

LRRP Contract and Invoicing Webinar FAQ Sheet

March 10 ,2021

Supporting Documentation

Can you provide a list/description of what is required for Support Documentation?

Support documentation consists of invoices, financial statements, or other vendor/accounting records that justify a payment request. For monitoring and/or auditing purposes, vendors must be able to show a paper trail of how costs were incurred.

When/if requested vendors must provide that documentation to justify their payment request. To clarify/correct what was stated in the training – **please do NOT forward support documentation when submitting invoices.** DHCD will request this information on an as needed basis.

How much detail do you want in the pertinent documents (summary)? For example, should the total costs be itemized by staff member and task and the number of hours worked and dollar amount? Or total hours worked and cost?

Documentation showing how costs were incurred must be reasonable to understand and match what was written in your contract's budget. If asked for additional information or clarification on your financial records, such information should be provided to DHCD in a timely manner.

Are “back-up documentation” and “pertinent documents” the same as Support Documentation?

Yes.

Signature

Can we use e-signature for the contracts or must it be a wet signature?

A wet signature is required on the contract. A wet signature is a handwritten signature with a pen. Electronic signature or e-signature is not accepted on a contract.

Mail the contract documents with an “original” wet signature (not a copy or PDF) to Julissa Tavez per the contract submission instructions.

Julissa Tavez will email your contract with clear contract submission instructions. Please follow the instructions that she provides in the email.

Can the invoices have electronic signatures, or must they be ink signatures?

A wet signature is required on the invoice. A wet signature is a handwritten signature with a pen. Electronic signature or e-signature is not accepted on an invoice.

Print the invoice, sign with a wet signature, and then scan and save the invoice as a PDF. The PDF invoice can be sent to Brett Morton via email per the invoice submission instructions.

So if I understand this correctly, the person who signs the invoices must also be on the authorized signatory form on the original contract, correct?

Yes, that is correct.

Will the contract documents to be signed and notarized be e-mail or sent by U.S. mail?

All initial contract documents need to be sent by mail per Slide 3 in the presentation.

Julissa Tavez will email your contract with clear contract submission instructions. Please follow the instructions that she provides in the email.

Contracts

If we are working with more than one community, do we prepare a separate contract for each one?

There will be one contract for all the communities for which a consultant is assigned.

Do we need a separate Settlement and Release Statement for each individual community?

No. The Settlement and Release included in the Final Contract will cover all the communities included in the final contract.

Must a Settlement and Release be submitted monthly? It may take us until after 3-25-21 to get the contracts signed. Until we get the final signed contract back from DHCD, should we complete multiple Settlement and Release documents (e.g., 3-25-21 and also 4-25-21)?

No. The Settlement and Release is signed at the time of the Final Contract and that is the only time that it needs to be submitted.

We submitted the notarized signatory forms in hard copy by mail when asked to do this two weeks ago. Do we have to mail a new set of forms?

Please review the “Additional Information” section at the end of this document.

Per contract instructions, you need to mail the complete contract package which includes these forms. However, Vendors can use the same **Contractor Authorized Signatory Listing** and **Proof of Authentication of Signature** forms that they already submitted for their NEW VENDOR CODES or with their applications.

So all forms we must submit can have the date we submitted in response to the RFR? No fresh forms?

Correct. Please review the “Additional Information” section at the end of this document.

Is the contract amount for Phase I only?

No. The contract amount is for phases 1 through 3.

Is a notary required for the Contractor Authorized Signatory Listing per slide 6?

The Contractor Authorized Signatory Listing must be authenticated by a notary or a corporate clerk.

Expenses

For "expenses" after 2/25, do we count our time toward these webinars?

What about mileage? Are you seeing that as under salary as allowable?

Municipalities were informed at yesterday's webinar that Plan Facilitators could undertake additional customer surveys and forums to gather public input. We regularly contract out for translation and interpretation for these events/programs. Can these costs be submitted as part of the contract costs?

Can we use a local subcontractor to support any of our work?

Can we invoice for travel costs for our initial site visit?

For the questions above:

The amounts allocated per community represent the compensation that was allocated to do the LRRP Plan Facilitator work for that community. The PF decides how those funds might be utilized. The PF scope of service outlines the work and deliverables for meeting the scope of service. Submitted invoices will reflect the PF work that was completed during that timeframe.

Copy of Presentation

Where can we find a copy of this presentation?

You can use this link for now.

<https://drive.google.com/file/d/1QxI4sj8lyvDvn7DAMGKN1zVTHX4dN8pL/view?usp=sharing>

Invoices

Can we use our own invoice template or do we need to use a specific template?

No. Please use the provided template.

Can you clarify the definition of monthly? Are you expecting invoices on the 25th of the month based on the contract start date?

Please submit invoices in 30-day increments.

Do we also mail hard copies of each invoice?

No, but each invoice will require a wet signature from an authorized signatory (see Signature section above for more information).

Kickoff

When should we expect to have the materials needed for our kickoffs?

Materials related to the Community Agreement, Business Survey, and Baseline Data Training will be e-mailed on 3/12/21.

SME's

Can you detail how SME time will be handled? Will there be separate contracts?

SME's will have separate contracts.

Additional Information:

Vendors can use the **Contractor Authorized Signatory Listing** and **Proof of Authentication of Signature** forms that they already submitted for their NEW VENDOR CODES or with their applications.

COMMONWEALTH OF MASSACHUSETTS
CONTRACTOR AUTHORIZED SIGNATORY LISTING

Issued May 2004

CONTRACTOR LEGAL NAME: _____
CONTRACTOR VENDOR/CUSTOMER CODE: _____

INSTRUCTIONS: Any Contractor (other than a sole-proprietor or an individual contractor) must provide a listing of individuals who are authorized as legal representatives of the Contractor who can sign contracts and other legally binding documents related to the contract on the Contractor's behalf. In addition to this listing, any state department may require additional proof of authority to sign contracts on behalf of the Contractor, or proof of authenticity of signature (a notarized signature that the Department can use to verify that the signature and date that appear on the Contract or other legal document was actually made by the Contractor's authorized signatory, and not by a representative, designee or other individual).

NOTICE: Acceptance of any payment under a Contract or Grant shall operate as a waiver of any defense by the Contractor challenging the existence of a valid Contract due to an alleged lack of actual authority to execute the document by the signatory.

For privacy purposes **DO NOT ATTACH** any documentation containing personal information, such as bank account numbers, social security numbers, driver's licenses, home addresses, social security cards or any other personally identifiable information that you do not want released as part of a public record. The Commonwealth reserves the right to publish the names and titles of authorized signatories of contractors.

AUTHORIZED SIGNATORY NAME	TITLE
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

I certify that I am the President, Chief Executive Officer, Chief Fiscal Officer, Corporate Clerk or Legal Counsel for the Contractor and as an authorized officer of the Contractor I certify that the names of the individuals identified on this listing are current as of the date of execution below and that these individuals are authorized to sign contracts and other legally binding documents related to contracts with the Commonwealth of Massachusetts on behalf of the Contractor. I understand and agree that the Contractor has a duty to ensure that this listing is immediately updated and communicated to any state department with which the Contractor does business whenever the authorized signatories above retire, are otherwise terminated from the Contractor's employ, have their responsibilities changed resulting in their no longer being authorized to sign contracts with the Commonwealth or whenever new signatories are designated.

Signature: _____ Date: _____

Title: _____ Telephone: _____

Fax: _____ Email: _____

[Listing can not be accepted without all of this information completed.]
A copy of this listing must be attached to the "record copy" of a contract filed with the department.

COMMONWEALTH OF MASSACHUSETTS
CONTRACTOR AUTHORIZED SIGNATORY LISTING

Issued May 2004

CONTRACTOR LEGAL NAME: _____
CONTRACTOR VENDOR/CUSTOMER CODE: _____

PROOF OF AUTHENTICATION OF SIGNATURE

This page is optional and is available for a department to authenticate contract signatures. It is recommended that Departments obtain authentication of signatures for the signatory who submits the Contractor Authorized Listing.

This Section **MUST** be completed by the Contractor Authorized Signatory in presence of notary.

Signatory's full legal name (print or type): _____

Title: _____

X _____
Signature as it will appear on contract or other document (Complete only in presence of notary):

AUTHENTICATED BY NOTARY OR CORPORATE CLERK (PICK ONLY ONE) AS FOLLOWS:

I, _____ (NOTARY) as a notary public certify that I witnessed the signature of the aforementioned signatory above and I verified the individual's identity on this date: _____, 20____.

My commission expires on: _____

AFFIX NOTARY SEAL

I, _____ (CORPORATE CLERK) certify that I witnessed the signature of the aforementioned signatory above, that I verified the individual's identity and confirm the individual's authority as an authorized signatory for the Contractor on this date: _____, 20____.

AFFIX CORPORATE SEAL

Please remember, that the signatory listed on this form is the same person that signs the contract.

Please note, Julissa Tavaréz will email the contracts to the vendors. She will provide clear submission instructions in the email. Please follow those instructions.

Further, upon receiving the contracts, vendors should follow these instructions:

➤ Contract Documents include:

Cover letter with instructions to have authorized signatory **execute** the following:

- 2 Standard Contract Forms
- 2 Authorized Signatory Listing Forms
- 2 Proof of Authentication Forms
- Settlement and Release Form

All executed documents must be mailed to **Contract Manager** Julissa Tavaréz at **100 Cambridge Street, Suite 300 Boston, MA 02114.** You may reach Julissa via email at Julissa.Tavaréz@mass.gov.