificate of non-collusion
- Business Reference
- Bidder's Conference Registration
- Bidders' Conference Presentation

Form Attachments:

SBPP (Small Business Purchasing Program) Eligible?: NO

Amendments:

Amendment #	Amendment Date	Amendment Note
1	06/15/2020 03:10:50 PM	Bid Amended to Post Request for Response and to Amend the Bid Availability and Bid Opening Dates. Header 1. Available Date changed from "04/02/2020 03:54:09 PM" to "06/15/2020 02:55:32 PM". 2. Bid Opening Date changed from "06/18/2020 03:00:00 PM" to "07/23/2020 03:00:00 PM". 3. Pre-Bid Conference changed from "" to "Pre-bid conference will be held June 25, 2020 (subject to amendment)".

Item Information

1-5 of 7
1 2

Item # 1: (80-14-00-00-0000) Bid will be posted for the provision of Advertising, Marketing and Event Planning Services for the Commonwealth of Massachusetts.

UNSPSC Code: 80-14-00
Marketing and distribution
80-14-00-00
Marketing and distribution
80-14-00-00-0000
Marketing and distribution

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0						
Manufacturer:			Brand:	Model:		
Make:			Packaging:			

Step 3: Reviewing Bid Solicitations

Important information displayed on a COMMBUYS Bid Solicitation includes:

- **Bid Number:** COMMBUYS-generated document number. Use last 5 digits for searches.
- **Description:** information varies according to Buyer input.
- **Bid Opening Date:** the date and time the bid closes to vendor quote submission; the deadline. Except for Rolling Enrollment solicitations, it is also the date the buyer may view submissions for evaluation.
- **Purchaser:** the person who posted the bid solicitation. Unless indicated elsewhere, this is also the buyer contact.
- **Type Codes:**
SW: Statewide bid solicitation. OSD is the only organization that can designate this.
NS: Non-Statewide. Departments and municipal users select this.
- **Allow Electronic Quote:** When marked yes, vendor responses must be submitted through COMMBUYS.
- **Available Date:** date bid was publicly posted on COMMBUYS.
- **Info Contact:** contact person for the bid. If the field is blank, the Purchaser is the contact.
- **Bid Type:** Most bids are "Open"; any vendor can respond. "Closed" bids are restricted to selected vendors already on the existing contract.
- **Rolling Enrollment:** If marked "Yes" the Purchaser can see vendor responses before the Bid Opening Date. Typically, this designation is used when the Purchaser is developing a list of businesses who are qualified to provide goods and services over a contract period.
- **Pre-Bid Conference:** details provided if such a meeting will take place.
- **File Attachments:** bid documents and forms uploaded by the agency. Be sure to download and read all attachments starting with the Request for Response (RFR). Complete forms and documents as instructed.
- **Item Information:** commodity code (UNSPSC), description, and other criteria.

1-5 of 12
1 2 3

Print Page Create Quote Bid Q & A Exit

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Step 4: Creating a Quote Response

1. Scroll to the bottom of the Bid Solicitation screen.
2. Click **Create a Quote**.

New Quote

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

Quote #: Bid #: BD-20-1990-BIDS1-BIDS1-52095

Organization: Department of State Purchasing

Status: In progress Description*: Space Equipment

Delivery Days: 0 Discount Percent: 0.0 %

Is "No Bid": ☐ Alternate Bid: ☐

Shipping Terms: Freight Terms:

Ship Via Terms: Payment Terms:

Promised Date: (MM/DD/YYYY)

Info Contact:

Comments:

Date Last Updated: User Last Updated:

Save & Continue

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Step 5: New Quote Screen - General Tab

1. COMMBUYS displays the **General Tab** on a "New Quote" screen. In most cases, editing these fields is not suggested. Read the RFR for guidance. Editable fields include:
 - **Description**: Defaults to the description from the bid solicitation.
 - **Delivery Days**: Days to deliver goods or services if awarded a contract that results in purchase orders.
 - **Discount Percent**: If entered, applies globally to all quoted items.
 - **Is "No Bid"**: Checkmark to formally declare that you will not be submitting a quote for this bid.
 - **Alternate Bid**: Checkmark to formally flag a quote as an alternate response if the buyer has allowed multiple quotes.
 - **Promised Date**: Due date to deliver items.
 - **Info Contact**: Contact information for questions regarding quote. This field is limited to 400 characters.
 - **Comments**: Field to enter notes to the buyer. Limit is 400 characters.
2. Click **Save & Continue**.

Quote Validation Errors

Terms & Conditions is not acknowledged

Question #1 for header is mandatory and not answered

2

Quote Validation Warnings

Your quote has not been submitted.

1

Quote QT-1080-OSD01-OSDPL-76982 - DQS Scientific

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

Quote #: Bid #: BD-21-1080-OSD07-OSD07-52103

Organization: QT-1080-OSD01-OSDPL-76982

Status: In progress Description*: Space Equipment

Delivery Days: 0 Discount Percent: 0.0 %

Is "No Bid": ☐ Alternate Bid: ☐

Shipping Terms: Freight Terms:

Ship Via Terms: Payment Terms:

Promised Date: (MM/DD/YYYY)

Info Contact:

Comments:

Date Last Updated: 08/09/2020 12:39:30 PM User Last Updated: Dectan Quinn

Save & Continue

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Step 6: Review System Messages

1. The pages refreshes displaying a **Quote Number**.
2. System messages are also displayed.
 - A red error message with steps that must be taken before a quote can be submitted. Following the steps in this Job Aid will resolve the errors.
 - A yellow message reads: Your quote has not been submitted. The message disappears once the quote is submitted.
3. Click on the **Items** tab to continue creating the quote

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

General Notes

Sort by Column: **Print Sequence** ☐ Sort Descending **Go**

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)	Remove Line
1.0	1.0	No	Spaceship	1.0	EA						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

QUOTE 1.0

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)	Remove Line
1.0	1.0	No	Spaceship	1.0	EA		0.0%	None	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Alternate Description:

[Add Quote Line](#)

--- not bidding

Quote QT-1990-BIDS1-BIDS1-78984 - DQS Scientific

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

General Notes

Sort by Column: **Print Sequence** ☐ Sort Descending **Go**

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)	Remove Line
1.0	1.0	No	Line Item 1	1.0	EA						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

QUOTE 1.0

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)	Remove Line
1.0	1.0	No	Line Item 1	1.0	EA	0.00	0.0		0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Alternate Description:

[Add Quote Line](#)

Quote Response Total: \$0.00

QUOTE 1.0

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)	Remove Line
1.0	1.0	No	Line Item 1	1.0	EA	3459.00	0.00		0.00	\$3459.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

QUOTE 1.0

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)	Remove Line
1.0	1.0	No	Line Item 1	1.0	EA	3631.00	0.0		0.00	\$3631.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Alternate Description:

QUOTE 1.001

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)	Remove Line
1.001	1.0	No	Line Item 1	1.0	EA	4290.00	15.0		0.00	\$3612.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Alternate Description:

[Add Quote Line](#)

Step 7: Complete the Quote Items Tab

1. Responding to Items. Actions needed to complete the Items tab vary depending upon how the Bid issuer configured it. Read the instructions given in the RFR to determine how best to complete the Quote Items tab.

The Items tab is the area to:

- indicate which item(s) are being Quoted. A **No Bid** Item selection indicates not bidding.
- indicate that quote cost data is submitted as an attachment (If **See Quote Attachment** has been enabled)
- enter unit cost per Bid Item(s) (if applicable)

A) If the **See Quote Attachment(s)** box is pre-selected, the **No Charge** and **Unit Cost** selections are disabled.

- ✓ Ensure the **See Quote Attachment(s)** indicator is selected for each Bid Item for which you wish to be considered.
- ✓ Based on instructions from the RFR, be sure to upload response files on the Attachments tab (see Step 10).
- ✓ Select **No Bid** for items you are not bidding on.

B) If the **No Bid** column is pre-selected, the **No Charge** and **Unit Cost** selections are editable; the **See Quote Attachment(s)** column is disabled.

- ✓ Ensure **Unit Cost** is entered or **No Charge** indicator is selected for *each Item you are bidding on*. Doing so deselects the **No Bid** box.
- ✓ Leave the selection **No Bid** for items you are not bidding on.
- ✓ Based on instructions from the RFR, be sure to upload response files on the Attachments tab (see Step 10).

C) To add an additional quote item to a Bid Solicitation item, click the **Add Quote Item** hyperlink. *Consult the RFR carefully to see if this option is encouraged or discouraged.*

- ✓ Fill in the **Alternative Description** box.
- ✓ Complete pricing details.
- ✓ The added item is numbered with a decimal that follows the original Quote Item number.

Screenshot

Directions

Item # 1.0 Print Sequence 1.0 Questions Exist No Description Quantity UOM Seeking responses from individuals and organizations that can (1) deliver training to professional adults working in a c... View Detail

QUOTE 1.0

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachments	Remove Line
1.0	1.0	No	Seeking responses from individuals and organizations that can (1) deliver training to professional adults working in a c... View Detail	1.0	EA	\$0.00	0.0%	None	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Alternate Description:

Add Quote Line

Item # 2.0 Print Sequence 2.0 Questions Exist No Description Quantity UOM Seeking to partner with a vendor to coordinate and oversee the administrative, grant management and programmatic impleme... View Detail

QUOTE 2.0

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachments	Remove Line
2.0	2.0	No	Seeking to partner with a vendor to coordinate and oversee the administrative, grant management and programmatic impleme... View Detail	1.0	EA	\$0.00	0.0%	None	\$0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Alternate Description:

Add Quote Line

Quote Response Total: \$0.00

Discount only quotes indicate discount amount off of list catalog price.

Save & Continue Export Items Upload Items

Step 7 (continued): Quote Items Tab

- To view additional details about an item, click on the blue hyperlinked Item #. Click **Save & Exit** to return to the Items Tab.
- Once all information has been completed on the **Items** tab, click **Save & Continue**. Click on the **Questions** tab.

NOTE: COMMBUYS offers Export and Upload capabilities for uncommon instances when a bid solicitation and quote response include many items. The Quick Reference Guide “Using the Items Export and Upload Tool” provides instructions.

Quote Validation Errors

Terms & Conditions is not acknowledged.
Question #1 for header is mandatory and not answered.

Quote Validation Warnings

Your quote has not been submitted.

Quote QT-1080-OSD01-OSDPL-78982 - DQS Scientific

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

Question #	Required	Question	Response
1	Yes	How many times has your proposed Project Manager traveled beyond Earth's atmosphere?	<input checked="" type="radio"/> Fully Provided <input type="radio"/> Not Provided <input type="radio"/> Custom Development Required <input type="radio"/> Provided with Modifications <input type="radio"/> Provided with Reporting or Development Tool

Save & Continue

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Step 8: Answering Buyer Questions

The Purchaser may use COMMBUYS to ask questions that must be answered before a quote can be submitted. In such cases, a red error message displays at the top of the screen.

- Type answers to questions
- Click **Save & Continue**. Any Question-related error message disappears.
- If you would like to record internal **Notes** about the quote, click the **Notes** tab.
- Otherwise, click the **Terms & Conditions** tab.

Quote QT-1080-OSD01-OSDPL-78982 - DQS Scientific

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

Question #	Required	Question	Response
1	Yes	How many times has your proposed Project Manager traveled beyond Earth's atmosphere?	<input checked="" type="radio"/> Fully Provided <input type="radio"/> Not Provided <input type="radio"/> Custom Development Required <input type="radio"/> Provided with Modifications <input type="radio"/> Provided with Reporting or Development Tool

Save & Continue

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The Notes Tab (Optional)

Provides space for vendor users to record notes. Information saved here is not accessible outside the vendor account.

Quote Validation Warnings
Your quote has not been submitted.

Quote QT-1080-OSD01-OSDPL-78982 - DQS Scientific

General Items Questions Subcontractors Notes **Terms & Conditions** Attachments Summary [Back to Bid](#)

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
Request for Response	(view details)	36,352 bytes
Response_Form.docx	(view details)	317,663 bytes
Company Price Sheet.xlsx	(view details)	8,338 bytes
Checklist.docx	(view details)	50,023 bytes
Terms and Conditions-1.docx	(view details)	12,003 bytes

Do you accept the terms & conditions of the bid?

☒ Yes ☐ Yes with exceptions ☐ No

If you do not fully accept the terms & conditions, please note the exceptions below:

[Save & Continue](#)

Step 9: Accepting Terms & Conditions

All files attached to the Bid Solicitation can also be found on (and downloaded from) the Terms & Conditions tab.

1. Click the radio button next to **Yes** to accept the Terms & Conditions of the Bid Solicitation.
2. Click **Save & Continue**. The red system message disappears.
3. Click on the **Attachments** tab.

Quote QT-1080-OSD01-OSDPL-78982 - DQS Scientific

General Items Questions Subcontractors Notes Terms & Conditions **Attachments** Summary [Back to Bid](#)

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Click **Add File** to add file attachments.

No File Attachments

[Add File](#)

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Step 10: Attaching Documents to Quote

1. Click on **Add File**.
2. Click on **Choose File** to locate the file you wish to upload. (This button may be labeled "Browse" in some browsers.)

Locate and select a file then click **Open** to upload it.

By default, the file's original name is populated into the **Name** field on the **Add File** page. This can be edited to change the posted file name. The **Name** field is limited to 200 characters and can contain alphanumeric characters, spaces, and special characters.

3. The **Description** field is optional. It allows you to briefly describe the file.
4. Click **Save & Exit** to return to a list of all attachments. Repeat until all required documents are attached.
5. Check off the **Confidential** box to designate an attachment as confidential.

Mark only those documents that contain confidential information not subject to the Massachusetts Public Records Law (e.g., those containing your Tax ID, bank account information, etc.) as confidential.

Similarly, to remove an attachment uploaded in error, click the **Delete** box for the item.

Click **Save & Continue** to save any changes.

6. Click the **Summary** tab.

Note: Unless an RFR or other bid document requests or allows zipped files, each required document must be added individually.

Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name*: DQScientificBidder Response Form.docx

Description:

File*: [Choose File](#) Bidder Resp...e Form.docx

Location: 00044558

Confidential: ☐

[Save & Exit](#) [Save & Continue](#) [Reset](#) [Cancel & Exit](#)

Quote QT-1080-OSD01-OSDPL-78982 - DQS Scientific

General Items Questions Subcontractors Notes Terms & Conditions **Attachments** Summary [Back to Bid](#)

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Name	Description	Confidential	Order	Attached By	Attached Date	Delete
DQScientific Bidder Response Form.docx	(view details)	<input type="checkbox"/>	0	Declan Quinn	08/03/2020	<input type="checkbox"/>
DQScientificChecklist.docx	(view details)	<input type="checkbox"/>	0	Declan Quinn	08/03/2020	<input type="checkbox"/>
DQScientificReferences.docx	(view details)	<input type="checkbox"/>	0	Declan Quinn	08/03/2020	<input type="checkbox"/>
DQScientific Supplier Diversity Form.docx	(view details)	<input type="checkbox"/>	0	Declan Quinn	08/03/2020	<input type="checkbox"/>

[Save & Continue](#) [Add File](#)

Step 11: Reviewing and Submitting Quotes

1. Review the quote information displayed on the **Summary** tab. Edit as needed by clicking on the tab that requires updating. (Remember to click **Save & Continue** on any tab you change.)
2. Remember that the quote does not cover items marked as “No Bid.”
3. Click the **Submit Quote** button at the bottom of the page.

Quote QT-1080-OSD01-OSDPL-78982 - DQS Scientific

General Items Questions Subcontractors Notes Terms & Conditions Attachments **Summary** Back to Bid

Header Information

Quote #: QT-1080-OSD01-OSDPL-78982	Bid #: BD-21-1080-OSD07-OSD07-52103	Status: In progress
Organization: Operational Services Division	Delivery Days: 0	Discount Percent: 0.0
Description: Space Equipment	Alternate Bid: No	Shipping Terms:
Bid Flag:	Payment Term:	Quote Total: \$0.00
Freight Terms:	Info Contact:	
Ship Via Terms:		
Promised Date:		
Comment:		
Date Last Updated: 08/03/2020 01:30:15 PM	User Last Updated: Declan Quinn	

Vendor accepts the terms & conditions with no exceptions.

Questions:

Question #	Required	Question	Response
1	Yes	How many times has your proposed Project Manager traveled beyond Earth's atmosphere?	Fully Provided

Attachments

Agency Files:

Agency Forms:

Vendor Files: DQSScientific Bidder Response Form.docx
DQSScientificChecklist.docx
DQSScientificReferences.docx
DQSScientific Supplier Diversity Form.docx

Vendor Forms:

Item Information

Print Sequence # 1.0 : (25-19 - 16) Spaceship

Quantity	UCM
1.0	EA

QUOTE 1.0	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)
	\$0.00	0.0%	0.0%	\$0.00	\$0.00	No	No	Yes

Print Sequence # 2.0 : (25-19 - 16) Hoverboard

Quantity	UCM
1.0	EA

QUOTE 2.0	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)
	\$0.00	0.0%	0.0%	\$0.00	\$0.00	No	No	Yes

Print Submit Quote Cancel Quote

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Step 12: Confirming Quote Submission

1. Click **OK** on the popup message window to proceed with submitting your quote.
2. Once the page refreshes, note that the quote status has changed to “submitted,” confirmation that the process is complete.

Note that once the Bid Opening Date passes, the **Submit** button disappears. It is not possible to submit a late response.

Once a quote is submitted, it is possible to Withdraw it by clicking the **Withdraw Quote** button at the bottom of the Summary Tab Page. See the Job Aid “How to Withdraw, Reopen, and Resubmit a Quote in COMMBYTS.”

www.training.commbuys.com says
Are you sure you want to submit this quote?

OK

Cancel

Header Information

Quote #: QT-1080-OSD01-OSDPL-78982	Bid #: BD-21-1080-OSD07-OSD07-52103	Status: Submitted
Organization: Operational Services Division	Delivery Days: 0	Discount Percent: 0.0
Description: Space Equipment	Alternate Bid: No	Shipping Terms:
Bid Flag:		