

*COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF ELDER AFFAIRS
ONE ASHBURTON PLACE, 5TH FLOOR
BOSTON, MA 02108*

REQUEST FOR APPLICATIONS

ENHANCING DIGITAL LITERACY FOR OLDER ADULTS

ISSUE DATE: April 10, 2023

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SECTION 1: BACKGROUND, SCOPE, AND PURPOSE OF RFA

As the population of Massachusetts residents over the age of 60 continues to grow, the need to strengthen the digital literacy of older adults rises as well. Digital literacy includes, but is not limited to, confidence in using digital platforms and devices, safely using the internet to access and share information, and virtually engaging with the institutions, system, services, and relationships that enrich our lives.

The Executive Office of Elder Affairs (EOEA) has received approval from the Center for Medicare and Medicaid Services (CMS) to provide \$1.5 million Massachusetts Councils on Aging (COAs) to help strengthen the digital literacy of older adults. This grant draws on funding from the American Rescue Plan Act (ARPA) and intends to strengthen, enhance, and expand Medicaid Home and Community-Based Services (HCBS).

EOEA is issuing this Request for Applications (RFA) to solicit applications from Eligible Organizations, as defined below, to implement strategies that support the COAs to help older adults use modern technology in a meaningful way for using telehealth, accessing information online, applying for benefits/filling out forms that are now mostly digitized, and participating in various social programming that combats isolation and loneliness (e.g., senior center virtual activities, faith-based services, family videocalls, etc.).

Each eligible COA located in Massachusetts may be awarded a grant of \$5,000 to \$100,000 for this initiative. If the applicant is a partnership of multiple COAs or COA(s) and other additional agencies, only one application should be submitted by the COA that will serve the role of financial agent for the grant. COAs working in partnership may apply for a grant amount equal to the number of COAs included in the application: for example, two COAs applying together can request a grant from \$10,000 to \$200,000; three or more COAs applying together can request a grant from \$15,000 to \$300,000.

Grant applications must include a clear plan on how the applicant will expand digital literacy to Massachusetts residents who are 60 years of age and older. Additionally, the proposed program must be designed to include **one or both** of the following activities:

- 1. Technology Training and Support:**

- a. Applicants must use the funds to provide digital literacy training, education, and support to older adults in the COA's service area. This may include, but is not limited to, funding personnel (e.g., COA staff and interns), third party vendor(s) (e.g., technology trainers), travel within the COA's service area, and materials (e.g., printed instructions). These funds may be used for in-person and/or remote support, with a preference for in-person.

- 2. Technology Purchases:**

- a. Applicants must use funds to purchase devices and/or Broadband for older adults and/or Councils on Aging with the objective of strengthening digital literacy of older adults in the COA's service area. While the emphasis of technology purchases should be for older adults, limited equipment purchases to allow the COA to successfully facilitate digital literacy support is permissible.

Applications submitted by the deadline established herein at **Section 11** will be reviewed and EOEA will choose awardees and award amounts after such review, as described in **Section 10**.

Eligible Organizations receiving grant awards will be required to certify that they will not use any grant payment received for uses other than those described in their grant applications.

EOEA staff, in coordination with a third-party vendor retained by EOEa, will monitor and evaluate the work of all Awardees. The grant program described in this RFA is funded from the Transitional Escrow Fund established in Section 16 of Chapter 76 of the Acts of 2021 as well as from amounts received by the Commonwealth of Massachusetts from the Substance Abuse and Mental Health Services Administration and the U.S. Department of the Treasury under Section 9817 of the American Rescue Plan Act of 2021 (ARPA), Strengthening and Investing in Home and Community Based Services for Medicaid Beneficiaries.

SECTION 2: DEFINITIONS

The following terms have the following meanings when capitalized throughout this RFA (Sections 3-11) and its attachments unless the context clearly indicates otherwise:

Applicant: An Eligible Organization that submits an application in response to this RFA.

Awardee: Any Applicant that applies in response to this RFA, is selected for a grant award under this RFA, enters into a Contract with EOEa and receives funding under the terms of this RFA.

Broadband: High-speed internet access. Congress explicitly required in the bipartisan infrastructure bill that any Broadband network receiving federal funds must meet a minimum threshold of 100 Mbps down and 20 Mbps up. This grant adheres to the same standards.

Budget: The total funding needed to implement the program. Each application must detail the cost of each program and associated activities.

Contract: An agreement between parties (i.e., Executive Office of Elder Affairs and Councils on Aging) creating mutual obligations that are legally enforceable.

Council on Aging (COA): Municipal agencies that meet the social and support needs of older adults, families, and caregivers in the community, with a range of services that includes information and referral, benefits counseling, physical activity, nutrition services, transportation, educational programming and opportunities for socialization and recreation.

Devices: Equipment or mechanisms that serve a special purpose or perform a special function. In the context of this grant, the purpose and function are to strength Digital Literacy of older adults. A list of allowable devices is defined in **Section 5A** .

Digital Literacy: The ability to independently and effectively utilize and communicate on digital platforms. The purpose of this grant is to support digital literacy of older adults to strengthen, enhance and expand Medicaid Home and Community-Based Services. This may include, but is not limited to, older adults' ability to engage in telehealth, access health care information through as patient portal, participate in preventative services and programs, and find and access supports to age in community.

Direct Program Cost: Costs that are directly incurred due to the proposed program. **Eligible Expenses:** Expenses proposed by the Applicant to be expended in furtherance of one or more of the objectives listed in **Section 1**, and which are not determined unreasonable or impermissible by EOEA. Eligible Expenses may include, without limitation, those identified in **Section 5 A**.

Eligible Organization: All Massachusetts-based Councils on Aging, or a group of Massachusetts COAs working together as co-Applicants, are eligible to apply for grant funding.

Executive Office of Elder Affairs (EOEA): The Commonwealth of Massachusetts agency created under M.G.L. c. 19A and charged with promoting independence, empowerment, and well-being of older people, individuals with disabilities, and their families.

Executive Office of Health and Human Services (EOHHS): The Massachusetts agency created under M.G.L. c. 118E responsible for the administration of the MassHealth program (Massachusetts' Medicaid program), pursuant to state law and Title XIX and XXI of the Social Security Act and other applicable laws and waivers.

Gateway City: A municipality with a population greater than 35,000 and less than 250,000 with a median household income below the Commonwealth's average and a rate of educational attainment of a bachelor's or graduate degree that is below the Commonwealth's average.

Indirect Costs: Costs that are not directly related to the design and administration of the proposed program. Indirect costs may include the costs of operating and maintaining facilities, and general administration and general expenses, such as the salaries and expenses of executive officers, personnel administration, and accounting.

Massachusetts Healthy Aging Collaborative (MHAC): A network of leaders in the community, health and wellness, government, advocacy, research, business, education, and philanthropy who have come together to advance healthy aging in the Commonwealth.

Metrics: Specific, measurable, and relevant measurements used to evaluate the success of a program.

Older Adult: An adult age 60 or older. For the purposes of this grant, older adults served by the Council on Aging or Senior Center must reside in Massachusetts.

Person-Centered: An approach to client interactions that is nondirective and motivates the client based on personal goals. In the context of Digital Literacy, this may include a "Bring Your Own Device" model where the COA trainer/staff assists the older adult in learning how to use their tablet to achieve personal goals, such as learning how to use email or searching the internet.

Rural Community: A geographic area that is located outside of towns and cities with low population density and small settlements. For a more detailed definition please visit: [Rural Definition Detail](#)

State Fiscal Year: The twelve-month period commencing July 1 and ending June 30 and designated by the calendar year in which the fiscal year ends (e.g., State Fiscal Year 2023 ends June 30, 2023).

SECTION 3: APPLICANT ELIGIBILITY

All Eligible Organizations may apply for funding if their organization is classified as a Council on Aging (COA) in the Commonwealth of Massachusetts.

SECTION 4: QUALIFYING PROGRAMS

A. Minimum Qualifications:

Grant applications must include a clear plan on how the applicant will expand Digital Literacy to Massachusetts residents who are 60 years of age and older. Additionally, the proposed program from the Applicant must be designed to meet one or both of the following activities:

1. Technology Training and Support:

Applicants must use the funds to provide Digital Literacy training, education, and support to Older Adults in the COA's service area. This may include, but is not limited to, funding personnel (e.g., COA staff and interns), third party vendor(s) (e.g., technology trainers), travel within the COA's service area, and materials (e.g., printed instructions). These funds may be used for in-person and/or remote support, with a preference for in-person.

2. Technology Purchases:

Applicants must use funds to purchase Devices and/or Broadband for Older Adults and/or Councils on Aging with the objective of strengthening Digital Literacy of Older Adults in the COA's service area. While the emphasis of technology purchases should be for Older Adults, limited equipment purchases to allow the COA to successfully facilitate Digital Literacy support is permissible.

B. Prioritized Application Criteria:

Applications that include one or both of the following criteria will receive preference in final awarding of grant funds:

1. Applications that provide in-person technology training and support in addition to purchasing equipment. "In Person" training should be Person-Centered and may result in support provided at the Council on Aging, the person's home, or an alternative community location, such as a library.
2. Applications from COAs that serve Gateway Cities or Rural Communities in Massachusetts. Municipalities that fall into these classifications can be identified as follows: [Rural Definition Detail](#) and [Mass General Law](#).

C. Ineligible Activities

Grant funds may not be used for any of the ineligible activities described below. Applications proposing to use grant funds on such impermissible expenses may be rejected in whole or in part, and under no circumstances will grant funds be approved for such impermissible expenses.

Expenses that occurred before the contract start date or after the contract end date will not be reimbursed. Awardees must expend funds by no later than December 31, 2024, unless otherwise directed by EOEA. EOEA may extend the date by which funds may be expended, in its discretion, by providing notice to the Awardees and without requiring an amendment to the Contract.

Grant funds **can** be used to supplement, but **not** supplant, existing Medicaid HCBS or any other state-funded initiatives. These grant funds also must not overlap with any Center for Medicare and Medicaid Services (CMS) waiver extension proposals.

Examples of ineligible expenses include, but are not limited to, the following:

- a. Internet, hot spots, or data plans for individuals who qualify for the Federal Communication Commission (FCC) [Affordable Connectivity Program](#)
- b. Televisions
- c. Television subscription services
- d. Television streaming services (e.g., Netflix, Hulu, Disney Plus)
- e. Smartphone, tablet, and internet app fees
- f. Personal Emergency Response Systems
- g. Durable Medical Equipment
- a. Any pet related technology fee or fees
- b. Appliances
- c. Home automation Devices
- d. Home security systems
- e. Robotic or electronic comfort pets
- f. Voice activated hardware and software (*eligible expense for Older Adults who are blind or visually impaired*)
- g. Smart watches
- h. Audio books

SECTION 5: ELIGIBLE EXPENSES

A. Eligible Expenses

Qualifying Programs must propose to use grant funds only for Eligible Expenses. An Applicant must propose to use grant funds only for Qualifying Programs, as defined in Section 4. Eligible Expenses must increase an older adult's digital literacy and enable the older adult to utilize allowable Devices in a meaningful way that strengthens, enhances, and expands Medicaid Home and Community-Based Services. This may include, but is not limited to, Older Adults' ability to engage in telehealth, ability to access health care information through a patient portal, ability to participate in preventive services and programs, ability to find and access supports to age in community:

Any device(s) or equipment given to a recipient for permanent use (i.e., will not be returned to the COA) cannot exceed the total value of \$500 per recipient.

Eligible expenses include, but are not limited to, the following:

- a. Hardware:
 - i. Tablets
 - ii. Computers/Laptops
 - iii. Monitors
 - iv. Keyboards
 - v. Computer mice
 - vi. Headphones
 - vii. Webcam
 - viii. Mobile hotspots for Older Adults without home internet and who are not eligible for the FCC's Affordable Connectivity Program ([Affordable Connectivity Program | Federal Communications Commission \(fcc.gov\)](https://www.fcc.gov/affordable-connectivity))
- b. Software
 - i. Speech-to Text, Text-to-Speech
 - ii. Anti-virus
- c. Data/ Broadband
 - i. Data Packages
 - ii. Stipends for individual consumer's home internet if an individual does not qualify for the FCC's Affordable Connectivity Program
- d. Training/Support
 - i. Training/support staff time (e.g., a part- or full-time staff person to provide education and training, stipends for interns)
 - ii. Contracts for training and support with a third party

As defined in Section 2, Direct Program Costs are costs that are directly incurred due to the proposed programs. Programs funded with ARPA dollars are subject to the cost principles of 2 CFR 200.

Subrecipients and recipients should consider:

- A. *Reasonableness*: Direct Program Costs must be necessary and reasonable for the performance of the program. A cost is considered reasonable if it does not exceed that which would be incurred by a prudent person under the similar circumstances. For goods and services, costs are considered reasonable if they are comparable to market prices for similar goods and services.
- B. *Salaries*: Administrative and clerical salaries are typically considered indirect program costs. In order to claim administrative or clerical salaries as Direct Program Costs, the individual must be integral to the program or activity; the salary must be included in the Budget; the subrecipient must have prior written approval; and the costs are not also recovered in indirect program costs.
- C. *Allocable*: Program costs must also be allocable to the program which means a recipient or subrecipient incurred the costs in the performance of the award.

Subrecipients should maintain records of all costs incurred in the performance of the program for which they received a Federal award. If a subrecipient serves as a pass-through entity, the subrecipient is responsible for collecting and maintaining such records.

SECTION 6: GRANT PROGRAM DESCRIPTION

6.1 Application Requirements

To apply for a grant award, Applicants must complete and submit the Applicant Form through MassGRANTS, an online Grant Portal established by EOEA and their designee (the “Grant Portal”). Applicants can access the Grant Portal at: <https://maanfgrants.force.com/s/loginpage>.

All information requested on the application must be supplied. If any question or request is not applicable to an application, the Applicant must indicate that it is not applicable.

All applicants will be invited to a **virtual Bidders Conference** to review the grant requirements and ask questions on Monday, **April 26th 2023 at 11:00 a.m.** Attendance at the conference is not a prerequisite for this grant. To receive a link to the Bidders conference, please email MAHCBSGRANTS@pcgus.com with the full name, email address and organization of the person(s) attending the bidders conference.

All applications must be submitted through <https://maanfgrants.force.com/s/loginpage> on or before 5 p.m. May 22, 2023. EOEA expects to award all the allocated funds during the first round of applications.

Questions must be submitted to MAHCBSGRANTS@pcgus.com by 5 p.m. April 28th. In accordance with procurement rules, answers to all questions will be posted on COMMBUYS as an update to **Attachment B**, (Enhancing Digital Literacy FAQ) or before May 12th, 2023.

Each application must include, at a minimum, the following information provided in the form, format, and manner requested through the Application Form on the Grant Portal:

- Name and contact information for a primary and secondary contact at the organization applying for the grant
- The MMARS vendor code for the COA (this is the vendor code for the associated municipality)
- Details on the technology access and support currently provided by the COA
- A detailed project narrative describing how the COA will utilize the funding to meet the grant goals
- A project Budget
- A project work plan

COMMBUYS will not be used for application submissions for this RFA. Any applications received through COMMBUYS or other delivery modes may be disregarded or rejected. However, all materials, including this RFA, an Applicant Form Preview (provided here as **Attachment A** for informational purposes only), and a Frequently Asked Questions document (**Attachment B**), along with any updates thereto, will be posted on COMMBUYS. In the event there are discrepancies between the materials or instructions on the Grant Portal and the COMMBUYS page for this RFA, the COMMBUYS materials will take precedence.

6.2 Evaluation of Enhanced Technology Funding

EOEA will require grant Awardees to report on a set of Metrics for the purposes of evaluating impact of the grant funds and progress towards reaching the defined goals. The first priority for Metrics and

reporting is accurate data. Grantees will not be penalized or required to return funding if the data reflects that the program did not produce the expected results. EOEA will work with grantees to provide support if there are concerns with feasibility in reporting on the required Metrics.

Applicants are permitted to use grant funds to support the collection and analysis of program data. Applications will not be excluded if applicants are unable to meet the reporting Metrics completely. The application will include space to list any Metrics or reporting requirements that applicants are unable to meet.

A. Overview of requirements:

Grantees will be required to provide interim and final reports across an established set of Metrics. A sample reporting template is included in the RFA but **is not required to be submitted as part of the application.**

- *Interim report:* An interim report will be required on January 31, 2024, covering the first six months of the funding period.
- *Final report:* A final report will be required on March 31, 2025, which is ninety days following the end of the grant period.

B. Details on required Metrics:

- a. Total dollars spent in the reporting period.
- b. Cumulative total dollars spent since the grant award.
- c. Total number of individuals served in the reporting period.

Technology and Training Support Only

- d. Total dollars spend for focus in the reporting period.
- e. List trainings completed in training period. Detail must include: 1) name of training, 2) date(s) training was conducted, 4) trainer(s) name, organization and qualifications , 5) length of training in minutes and 6) number of participants who completed the training.
- f. Total number of trainings completed in reporting period.
- g. Total number of training certificates awarded to agency staff during reporting period.

Technology Purchases Only

- h. Total dollars spend for focus in the reporting period.
- i. Average number of organization staff employed by agency in reporting period.
- j. List all workforce incentives awarded in reporting period. Detail must include: 1) name of recipient, 2) total funds awarded, 3) type of award(s) and 4) date of award.
- k. List technology purchased during reporting period. Detail must include: 1) name of technology, 2) purchase date, 3) purchase price and 4) technology's permanent owner.

Grantees will also be required to participate in no more than three facilitated focus groups convened by EOEA and Massachusetts Healthy Aging Collaborative (MHAC)--six months after award notification, twelve months after award notification, and again at the end of the grant period. The purpose of these focus groups is to collect qualitative information on what worked well and ways to further support grantees in execution of digital literacy programming. Focus groups will also serve as a learning collaborative for grantees to benefit from each other's experience.

Per the Commonwealth Terms and Conditions, grant recipients are required to retain program documents and records for six years from the date of submission of the final expenditure report.

SECTION 7: GRANT PROGRAM INFORMATION

7.1 Grant Program Process and Authority

This RFA is issued under the provisions of regulations at 815 CMR 2.00. Various terms found in the state procurement regulations at 801 CMR 21.00 are also incorporated by reference in this RFA. Words used but not specifically defined in this RFA shall have the meanings defined in 815 CMR 2.00 or 801 CMR 21.00. Unless otherwise specified in this RFA, all communications, applications, and documentation must be in English, using English customary weights and measures (feet, pounds, quarts, etc.) and U.S. dollars. All applications must be submitted in accordance with the terms specified in **Section 9**.

Payments under this RFA, including payments under any Contract extensions, are subject to legislative appropriation and authorization, availability of state and federal funds, and EOEA's determination of satisfactory performance and advancement of the public interest and the objectives of EOEA.

EOEA reserves the right to amend this RFA at any time prior to contract execution. Any such amendment will be posted on COMMBUYS. Potential Applicants are advised to check this site regularly, as this will be the sole guaranteed method used for notification of changes.

EOEA makes no guarantee that a Contract, or any obligation to provide funding, will result from this RFA.

This RFA is distributed electronically using the Commonwealth of Massachusetts' eProcurement system known as COMMBUYS at www.commbuys.com (see **Section 12.1** for more information about COMMBUYS). However, as described in **Section 6.1**, COMMBUYS is **not** the method to be used for submission or acceptance of applications. Applicants must use the Grant Portal to submit applications.

7.2 Duration of Contract

Contracts resulting from this RFA shall be in effect upon execution and shall end on January 1, 2025, provided however, that EOEA may extend an Awardee's Contract for up to four years in its discretion, in increments to be determined by EOEA.

7.3 Anticipated Grant Awards

This grant is designed to provide funding in the form of time-limited grants to COAs to provide Devices, internet, and/or training to Older Adults in the COA's service area to enhance Digital Literacy of Older Adults. A grantmaking process would result in supporting an estimated **30 COAs**. Devices (e.g., tablets, computers) will remain at the COAs after the performance period (January 2025) and the COA would be responsible for the cost of continued training and support. An exception to this may be made if COA specifically applied to provide technology directly to Older Adults.

Allowable expenses include Devices (i.e., tablets, computers), internet (i.e., hotspots, stipends for individual consumers' internet if they do not qualify for the FCC's Affordable Connectivity Program), and training/support (i.e., a part- or full-time staff person to provide education and training or a contract with a non-profit organization to assist with digital literacy).

COAs will be awarded up to \$100,000 each to provide Devices, internet, and/or training/support to Older Adults for the grant cycle.

Grant funds will be awarded through a competitive application process according to this RFA. Applications will be evaluated in accordance with **Section 10**. Awards under this RFA shall be for a fixed amount, which amount shall be determined and announced to the Awardee in accordance with **Section 10** and shall be paid out in a single payment to each Awardee upon execution of the Contract. Grant recipients are required to retain program documents and records for six years from the date of submission of the final expenditure report.

If additional funds become available during the Contract period, EOEA reserves the right to increase the maximum obligation to some or all of the Contracts executed as a result of this RFA or to execute Contracts with organizations not funded in the initial selection process, subject to available funding, satisfactory Contract performance, and service or commodity need.

SECTION 8: CONTRACT REQUIREMENTS

Under any Contract resulting from this RFA, the Awardee will be responsible for the implementation of its proposed Qualified Program, submission of required reporting, conducting required evaluation activities, and any other requirements outlined in the Awardee's application, this RFA, the grant award notification letter, and the Contract negotiated between EOEA and the Awardee. Awardees are also required to meet the requirements described in this section. See also **Attachment D, Additional Contract Terms**, for certain model contract terms.

8.1 Participation in Contract Activities

Awardees are responsible for:

- 1) As EOEA deems appropriate, participating in periodic phone conferences and meetings with EOEA staff and other Awardees to provide updates, share lessons learned, and receive feedback; and
- 2) Participating in such activities that EOEA deems necessary to monitor Qualifying Program status during the term of the Contract and support EOEA objectives.

8.2 Continuing Obligation to Disclose Conflicts of Interest

In submitting applications and through the term of the Contract, Applicants are obligated to disclose any of their own interests, including interests of any vendor identified in an Applicant's application as expected to perform specific work in the proposed Qualifying Program or experience specific benefits from the proposed Qualifying Program, that may conflict with the performance of services required under any Contract resulting from this RFA, or that may be otherwise anti-competitive, as determined by EOEA. EOEA may require the Applicant to submit any additional relevant information regarding its financial, legal, contractual or other business interests, including those of any vendors identified in an Applicant's application as expected to perform specific work in the proposed Qualifying Program or experience specific benefits from the proposed Qualifying Program. If EOEA in its sole judgment

determines that an Applicant, including any vendor identified in an Applicant's application as expected to perform specific work in the proposed Qualifying Program or experience specific benefits from the proposed Qualifying Program, possesses a conflicting interest, EOEА may propose or consider any application for any measures that would eliminate or mitigate such conflicting interest to EOEА's satisfaction.

SECTION 9: APPLICATION REQUIREMENTS

9.1 Application Submission Requirements

Applicants must submit an electronic application on the Grant Portal, found here: <https://maanfggrants.force.com/s/loginpage>. The application must be submitted by the bid opening date (deadline for applications) specified in **Section 11**.

Any technical questions regarding the Grant Portal, including regarding access issues or functionality issues, should be directed to the Grant Portal support team at MassGrantsSupport@mtxb2b.com.

9.2 Application Contents

Applicants must follow the RFA's submission instructions carefully. Information wrongly placed or placed out of sequence may be ignored or treated as missing.

The application must be submitted through the Grant Portal. An Applicant Form Preview, attached to the RFA as **Attachment A** shows in screenshots the information that Applicants will be required to submit through the portal. Applicants must provide all required information requested in the Applicant Form and must indicate when a question or request is not applicable to its application.

The Applicant must also upload to the Grant Portal any required additional forms or attachments described in this RFA under **Sections 9.4** and **9.5**.

The Applicant's application is effective through the date that the Applicant executes a Contract with EOEА pursuant to this RFA.

9.3 Applicant Form Electronic Signature

Applications submitted via the Grant Portal must be signed electronically by the Applicant or the Applicant's Agent. By checking the attestation that the submitter is an authorized signatory for the Applicant organization, the application will be deemed to be signed electronically by the Applicant.

9.4 Taxpayer Identification Number and Certification (Mass. Substitute W-9 Form)

Applicants must submit a complete and accurate Request for Taxpayer Identification and Certification Number (Mass. Substitute W-9 Form) as part of a completed Application as described in **Section 9.2**. An original W-9 form is not required; an electronically signed or scan of wet-ink signed form is acceptable. If the Applicant's name, address, or Tax ID Number have not changed since the Applicant last submitted and executed a Mass. Substitute W-9 Form, a new Mass. Substitute W-9 Form is not required.

The Mass. Substitute W-9 Form is available at this [link](#) and also on COMMBUYS. The information on this form will be used to record the Applicant's legal address and where payments under a State

Contract will be sent. The company's correct legal name and legal address must appear on this form and must be identical to the legal name and legal address on the Commonwealth Terms and Conditions. Please do not use the U.S Treasury's version of the W-9 Form.

9.5 Awardee Authorized Signatory Listing

Applicants must complete the Contractor Authorized Signatory Listing available on COMMBUYS or at this [link](#), in accordance with Comptroller requirements, as part of a complete Application as described in **Section 9.2**.

Further information on how to correctly complete the Authorized Signatory Form is provided, below.

In the table entitled "Authorized Signatory Name" and "Title," type the names and titles of those individuals authorized to execute loan agreements, contracts, and other legally binding documents on behalf of the Applicant. Applicants are advised to keep this list as small as possible, as Awardees will be required to notify EOEА of any changes. If the person signing in the signature block at the bottom of the first page of this form also will serve as an "Authorized Signatory," that person's name must be included in the typed table.

In the next paragraph, which begins "I certify that I am the President, Chief Executive Officer, Chief Fiscal Officer, Corporate Clerk, or Legal Counsel for the Awardee..." if your organization does not have these titles, cross them out and handwrite the appropriate title above the paragraph.

The second page of the form (entitled "Proof of Authentication of Signature") states that the page is optional. However, EOEА requires the completion of separate second pages for each signatory listed on the first page (e.g., if three names are listed on the first page, three separate second pages, one for each signatory, must be completed).

Please note that in two places where the form states "in the presence of a notary," this should be interpreted to mean "in the virtual presence of a notary or corporate clerk/secretary." Either a notary or corporate clerk/secretary may authenticate the form; only one is required.

Organizations whose corporate clerks/secretaries authenticate this form are not required to obtain a Corporate Seal to complete this document.

9.6 Acceptable Forms of Signature

Effective June 15, 2021, for all 1) CTR forms, including the Standard Contract Form, W-9s, Electronic Funds Transfer (EFT) forms, ISAs, and other CTR-issued documents and forms, or 2) documents related to state finance and within the statutory area of authority or control of CTR (i.e. contracts, payrolls, and related supporting documentation), CTR will accept signatures executed by an authorized signatory in any of the following ways: 1. Traditional "wet signature" (ink on paper); 2. Electronic signature that is either: a. Hand drawn using a mouse or finger if working from a touch screen device; or b. An uploaded picture of the signatory's hand drawn signature; or 3. Electronic signatures affixed using a digital tool such as Adobe Sign or DocuSign. If using an electronic signature, the signature must be visible, include the signatory's name and title, and must be accompanied by a signature date. Please be advised that typed text of a name not generated by a digital tool such as Adobe Sign or DocuSign, even in computer-generated cursive script, or an electronic symbol, are not acceptable forms of electronic signature.

This section is not applicable to the Applicant’s application, submitted through the Grant Portal. Instead, the Applicant’s attestation will serve as the electronic signature of the application materials, as described in Section 9.3.

9.7 Applicant Certifications

By submitting an application, each Applicant certifies that:

- 1) All information provided in or as part of the application is accurate;
- 2) If awarded grant funds, the Applicant will produce receipts or other evidence that funds were used as proposed and approved and will otherwise comply with the terms of this RFA and the Contract; and
- 3) The Applicant understands that EOEА may recoup the amount of any funding not used as proposed and approved.

SECTION 10: APPLICATION EVALUATION PROCESS

10.1 Application Review

- 1) Applications submitted in response to this RFA shall undergo initial review by a third-party vendor retained by EOEА, who will determine compliance with the minimum requirements of this RFA. Failure to meet any such requirements may cause an application to be disqualified from consideration. The third-party vendor will then compile and summarize the key information from the Applicant’s application for EOEА’s internal Evaluation Committee (the “Committee”) and make initial recommendations.
- 2) The Committee will then review the materials from the third-party vendor, and complete final evaluations and recommendations for Awardees and award amounts. In addition to the information provided in an Applicant’s application, the Committee may consider any relevant information about the Applicant known to EOEА. The third-party vendor may provide the Committee with technical assistance, as the Committee deems necessary, during its review.
- 3) The Committee will then make recommendations to the Secretary of EOEА or her designee.
- 4) Applications that lack adequate detail with respect to the information required under **Section 6**, as determined by the Committee, may be considered incomplete, and may cause an application to be disqualified from consideration. At its option, the Committee may seek clarification from the Applicant pursuant to **Subsection 10.3**, below.

All applications will be rated according to uniform criteria, such as comprehensiveness, clarity, responsiveness to EOEА’s needs and goals, effectiveness, timeline, and each application will be rated according to the following scale: “Excellent”, “Good”, “Fair”, “Poor”, or “Not Applicable (N/A)”. Each rating will be accompanied by key points supporting the rating. These ratings will then be used to make recommendations for Awardees and award amounts, through the following categories for funding awards: “Strongly Recommend”, “Recommend”, “Recommend if Funding Remains Available”, or “Do Not Recommend”. Higher ratings will correlate with “Strongly Recommend” or “Recommend” categories, while lower ratings will correlate with “Recommend if Funding Remains Available” or “Do Not Recommend” categories.

The Committee may determine that a defect in an Applicant's application is immaterial and may, at its discretion, consider the application to meet the requirements of this RFA, with or without clarification from the applicant.

10.2 Budget and Work Plan Revisions

EOEA will notify Applicants of any approved awards. After notification, selected Applicants may be required to develop and submit a revised work plan and Budget, using the approved award amount as a condition of receipt of award. Work plans and Budgets may need to be revised to clarify something in the initial applications or to accommodate the approved award amount (which may be less than the Applicant requested). Revised work plans and Budgets must still satisfy the requirements of this RFA as determined by EOEA. Additionally, Applicants may be required to submit updated cost proposals, quotes, etc. to support revised work plans, if applicable, on request.

10.3 Non-compliance and Clarifications

- 1) EOEA reserves the right to reject an application at any time during the evaluation process if the Applicant:
 - a) Fails to demonstrate to EOEA's satisfaction that it meets all requirements of this RFA or receives a rating of "Poor" in one or more sections of the evaluation;
 - b) Fails to submit all required information or otherwise satisfy all response requirements in **Sections 6 and 9**;
 - c) Has any interest that may, in EOEA's sole determination, conflict with performance of services for the Commonwealth or be anti-competitive; or
 - d) Rejects or qualifies its agreement to any of the mandatory provisions of this RFA, the Contract or the Commonwealth's Standard Contract Form or Terms and Conditions.
- 2) The Committee may determine that non-compliance with an RFA requirement is not material. In such cases, the Committee may seek clarification, allow the Applicant to make minor corrections, consider the non-compliance when evaluating the response, or apply a combination of all three remedies.

SECTION 11: TIMETABLE

All dates are estimated **except** due dates for written inquiries and for receipt of Applicant applications. All times are Eastern.

#	DESCRIPTION	DATE
1	RFA released	April 10, 2023
2	Bidders Conference	April 26, 2023 11a.m.
3	Deadline for receipt of written questions on the RFA	April 28, 2023, by 5 p.m.
4	Responses to all Applicant Questions will be posted on CommBuys	May 12, 2023
5	Bid Opening Date (Deadline for Applications)	May 22, 2023, by 5 p.m.
6	Awardees and award amounts determined (anticipated)	Week of July 24, 2023
7	Projected Contract start date (anticipated)	August 15, 2023
8	Projected Project End Date	December 31, 2024

SECTION 12: ADDITIONAL GRANT PROGRAM REQUIREMENTS AND TERMS

12.1 COMMBUYS as Official Source of Information

COMMBUYS is the official source of information for this procurement (known as a Bid in COMMBUYS terminology) and is publicly accessible at no charge at www.commbuys.com. Information contained in this RFA document and in COMMBUYS, including file attachments, announcements, or modifications, if any, and information contained in the related Frequently Asked Questions document, attached as **Attachment B**, along with any modifications thereto, are all components of the procurement.

Applicants are solely responsible for obtaining all information distributed for this procurement via COMMBUYS.

It is each Applicant’s responsibility to check COMMBUYS for:

- Any amendments, addenda, announcements or modifications to this RFA, and
- Any Q&A records or updated Frequently Asked Questions document (**Attachment B**) related to this RFA.

The Commonwealth accepts no responsibility and will provide no accommodation to Applicants who submit a Response to this RFA based on out-of-date information or received from a source other than COMMBUYS.

COMMBUYS Registration. Applicants may elect to obtain a free COMMBUYS Seller registration which provides value-added features, including automated email notification associated with postings and

modifications to COMMBUYS records. However, in order to respond to this RFA, Applicants must submit their application through the EOEAs Grant Portal, as described in **Sections 6.1** and **9.1**.

The COMMBUYS system introduces terminology, which Applicants should be familiar with in order to conduct business with the Commonwealth. To view this terminology and to learn more about the COMMBUYS system, visit the [COMMBUYS Resource Center](#).

Questions specific to COMMBUYS should be made to the COMMBUYS Help Desk at commbuys@mass.gov.

Questions specific to the Grant Portal should be made to the MassGrantsSupport@mtxb2b.com.

All other questions must be directed to the RFA contact, in accordance with **Section 12.2**.

12.2 Applicant Communications

Applicants are prohibited from communicating directly with any employee of EOEAs concerning this RFA except as specified below, and no other individual Commonwealth employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFA.

RFA Contact: MAHCBSGrants@pcgus.com

Reasonable Accommodation: Applicants with disabilities or hardships that seek reasonable accommodation, which may include the receipt of RFA information in an alternative format, must submit a written statement describing the Applicant's disability and the requested accommodation to the contact person for the RFA. EOEAs reserves the right to reject unreasonable requests.

12.3 RFA Inquiries

Applicants may make written inquiries concerning this RFA until no later than the date and time specified in the timetable in **Section 11** of this RFA. Written inquiries must be sent to the RFA contact at the email address listed in **Section 12.2** above. No acknowledgment of receipt will be given. EOEAs will review all questions and, at its discretion, prepare written responses to those it determines to be of general interest and relevant to the preparation of an application in response to the RFA. These responses will be posted on the COMMBUYS website. Only written responses will be binding on EOEAs.

EOEAs reserves the right to accept additional written questions after the date and time specified in the timetable in **Section 11** of this RFA and, at its discretion, prepare written responses to those it determines to be of general interest and relevant to the preparation of an application in response to the RFA. These additional responses will also be posted on the COMMBUYS website. However, EOEAs makes no guarantee that it will answer questions received after the deadline.

12.4 Electronic Communication and Update of Applicant's Contact Information

It is the responsibility of the Applicant to keep current the e-mail address of the Applicant's contact person and prospective Contract manager, if awarded a Contract, and to monitor that e-mail inbox for communications from EOEAs, including requests for clarification. EOEAs and the Commonwealth assume no responsibility if an Applicant's designated e-mail address is not current, or if technical problems, including those with the Applicant's computer, network or internet service provider (ISP) cause e-mail

communications sent to or from the Applicant and EOEA to be lost or rejected by any means, including e-mail or spam filtering.

12.5 Amendment or Withdrawal of RFA

EOEA reserves the right to amend the RFA at any time prior to contract execution and to terminate this procurement in whole or in part at any time. If EOEA decides to amend or clarify any part of this RFA, any amendment will be posted on COMMBUYS. EOEA recommends that Applicants check the COMMBUYS site regularly for updates, as it is the Applicant's responsibility to remain aware of clarifications and amendments.

12.6 Funding Levels

Funding levels not specifically identified in an Applicant's response and accepted by EOEA as part of a Contract will not be compensated under any Contract awarded pursuant to this RFA. The Commonwealth will not be responsible for any costs or expenses incurred by Applicants in responding to this RFA.

12.7 Electronic Funds Transfer (EFT)

By responding to this RFA, Applicants agree to participate in the Commonwealth Electronic Funds Transfer (EFT) program for receiving payments, unless the Applicant can provide compelling proof that it would be unduly burdensome. EFT is a benefit to both Awardees and the Commonwealth because it ensures fast, safe, and reliable payment directly to Awardees and saves both parties the cost of processing checks. Awardees can track and verify payments made electronically through the Comptroller's VendorWeb application. Additional information about EFT and VendorWeb is available on the [VendorWeb](#) site. Any successful Applicant must enroll in EFT.

Awardees may submit their Electronic Funds Transfer Authorization Agreement, provided by EOEA, at any time prior to execution of a grant award under this RFA. It is not required as part of the Application submission.

12.8 Incorporation of RFA

This RFA and any documents an Applicant submits in response to it may be incorporated into any Contract awarded to that Applicant.

12.9 Public Records

All applications and related documents submitted in response to this RFA become public records and are subject to the Massachusetts Public Records Law, M.G.L. c. 66, § 10 and M.G.L. c. 4, § 7 subsection 26. Any statements in submitted applications that are inconsistent with these statutes will be disregarded.

EOEA will not return to Applicants any applications or materials they submit in response to this RFA.

Because the Electronic Funds Transfer (EFT) Authorization Agreement contains banking information, this form, and all information contained on this form, shall not be considered a public record and shall not be subject to public disclosure through a public records request.

12.10 Restriction on the Use of the Commonwealth Seal

Applicants and Awardees are not allowed to display the Commonwealth of Massachusetts Seal in their bid package or subsequent marketing materials if they are awarded a Contract because use of the coat of arms and the Great Seal of the Commonwealth for advertising or commercial purposes is prohibited by law.

12.11 Application Duration

The Applicant's Application shall remain in effect until any Contract with the Applicant is executed.