**INSTRUCTIONS FOR PURCHASERS:**

**This template document may be used to create Request for Response (RFR) documents for basic purchases. It identifies the minimum contents required for an RFR. as well as suggested additional content.**

**Departments are responsible for reviewing and completing the RFR in compliance with OSD regulation, 801 CMR 21.00, and associated guidance and policies contained in OSD’s** [**Conducting Best Value Procurements Handbook**](https://www.mass.gov/media/875656/download)**.**

**Color coding explanation for purchasers:**

This template uses color highlighting to identify the following:

* Items required for all Bids – shown in red, and highlighting should be removed before RFR publication.
* Optional items that may apply to some Bids – shown in gray and may be deleted. Highlighting should be removed before RFR publication if those items remain in the document.
* Instructions – shown in yellow should be deleted before RFR publication.

**Please delete this instructions page and remove highlighting after document completion and before publication.**

**Note on document accessibility:** This document uses highlighting, which may present accessibility challenges for some readers. If you are developing an RFR and require an accessible version of this document for editing, please email your request to [osdlegal@state.ma.us](mailto:osdlegal@state.ma.us).

**ISSUE DATE:**

| **Purchasing Department** |  |
| --- | --- |
| **Address** |  |
| **City, State Zip Code** |  |
| **Procurement Contact Person** |  |
| **Telephone Number** |  |
| **Fax Number** |  |
| **E-Mail Address** |  |
| **RFR Name/Title** |  |
| **RFR Number** |  |
| **COMMBUYS Bid Number** |  |

1. **Description or Purpose of Procurement:**

**[INSERT SHORT DESCRIPTION]**

1. **Applicable Procurement Law**

| **Check Appropriate Box (“X”):** | **Type of Purchase** | **Applicable Laws** |
| --- | --- | --- |
|  | **Executive Branch Goods and Services** |  |
|  | Goods and Services | MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00 |
|  | Human and Social Services | MGL c. 7, § 22, § 22N; c. 30, § 51, § 52; 801 CMR 21.00; 808 CMR 1.00 |
|  | Legal Services | MGL c. 30, § 51, § 52 and § 65; c. 7, § 22; and 801 CMR 21.01(2) (b) |
|  | Grants | MGL c. 7A, § 7; St. 1986 c. 206, § 17; 815 CMR 2.00 |

1. **Acquisition Method:**

| **Check All Applicable (“X”):** | **Category** |
| --- | --- |
|  | Fee-For-Service |
|  | Outright Purchase |
|  | Rental (not to exceed 6 months) |
|  | Term Lease |
|  | License |
|  | Other: [specify, e.g., TELP] |

1. **Whether Single or Multiple Contractors are Required for Contract:**

| **Check One (“X”):** |  |
| --- | --- |
|  | Single Contractor |
|  | Multiple Contractors |

1. **Estimated Number of Awards**

The target maximum number of Contractors is       [Insert the maximum number of Contractors]; the Purchasing Department may award more or fewer contracts, if it is in the best interests of the Commonwealth to do so.

1. **Adding Contractors after initial Contract Award [OPTIONAL]**

If, over the life of the contract, the Purchasing Department determines that additional Contractors may be added, these may be drawn from qualified companies that responded to this Solicitation and not awarded Contracts. If necessary to meet the requirements of the Commonwealth, the Solicitation may be reopened to obtain additional Bids.

1. **Entities Eligible to Use the Resulting Contract**

| **Check One (“X”):** | **Eligible Entities** |
| --- | --- |
|  | **Limited User Contract – Restricted to Use by Defined Entities Only.** Any Contract(s) resulting from this Bid will be open for use by the issuing Purchasing Department and the following other entities:   * [Identify additional Eligible Entities by name] |
|  | **Limited User Contract – Restricted to Use by Issuing Entity Only.** |

1. **Expected Duration of Contract (Initial Duration and any Options to Renew):**

| **Contract Duration** | **Number of Options** | **Number of Years/Months** | **Instructions** |
| --- | --- | --- | --- |
| **Initial Duration** |  |  | Specify Initial Contract Term in Months/Years. The Contract will be executed for this Initial Duration and will run from the Contract Effective/Start Date (execution date) for this Initial Duration. (e.g., “Two Years” or “From the execution date through MM/DD/YYYY”). |
| **Renewal Options** |  |  | Identify the duration of options to renew and the number of such options (e.g. “two options to renew for one year each”). |
| **Total Maximum Contract Duration** |  |  | Initial Number of Years/Months for the Initial Term Plus All Renewal Periods. |

1. **Anticipated Expenditures, Funding, or Compensation:**

Estimated Value of Procurement: $      [OPTIONAL]

[USE ONLY IF APPLICABLE] The funding for any contract resulting from this procurement is conditioned upon receipt of [select from this list if applicable: bond/grant/federal/other (identify source)] funds.

1. **Contract Performance and Business Specifications:** **[CHOOSE WHAT IS APPLICABLE]**

**Scope of Services: [INSERT DESCRIPTION OF PERFORMANCE, SERVICES, ETC.]**

**and/or**

**Commodities being Procured: [INSERT LIST OR TABLE]**

**Fiscal Terms: [INSERT DESCRIPTION OF PAYMENT TERMS AND REQUIREMENTS, (INCLUDING: COMMONWEALTH IS TAX EXEMPT, PROMPT PAYMENT DISCOUNTS (INCLUDED IN REQUIRED SPECIFICATIONS), BILLS ARE PAYABLE IN ACCORDANCE WITH CTR’S BILL PAYMENT POLICY); ALSO ADD DETAIL AS APPROPRIATE TO SPECIFY BASIS FOR ISSUING INVOICES (E.G., TIME AND MATERIALS OR DELIVERABLES-BASED PAYMENTS)]**

**Performance Measures: [INSERT DESCRIPTION]**

1. **Small Business Purchasing Program** <All subsections of this section are required for inclusion> **[MANDATORY FOR PROCUREMENTS WITH ANNUAL VALUES EQUAL TO OR LESS THAN $250,000; DELETE IF NOT APPLICABLE]**

**Program Background**

The Massachusetts [Small Business Purchasing Program](https://www.mass.gov/sbpp) (SBPP) was established pursuant to [Executive Order 599](https://www.mass.gov/executive-orders/no-599-reaffirming-programs-to-ensure-diversity-equity-and-inclusion-for-diverse-and-small-massachusetts-businesses-in-state-procurement-and-contracting)to increase state contracting opportunities with small businesses having their principal place of business within the Commonwealth of Massachusetts. Pursuant to the SBPP, it is the intention of the issuing department to award this Small Procurement to one or more SBPP participating business(es) as described below.

**SBPP Award Preference**

While all businesses, no matter the size or principal place of business, may submit responses to this solicitation, should an SBPP participant respond and meet the best value criteria as described in this solicitation, the SBPP participant shall be awarded the contract. The Strategic Sourcing Services Team (SSST) will not evaluate submissions from non-SBPP participants unless no SBPP Bidder meets the SSST’s best value evaluation criteria.

**SBPP Participation Eligibility**

To be eligible to participate in this procurement as an SBPP participant, an entity must meet the following criteria, and be marked as an SBPP-registered business in [COMMBUYS](https://www.commbuys.com/bso/):

1. Have its principal place of business in the Commonwealth of Massachusetts;
2. Been in business for at least one year;
3. Employ a combined total of 50 or fewer full-time equivalent employees in all locations, or employees work less than a combined total of 26,000 hours per quarter; and
4. Have gross revenues, as reported on appropriate tax forms, of $15 million or less, based on a three-year average.

Non-profit firms also must be registered as a non-profit or charitable organization with the MA Attorney General’s Office and be up to date with all filings required by that office and be tax exempt under Section 501(c) of the Internal Revenue Code.

**SBPP Compliance Requirements**

It is the responsibility of the Bidder to ensure that their SBPP status is current at the time of submitting a response and throughout the life of any resulting contract. Misrepresentation of SBPP status will result in disqualification from consideration, and may result in debarment, contract termination, and other actions. To learn more about the SBPP, including how to apply, visit the [SBPP Webpage](http://www.mass.gov/sbpp).

**Program Resources and Assistance**

Bidders and Contractors seeking assistance regarding SBPP may visit the SBPP webpage, <http://www.mass.gov/sbpp>, or contact the SBPP Help Desk at [sbpp@mass.gov](mailto:sbpp@mass.gov).

1. **Supplier Diversity Plan (SDP) Plan** <All subsections of this section are required for inclusion> **[MANADATORY FOR PROCUREMENTS WITH ESTIMATED ANNUAL VALUES EXCEEDING $250,000; DELETE IF NOT APPLICABLE.]**

**Program Background**

Pursuant to [Executive Order 599](https://www.mass.gov/executive-orders/no-599-reaffirming-programs-to-ensure-diversity-equity-and-inclusion-for-diverse-and-small-massachusetts-businesses-in-state-procurement-and-contracting)the Commonwealth’s [Supplier Diversity Program](https://www.mass.gov/info-details/learn-about-the-supplier-diversity-program-sdp) (SDP) promotes business-to-business relationships between awarded Contractors and diverse businesses and non-profit organizations (“SDP Partners”) certified or recognized (see below for more information) by the [Supplier Diversity Office (SDO)](https://www.mass.gov/supplier-diversity-office).

All Bidders and Contractors are strongly encouraged to create a profile on the SDO’s Supplier Diversity Hub to access the Commonwealth’s supplier diversity resources and tools.

**Financial Commitment Requirements**

**All** Bidders responding to this solicitation are required to make a significant financial commitment (“SDP Commitment”) to partnering with one or more SDO-certified or recognized diverse business enterprise(s) or non-profit organization(s). This SDP Commitment must be expressed as a percentage of contract sales resulting from this solicitation that would be spent with the SDP Partner(s).

After contract award (if any), the Total SDP Commitment shall become a contractual requirement to be met annually on a Massachusetts fiscal year basis (July 1 – June 30) for the duration of the contract. The minimum acceptable Total SDP Commitment in response to this solicitation shall be 1%. Bidders shall be awarded additional evaluation points for higher SDP Commitments.

No contract shall be awarded to a Bidder without an SDP Commitment that meets the requirements stated herein. This requirement extends to **all** Bidders regardless of their own supplier diversity certification.

**Eligible SDP Partner Certification Categories**

SDP Partners must be business enterprises and/or non-profit organizations certified or recognized by the SDO in one or more of the following certification categories:

* Minority-Owned Business Enterprise (MBE)
* Minority Non-Profit Organization (M/NPO)
* Women-Owned Business Enterprise (WBE)
* Women Non-Profit Organization (W/NPO)
* Veteran-Owned Business Enterprise (VBE)
* Service-Disabled Veteran-Owned Business Enterprise (SDVOBE)
* Disability-Owned Business Enterprise (DOBE)
* Lesbian, Gay, Bisexual, and Transgender Business Enterprise (LBGTBE)

**Eligible Types of Business-to-Business Relationships**

Bidders and Contractors may engage SDP Partners as follows:

* **Subcontracting**, defined as a partnership in which the SDP partner is involved in the provision of products and/or services to the Commonwealth.
* **Ancillary Products and Services**, defined as a business relationship in which the SDP partner provides products or services that are not directly related to the Contractor’s contract with the Commonwealth but may be related to the Contractor’s own operational needs.

Other types of business-to-business relationships are not acceptable under this contract. All provisions of this RFR applicable to subcontracting shall apply equally to the engagement of SDP Partners as subcontractors.

**Program Flexibility**

The SDP encompasses the following provisions to support Bidders in establishing and maintaining sustainable business-to-business relationships meeting their needs:

* SDP Partners are **not** required to be subcontractors.
* SDP Partners are **not** required to be Massachusetts-based businesses.
* SDP Partners **may be changed or added** during the term of the contract, provided the Contractor continues to meet its SDP Commitment.

**SDP Plan Form Requirements**

**All** Bidders must complete the SDP Plan Form included in this solicitation and attach it to their bid response. In addition to proposing an SDP Commitment, each Bidder must propose one or more SDP Partner(s) to utilize to meet its SDP Commitment. Certified diverse Bidders may not list their own companies, or their subsidiaries or affiliates, as SDP Partners and may not meet their SDP Commitment by spending funds internally or with their own subsidiaries or affiliates.

**Bidders may propose SDP Partners that are:**

* **Certified or recognized by the SDO**: Such partners appear in the [SDO Directory of Certified Businesses](https://www.sdo.osd.state.ma.us/BusinessDirectory/BusinessDirectory.aspx) or in the [SBA Veteran Small Business Certification (VetCert](https://veterans.certify.sba.gov/)) directory. After contract award (if any), spending with such partners will contribute to meeting the Contractor’s SDP Commitment.
* **Not yet certified or recognized by the SDO**: Such partners must be certified in eligible categories by a third-party certification body, such as another city or state supplier diversity certification office, the [National Minority Supplier Development Council](https://nmsdc.org/mbes/mbe-certification/), the [Women Business Enterprise National Council](https://www.wbenc.org/certification/), [Disability: IN](https://disabilityin.org/what-we-do/supplier-diversity/get-certified/), or the [National LGBT Chamber of Commerce (NGLCC)](https://www.nglcc.org/get-certified), but are not listed in the above-mentioned directories. Self-certification is not acceptable. While Bidders may list such proposed SDP Partners on their SDP Plans, spending with such partners will not contribute to meeting the Contractor’s SDP Commitment unless they apply for and are granted SDO supplier diversity certification or recognition. If proposed SDP Partners do not receive SDO supplier diversity certification or recognition, the Contractor must find alternative SDP Partners to meet the SDP Commitment.

It is the responsibility of the Contractor to ensure that their proposed SDP Partners obtain such certification or recognition by the SDO after contract award (if any). The issuing department and the SDO will not conduct outreach to proposed SDP Partners to ensure their certification. Furthermore, no guarantee may be made that a proposed SDP Partner will be certified, or regarding the time it may take to process a proposed SDP Partner certification. Contractors may direct partners to the SDO’s homepage, [www.mass.gov/sdo](file:///C:\Users\bborchrote\AppData\Local\Microsoft\Windows\Temporary%20Internet%20Files\Content.Outlook\002B2JQ1\www.mass.gov\sdo) and the [Certification Self-Assessment Tool](https://www.mass.gov/forms/take-the-certification-self-assessment) for guidance on applying for certification.

It is **desirable** for Bidders to provide an SDP Focus Statement that describes the Bidder’s overall approach to increasing the participation of diverse businesses in the provision of products and services under this proposal/contract (subcontracting) and in the Bidder’s general business operations (ancillary products and services). Such a description may include but not be limited to:

* A clearly stated purpose or goal.
* Specific types of diverse and small businesses targeted.
* Which departments/units within the business are responsible for implementing supplier diversity.
* Types of opportunities for which diverse and small businesses are considered.
* Specific measures/methods of engagement of diverse and small businesses.
* An existing internal supplier diversity policy.
* Public availability of the Bidder’s supplier diversity policy.

It also is **desirable** for Bidders to use the SDP Plan Form to describe additional creative initiatives (if any) related to engaging, buying from, and/or collaborating with diverse businesses. Such initiatives may include but not be limited to:

* Serving as a mentor in a mentor-protégé relationship.
* Technical and financial assistance provided to diverse businesses.
* Participation in joint ventures between nondiverse and diverse businesses.
* Voluntary assistance programs by which nondiverse business employees are loaned to diverse businesses or by which diverse business employees are taken into viable business ventures to acquire training and experience in managing business affairs.

**Evaluation of SDP Forms**

To encourage Bidders to develop substantial supplier diversity initiatives and commitments as measures valuable to the Commonwealth, at least 25% of the total available evaluation points for this bid solicitation shall be allocated to the evaluation of the SDP Plan submissions. Because the purpose of the SDP is to promote business-to-business partnerships, the Bidders’ workforce diversity initiatives will not be considered in the evaluation.

**SDP Spending Reports**

After contract award, Contractors must submit reports at least annually to demostrate compliance with the agreed-upon SDP Commitment To submit SDP spending reports using the Hub, Contractors must create a profile in the Hub. Contractors must follow report submission instructions from the issuing department and the SDO.

SDP Spending Compliance

Only Spending with SDP Partners that appear in the [SDO Directory of Certified Businesses](https://www.sdo.osd.state.ma.us/BusinessDirectory/BusinessDirectory.aspx) or in the [SBA Veteran Small Business Certification (VetCert](https://veterans.certify.sba.gov/)) directory shall be counted toward a Contractor’s compliance with their SDP Commitment. Spending with SDP Partners that do not appear in the directories above shall not be counted toward meeting a Contractor’s SDP Commitment.

It is the responsibility of the Contractor to ensure they meet their SDP Commitment. The SDO and the issuing department assume no responsibility for any Contractor’s failure to meet its SDP Commitment.

**SDP Spending Verification**

The SDO and the contracting department reserve the right to contact SDP Partners at any time to request that they attest to the amounts reported to have been paid to them by the Contractor.

**Program Resources and Assistance**

Contractors seeking assistance in the development of their SDP Plans or identification of potential SDP Partners may visit the SDP webpage, [www.mass.gov/sdp](http://www.mass.gov/sdp), or contact the SDP Help Desk at [sdp@mass.gov](mailto:sdp@mass.gov).

1. **Environmentally Preferable Products**

Products and services purchased by state agencies must be in compliance with [Executive Order 515](https://www.mass.gov/executive-orders/no-515-establishing-an-environmental-purchasing-policy?_ga=2.237660352.1741219494.1633353146-758386467.1632336759), issued October 27, 2009.  Under this Executive Order, Executive Departments are required to reduce their impact on the environment and enhance public health by procuring environmentally preferable products and services (EPPs) whenever such products and services perform to satisfactory standards and represent best value, consistent with 801 CMR 21.00. In line with this directive, all Contracts, whether departmental or statewide, must comply with the specifications and guidelines established by OSD and the EPP Program. EPPs are products and services that help to conserve natural resources, reduce waste, protect public health and the environment, and promote the use of clean technologies, recycled materials, and less toxic products. Bid responses must identify how a contractor meets these goals.

1. **Evaluation Criteria**

Contractors must submit responses that meet all the submission requirements of the RFR. Only responsive proposals that meet the submission requirements will be evaluated, scored, and ranked by the evaluation team according to the evaluation criteria. Additional information may be requested for evaluation purposes.

**[OPTIONAL: INSERT DESCRIPTION OF EVALUATION CRITERIA]**

1. **Instructions for Submission of Responses:**

Only electronic quotes submitted via COMMBUYS will be accepted in response to this RFR. Responses must be sent via the “Create Quote” functionality in COMMBUYS. For instructions concerning how to submit a Quote, please see Appendix B.

EDIT AS APPROPRIATE:

Any submission that fails to meet the submission requirements of the RFR 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.

1. **Estimated Procurement Calendar**

| **Procurement Activity** | **Date** | **Time [Indicate: AM or PM; EST or EDT]** |
| --- | --- | --- |
| Announcement of Intent to Procure [IF WTO Notice applies, delete if NA] |  |  |
| Bid Release Date |  |  |
| Bidder’s Conference [delete if NA] | [date and location] |  |
| Deadline for Submission of Questions through COMMBUYS “Bid Q&A” [delete if NA] |  |  |
| Official Answers for Bid Q&A published (Estimated) [delete if NA] |  |  |
| Bid Amendment Deadline / Online Quote Submission Begins. Bid documents will not be amended after this date. [delete if NA] |  |  |
| Deadline for Quotes/Bid Responses (“Bid Opening Date/Time” in COMMBUYS) |  |  |
| Oral Presentations for Selected Bidder(s) (Estimated) [delete if NA] |  |  |
| Site Inspections for Selected Bidder(s) (Estimated) [delete if NA] |  |  |
| Notification of Apparent Successful Bidder(s) (Estimated) |  |  |
| Negotiations (Estimated) [delete if NA] |  |  |
| **Estimated Contract Start Date** |  |  |

Bidders are required to monitor COMMBUYS for changes to the procurement calendar for this Bid.

1. **Online Questions (Bid Q&A)** [delete if NA]

Written Questions must be entered using the “Bid Q&A” tab for the Bid in COMMBUYS no later than the “Online Questions Due” date and time indicated in the Estimated Procurement Calendar (above). The issuing department reserves the right to not respond to questions submitted after this date. It is the Bidder’s responsibility to verify receipt of questions.

It is the responsibility of the prospective Bidder and awarded Contractor to maintain an active registration in COMMBUYS and to keep current the email address of the Bidder’s contact person and prospective contract manager, if awarded a contract, and to monitor that email inbox for communications from the Purchasing Department, including requests for clarification. The Purchasing Department and the Commonwealth assume no responsibility if a prospective Bidder’s/awarded Contractor’s designated email address is not current, or if technical problems, including those with the prospective Bidder’s/awarded Contractor’s computer, network, or internet service provider (ISP) cause email communications sent to/from the prospective Bidder/Awarded contractor and the Purchasing Department to be lost or rejected by any means including email or spam filtering.

**Written Responses to Questions will be released on or about the “Responses to Questions Posted Online” date indicated in the Estimated Procurement Calendar (above).**

**(Written questions and responses will be posted on the Bid Q&A Tab for this Bid in COMMBUYS.)**

**b. Bid Amendment Deadline** [delete if NA]

The Purchasing Department reserves the right to make amendments to the Bid after initial publication. It is each Bidder’s responsibility to check COMMBUYS for amendments, addenda, or modifications to this Bid, and any Bid Q&A records related to this Bid. The Purchasing Department and the Commonwealth accept no responsibility and will provide no accommodation to Bidders who submit a Quote based on an out-of-date Bid or on information received from a source other than COMMBUYS.

**c.Quotes (Bid Responses) Deadline (Bid Opening Date/Time)**

**See the Quotes (Bid Responses) Deadline (Bid Opening) Date and Time indicated in the Estimated Procurement Calendar (above).**

**d. Estimated Contract Start Date**

**This is the approximate start date. The actual start date will be the Contract Effective Date which is the date the Contract is executed by the parties.**

1. **Required Forms**

Responses to this RFR must contain the following documents [SELECT APPLICABLE FORMS, DELETE OTHERS; ADD OTHER APPLICABLE FORMS SUCH AS SCOPE OF SERVICE / COMMODITY RESPONSE FORMS AND PRICE/COST PROPOSAL TABLES. ALL APPLICABLE FORMS MUST BE ADDED AS ATTACHMENTS TO THE BID BEFORE PUBLICATION]:

| **Check if applicable (“X”)** | **Form/Document** | **Notes/Instructions (If any)** |
| --- | --- | --- |
|  | [IDENTIFY ALL APPLICABLE DEPARTMENT BID DOCUMENTS AND ADD ADDITIONAL LINES AS NEEDED] | [IDENTIFY SUBMISSION INSTRUCTIONS] |
|  | Commonwealth Terms and Conditions/Commonwealth IT Terms and Conditions [IDENTIFY WHICH TERMS ARE NEEDED. For more information regarding use of IT Ts and Cs, consult the [FAQ](http://www.macomptroller.info/comptroller/docs/TermsandConditions/FAQ%20Commonwealth%20Terms%20and%20Conditions%20for%20Information%20Technology%20Contracts%20.pdf) on the Comptroller’s Website] |  |
|  | Request for Taxpayer Identification Number & Certification (Massachusetts Substitute W-9 Form) |  |
|  | Standard Contract Form and Instructions |  |
|  | Contractor Authorized Signatory Listing |  |
|  | Authorization for Electronic Funds Transfer | Electronic Submission |
|  | Additional Environmentally Preferable Products/Practices | Electronic Submission |
|  | Supplier Diversity Plan Form (SDP Plan Commitment) | Electronic Submission |
|  | Prompt Payment Discount Form | Electronic Submission |
|  | Business Reference Form | Electronic Submission |

**The above attachments are available as part of the Bid record on** [**COMMBUYS**](http://WWW.COMMBUYS.COM) **(WWW.COMMBUYS.COM**)**.**

1. **RFR Attachments**

**Appendix A: Required Specifications**

[**https://www.mass.gov/doc/rfr-required-specifications-of-commodities-and-services**](https://www.mass.gov/doc/rfr-required-specifications-of-commodities-and-services)

**Appendix B: Electronic Quote Submission Instructions**

**<https://www.mass.gov/doc/instructions-for-vendors-responding-to-bids>**

**Appendix C: Required Specifications for Information Technology [USE ONLY FOR IT]**

[**https://www.mass.gov/doc/rfr-required-specifications-for-information-technology/download**](https://www.mass.gov/doc/rfr-required-specifications-for-information-technology/download)

**Appendix D: RFR – Other Specifications [OPTIONAL, IF NOT IT CHANGE TO C IF USED]**

1. 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 Page 2 b. An uploaded picture of the signatory’s hand drawn signature 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.