The Commonwealth of Massachusetts
Executive Office for Administration and Finance
Operational Services Division
Charles D. Baker, Governor
Karyn E. Polito, Lieutenant Governor
Michael J. Heffernan, Secretary

Gary J. Lambert
Assistant Secretary for Operational Services

OSD POLICY GUIDANCE 23-01

TO: Executive Department Heads, Chiefs of Staff, Chief Procurement Officers, Chief Fiscal Officers, General Counsels, and COMMBUYS Organization Administrators

FROM: Gary Lambert, Assistant Secretary for Operational Services

DATE: August 11, 2022

RE: **OSD Policy Guidance 23-01: COMMBUYS-CLM Use Policy**

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This memo supplements all previous OSD Policy Guidance communications and serves to alert executive departments to changes to requirements in Section 4 of OSD Policy Guidance Memo 19 - 01 stemming from the addition of the Contract Lifecycle Management ("CLM") module to COMMBUYS. OSD's Conducting Best Value Procurement Handbook will be updated to incorporate the changed policy requirements.

a) All previous COMMBUYS policies and guidance remain in effect, including the requirement that executive departments are required to post records on COMMBUYS when conducting the following:
   a) Creating requisitions to initiate purchases in the system
   b) Posting all solicitations for goods and services, including Request for Quotes (RFQs)
   c) Recording procurement exceptions
   d) Posting Procurement Notifications: Due Diligence Postings, Requests for Information (RFIs), World Trade Organization (WTO) Notices
   e) Receiving only electronic responses for Small and Large Procurements
   f) Awarding contracts, creating electronic catalogs, and placing orders
   g) Announcements of grant funding availability and grantee selection for State Discretionary Grants

2. Once the COMMBUYS CLM module goes live and is made available to executive departments, all departments will be required to assign appropriate staff to Organization Administrator roles and other user roles, maintain staff accounts and ensure that departmental staff using CLM receive appropriate training.

3. Once the COMMBUYS CLM module goes live and is made available to executive departments, all departments will be required to utilize the CLM module for creating the documents listed below, and using the included workflows and approval paths to ensure documents include all required components and required language:
   a) Requests for Response (RFR)
   b) Requests for Quotes (RFQ)
   c) Detailed Statements of Work (SOW)
   d) Requests for Information (RFI)
   e) Due Diligence Notices of Intent (NOI)
   f) World Trade Organization Notices (WTO)
   g) Requests for OSD Approval of:
      a) Exceptions to required use of Statewide Contracts
      b) Due Diligence Postings
      c) Use of Collective Purchase Contract
      d) Interim Contracts

4. Once the COMMBUYS CLM module goes live and is made available to executive departments, executive departments will be required to draft and execute departmental contracts (including renewal of existing contracts) within the COMMBUYS CLM module following the included workflows and approval paths to ensure complete and accurate contract documents.

5. Executive departments will follow previous OSD guidance regarding procurement documents. (Please see Compliance Memo dated June 16, 2021.) In addition, departments should use the file names created by the CLM tool to make it easier to identify and report on the required documents. **Organization Administrators are asked not to make changes to the default file names in CLM.** The CLM module will include functionality to push required documents directly from CLM into COMMBUYS, which will simplify compliance with procurement document requirements.

Please distribute this document to all department personnel who need to be aware of these changes and make any necessary modifications to your departments' internal procurement, contracting, and purchasing procedures so that your organization is fully compliant with these policies.

This policy is available on OSD's web page [INSERT LINK] by selecting the "OSD Statutory Authority, Regulations, Executive Orders and Policies" menu button and scrolling down to the OSD's "Procurement Policies, Procedures and Forms" section.

OSD's Quality Assurance unit will enforce these policies using COMMBUYS-CLM Reporting tools available to executive departments' COMMBUYS-CLM Administrators (OAs) and those COMMBUYS-CLM Users so authorized by the administrator. Failure to comply with this policy may result in a procurement finding.

For procurement compliance issues, please contact the OSD Legal, Policy and Compliance Unit at OSDLegal@osd.state.ma.us.

The OSD Training unit designed CLM-specific classes that are available within MassAchieve. CLM features also will be included in pertinent COMMBUYS classes (also available within MassAchieve) after the rollout. For questions about available training, please contact OSD training unit at OSDTraining@mass.gov.

For COMMBUYS functionality issues, contact the OSD Help Desk at osdhelpdesk@mass.gov or call during normal business hours (8am - 5pm ET Monday – Friday) at 1-888-627-8283 or 617-720-3197.