

THE COMMONWEALTH OF MASSACHUSETTS

EXECUTIVE OFFICE OF ENERGY & ENVIRONMENTAL AFFAIRS

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BOSTON, MA 02114



Request for Quote (RFQ)

Document Title:

RESILIENCE FINANCE MECHANISM DEVELOPMENT

November 7, 2025

Please Note: This is a single document associated with a complete Bid (also referred to as Solicitation) that may be found on [COMMBUYS](http://COMMBUYS.com) (www.commbuys.com). Bidders are responsible for reviewing and adhering to all information, forms, and requirements for the entire Bid, which are incorporated into the Bid. Bidders also may contact the OSD Help Desk at OSDHelpDesk@mass.gov or by phone at 1-888-MA-STATE (627-8283). The OSD Help Desk is staffed from 8:00 p.m. to 5:00 p.m. Monday through Friday, Eastern Time, except during federal, state, and Suffolk county holidays.

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1 RFQ INTRODUCTION AND GENERAL DESCRIPTION

1.1 Procurement Scope and Description

The Commonwealth of Massachusetts' Executive Office of Energy and Environmental Affairs (EEA) is soliciting Bidders to provide assistance with the research and development of new finance mechanisms that the Commonwealth may consider to scale implementation of resilience projects.

ResilientMass is the Commonwealth's cross-government initiative for reducing risk and building resilience to natural hazards and local impacts of climate change, encompassing all of the state's climate adaptation and resilience planning, programs, and partnerships. ResilientMass acknowledges that climate change is already worsening natural hazards and extreme weather events and incorporates the best available scientific data and projections to account for potential changes in precipitation, temperature, sea-level rise, and extreme weather events that will impact Massachusetts. The mission of ResilientMass is to be both visionary and practical in its approach to protecting human health and wellbeing, critical built infrastructure, environmental resources, the economy, and cultural resources in Massachusetts now and into the future, and to identify the cross-government and agency actions needed to reduce that risk and build resilience over time.

To meet the goals set in ResilientMass, the Commonwealth will need to streamline and scale capital investments to build resilience to priority climate impacts. From Fall 2024 through summer 2025, EEA explored options and outlined a phased approach to building the financial, institutional, and technical capacity to deliver those measures over time. This work was done in consultation with other agencies and stakeholders. A key action identified in this strategy is the development of additional finance mechanisms that will fund critical resilience projects with, for example, low-interest, flexible loans. Exploring finance mechanisms beyond current grants will help unlock investments for under-resourced communities, accelerate delivery of climate-smart infrastructure, and build scale for resilience work. The new finance mechanisms will complement existing Commonwealth grant programs to allow for stable and continued investment over time.

Specifically, EEA is soliciting bidders for a contract for the Resilience Finance Mechanism project that will result in the following main categories of deliverables:

1. **A local resilience finance strategy memo** that explores how to strengthen community financial and institutional capacity for resilience investment, including different models/financial structures that municipalities might use to repay resilience loans and identification of mechanisms/partnerships needed to sustain local investment. The Consultant team should look to successful examples in other jurisdictions and research best practices, taking into account budget processes and procedures for cities, towns and other eligible borrowers in Massachusetts. The memo should account for options for how municipalities of different size, organizational capacity, and those with residents in burdened areas can structure projects to take advantage of and increase access to and demand for loan funds.
2. **A recommended operational policy memo** that provides an overview of potential loan fund policies and procedures (including recommendations on the process for moving from solicitation to application review and contracting). The memo should summarize the recommended roles, responsibilities, and staffing plan for fund management at EEA, including partnership with the CWT. The memo should include recommendations given review of successful examples and lessons learned from other jurisdictions. The operations memo should also discuss how a loan program would relate to/interact with other EEA grant programs and propose a process for tracking the pipeline of potential projects. It should recommend how equity considerations can be incorporated into program operations and management. The **memo** should also include considerations for drafting standardized application materials, accompanying guides, review/scoring materials, and reporting procedures, providing examples/drafts as necessary.

- a. Alongside the memo, the Consultant team should develop a **data management and tracking process** to support EEA staff with the collection of loan applications, programmatic review, and tracking of project pipeline and financial side of loan portfolios. The process should be readily able to integrate into the current EEA grants management system.
3. An **engagement and technical assistance strategy** containing an engagement plan to launch a potential resilience loan fund and a longer-term outreach strategy for continued engagement and technical assistance offerings in the years following. Technical assistance could include support for communities to design and structure projects in ways that attract public and private capital. The longer-term strategy should include potential models for technical assistance for applicants, and recommendations for how this technical assistance might connect with existing grant program offerings. The Consultant team will be expected to develop the plan now, along with any relevant materials to support continued engagement. Engagement will be internal among EEA, state agencies and the Clean Water Trust (CWT) in the first half of 2026. No external engagement will occur prior to summer 2026.

The selected expert vendor team will work with a project management team composed of representatives from EEA and other relevant state agencies and offices as appropriate (e.g. DEP, CWT). Additional deliverables will be associated with each stage of the work, as outlined below. EEA expects environmental justice and equity to be centered in every process and product of this RFQ and, and that the Consultant team considers how the fund can be structured to allow for participation by residents in burdened areas.

The initial project timeline is estimated from January 2026 through June 2026, but EEA reserves the right to add additional deliverables that fall within the scope of this procurement and extend the timeline.

1.2 Background information

Executive Order 569 establishes an Integrated Climate Change Strategy for the Commonwealth by requiring the coordination of efforts across the Commonwealth to strengthen the resilience of our communities and agencies, prepare for the impacts of climate change, and to prepare for and mitigate damage from extreme weather events. The order requires the publication of a Climate Adaptation Plan that includes a statewide adaptation strategy, and an update of this plan at least every five years, incorporating information learned from implementing the Plan and the experiences of state agencies, and Cities and Towns in assessing and responding to climate change vulnerability. The first 5-year update of this plan, the 2023 ResilientMass Plan, was released in October 2023. It is aligned with the Massachusetts Clean Energy and Climate Plan for 2050 and incorporates science and findings from the 2022 Massachusetts Climate Change Assessment. The mission of ResilientMass is to be both visionary and practical in its approach to protecting human health and wellbeing, critical built infrastructure, environmental resources, the economy, and cultural resources in Massachusetts now and into the future, and to identify the cross-government and agency actions needed to reduce that risk and build resilience over time. Several actions included under the ResilientMass Plan are to increase funding to support municipal and agency resilience actions and access to funding opportunities and increase access to state resilience funding more broadly. These actions include an emphasis on expanding other resources and capacity for local resilience action as well, for example by making it easier to apply for funding and scale implementation of projects. Consideration of new resilience finance mechanisms is one way that EEA is looking to provide more resources to scale resilience implementation across the state.

1.3 Applicable Procurement Law

This Bid is issued under the following law(s):

- MGL c. 7, § 22; c. 30, § 51, § 52; and 801 CMR 21.00 (Goods and Services)

1.4 Number of awards

The target maximum number of Contractors is one. This is a target number; the Strategic Sourcing Team (SST) may award more or fewer Contracts if it is in the best interests of the Commonwealth to do so.

1.5 Adding Contractors after initial Contract award

If, over the life of the Contract, the SSST determines that additional Contractors should be added, these may first be drawn from qualified companies that responded to this Bid but were not awarded contracts. If necessary to meet the requirements of the Commonwealth, the Bid may be reopened to obtain additional Quotes.

1.6 Eligible Entities

Any contract resulting from this Bid will be open for use to EEA.

1.7 Acquisition Method(s)

The acquisition method to acquire goods and/or services from this Bid is Fee for Service.

1.8 Performance and Payment Timeframes Which Continue Beyond Duration of the Contract.

All term leases, rentals, maintenance, or other agreements for services entered into during the duration of this contract and whose performance and payment timeframes extend beyond the duration of this contract shall remain in effect for performance and payment purposes no longer than 12 months after final contract end date. No new leases, rentals, maintenance, or other agreements for services may be executed after the contract has expired. Any contract termination or suspension pursuant to this section shall not automatically terminate any leases, rentals, maintenance, or other agreements for services already in place unless the department also terminates said leases, rentals, maintenance, or other agreements for service, which were executed pursuant to the main contract.

1.9 Contract Duration

The expected duration of any Contract resulting from this Solicitation will be from contract execution estimated to be in early January 2026 until June 30, 2026. EEA will have the option to renew the Contract in increments of up to one (1) year until and including June 30, 2028.

1.10 Estimated Value of the Contract

The estimated value of purchase(s) resulting from this Bid is \$175,000 for fiscal year 2026 and preference given to submissions mindful of costs. The Commonwealth makes no guarantee that any commodities or services will be purchased from any Contract resulting from this Bid. Any estimates or past procurement volumes referenced in this Bid are included only for the convenience of Bidders and are not to be relied upon as any indication of future purchase levels.

2 ESTIMATED PROCUREMENT CALENDAR

EVENT	DATE
Notice of Intent to Procure	November 7, 2025
Bid Release Date	November 7, 2025
Bidders' Conference	November 13, 2025, 12:00pm-1:00pm Webinar: https://teams.microsoft.com/join/19%3ameeting_NGEyNTkzYzEtMjFmNS00NzU1LTgzZTUtZTRmMTlkMjl5MDc2%40thread.v2/0?context=%7b%22Tid%22%3a%223e861d16-48b7-4a0e-9806-8c04d81b7b2a%22%2c%22Oid%22%3a%227f631a87-df4e-4797-bf00-33ffb8ef5074%22%7d Meeting ID: 254 566 384 045 12 Passcode: p3Hr32Nn
Deadline for Submission of Questions through COMMBUYS "Bid Q&A"	November 17, 2025
Official Answers for Bid Q&A published (Estimated)	November 21, 2025
Bid Amendment Deadline / Online Quote submission begins. EEA reserves the right to amend this RFQ at any time prior to the date of the responses due. Any such amendment will be posted to the Commonwealth's procurement website, COMMBUYS (www.commbuys.com). Bidders are advised to check this site regularly, as this will be the sole method used for notification of changes.	November 21, 2025
Deadline for Quotes/Bid Responses ("Bid Opening Date/Time" in COMMBUYS)	December 10, 2025 at 5pm
Oral Presentations for Selected Bidder(s) Bidders will be notified individually if they are asked to present.	December 19, 2025
Notification of Apparent Successful Bidder(s) (Estimated)	January 5, 2026
Negotiations (Estimated)	January 6, 2026-January 9, 2026
Estimated Contract Start Date	January 12, 2026

Times are Eastern Standard/Daylight Savings (US), as displayed on the COMMBUYS system clock displayed to Bidders after logging in. If there is a conflict between the dates in this Procurement Calendar and dates in the Bid's Header, the dates in the Bid's Header on COMMBUYS shall prevail. Bidders are responsible for checking the Bid record, including Bid Q&A, on COMMBUYS for Procurement Calendar updates.

2.1 Written questions via the Bid Q&A on COMMBUYS

The "Bid Q&A" provides the opportunity for Bidders to ask written questions and receive written answers from the SSST regarding this Bid. Bidders' questions must be submitted through the Bid Q&A found on COMMBUYS (see below for instructions) and prior to the Deadline for Submission of Questions stated in the Estimated Procurement Calendar. The issuing department reserves the right not to respond to questions submitted after this date. It is the Bidder's responsibility to verify receipt of questions.

Please note that questions submitted to the SSST using any other medium (including those that are sent by mail, fax, email, or voicemail, etc.) will not be answered. To reduce the number of redundant or duplicate questions, Bidders are asked to review all questions previously submitted to determine whether the Bidder's question has already been posted.

Bidders are responsible for entering content suitable for public viewing since all questions are accessible to the public. Bidders must not include information that could be considered personal, security sensitive, inflammatory, incorrect, collusory, or otherwise objectionable, including information about the Bidder's company or other companies. The SSST reserves the right to edit or delete submitted questions that raise any of these issues or that are not in the best interest of the Commonwealth or this Bid.

All answers are final when posted. Any subsequent revisions to previously provided answers will be dated.

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.

2.2 Locating Bid Q&A

Log into COMMBUYS, locate the Bid, acknowledge receipt of the Bid, and scroll down to the bottom of the Bid Header page. The "Bid Q&A" button allows Bidders access to the Bid Q&A page.

2.3 Amendment Deadline

The SSST 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 SSST and the Commonwealth accepts 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.

2.4 Bidders' Conference

The Bidders' Conference is conducted by the SSST for the purpose of providing general information about the bid and may be in person or via webinar or conference call. Attendance is optional. Please refer to the COMMBUYS website for updated information, including the location, time, and date of the Bidders' Conference.

2.5 Oral Presentations/Product Demonstrations

Selected Bidders who are asked to participate in Oral Presentations / Product Demonstrations will be expected to prioritize this in their schedules. The SSST will make every effort to find a mutually convenient time for the Bidder and the SSST. However, failure to appear at the scheduled time of the presentation/demonstration may result in disqualification, reduction of points, or other action that the SSST deems appropriate.

3 SPECIFICATIONS

Additional required terms appear in the Appendices to this RFQ.

3.1 Bidder Qualifications

3.1.1 Experience

Contractors wishing to be selected must demonstrate extensive experience and expertise within their organization and/or with subcontractor/partner organizations.

The proposed core project team should have relevant experience that includes, but not be limited to, the following:

- Expertise in climate finance, including a strong understanding of and experience with state revolving loan establishment, fund structure and administration/operation/management as well as other financial mechanisms (particularly in Massachusetts)
- Understanding of municipal finance and budget processes in Massachusetts at the state and local level
- Knowledge of or ability to quickly learn about existing and proposed green banks, revolving loan funds, and other climate resilience focused funds across the United States.
- Knowledge of climate resilience infrastructure project types such as stormwater management, floodplain restoration, and nature-based solutions
- Knowledge of data management and application web development
- Experience with Massachusetts regulations pertaining to revolving loan funds
- Experience developing technical assistance materials for loan and other finance programs
- Convening and engaging stakeholder/advisory groups and using stakeholder feedback to inform the development of climate finance mechanisms, technical assistance products, and to encourage program adoption.
- Experience integrating equity and environmental justice considerations throughout project work from stakeholder engagement to product development.
- Experience working with tribal governments.
- Producing clear, well-organized, consistently formatted, and visually pleasing documents (with public-facing documents in plain language).
- Knowledge of or ability to rapidly learn about Massachusetts statewide and local initiatives, programs, and reports, including the 2023 ResilientMass Plan (the State Hazard Mitigation and Climate Adaptation Plan), the Municipal Vulnerability Preparedness Program, and other state-led initiatives related to climate resilience including land conservation programs, coastal resilience programs, and existing state loan programs

- Design and management of complex projects with multiple deliverables, including written and visual deliverables, and short timelines

3.2 Small Business Purchasing Program

3.2.1 Program Background

The Massachusetts Small Business Purchasing Program (SBPP) was established pursuant to Executive Order 599 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.

3.2.2 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 (PM) will not evaluate submissions from non-SBPP participants unless no SBPP Bidder meets the PM's best value evaluation criteria.

3.2.3 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:

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.

3.2.4 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>

3.3 Environmental Specifications

3.3.1 Executive Order 515, Establishing an Environmental Purchasing Policy

Products and services purchased by state agencies must comply with [Executive Order 515](#), 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. Questions concerning the EO or the appropriate specifications may be directed to OSD's EPP Procurement Program, www.mass.gov/epp. The Order may be seen at <https://www.mass.gov/executive-orders/no-515-establishing-an-environmental-purchasing-policy>.

3.4 Compensation Structure/Pricing

This is a fee for service contract. The payment procedure for this project is a fixed fee for services based upon EEA's acceptance of all deliverables from the Contractor during the contractual period. The Contractor will be responsible for the timely completion of the requirements described in the detailed Scope of Services and Deliverables (see Appendix 1) and as directed by EEA. The Contractor must assume overall responsibility for coordinating and completing all deliverables contained in the resultant contract.

All-inclusive hourly rate for each Bidder-provided staff person that will perform work under the Contract will remain in effect for the duration of the Contract. All reimbursements will be agreed upon by EEA as part of the final Scope of Work. The Contractor will be required to submit monthly invoices, broken down by sub-task, staff, and hours. **Advance payments shall not be made.** Commuting expenses will not be reimbursed. Payments are subject to Comptroller office bill payment policies.

After Contract award, EEA reserves the right to further negotiate all labor rates and performance specifications with the Contractor within the scope of this RFQ during the period of the contract(s).

4 OTHER TERMS

4.1 Continued qualification based on performance

4.2 Reporting.

Contractors are responsible for compliance with all contract reporting requirements including, but not limited to, the Small Business Purchasing Program (SBPP) and other contract reports, as required by this contract.

4.3 Security and confidentiality

The Contractor shall comply fully with all security procedures of the Commonwealth and Commonwealth Agencies in performance of the Contract. The Contractor shall not divulge to third parties confidential information obtained by the Contractor or its agents, distributors, resellers, subcontractors, officers, or employees in the course of performing Contract work, including, but not limited to, security procedures, business operations information, personally identifiable information, or commercial proprietary information in the possession of the Commonwealth Agency.

4.4 Contract Management (Contractor's interface with Commonwealth's Contract Manager)

All Contract questions must be directed to the Commonwealth Contract Manager. Changes to the Contractor's contact information, company name, legal address, payment address, tax identification number, authorized signatories, SDO-certification status, or EFT information must be reported promptly via email to the Commonwealth Contract Manager. In some cases, additional paperwork will be required to effect the change.

5 AUDIT

During the term of this Agreement and for a period of six years thereafter, EEA, its auditors, the Operational Services Division, the Office of the Inspector General, or other authorized representatives shall be afforded access at reasonable times to Contractor's accounting records, including sales

information on any system, reports or files, to audit all records relating to goods sold or services performed pursuant to this Agreement. If such an audit indicates that Contractor has materially overcharged EEA, then the Contractor shall remit the overcharged amount and be responsible for payment of any costs associated with the audit.

6 EVALUATION CRITERIA

Bidder scores will be used to rank Bidders and will determine which Bidders will proceed to subsequent stages of the evaluation and/or enter negotiations with the Commonwealth to receive a Contract award.

EEA will review the submitted proposals and may conduct an interview process. EEA reserves the right to select no Bidders if the responses do not meet a sufficient standard based on the evaluation criteria. EEA reserves the right to waive any technical defect or informality in proposals received or to allow the Bidders to correct them, and to accept or reject any proposal or portion thereof. EEA reserves the right to seek additional information from any and all Bidders including but not limited to requests for clarifications and interviews. In reviewing proposals or interviewing Bidders, EEA may seek the input of other relevant agencies or stakeholders.

The selected Contractor(s) must have the experience, ability, and skills to complete projects of this type on time and within budget.

All proposals received by the due date and meeting the requirements established in this RFQ will be reviewed and evaluated in accordance with, but not limited to, the following criteria:

6.1 Mandatory requirements – RFQ Response Components

As part of the RFQ Response, Bidders must submit, at a minimum, the following information to demonstrate that they are qualified and capable to perform the RFQ services:

6.1.1 Bidder Capabilities and Project Approach

In general, all Bidders must provide a narrative, not exceeding fifteen (15) pages, describing the Bidder's and subcontractors' capabilities and qualifications for performing this project and direct experience relevant under RFQ Section 3.1. In addition, the narrative should include a description of the Bidder's and subcontractors' proposed methodology and output for each task and sub-tasks described in the Scope of Services and Deliverables (see Appendix 1), including proposed data sources and frameworks. This narrative should include:

- Detailed implementation timeline between January to August 2026, including:
 - Sub-task deadlines
 - Detailed sequencing of internal agency engagement and content development
- Approach for developing the local resilience finance memo, including how the team will explore and recommend different models or financial structures that municipalities could use to repay resilience loans.
 - Approach for tailoring suggested models towards Massachusetts specific budgeting processes
 - How the team will incorporate options for ways municipalities of different size, organizational capacity, and those with disadvantaged populations can structure projects to take advantage of loan funds.
- Clear outline of the team's proposed approach to developing the operations memo, including:
 - Approach for assessing successful examples from other loan funds and jurisdictions
 - Approach for developing potential fund policies and procedures, including:
 - Potential loan fund processes and management from the solicitation to application review to contracting phases
 - Staffing plan for fund management with clear roles and responsibilities for EEA, Clean Water Trust.
 - Approach for assessing possible climate resilience project types that the fund could be used for, considerations for the development of scoring criteria, and potential process for evaluating proposals to identify a priority list

- Approach for developing considerations for creating standardized application materials and forms necessary to collect information from potential borrowers
 - Approach for compiling example materials for EEA to use to review applications, such as scoring rubrics, as well as understanding of reporting procedures required and considerations for materials that will facilitate that process
 - Approach for developing a plan for how to track project pipeline across state resilience programs, and providing analysis/recommendations for how grant and loan programs might relate to one another
 - Approach for integrating equity into the operations memo and analyzing how best to structure/manage the fund to facilitate participation by all communities
- Approach for creating a data management process that EEA could consider for internal tracking of loan applications, programmatic review, project pipelines, and financial information on loan portfolios.
- Clear outline of the team's proposed approach to developing the engagement and technical assistance strategy, including:
 - Approach to stakeholder outreach leading up to and just following the launch of a potential resilience revolving fund, including:
 - How the team will develop a plan for outreach to make relevant stakeholders aware of the new fund
 - Plan for including a diverse stakeholder list with broad representation from the potential borrower, project implementor, and other audiences. The list should include (but not be limited to) municipalities of varying geography and size, those with residents in burdened areas, and tribal governments.
 - Proposed outreach actions to create buy-in and encourage eligible borrowers to participate in a loan fund
 - Plan for understanding what level of technical assistance will be needed
 - Approach for developing a longer-term stakeholder engagement and technical assistance plan, including:
 - Identifying the format, cadence of stakeholder engagement/outreach by EEA on an on-going basis once a fund is developed
 - Researching and compiling potential models for technical assistance
 - Recommendations for a technical assistance plan and how this technical assistance might connect with existing grant program offerings.
 - Identifying at what format and at what milestones stakeholders would be engaged throughout all of the above stakeholder engagement tasks
- Identification of the Bidder's point of contact (POC) if awarded this contract, and a description of the POC's authority for committing Bidder resources and staff to the project as required
- Organizational chart of the team (Bidder and subcontractors) and their roles, with a description of the Bidder's organization and proposed management structure that make the proposal effective and responsive to the needs of this project, including:
 - The Bidder's proposed management and implementation of project components
 - The specific leads for each proposed component of the project, and why these leads are uniquely qualified to lead this component of the project
 - Communication and workflow among team members, regular communication plan between the team and EEA, and its ability to administer the contract in a timely and cost-effective manner
- Description of subcontractors the Bidder is proposing in connection with performing the RFR services specified in this solicitation. The Bidder must provide (1) the name of the subcontractor firm(s); (2) the address and contact information (including email) of the subcontractor firm(s); and (3) the role the subcontractor(s) will perform with respect to the implementation of the contract requirements, and including a narrative that addresses and responds to the requirements of RFR Section 8.1
- Three references for the Bidder and at least two for each subcontractor firms (if applicable)

Bidders are free to propose a phased approach to accomplish the tasks referenced in the Scope of Services and Deliverables (see Appendix 1). EEA reserves the ability to negotiate a final scope of work, which includes a phased approach based on tasks.

6.1.2 Cost Estimates

The Bidder will provide a detailed estimate of prices and costs for each task, including sub-task itemizations, described in the Scope of Services and Deliverables in Appendix 1.

6.1.3 Prior Projects and Writing Samples

Bidders must provide a narrative statement, not exceeding four (4) pages, describing at least two (2) prior projects in which the Bidder performed services relevant to the RFQ scope of services described in this solicitation. For each of these prior projects, the Bidder must also provide and submit contact information of the point of contact (POC) (i.e., name, title, address, email address, and business telephone number), and **identify whether and to what extent key personnel assigned to this project directly participated in Bidder's prior projects**. In addition, the Bidder must include a sample of technical and summary reports completed for each of the prior projects. Publicly available reports of prior projects are strongly preferred.

6.1.4 References

Bidder should include at a minimum three (3) professional references including updated contact information that can speak to the Bidder's experience and success in similar projects.

6.1.5 Key Personnel

Bidders must identify all key personnel (including from subcontractor firms) who will be assigned to this project, including a narrative description of each person's role and hourly rates, not to exceed ten (10) pages total. In addition, the Bidder should attach all current resumes of key personnel (not to exceed two pages per person). Identification of key personnel will also include the expected availability during the contract period; **if any key staff-member is not expected to be available for a portion of the contract period, the Contractor should propose how it will fulfill that person's duties, for approval by EEA**. EEA recognizes that some flexibility in scheduling is appropriate and necessary to obtain qualified staff.

6.1.6 Conflicts and Litigation (Conflicts Disclosure)

The following information must be provided as part of the Conflicts Disclosure form to be submitted as part of the bid response.

Bidder must identify any past, pending, or threatened litigation or administrative proceedings, such as state ethics or professional board proceedings, to which the Bidder or any staff member who will be engaged in this project for EEA is or may be a party, and which would either materially impair the ability of the Bidder or staff member to perform the services described herein or materially affect the financial condition of the staff member or the Bidder.

6.2 Evaluation Components

The following components will be some of the criteria considered by the PMT when evaluating each Quote. The Small Business Purchasing Plan will account for 25% weight, the project approach will account for 40% weight, and the remainder will be weighted evenly across 35%.

6.2.1 Project Approach

The Bidder should present a plan of approach that is logical, well thought-out, and presents a clear and achievable vision for project deliverables in a way that fully addresses all elements stated in this RFQ. This includes, but is not limited to:

- A feasible and organized work plan and schedule that meets the project timeline,
- Proposed project timeline with intermediate and final milestones and deliverables identified

- Organization chart including confirmed team members and subcontractors,
- Communication plan between the project team and EEA
- Proposal for incorporating environmental justice and social vulnerability within the project approach,
- Internal and external stakeholder engagement plan, including identification of key stakeholders, issues, and the facilitator’s approach to these topics, and
- Detailed project budget that meets all scope requirements.

6.2.2 Price

The Bidder should present a reasonable budget with expected hours of work broken down by sub-tasks and personnel. This should be as cost effective as is feasible.

6.2.3 Team Qualifications and Technical/Analytical Capabilities

The Bidder’s proposed team (including subcontractors) should demonstrate significant knowledge, experience, and analytical skills necessary to complete all tasks and deliverables described in the detailed Scope of Services and Deliverables (see Appendix 1) and specified in section 3.1.1 “Experience.”

6.2.4 Experience with Similar Projects and Project Management

The Bidder should demonstrate extensive experience working and managing projects of a similar type, size, and scope to this project, and demonstrate that key personnel assigned to this project have directly participated in relevant prior efforts and will be available across the project contract term.

6.2.5 Report Writing Experience and Communication Skills

The Bidder’s proposed team should demonstrate strong skills and experience developing and writing reports for the public and policymakers that clearly lay out the details of analyses performed (including data sources, assumptions, methodologies, results, and discussion of the results), and that succinctly and accessibly translate the scope, results, and key takeaways of the analyses. In addition, Bidders that are invited to provide Oral Presentations should demonstrate strong ability to effectively convey complex and technical information to a diverse audience of policy makers and external stakeholders. Minimum qualifications include:

- A highly qualified project manager with direct experience on relevant projects and the ability to manage teams and budgets, and meet deadlines
- Appropriate expertise of personnel to address project scope and content areas
- Excellent past performance of the responder with regard to state-funded projects

7 HOW TO SUBMIT A QUOTE

All Bidders may begin creating and compiling Quote materials as soon as the Bid and all attachments are in the Sent document status in COMMBUYS. Bidders are instructed not to submit Quotes before the Bid Amendment Deadline has been reached (see Estimated Procurement Calendar).

7.1 Quote Submission Method

Online Quote Submission via COMMBUYS is required.

All Bidders must submit Quotes online using tools available only to Sellers registered in COMMBUYS. COMMBUYS provides Seller registration functionality at no charge. To register, go to www.COMMBUYS.com and click on the “Register” link on the home or landing page. Bidders who are awarded a contract resulting from this Bid, if any, will be required to maintain an active COMMBUYS account for the duration of the Contract, by reviewing their registration information regularly and maintaining its accuracy.

7.2 COMMBUYS Quote Submission Training and Instructions

<Edit this section as needed based on the resources you plan to provide to bidders, e.g. whether you will be holding a Bidders' Conference.>

The following resources are provided to assist Bidders in submitting Quotes:

- **Appendix <include appendix number, 5 or 6>, Instructions for Vendors Responding to Bids Electronically through COMMBUYS, which is part of this document;**
- Training sessions focused on online Quote submission, if offered, are noted in the Estimated Procurement Calendar;
- An online job aid on [How to Create a Quote](#)
- Webcast video on [How to Find Bids \(Solicitations\) and Submit Quotes \(Responses\) through COMMBUYS.](#)

7.3 COMMBUYS Support

Technical assistance is available during the procurement process. Every effort is made to respond to inquiries within one business day.

Website: Go to www.mass.gov/osd/commbuys to access COMMBUYS resources, including new bid postings, job aids, and training schedules for buyers, among others.

Email: Send inquiries to the OSD Help Desk at OSDHelpDesk@mass.gov

Telephone: Call the OSD Help Desk at 1-888-MA-STATE (1-888-627-8283). The Help Desk is staffed from 8:00 a.m. to 5:00 p.m., Monday through Friday Eastern Time, except on federal and state holidays.

Bidders are advised that COMMBUYS will be unavailable during regularly scheduled maintenance hours of which all users will be notified.

7.4 Bid Opening Date/Time

All Bids must be posted in COMMBUYS before the specified date, month, year, and time displayed as the Bid Opening Date/Time in the Header Information section of the Bid in COMMBUYS. Times are Eastern Time. All Bidders are advised to allow adequate time for Bid submission by considering potential online submission impediments such as Internet traffic, Internet connection speed, file size, and file volume. OSD is not responsible for delays encountered by Bidders or their agents, or for a Bidder's local hardware failures, such as computers or related networks, associated with bid compilation or submission. Bids submitted via COMMBUYS are time stamped by the COMMBUYS system clock which is considered the official time of record. COMMBUYS will not accept Bids submitted after the Bid Opening Date/Time deadline.

7.5 Quote Contents

Bidders must comply with the requirements below.

7.5.1 RFQ Submission Checklist

Strategic Sourcing Services Teams seek to reduce the number of Bidder disqualifications based on incomplete submissions. Therefore, Bidders must complete and submit the RFQ Submission Checklist and all documents referenced in the Checklist.

- ✓ **Cover Letter**: Signed by an authorized signatory of the Bidder, affirming that the Bidder, by submitting a response to the RFQ, agrees to and will comply with all requirements of this RFQ during the Contract term.
- ✓ **Bidder Capabilities and Project Approach**

- ✓ **Bidder Cost Estimate**
- ✓ **Prior Projects and Writing Samples**
- ✓ **References**
- ✓ **Key Personnel**
- ✓ **Conflict Disclosure Form**

7.5.2 Electronic Signatures

Quotes submitted via COMMBUYS must be signed electronically by the Bidder or the Bidder’s Agent by accepting the terms and conditions of the bid on the “Terms & Conditions” tab of the Bid in COMMBUYS. By selecting “Save & Continue” on the “Terms and Conditions” tab after accepting the terms and conditions of the bid, the submitter attests that she/he/they is an agent of the Bidder with authority to sign on the Bidder’s behalf, and that she/he/they has read and assented to each document’s terms.

7.5.3 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.

7.6 Limits and Restrictions

7.6.1 File Naming Conventions

Files submitted via COMMBUYS must follow the file naming convention specified below. The Description entered during the file upload process ensures each file is readily identified by Company Name and content. The File Name assigned by the Bidder as stored on their computer or network must be structured such that each file may be processed by the upload tool. The upload tool will reject file names that includes spaces or symbols, such as brackets [] that some systems apply when downloading files from the Internet.

RFQ Response Component	Description Enter in COMMBUYS during upload	File Name Assign when creating files
Cover Letter	Company Name Cover Letter	CompanyName_CoverLetter.pdf
Statement of Qualification and Scope of Service Narrative	Company Name Proposal	CompanyName_Proposal.pdf
Cost Estimate	Company Name Pricing	CompanyName_Price.xls
Writing Samples	Company Name Writing Sample 1 Company Name Writing Sample 2	CompanyName_Sample1.pdf CompanyName_Sample2.pdf

Conflict Disclosure (if needed)	Company Name Conflict Disclosure	CompanyName_ConflictDisclosure.doc
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7.6.2 File Size Limits

COMMBUYS will not accept files that approach or exceed 10 MB. If a large file fails to upload, the Bidder must save the contents as multiple files. Note the naming conventions used above and add _Part 1, _Part 2, etc. at the end of the file name. If a large file fails to upload, bidders must break up the file and append _Part1, _Part2 to the end of the Description and File Name.

7.7 Withdrawing a Quote

7.7.1 Prior to Bid Opening Date/Time

Quotes may be withdrawn using the “Withdraw Quote” button offered under the Summary tab of a submitted Quote in COMMBUYS.

7.7.2 After Bid Opening Date/Time

Quotes may not be withdrawn after the Bid Opening Date/Time. If the Bidder wants to remove a Quote from consideration, contact the Strategic Sourcing Services Lead for guidance.

7.8 Additional Quote Terms

7.8.1 Prohibition regarding contract terms

Bidders must not, as part of their Quote, propose additional contractual terms, or supplemental or clarifying language pertaining to contractual terms, even if the proposed additions/clarifications are not in conflict with the Commonwealth Terms and Conditions, the Standard Contract Form, or other documents comprising this RFQ. Contracting Departments expect that all Statewide Contracts incorporate the same terms and conditions and only those terms and conditions. Contractors who wish to propose additional non-conflicting contractual terms, or supplemental or clarifying language, may do so ONLY on a case-by-case basis, negotiated for each specific engagement and memorialized in the Project Statement of Work.

7.8.2 Bidder Response Form

All specifications of this RFQ that are not mandatory such as those specifically identified as “optional,” “desirable,” or in other terms indicating that the specification is not mandatory must have a response within the Bidder Response Form (or equivalent) provided on COMMBUYS for this Bid to be evaluated. Most items within the Bidder Response Form will be scored to determine the apparent successful bidders. The SSST does not want and will not read, consider, or evaluate a line by line response to this RFQ.

8 APPENDIX 1 – DETAILED SCOPE OF SERVICES AND DELIVERABLES

The Commonwealth of Massachusetts' Executive Office of Energy and Environmental Affairs (EEA) is soliciting Bidders to provide assistance with the research and development of new finance mechanisms that the Commonwealth may consider to scale implementation of resilience projects.

ResilientMass is the Commonwealth's cross-government initiative for reducing risk and building resilience to natural hazards and local impacts of climate change, encompassing all of the state's climate adaptation and resilience planning, programs, and partnerships. ResilientMass acknowledges that climate change is already worsening natural hazards and extreme weather events and incorporates the best available scientific data and projections to account for potential changes in precipitation, temperature, sea-level rise, and extreme weather events that will impact Massachusetts. The mission of ResilientMass is to be both visionary and practical in its approach to protecting human health and wellbeing, critical built infrastructure, environmental resources, the economy, and cultural resources in Massachusetts now and into the future, and to identify the cross-government and agency actions needed to reduce that risk and build resilience over time.

To meet the goals set in ResilientMass, the Commonwealth will need to streamline and scale capital investments to build resilience to priority climate impacts. From Fall 2024 through summer 2025, EEA explored options and outlined a phased approach to building the financial, institutional, and technical capacity to deliver those measures over time. This work was done in consultation with other agencies and stakeholders. A key action identified in this strategy is the development of additional finance mechanisms that will fund critical resilience projects with, for example, low-interest, flexible loans. Exploring finance mechanisms beyond current grants will help unlock investments for under-resourced communities, accelerate delivery of climate-smart infrastructure, and build scale for resilience work. The new finance mechanisms will complement existing Commonwealth grant programs to allow for stable and continued investment over time.

Specifically, EEA is soliciting bidders for a contract for the Resilience Finance Mechanism project that will result in the following main categories of deliverables:

1. **A local resilience finance strategy memo** that explores how to strengthen community financial and institutional capacity for resilience investment, including different models/financial structures that municipalities might use to repay resilience loans and identification of mechanisms/partnerships needed to sustain local investment. The Consultant team should look to successful examples in other jurisdictions and research best practices, taking into account budget processes and procedures for cities, towns and other eligible borrowers in Massachusetts. The memo should account for options for how municipalities of different size, organizational capacity, and those with residents in burdened areas can structure projects to take advantage of and increase access to and demand for loan funds.
2. **A recommended operational policy memo** that provides an overview of potential loan fund policies and procedures (including recommendations on the process for moving from solicitation to application review and contracting). The memo should summarize the recommended roles, responsibilities, and staffing plan for fund management at EEA, including partnership with the CWT. The memo should include recommendations given review of successful examples and lessons learned from other jurisdictions. The operations memo should also discuss how a loan program would relate to/interact with other EEA grant programs and propose a process for tracking the pipeline of potential projects. It should recommend how equity considerations can be incorporated into program operations and management. The **memo** should also include considerations for drafting standardized application materials, accompanying guides, review/scoring materials, and reporting procedures, providing examples/drafts as necessary.

- a. Alongside the memo, the Consultant team should develop a **data management and tracking process** to support EEA staff with the collection of loan applications, programmatic review, and tracking of project pipeline and financial side of loan portfolios. The process should be readily able to integrate into the current EEA grants management system.
3. An **engagement and technical assistance strategy** containing an engagement plan to launch a potential resilience loan fund and a longer-term outreach strategy for continued engagement and technical assistance offerings in the years following. Technical assistance could include support for communities to design and structure projects in ways that attract public and private capital. The longer-term strategy should include potential models for technical assistance for applicants, and recommendations for how this technical assistance might connect with existing grant program offerings. The Consultant team will be expected to develop the plan now, along with any relevant materials to support continued engagement. Engagement will be internal among EEA, state agencies and the Clean Water Trust (CWT) in the first half of 2026. No external engagement will occur prior to summer 2026.

The selected expert vendor team will work with a project management team composed of representatives from EEA and other relevant state agencies and offices as appropriate (e.g. DEP, CWT). Additional deliverables will be associated with each stage of the work, as outlined below. EEA expects equity to be centered in every process and product of this RFQ and consider how the fund can be structured to allow for participation by disadvantaged populations.

The initial project timeline is estimated from January 2026 through August 2026, but EEA reserves the right to add additional deliverables that fall within the scope of this procurement and extend the timeline.

EEA expects environmental justice and equity to be centered in every process and product of this RFQ, and that the Consultant team considers how the fund can be structured to allow for participation by residents in burdened areas.

8.1 Services

The project will include the following distinct tasks:

1. A **local resilience finance strategy memo** that explores how to strengthen community financial and institutional capacity for resilience investment, including different models/financial structures that municipalities might use to repay resilience loans and identification of mechanisms/partnerships needed to sustain local investment. The Consultant team should look to successful examples in other jurisdictions and research best practices, taking into account budget processes and procedures for cities, towns and other eligible borrowers in Massachusetts. The memo should account for options for how municipalities of different size, organizational capacity, and those with residents in burdened areas can structure projects to take advantage of and increase access to and demand for loan funds.
2. A **recommended operational policy memo** that provides an overview of potential loan fund policies and procedures (including recommendations on the process for moving from solicitation to application review and contracting). The memo should summarize the recommended roles, responsibilities, and staffing plan for fund management at EEA, including partnership with the CWT. The memo should include recommendations given review of successful examples and lessons learned from other jurisdictions. The operations memo should also discuss how a loan program would relate to/interact with other EEA grant programs and propose a process for tracking the pipeline of potential projects. It should recommend how equity considerations can be incorporated into program operations and management. The **memo** should also include considerations for drafting standardized application materials, accompanying guides, review/scoring materials, and reporting procedures, providing examples as necessary.

- A) Alongside the memo, the Consultant team should develop a **data management and tracking process** to support EEA staff with the collection of loan applications, programmatic review, and tracking of project pipeline and financial side of loan portfolios. The process should be readily able to integrate into the current EEA grants management system.
3. An **engagement and technical assistance strategy** containing an engagement plan to launch a potential resilience loan fund and a longer-term outreach strategy for continued engagement and technical assistance offerings in the years following. Technical assistance could include support for communities to design and structure projects in ways that attract public and private capital. The longer-term strategy should include potential models for technical assistance for applicants, and recommendations for how this technical assistance might connect with existing grant program offerings. The Consultant team will be expected to develop the plan now, along with any relevant materials to support continued engagement. Engagement will be internal among EEA, state agencies and the Clean Water Trust (CWT) in the first half of 2026. No external engagement will occur prior to summer 2026. There is an option to conduct external engagement to assist EEA with carrying out the longer-term strategy in fiscal year 2027 if additional funding is available.

Task 1: Local Resilience Finance Memo

The Consultant team should research and analyze different pathways for local financing of resilience actions that municipalities across Massachusetts could use to repay resilience loans. The team should account for jurisdictions of varying size, geographic location, and capacity. Options should be summarized in a local resilience finance memo.

1.1 Understand current ways that Massachusetts municipalities finance resilience projects to gain a better understanding of local budgeting processes as well as the local realities of implementation and maintenance of resilience actions.

1.2 Research local climate finance options to leverage state funding into longer-term local investment, building off of the work in EEA's phased approach for building resilience finance. Options should focus on how municipalities can attract, manage, and sustain investments over time, and specifically how they can finance potential repayments to a resilience loan fund. Specific attention should be put towards finance options that will help communities strengthen local fiscal and institutional capacity through resilience investments. The analysis should consider finance mechanisms that will work for municipalities of different size, geographic location, financial standing, and staff capacity, ensuring that ability to repay loans is as equitable across jurisdictions as possible. The Consultant team should also look to successful examples in other states and jurisdictions.

1.3 In addition to specific financial mechanisms, the research and memo should explore ways that communities can structure projects to generate economic, environmental, or social returns for the community. For example, this could include linkage of resilience investments with actions that drive community and workforce development or structuring resilience projects to build social trust and institutional capacity.

1.4 Analyze the local finance options against a developed set of criteria, such as ease of implementation, impact on cost of living, feasibility, equity, benefit to the community. Local resilience finance options should be summarized, highlighting pros/cons of different approaches, with a few recommended strategies for different community types. Analysis should be synthesized into a local resilience finance memo.

Task 1 Deliverables:

- Small group meeting notes, attendee lists, and outcome summaries from any related meetings

- Criteria for evaluation of local finance options
- Draft set of local resilience finance options following research, for EEA review prior to memo compilation
- Draft and final local resilience finance memo

Task 1 Timeline: Task 1 should be completed by the end of the contract.

Task 2: Develop operational policies for a potential loan fund, compiled into a recommended operational policy memo, and accompanying data management process

The Consultant team will assess policy frameworks for similar funds and understand Massachusetts specific requirements for similar borrowing programs. Within (7) months of the contract start, the Consultant team should compile a recommended operational policy memo that provides an overview of potential loan fund policies and procedures, a proposed plan for fund management, and recommendation for how the loan fund will sequence/integrate with existing grant programs. The Consultant team should also develop a data management and tracking process to support EEA staff with the collection of loan applications, review, and tracking of project pipeline and financial aspects of the loan portfolios for the program. Specific sub-tasks include:

2.1 Review state revolving fund regulations from Massachusetts DEP and other similar state funds and understand what state-specific requirements must be included. Also review federal state revolving fund regulations as relevant to understand the context in which current Massachusetts state revolving funds operate.

2.2 Review the ECO One Stop process and application to understand the context and design the loan fund processes to overlap with the streamlined funding application. Provide recommendations for how the loan fund application process might be integrated into ECO One Stop in the future.

2.3 Review the EEA team’s proposed roles, responsibilities, and staffing plan for fund management. Work with the PMT to refine the management plan/structure. The Consultant team should draw on their own experience with loan funds and other finance mechanisms, their understanding of state grant and loan procedures, and successful examples and lessons learned from other jurisdictions. Share draft notes on the review of EEA’s proposed management plan.

2.4 Develop a recommended operational policy memo that provides a concise overview of the goals of a resilience revolving loan fund, as well as recommended policies and procedures (pulling together information learned across tasks). The memo should include the following:

- A recommended approach for developing and sharing fund structure with potential borrowers (i.e. sequencing of regulations with potential development of a fund manual or RFP).
- Recommended climate resilience project eligibility types/criteria, considerations for the development of scoring criteria, potential process for evaluating proposals to identify a priority list, and other key policy information expected to be included as part of any regulations.
- An overview of a recommended solicitation, application, review, prioritization/selection, and reporting processes.
- Recommended roles, responsibilities, and staffing plan for fund management at EEA, in partnership with the Clean Water Trust. The memo should provide recommendations based on the review of EEA’s proposed plan and successful examples from other jurisdictions in Task 2.1. It should recommend steps to expand fund operations assuming a certain level of growth over the coming 5-10 years.
- Analysis of successful examples of how other states or jurisdictions have integrated grant and loan programs and recommendation for a process that will most efficiently sequence projects across programs. The operational plan should discuss how the loan program will relate to/interact

with other EEA grant programs and propose a process for tracking the pipeline of potential projects.

- Recommendations for how equity considerations can be incorporated into program operations and management to ensure that all communities across Massachusetts, regardless of size or capacity, can take advantage of a loan fund.
- Recommendations and templates for the development of materials to assist the EEA team with fund management, including application, selection, prioritization, and reporting. Provide example materials from successful jurisdictions (if relevant).

2.5 Meet with the Clean Water Trust staff to understand the general process for how the loan fund finances will be tracked. Create a data management process for EEA program staff (in partnership with CWT) to internally track applications for loans or technical assistance funding related to loan funds as well as other pertinent information to adequately monitor performance over time on grants or loan assistance issued by EEA. The system/process should be compatible with the current grants management system that EEA uses.

Task 2 Deliverables:

- Internal memo summarizing the review of other funds' regulations/policy framework and recommendations for how they may be relevant to the Massachusetts context
- Small group meeting notes, attendee lists, and outcome summaries from any related meetings
- Draft notes on the review of EEA's proposed management plan
- Draft and final operational policy memo (formatted to allow for future EEA changes)
- Examples of standardized application form and instructions, scoring materials, materials for project prioritization/ranking, and reporting
- Meeting notes, attendee lists, and outcome summary for relevant meetings
- Overview of a proposed data management process for the loan fund
- Accompanying materials, templates to be used for data management

Task 2 Timeline: Task 2 should be drafted completed in final form no later than July 31, 2026.

Task 3: An Engagement and Technical Assistance Strategy for outreach upon fund launch and longer-term engagement

The Consultant team will review any prior stakeholder engagement work conducted by EEA to understand the needs of potential borrowers for a resilience focused loan fund. Based on this information as well as other researched best practices and expert input, the Consultant team will work to develop an outreach plan for the fund launch. The team will also assess different options for providing technical assistance and recommend a strategy for longer-term engagement and technical assistance in coordination with EEA grant programs.

3.1 Understand what is needed to support the investment readiness of communities and develop potential technical assistance approaches to help communities build this capacity. For example, support could include models for helping communities design and structure projects in ways that are attractive to both public and private capital or help to build partnerships for collaborative investment. Approaches could also include strengthening the institutional capacity of entities to manage finances and develop innovative revenue strategies to sustain projects.

3.2 Understand from EEA what stakeholder engagement has been accomplished to date and key lessons learned from potential borrowers. Conduct research to understand how other successful resilience loan fund programs have engaged with stakeholders during the initial launch of the funds and what (if any) technical assistance offerings they have provided and lessons learned.

3.3 Develop a plan for an outreach and engagement campaign for the two to three months preceding the launch of the fund and through the first round of loan applications. The plan should include the format and content EEA might use to engage with potential borrowers as well as a proposed timeline and list for engagement.

3.4 Conduct meetings with relevant state program managers to understand current technical assistance offerings for resilience-focused grant programs, including the type of assistance offered, timing, and stakeholders who are eligible.

3.5 Evaluate potential models for technical assistance offerings, drawing on tasks 3.3-3.4, and recommend a plan for what types of technical assistance should be offered to applicants during the application, selection, and loan duration phases. Technical assistance could include guides or other materials to help applicants more quickly fill out the application process, direct staff engagement to answer questions, assistance with the finance components of applying for and receiving a loan, or other assistance in compiling the required information. Assistance could also include broader actions to help bolster community investment readiness, or to prepare for development of a project proposal. In consultation with the PMT, the Consultant team should also provide considerations for the development of materials or example materials, as relevant, to carry out the technical assistance plan. The evaluation of potential technical assistance models should pay specific attention to how offerings can be streamlined or integrated across existing grant programs and a proposed loan fund.

Task 3 Deliverables:

- Outreach and engagement campaign plan (draft and final)
- Notes and synthesis from conversations with state program managers on current technical assistance offerings
- Draft of developed technical assistance approaches
- Evaluation of potential technical assistance models
- Technical assistance offerings plan
- Example technical assistance materials
- Feedback on draft documents

Task 3 Timeline: Task 3 should be completed by the end of the contract.

8.2 Project Management

The Consultant Team will provide a highly experienced project manager who is well-versed in climate finance mechanisms. This person will serve as the main point of contact to EEA and provide project management services, including regular scope, status, risk, and budget tracking and reporting through documentation and bi-weekly meetings, to ensure timely completion of all tasks and deliverables, and to ensure that all tasks and deliverables are completed as directed by the EEA project manager and documented in the work plan. A secondary Consultant Team project manager will be identified to ensure project continuity and will attend project meetings whenever possible.

8.3 Compliance with Commonwealth Standards

Vendor is responsible for addressing accessibility problems in any implementation, configuration, or documentation delivered or performed by Vendor, and in any software provided or licensed by Vendor and delivered to the Commonwealth.

Vendor shall ensure that all End User Deliverables adhere to the IT Accessibility Standards set in the current version (as of the date of this Solicitation) of the Enterprise Information Technology Accessibility Policy and interoperate with the environments listed on the AT/IT List. At a minimum, Vendor is expected to remain compliant with the latest version of the [Commonwealth Enterprise](#)

[Information Technology Accessibility Policy](#) or the standard set forth by the purchasing agency, and must be able to update any software/systems in the event of updates to either.

Vendor must ensure that accessibility and usability are addressed at every stage of the project. At the commencement of any project, prior to beginning any significant design or implementation work, Vendor's project manager shall meet with the Commonwealth's project manager and appropriate resources to review the Enterprise Information Technology Accessibility Policy, the AT/IT List, and any accessibility guidance provided by Vendor, in order to discuss their impact on the project.

9 APPENDIX 2 – REQUIRED TERMS FOR ALL RFQS

9

9.1 General Procurement Information

9.1.1 Alterations

Bidders may not alter (manually or electronically) the Bid language or any Bid component files, except as directed in the RFQ. Modifications to the body of the Bid, specifications, terms and conditions, or which change the intent of this Bid are prohibited and may disqualify a Quote.

9.1.2 Ownership of Submitted Quotes

The SST shall be under no obligation to return any Quotes or materials submitted by a Bidder in response to this Bid. All materials submitted by Bidders become the property of the Commonwealth of Massachusetts and will not be returned to the Bidder. The Commonwealth reserves the right to use any ideas, concepts, or configurations that are presented in a Bidder's Quote, whether or not the Quote is selected for Contract award.

Quotes stored on COMMBUYS in the encrypted lock-box are the file of record. Bidders retain access to a read-only copy of this submission via COMMBUYS, as long as their account is active. Bidders may also retain a traditional paper copy or electronic copy on a separate computer or network drive or separate media, such as CD or DVD, as a backup.

9.1.3 Prohibitions

Bidders are prohibited from communicating directly with any employee of the procuring Department or any member of the SST regarding this RFQ except as specified in this RFQ, and no other individual Commonwealth employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFQ. Bidders may contact the contact person using the contact information provided in the Header Information this Bid in the event that this RFQ is incomplete or information is missing. Bidders experiencing technical problems accessing information or attachments stored on COMMBUYS should contact the [COMMBUYS Helpdesk](#) (see the document cover page for contact information).

In addition to the certifications found in the Commonwealth's Standard Contract Form, by submitting a Quote, the Bidder certifies that the Quote has been arrived at independently and has been submitted without any communication, collaboration, or without any agreement, understanding or planned common course or action with, any other Bidder of the commodities and/or services described in the RFQ.

9.2 Terms and Requirements Pertaining to Awarded Contracts

9.2.1 Commonwealth Tax Exemption

Invoices or invoices submitted to Massachusetts government entities must not include sales tax.

9.2.2 Contractor's Contact Information

It is the Contractor's responsibility to keep the Contractor's Contract Manager information current. If this information changes, the Contractor must notify the Contract Manager by email immediately, using the address located in the Header Information of the Purchase Order or Master Blanket Purchase Order on COMMBUYS.

The Commonwealth assumes no responsibility if a Contractor's designated email address is not current, or if technical problems, including those with the Contractor's computer, network or ISP, cause e-mail communications between the Bidder and the SST to be lost or rejected by any means including email or spam filtering.

9.2.3 Publicity

Any Contractor awarded a contract under this Bid is prohibited from selling or distributing any information collected or derived from the Contract, including lists of participating Eligible Entities,

Commonwealth employee names, telephone numbers or addresses, or any other information except as specifically authorized by the SSST.

10 APPENDIX 3 – RFQ - REQUIRED SPECIFICATIONS

In general, most of the required contractual stipulations are referenced in the Standard Contract Form and Instructions and the Commonwealth Terms and Conditions. However, the following RFQ provisions must appear in all Commonwealth competitive procurements conducted under 801 CMR 21.00.

The terms of 801 CMR 21.00: Procurement of Commodities and Services are incorporated by reference into this RFQ. Words used in this RFQ shall have the meanings defined in 801 CMR 21.00. Additional definitions may also be identified in this RFQ. Other terms not defined elsewhere in this document may be defined in OSD's Glossary of Terms. Unless otherwise specified in this RFQ, all communications, responses, and documentation must be in English, all measurements must be provided in feet, inches, and pounds and all cost proposals or figures in U.S. currency. All responses must be submitted in accordance with the specific terms of this RFQ.

COMMBUYS Market Center. COMMBUYS is the official source of information for this Bid and is publicly accessible at no charge at www.commbuys.com. Information contained in this document and in COMMBUYS, including file attachments, and information contained in the related Bid Questions and Answers (Q&A), are all components of the Bid, as referenced in COMMBUYS, and are incorporated into the Bid and any resulting contract.

Bidders are solely responsible for obtaining all information distributed for this Bid via COMMBUYS. Bid Q&A supports Bidder submission of written questions associated with a Bid and publication of official answers. It is each Bidder's responsibility to check COMMBUYS for:

- Any amendments, addenda or modifications to this Bid, and
- Any Bid Q&A records related to this Bid.

The Commonwealth accepts 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.

COMMBUYS Registration. Bidders 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 a Bid, Bidders must register and maintain an active COMMBUYS Seller account.

All Bidders submitting a Quote (previously referred to as Response) in response to this Bid (previously referred to as Solicitation) agree that, if awarded a contract: (1) they will maintain an active seller account in COMMBUYS; (2) they will, when directed to do so by the procuring entity, activate and maintain a COMMBUYS-enabled catalog using Commonwealth Commodity Codes; (3) they will comply with all requests by the procuring entity to utilize COMMBUYS for the purposes of conducting all aspects of purchasing and invoicing with the Commonwealth, as added functionality for the COMMBUYS system is activated; (4) Bidder understands and acknowledges that all references to the Comm-PASS website or related requirements throughout this RFQ, shall be superseded by comparable requirements pertaining to the COMMBUYS website; and (6) in the event the Commonwealth adopts an alternate market center system, successful Bidders will be required to utilize such system, as directed by the procuring entity. Commonwealth Commodity Codes are based on the United Nations Standard Products and Services Code (UNSPSC).

The COMMBUYS system introduces new terminology, which bidders must be familiar with in order to conduct business with the Commonwealth. To view this terminology and to learn more about the COMMBUYS system, please visit the COMMBUYS Resource Center.

Multiple Quotes. Bidders may not submit Multiple Quotes in response to a Bid unless the RFQ authorizes them to do so. If a Bidder submits multiple quotes in response to an RFQ that does not authorize multiple responses, only the latest dated quote submitted prior to the bid opening date will be evaluated.

Quote Content. Bid specifications for delivery, shipping, billing and payment will prevail over any proposed Bidder terms entered as part of the Quote, unless otherwise specified in the Bid.

Best Value Selection and Negotiation. The Strategic Sourcing Team or SST may select the response(s) which demonstrates the best value overall, including proposed alternatives that will achieve the procurement goals of the department. The SST and a selected bidder, or a contractor, may negotiate a change in any element of contract performance or cost identified in the original RFQ or the selected bidder's or contractor's response which results in lower costs or a more cost effective or better value than was presented in the selected bidder's or contractor's original response.

Bidder Communication. Bidders are prohibited from communicating directly with any employee of the procuring department or any member of the SSST regarding this RFQ except as specified in this RFQ, and no other individual Commonwealth employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFQ. Bidders may contact the contact person for this RFQ in the event this RFQ is incomplete or the bidder is having trouble obtaining any required attachments electronically through COMMBUYS.

Contract Expansion. If additional funds become available during the contract duration period, the department reserves the right to increase the maximum obligation to some or all contracts executed as a result of this RFQ or to execute contracts with contractors not funded in the initial selection process, subject to available funding, satisfactory contract performance and service or commodity need.

Costs. Costs which are not specifically identified in the bidder's response, and accepted by a department as part of a contract, will not be compensated under any contract awarded pursuant to this RFQ. The Commonwealth will not be responsible for any costs or expenses incurred by bidders responding to this RFQ.

Electronic Communication/Update of Bidder's/Contractor's Contact Information. It is the responsibility of the prospective bidder and awarded contractor to keep current on COMMBUYS 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 SST, including requests for clarification. The SST 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 ISP cause email communications sent to/from the prospective bidder/awarded contractor and the SST to be lost or rejected by any means including email or spam filtering.

Electronic Funds Transfer (EFT). All bidders responding to this RFQ must agree to participate in the Commonwealth Electronic Funds Transfer (EFT) program for receiving payments, unless the bidder can provide compelling proof that it would be unduly burdensome. EFT is a benefit to both contractors and the Commonwealth because it ensures fast, safe and reliable payment directly to contractors and saves both parties the cost of processing checks. Contractors are able to track and verify payments made electronically through the Comptroller's Vendor Web system. A link to the EFT application can be found on the OSD Forms page (www.mass.gov/osd). Additional information about EFT is available on the VendorWeb site (www.mass.gov/osc). Click on MASSfinance.

Successful bidders, upon notification of contract award, will be required to enroll in EFT as a contract requirement by completing and submitting the Authorization for Electronic Funds Payment Form to this department for review, approval and forwarding to the Office of the Comptroller. If the bidder is already enrolled in the program, it may so indicate in its response. Because the Authorization for Electronic Funds Payment Form 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.

The requirement to use EFT may be waived by the SST on a case-by-case basis if participation in the program would be unduly burdensome on the bidder. If a bidder is claiming that this requirement is a hardship or unduly burdensome, the specific reason must be documented in its response. The SST will consider such requests on a case-by-case basis and communicate the findings with the bidder.

Executive Order 509, Establishing Nutrition Standards for Food Purchased and Served by State Agencies. Food purchased and served by state agencies must be in compliance with Executive Order 509, issued in January 2009. Under this Executive Order, all contracts resulting from procurements posted after July 1, 2009 that involve the purchase and provision of food must comply with nutrition guidelines established by the Department of Public Health (DPH). The nutrition guidelines are available at the Department's website: Tools and Resources for Implementation of Executive Order 509.

HIPAA: Business Associate Contractual Obligations. Bidders are notified that any department meeting the definition of a Covered Entity under the Health Insurance Portability and Accountability Act of 1996 (HIPAA) will include in the RFQ and resulting contract sufficient language establishing the successful bidder's contractual obligations, if any, that the department will require in order for the department to comply with HIPAA and the privacy and security regulations promulgated thereunder (45 CFR Parts 160, 162, and 164) (the Privacy and Security Rules). For example, if the department determines that the successful bidder is a business associate performing functions or activities involving protected health information, as such terms are used in the Privacy and Security Rules, then the department will include in the RFQ and resulting contract a sufficient description of business associate's contractual obligations regarding the privacy and security of the protected health information, as listed in 45 CFR 164.314 and 164.504 (e), including, but not limited to, the bidder's obligation to: implement administrative, physical, and technical safeguards that reasonably and appropriately protect the confidentiality, integrity, and availability of the protected health information (in whatever form it is maintained or used, including verbal communications); provide individuals access to their records; and strictly limit use and disclosure of the protected health information for only those purposes approved by the department. Further, the department reserves the right to add any requirement during the course of the contract that it determines it must include in the contract in order for the department to comply with the Privacy and Security Rules. Please see other sections of the RFQ for any further HIPAA details, if applicable.

Minimum Quote (Bid Response) Duration. Bidders Quotes made in response to this Bid must remain in effect for at least 90 days from the date of quote submission.

Prompt Payment Discounts (PPD). All bidders responding to this procurement must agree to offer discounts through participation in the Commonwealth Prompt Payment Discount (PPD) initiative for receiving early and/or on-time payments, unless the bidder can provide compelling proof that it would be unduly burdensome. PPD benefits both contractors and the Commonwealth. Contractors benefit by increased, usable cash flow as a result of fast and efficient payments for commodities or services rendered. Participation in the Electronic Funds Transfer initiative further maximizes the benefits with payments directed to designated accounts, thus eliminating the impact of check clearance policies and traditional mail lead time or delays. The Commonwealth benefits because contractors reduce the cost of products and services through the applied discount. Payments that are processed electronically can be tracked and verified through the Comptroller's Vendor Web system. The PPD form can be found as an attachment for this Bid on COMMBUYS.

Bidders must submit agreeable terms for Prompt Payment Discount using the PPD form within their proposal, unless otherwise specified by the SST. The SST will review, negotiate or reject the offering as deemed in the best interest of the Commonwealth.

The requirement to use PPD offerings may be waived by the SST on a case-by-case basis if participation in the program would be unduly burdensome on the bidder. If a bidder is claiming that this requirement is a hardship or unduly burdensome, the specific reason must be documented in or attached to the PPD form.

Public Records. All responses and information submitted in response to this RFQ are subject to the Massachusetts Public Records Law, M.G.L., c. 66, s. 10, and to c. 4, s. 7, ss. 26. Any statements in submitted responses that are inconsistent with these statutes, including marking by bidders of information as confidential during the quote submission process in COMMBUYS, shall be disregarded.

Reasonable Accommodation. Bidders with disabilities or hardships that seek reasonable accommodation, which may include the receipt of RFQ information in an alternative format, must communicate such requests in writing to the contact person. Requests for accommodation will be addressed on a case by case basis. A bidder requesting accommodation must submit a written statement which describes the bidder's disability and the requested accommodation to the contact person for the RFQ. The SST reserves the right to reject unreasonable requests.

Restriction on the Use of the Commonwealth Seal. Bidders and contractors 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.

Subcontracting Policies. Prior approval of the department is required for any subcontracted service of the contract. Contractors are responsible for the satisfactory performance and adequate oversight of its subcontractors. Human and social service subcontractors are also required to meet the same state and federal financial and program reporting requirements and are held to the same reimbursable cost standards as contractors.

11 APPENDIX 4 – INSTRUCTIONS FOR VENDORS RESPONDING TO BIDS ELECTRONICALLY THROUGH COMMBUYS

Introduction

COMMBUYS refers to all solicitations, including but not limited to Requests for Proposals (RFP), Invitations for Bid (IFB), Requests for Response (RFR), Requests for Quote (RFQ), as “Bids.” All responses to Bids are referred to as “Quotes.”

Steps for Bidders to Submit a Quote

1. Launch the COMMBUYS website by entering the URL (www.COMMBUYS.com) into the browser.
2. Enter Bidder login credentials and click the **Login** button on the COMMBUYS homepage. Bidders must be registered in COMMBUYS in order to submit a Quote. Each Vendor has a COMMBUYS Seller Administrator, who is responsible for maintaining authorized user access to COMMBUYS.
3. Upon successful login, the Vendor home page displays with the Navigation and Header Bar as well as the Control Center. The Control Center is where documents assigned to your role are easily accessed and viewed.
4. Click on the **Bids** tab
5. Clicking on the Bid tab opens four sections:
 - a. Request for Revision
 - b. Bids/Bid Amendments
 - c. Open Bids
 - d. Closed Bids
6. Click on the blue **Open Bid** hyperlinks to open and review an open bid
7. A new page opens with a message requesting you acknowledge receipt of the bid. Click **Yes** to acknowledge receipt of the bid. Bidders should acknowledge receipt to receive any amendments/updates concerning this bid.
8. After acknowledgement, the bid will open.

The top left half of the page contains the following information:

- a. Purchaser
- b. Department
- c. Contact for this bid
- d. Type of purchase
 - i. Open Market
 - ii. Blanket
- e. Pre-Bid Conference details (if applicable)
- f. Ship-to and Bill-to addresses
- g. Any attachments to the bid, which may include essential bid terms, response forms, etc.

The top right half of the bid includes the following information:

- h. Bid Date
- i. Required Date
- j. Bid Opening Date – date the bid closes and no further quotes will be accepted
- k. Informal Bid Flag
- l. Date goods/services are required

9. The lower half of the page provides information about the specific goods/services the bid is requesting.
10. Click **Create Quote** to begin.
11. The General tab for a new quote opens. This page is populated with some information from the bid. Fields available to update include:
 - a. Delivery days
 - b. Shipping terms
 - c. Ship via terms
 - d. Is "no" bid – select if you will not be submitting a quote for this bid
 - e. Promised Date
 - f. Info Contact
 - g. Comments
 - h. Discount Percent
 - i. Freight Terms
 - j. Payment Terms

It is important to note that the bid documents (RFQ and attachments) may specify some or all of these terms and may prohibit you from altering these terms in your response. Read the bid documents carefully and fill in only those items that are applicable to the bid to which you are responding.

Update these fields as applicable to the bid and click **Save & Continue** to save any changes and create a Quote Number.

The page refreshes and messages display. Any message in Red is an error and must be resolved before the quote can be submitted. Any message in Yellow is only a warning and will allow processing to continue.

The following messages are received:

Terms & Conditions is not acknowledged – to resolve this, click on the Terms & Conditions tab and accept the terms. Your quote has not been submitted – information message; no action required

12. Click on the Terms & Conditions Tab. This tab refers to the terms and conditions that apply to this bid. The terms and conditions must be accepted before your quote can be submitted. If your acceptance is subject to any exceptions, those exceptions must be identified here. Exceptions cannot contradict the requirements of the RFQ, or required Commonwealth standard forms and attachments for the bid. For instance, an RFQ may specify that exceptions may or will result in disqualification of your bid.
13. Click the **Items** tab. The Items tab displays information about the items requested in the bid. To view additional details about an item, click the item number (blue hyperlink) to open.
14. The item opens. Input all of your quote information and click **Save & Exit**.
15. **CONFIDENTIAL INFORMATION:** If documents uploaded in your quote response contain confidential information (security sensitive, EFT, W9, Commonwealth Terms and Conditions), **you must mark each item as confidential**. The confidential column on the Attachments view allows the user to select whether the attached form is confidential or not. Place a check box under the confidential column for each confidential attached form.

16. Click on the **Attachments** Tab. Follow the prompts to upload and name all required attachments and forms and bid response documents in accordance with the instructions contained in the solicitation or bid documents. After uploading each individual file or form, click **Save & Continue**. After you have uploaded all required documents click **Save & Exit**. Be sure to review your attachments to make sure each required document has been submitted.
17. Click the Summary tab. Review the information and update/correct, as needed. If the information is correct, click the **Submit Quote** button at the bottom of the page.
18. A popup window displays asking for verification that you wish to submit your quote. Click **OK** to submit the quote.
19. The Summary tab redisplay with an updated Status for the quote of **Submitted**.
20. Your quote submission is confirmed only when you receive a confirmation email from COMMBUYS. If you have submitted a quote and have not received an email confirmation, please contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us.

If you wish to revise or delete a quote after submission, you may do so in COMMBUYS: (1) for a formal bid, prior to the bid opening date, or (2) for an informal bid (which may be viewed upon receipt), prior to the opening of your quote by the issuing entity or the bid opening date, whichever is earlier.

Bidders may not submit Multiple Quotes in response to a Bid unless the Bid authorizes Multiple Quote submissions. If you submit multiple quotes in response to a bid that does not allow multiple quotes, only the latest submission prior to the bid opening date will be evaluated.