

THE COMMONWEALTH OF MASSACHUSETTS

EXECUTIVE OFFICE OF ENERGY & ENVIRONMENTAL AFFAIRS

100 CAMBRIDGE STREET, SUITE 900
BOSTON, MA 02114



Request for Response (RFQ)

**Document Title: Technical Guide to Incorporating Resilience into
Existing Infrastructure Design Standards**

COMMBUYS Bid#: BD-26-1042-ENV-ENV01- 119974

August 13, 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://www.commbuys.com) ([www..com](http://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.

Table of Contents

<u>1</u>	<u>RFQ INTRODUCTION AND GENERAL DESCRIPTION</u>	<u>6</u>
1.1	Procurement Scope and Description	6
1.2	Background information	8
1.3	Applicable Procurement Law.....	8
1.4	Number of awards	8
1.5	Adding Contractors after initial Contract award	8
1.6	Eligible Entities.....	8
1.7	Acquisition Method(s)	9
1.8	Performance and Payment Timeframes Which Continue Beyond Duration of the Contract.....	9
1.9	Contract Duration	9
1.10	Estimated Value of the Contract.....	9
<u>2</u>	<u>ESTIMATED PROCUREMENT CALENDAR.....</u>	<u>10</u>
2.1	Written questions via the Bid Q&A on COMMBUYS	10
2.2	Locating Bid Q&A.....	11
2.3	Amendment Deadline	11
2.4	Bidders' Conference.....	12
2.5	Oral Presentations/Product Demonstrations.....	12
<u>3</u>	<u>SPECIFICATIONS</u>	<u>12</u>
3.1	Bidder Qualifications.....	12
3.1.1	Experience	12
3.2	Supplier Diversity Program.....	13
3.2.1	Program Background	13
3.2.2	Financial Commitment Requirements.....	13
3.2.3	Eligible SDP Partner Certification Categories	13
3.2.4	Eligible Types of Business-to-Business Relationships	13
3.2.5	Program Flexibility	14
3.2.6	SDP Plan Form Requirements	14
3.2.7	Evaluation of SDP Forms	15
3.2.8	SDP Spending Reports and Compliance	15
3.2.9	SDP Spending Verification	15
3.2.10	Program Resources and Assistance.....	15
3.3	Environmental Specifications.....	15
3.3.1	Executive Order 515, Establishing an Environmental Purchasing Policy	15
3.4	Compensation Structure/Pricing.....	16
<u>4</u>	<u>OTHER TERMS</u>	<u>16</u>

4.1	Continued qualification based on performance	16
4.2	Reporting.	16
4.3	Security and confidentiality	16
4.4	Contract Management (Contractor's interface with Commonwealth's Contract Manager).....	16
5	<u>AUDIT.....</u>	17
6	<u>EVALUATION CRITERIA.....</u>	18
6.1	Mandatory requirements – RFQ Response Components	18
6.1.1	Bidder Capabilities and Project Approach	18
6.1.2	Cost Estimates	19
6.1.3	Prior Projects and Writing Samples	20
6.1.4	References.....	20
6.1.5	Key Personnel.....	20
6.1.6	Conflicts and Litigation (Conflicts Disclosure)	20
6.2	Evaluation Components.....	20
6.2.1	Project Approach.....	20
6.2.2	Price.....	21
6.2.3	Supplier Diversity Plan	21
6.2.4	Team Qualifications and Technical/Analytical Capabilities	21
6.2.5	Experience with Similar Projects and Project Management	21
6.2.6	Report Writing Experience and Communication Skills	21
7	<u>HOW TO SUBMIT A QUOTE.....</u>	21
7.1	Quote Submission Method	21
7.2	COMMBUYS Quote Submission Training and Instructions.....	21
7.3	COMMBUYS Support.....	22
7.4	Bid Opening Date/Time	22
7.5	Quote Contents.....	22
7.5.1	RFQ Submission Checklist.....	22
7.5.2	Electronic Signatures	23
7.5.3	Acceptable Forms of Signature	23
7.6	Limits and Restrictions	23
7.6.1	File Naming Conventions	23
7.6.2	File Size Limits	24
7.7	Withdrawing a Quote.....	24
7.7.1	Prior to Bid Opening Date/Time.....	24
7.7.2	After Bid Opening Date/Time.....	24
7.8	Additional Quote Terms	24
7.8.1	Prohibition regarding contract terms	24
7.8.2	Bidder Response Form	24
8	<u>APPENDIX 1 – DETAILED SCOPE OF SERVICES AND DELIVERABLES</u>	25

8.1 Services	27
8.1.1 Task 1: Confirmation of relevant infrastructure types and assessment of effective existing design manuals	27
8.1.2 Task 2: Engagement with relevant agencies and individuals representative of the resilient infrastructure standards' audience (municipal staff, practicing engineering consultants, etc.)	29
8.1.3 Task 3: Development of a strategy for incorporating climate change resilience considerations into existing design standards	29
8.1.4 Task 4: Creation of a public-facing Technical Guide to Incorporating Resilience into Existing Infrastructure Standards and Content and Mock-up for a public-facing Resilient Infrastructure Design Technical webpage, as well as an internal Summary of Recommendations for Implementing Resilient Infrastructure Design Standards	31
8.1.5 Task 5: Creation of standardized project delivery templates to incorporate climate resilience into key infrastructure project types to be grouped by sector and compiled into public-facing, user-friendly toolkit documents	32
8.2 Project Management	33
8.3 Compliance with Commonwealth Standards	33
 9 APPENDIX 2 – REQUIRED TERMS FOR ALL RFQS	 35
 9.1 General Procurement Information	 35
9.1.1 Alterations	35
9.1.2 Ownership of Submitted Quotes	35
9.1.3 Prohibitions	35
9.2 Terms and Requirements Pertaining to Awarded Contracts	35
9.2.1 Commonwealth Tax Exemption	35
9.2.2 Contractor's Contact Information	35
9.2.3 Publicity	35
 10 APPENDIX 3 – SUPPLIER DIVERSITY PROGRAM	 37
 10.1 Supplier Diversity Program	 37
10.1.1 Program Background	37
10.1.2 Financial Commitment Requirements	37
10.1.3 Eligible SDP Partner Certification Categories	37
10.1.4 Eligible Types of Business-to-Business Relationships	37
10.1.5 Program Flexibility	38
10.1.6 SDP Plan Form Requirements	38
10.1.7 Evaluation of SDP Forms	39
10.1.8 SDP Spending Reports	39
10.1.9 SDP Spending Compliance	39
10.1.10 SDP Spending Verification	39
10.1.11 Program Resources and Assistance	39
 11 APPENDIX 4 – RFQ - REQUIRED SPECIFICATIONS	 40

12	<u>APPENDIX 5 – INSTRUCTIONS FOR VENDORS RESPONDING TO BIDS</u>	
	<u>ELECTRONICALLY THROUGH COMMBUYS.....</u>	<u>45</u>

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 consulting services and related deliverables for the development of a guide to incorporating climate resilience considerations into existing engineering design standards and provide recommendations for changes to standards, if necessary.

EEA leads ResilientMass, 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, heat and related health impacts, 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.

EEA's Climate Team has identified the need for a specific, standardized technical guide for incorporating climate resilience considerations into the design of certain infrastructure project types. This guide will be a resource for state-funded and reviewed capital projects to reduce their risks of unanticipated loss or interruption of service life and are able to quickly recover from disruptions with minimal impacts under projected future climate scenarios. This effort will review existing infrastructure standards and develop specific guidance for incorporating climate change considerations in technical design for the following infrastructure sectors:

- Transportation (with a specific focus on culverts)
- Stormwater conveyance
- Water supply
- Wastewater
- Energy & Utilities

Climate change considerations to be incorporated in the design standards should include those referenced in the [2023 ResilientMass Plan](#), and should include but not be necessarily limited to:

- Sea level rise
- Storm surge
- Coastal erosion
- Riverine flooding
- Drought
- Stream erosion
- Extreme precipitation
 - Stormwater or pluvial flooding
 - Geohazards (rock fall, land slides) as relating to precipitation
- Extreme temperatures (high and low)
- High winds
- Wildfires

The selected expert vendor team will facilitate the development of a technical document containing recommended processes and procedures for each infrastructure sector for (a) incorporating climate considerations in conceptual design and siting decisions and (b)

incorporating climate projections into existing technical design specifications. The deliverables should evaluate existing specifications from infrastructure design manuals and guidance currently in effect, Massachusetts climate change projections, other projections datasets, and feedback from a practitioner stakeholder group. The deliverable will provide guidance for the design of new and replacement or retrofit infrastructure projects which are funded by state grants or reviewed by the state. The deliverable will also serve as a reference for any owners of infrastructure located in Massachusetts who seek to incorporate climate resilient design into individual infrastructure assets.

EEA is therefore soliciting bidders for a contract to develop a technical guide for incorporating climate resilience into existing infrastructure design standards and the facilitation of state agency and stakeholder engagement for the implementation of these standards that will result in two main categories of deliverables (with intermediate sub-deliverables):

1. **A Technical Guide to Incorporating Resilience into Existing Infrastructure Design Standards** containing the general guidance for incorporating climate resilience into infrastructure design and a guide to application in each infrastructure sector, for public distribution. (See Task 4 in Appendix 1). In preparation for compiling this main report, sub-deliverables include:
 - a. An internal summary background memo identifying, by sector, key infrastructure design or siting choices which may be influenced by climate considerations, current effective technical and design manuals being used in practice, and instances in which levels of risk tolerance in current effective design manuals may be inappropriate. (See Task 1 in Appendix 1)
 - b. An accessible, **public-facing inventory** (e.g. a static list, table, etc.) containing, by sector, all climate-relevant design metrics used in Massachusetts, the design manual in which they are referenced, whether manual is regulatory or optional/guidance, the level(s) of risk tolerance at which they are used, and the potential source of projected values of the metric identified by the EEA Office of Climate Science (OCS) if applicable. (See Task 1 in Appendix 1)
 - c. A **summary of strategies and recommendations memo** detailing different approaches for integrating climate resilience into existing infrastructure design standards by sector, for internal use. The memo should include an overview of different strategies, methodology and criteria for selection, and a recommended approach (to then be developed for the technical guide in deliverable one). (See Task 3 in Appendix 1)
 - d. An internal summary of recommendations for implementation of the resilient infrastructure design standards guide, including recommendations for technical assistance or possible future changes to standards to consider (if warranted). (See Task 4 Part 6 in Appendix 1)
2. **Content** and a **mockup** for a project web page & a public-facing summary. (See Task 4 in Appendix 1).
 - a. A **public-facing, user-friendly toolkit** compiling the series of standardized project delivery templates for infrastructure projects by sector into a user-friendly document. (See Task 4 in Appendix 1).
 - b. **Resilient Infrastructure Design Standards web tool** (optional – for discussion as potential future project phase, not as part of this project scope or budget).

Additional deliverables will be associated with each stage of the work, as outlined in Appendix 1.

The initial project timeline is estimated from October 2025 through November 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 (EJ) and equity to be centered in every process and deliverable of this RFQ. EEA established an Environmental Justice Policy to help address the disproportionate share of environmental burdens experienced by lower-income people and communities of color who, at the same time, often lack environmental assets in their neighborhoods. The policy is designed to help ensure their protection from environmental pollution as well as promote community involvement in planning and environmental decision-making to maintain and/or enhance the environmental quality of their neighborhoods. Refer to the current Massachusetts [Environmental Justice Policy](#) updated in June 2021 and see **Appendix 1: Scope of Services and Deliverables** within this RFQ for more details. EEA therefore strongly encourages applicants to ensure that their core project team includes diverse team members for each project task and that they partner with diverse suppliers; see **Appendix 3: Supplier Diversity Program**. In addition, the proposed core project teams should have relevant experience and expertise in both collecting qualitative and quantitative environmental justice and equity data and measuring and analyzing environmental justice and equity data.

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 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, 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 Climate and Clean Energy Plan for 2050 and incorporates science and findings from the 2022 Massachusetts Climate Change Assessment. The 2023 ResilientMass Plan identifies infrastructure as an area of urgent priority impact. The technical guide for incorporating climate resilience into existing infrastructure design standards developed by this project will support the execution of a variety of 2023 ResilientMass Plan actions through the identified goals of using science-based and informed decision-making to support resilient and equitable infrastructure, ecosystems, and communities.

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 until November 30, 2026.

1.10 Estimated Value of the Contract

The estimated value of purchase(s) resulting from this Bid has a recommended budget of less than \$250,000, 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	August 13, 2025
Bid Release Date	August 13, 2025
Bidders' Conference	August 21, 2025 –10AM ET Webinar: Join the meeting now Meeting ID: 245 531 082 988 1 Passcode: s6kV6Ry7
Deadline for Submission of Questions through COMMBUYS "Bid Q&A"	August 25, 2025
Official Answers for Bid Q&A published (Estimated)	August 28, 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.	August 28, 2025
Deadline for Quotes/Bid Responses ("Bid Opening Date/Time" in COMMBUYS)	September 19, 2025 at 5pm
Oral Presentations for Selected Bidder(s) Bidders will be notified individually if they are asked to present.	October 1, 2025
Notification of Apparent Successful Bidder(s) (Estimated)	October 9, 2025
Negotiations (Estimated)	October 14-17, 2025
Estimated Contract Start Date	October 20, 2025

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:

- Convening and engaging technically oriented stakeholder/advisory groups
- Developing or contributing to the development of technical specifications and guidance, especially design standards and guidelines to be used in engineering practice
- Developing climate resilience guidance
- Producing clear, well-organized, consistently formatted, and visually pleasing documents
- Knowledge of infrastructure permitting in Massachusetts
- Knowledge of the statutory and political environment of Massachusetts and relevant environmental regulations.
- 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 and coastal resilience programs
- Engineering, design of, and currently effective design standards for
 - Transportation (with a specific focus on culverts)
 - Experience with the MassDOT Project Development Process and the PDDG
 - Stormwater conveyance infrastructure
 - Water supply infrastructure
 - Wastewater infrastructure
 - Energy utility infrastructure
 - Green infrastructure and nature-based solutions
- Implementing infrastructure design with climate resilience considerations for any or all of the above infrastructure types
- Expertise in climate resilience issues and best practices including those related to policy, natural resources, economy, stakeholder priorities, and local action
- Design and management of complex projects with multiple deliverables, including written and visual deliverables, and short timelines

EEA strongly encourages applicants to ensure their core project team includes a diversity of team members for each project task and that they partner with diverse suppliers—Supplier Diversity Program requirements are a core component of this RFQ; see **Appendix 3** for full details. Massachusetts Executive Order 565 reaffirmed and expanded the Commonwealth’s policy to promote the award of state contracts in a manner that develops and strengthens certified Minority Business Enterprises (MBEs), Women Business Enterprises (WBEs), Minority and Women Nonprofit Organizations (M/WNPOs), Veteran Business Enterprises (VBEs), Service-Disabled Veteran-Owned Business Enterprises (SDVOBEs), Disability-Owned Business Enterprises (DOBEs), and Lesbian, Gay, Bisexual and Transgender Business Enterprises (LGBTBEs).

EEA’s appreciation of diversity is based on the research that demonstrates that diversity within a project team unlocks higher innovation. At this critical time, the most innovative solutions are necessary to ensure that the Commonwealth meets its climate goals.

3.2 Supplier Diversity Program

3.2.1 Program Background

Pursuant to [Executive Order \(EO\) 565](#), the Commonwealth’s [Supplier Diversity Program](#) (SDP) promotes business-to-business relationships between awarded Contractors and diverse businesses and non-profit organizations (“SDP Partners”) certified or recognized by the [Supplier Diversity Office \(SDO\)](#).

3.2.2 Financial Commitment Requirements

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

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

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

3.2.3 Eligible SDP Partner Certification Categories

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

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

3.2.4 Eligible Types of Business-to-Business Relationships

Bidders and Contractors may engage SDP Partners in the following two ways:

- **Subcontracting**, defined as a partnership in which the SDP partner is involved in the provision of products and/or services to the Commonwealth.

- **Ancillary Products and Services**, defined as a business relationship in which the SDP partner provides products or services that are not directly related to the Contractor's contract with the Commonwealth but may be related to the Contractor's own operational needs.

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

3.2.5 **Program Flexibility**

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

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

3.2.6 **SDP Plan Form Requirements**

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

Bidders may propose SDP Partners that are:

- **Certified or recognized by the SDO:** Such partners appear in the [SDO Directory of Certified Businesses](#) or in the [U.S. Dept of Veterans Affairs VetBiz Vendor Information Pages](#) directory. After contract award (if any), spending with such partners will contribute to meeting the Contractor's SDP Commitment.
- **Not yet certified or recognized by the SDO:** Such partners must be certified in eligible categories by a third-party certification body, such as another city or state supplier diversity certification office, the [National Minority Supplier Development Council](#), the [Women Business Enterprise National Council](#), [Disability:IN](#), or the [National LGBT Chamber of Commerce \(NGLCC\)](#), but not listed in the above-mentioned directories. Self-certification is not acceptable. While Bidders may list such proposed SDP Partners on their SDP Plans, spending with such partners will **not** contribute to meeting the Contractor's SDP Commitment unless they apply for and are granted SDO supplier diversity certification or recognition. If proposed SDP Partners do not receive SDO supplier diversity certification or recognition, the Contractor must find alternative SDP Partners to meet their SDP Commitment.

It is the responsibility of the Contractor to ensure that their proposed SDP Partners obtain such certification or recognition by the SDO after contract award (if any). The issuing department and the SDO will not conduct outreach to proposed SDP Partners to ensure their certification. Furthermore, no guarantee may be made that a proposed SDP Partner will be certified, or regarding the time it may take to process a proposed SDP Partner certification. Contractors may direct partners to the SDO's homepage, www.mass.gov/sdo and the [Certification Self-Assessment Tool](#) for guidance on applying for certification.

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

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

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

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

3.2.7 Evaluation of SDP Forms

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

3.2.8 SDP Spending Reports and Compliance

After contract award, Contractors shall be required to provide reports demonstrating compliance with the agreed-upon SDP Commitment as directed by the department, which in no case shall be less than annually.

Only spending with SDP Partners that appear in the [SDO Directory of Certified Businesses](#) or in the [U.S. Dept of Veterans Affairs VetBiz Vendor Information Pages](#) directory shall be counted toward a Contractor's compliance with their SDP Commitment. Spending with SDP Partners that do not appear in the directories above shall not be counted toward meeting a Contractor's SDP Commitment.

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

3.2.9 SDP Spending Verification

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

3.2.10 Program Resources and Assistance

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

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, Supplier Diversity Program (SDP) 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 background resources, data sources, and frameworks. This narrative should include:

- Detailed implementation timeline between October 2025 and November 2026, including:
 - Sub-task deadlines
 - Detailed sequencing of internal agency engagement, relevant stakeholder engagement, and content development
- Clear outline of the team's proposed approach to developing the resilient infrastructure standards technical product, including:
 - Approach to assessing design manuals and guidelines used by the included infrastructure sectors in Massachusetts
 - Approach to evaluating the effective design manuals and guidelines and flagging potential deficiencies related to
 - Climate-relevant design values and specifications in terms of the implicit risk tolerance for risk of failure or disruptions
 - Embedded ecological considerations in terms of suitability or potential complications under future climate scenarios
 - Embedded environmental justice considerations
 - Approach to developing a database on climate-relevant design values used in each manual or guidelines document, for use by engineering or architecture professionals
 - Approach to developing alternative strategies for incorporating climate change considerations into siting, design concept selection, and existing technical design specifications within each infrastructure sector

- Approach to developing an alternatives evaluation and selection strategy, including consideration of stakeholder feedback
- Approach to drafting the resilient infrastructure standards technical guidance document, collecting and integrating feedback, and finalizing the product
- Approach to developing visual mock-up and conceptual business requirements for a potential resilient infrastructure standards web tool
- Approach to developing a public-facing project summary
- Approach to engaging stakeholders around the development of the resilient infrastructure standards, including:
 - Expanding the stakeholder list with broad representation of user audience
 - Collecting input on design manuals and guidelines documents assessed
 - Collecting feedback and incorporating stakeholder input on alternative conceptual frameworks/strategies for integrating climate change in existing design practices and standards (and recommending consideration of changes, if warranted)
 - Collecting and integrating feedback on resilient infrastructure design standards final product
 - Identifying through what format and at what milestones stakeholders would be engaged
- Approach for reviewing key infrastructure sectors, engaging stakeholders, and using that feedback to define common infrastructure types for which standardized design templates would be useful (and thus will be developed).
- Approach for development of the project delivery templates and corresponding toolkits.
- 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 RFQ 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 RFQ Section 8.1

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 supplier diversity 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 Supplier Diversity Plan

Bidders responding to this RFQ are required to submit a Supplier Diversity Plan. Requirements for the Supplier Diversity Plan are included in Section 3. At least 25% of the total available evaluation points for this bid solicitation shall be allocated to the evaluation of the SDP Plan submissions.

6.2.4 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."

6.2.5 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.

6.2.6 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 policy-makers 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**
- ✓ **Supplier Diversity Program Plan**

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

Supplier Diversity Program Plan	Company Name SDP Form 1	CompanyName_SDPform1.doc
---------------------------------	-------------------------	--------------------------

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 consulting services and related deliverables for the development of an updated set of engineering design standards for infrastructure that incorporate climate resilience considerations.

EEA leads ResilientMass, 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, heat and related health impacts, 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.

EEA's Climate Team has identified the need for specific and technical guidance for incorporating climate resilience considerations into existing practices and standards for the design of critical infrastructure project types. The guide and existing standards will be a resource for state-funded and reviewed capital projects to reduce their risks of unanticipated loss of lifespan and are able to quickly recover from disruptions with minimal impacts under projected future climate scenarios. This effort will develop specific guidance for incorporating climate change considerations in technical design for the following infrastructure sectors:

- Transportation (with a specific focus on culverts)
- Stormwater conveyance
- Water supply
- Wastewater
- Energy & Utilities

Climate change considerations to be incorporated in the design standards should include those referenced in the [2023 ResilientMass Plan](#), and should include but not necessarily be limited to:

- Sea level rise
- Storm surge
- Coastal erosion
- Riverine flooding
- Drought
- Stream erosion
- Extreme precipitation
 - Stormwater or pluvial flooding
 - Geohazards (rock fall, land slides)
- Extreme temperatures (high and low)
- High winds
- Wildfires

The selected expert vendor team will work with a project management team composed of representatives from EEA, MEMA, MassDOT, DEP, DOER, and other relevant state agencies and offices to facilitate the development of a technical document containing recommended processes and procedures for (a) incorporating climate considerations in conceptual design and siting decisions and (b) incorporating climate projections into existing technical design specifications. The deliverables should incorporate existing

specifications from infrastructure design manuals and guidance currently in effect, Massachusetts climate change projections, other projections datasets, and feedback from a practitioner stakeholder group. The deliverable will inform design of new and replacement or retrofit infrastructure projects which are funded by MA grants. The deliverable will also serve as a reference for any owners of infrastructure located in Massachusetts who seek to incorporate climate resilient design in individual infrastructure assets.

EEA is therefore soliciting bidders for a contract to develop a technical guide for incorporating climate resilience considerations into existing design standards and the facilitation of state agency and stakeholder engagement for the implementation of these standards that will result in seven main categories of deliverables:

1. A Technical Guide to Incorporating Resilience into Existing Infrastructure Design Standards containing the general guidance for incorporating climate resilience into infrastructure design and a guide to application in each infrastructure sector, for public distribution. (See Task 4 below). In preparation for compiling this main report, sub-deliverables include:
 - a. An internal summary background memo identifying, by sector, key infrastructure design or siting choices which may be influenced by climate considerations, current effective technical and design manuals being used in practice, and instances in which levels of risk tolerance in current effective design manuals may be inappropriate. (See Task 1 below)
 - b. An accessible public-facing inventory (e.g. a static list, table, etc.) containing, by sector, all climate-relevant design metrics used in Massachusetts, the design manual in which they are referenced, whether manual is regulatory or optional/guidance, the level(s) of risk tolerance at which they are used, and the potential source of projected values of the metric identified by the EEA Office of Climate Science (OCS) if applicable. (See Task 1 below)
 - c. A summary of strategies and recommendations memo detailing different approaches for integrating climate resilience into existing infrastructure design standards by sector, for internal use. The memo should include an overview of different strategies, methodology and criteria for selection, and a recommended approach (to then be developed for the technical guide in deliverable one). (See Task 3 below)
 - d. An internal summary of recommendations for implementation of the resilient infrastructure design standards guide, including recommendations for technical assistance or possible future changes to standards to consider (if warranted). (See Task 4 Part 6 below)
2. Content and a mockup for a project web page & a public-facing summary. (See Task 4 below).
 - a. A public-facing, user-friendly toolkit compiling the series of standardized project delivery templates for infrastructure projects by sector into a user-friendly document. (See Task 4 below).
 - b. Resilient Infrastructure Design Standards web tool (optional – for discussion as potential future project phase, not as part of this project scope or budget).

Additional deliverables will be associated with each stage of the work, as outlined below.

The initial project timeline is estimated from October 2025 through November 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 (EJ) and equity to be centered in every process and product of this RFQ. EEA established an Environmental Justice Policy to help address the disproportionate share of environmental burdens experienced by lower-income people and communities of color who, at the same time, often lack environmental assets in their neighborhoods. The policy is designed to help ensure their protection from environmental pollution as well as promote community involvement in planning and environmental decision-making to maintain and/or enhance the environmental quality of their

neighborhoods. Refer to the current Massachusetts [Environmental Justice Policy](#) updated in October 2023. Environmental justice and equity goals include, but are not limited to, the following:

1. Consider the current and future impacts that climate change will have on environmental justice populations, taking care that potential benefits and burdens will be distributed equitably across communities.
2. Ensure that public-facing materials are accessible, ADA compliant, include plain-language explanations, and are in accordance with the EEA's [Language Action Plan](#).
3. Take appropriate measures towards ensuring that environmental justice populations are equally protected from hazards and health risks imposed by future climate changes and properly informed of appropriate measures taken to increase their adaptive capacity.

EEA therefore strongly encourages applicants to ensure that their core project team includes diverse team members for each project task. Partnering with diverse suppliers is a requirement as well (see Appendix 3). In addition, the proposed core project teams should have relevant experience and expertise in both collecting qualitative and quantitative environmental justice and equity data and measuring and analyzing environmental justice and equity data.

8.1 Services

The project will include the following distinct tasks:

1. Confirmation of relevant infrastructure types and assessment of effective existing design manuals.
2. Conduction of stakeholder engagement with relevant agencies and individuals representative of the resilient infrastructure standards' audience (municipal staff, practicing engineering consultants, etc.).
3. Development of strategy for incorporating climate change resilience considerations into existing design standards.
4. Creation of public-facing technical guide to incorporating climate resilience into existing infrastructure standards document and content and mock-up for a public-facing webpage, as well as an internal summary of recommendations for implementing resilient infrastructure design standards.
5. Creation of standardized project delivery templates to incorporate climate resilience into key infrastructure project types to be grouped by sector and compiled into public-facing, user-friendly toolkit documents.

8.1.1 Task 1: Confirmation of relevant infrastructure types and assessment of effective existing design manuals

Within twelve (12) weeks of the start of contract, the Consultant will review the list of infrastructure sectors to be included in project as compiled by EEA and revise if necessary, confirming especially the scope of transportation infrastructure to be included. The Consultant will assess climate-relevant criteria and design values included in design manuals or guidelines currently in effect in Massachusetts within each of the infrastructure sectors and work with EEA's Office of Climate Science to identify potential sources of climate projections which correspond to each climate-relevant design metric identified. The manuals and guidelines documents reviewed should include, but not be limited to:

- [ASCE 24: Flood-Resistant Design and Construction](#)
- AASHTO LRFD Bridge Design Specifications

- [MassDOT Bridge Manual, Hundredth Anniversary Edition](#)
 - [MassDOT Project Development and Design Guide](#)
 - [MA River and Stream Crossing Standards](#)
 - MA Stormwater Handbook
 - [MassDEP Guidelines for the Design, Construction, Operation, and Maintenance of Small Wastewater Treatment Facilities with Land Disposal](#)
 - [TR-16 Guides for the Design of Wastewater Treatment Works](#)
 - [Water Environment Federation \(WEF\) Design of Municipal Wastewater Treatment Plants](#)
 - [MassDEP Guidelines for Public Water Systems](#)
 - [220 CMR 125.00: Installation and Maintenance of Transmission Lines](#)
 - [Eversource Underground Transmission Lines Standards](#)
 - [MA River and Stream Crossing Standards](#) and upcoming toolkit
 - EDCs' Electric Sector Modernization (and resilience) Plans
- 1) In consultation with the EEA project team and stakeholder partners, the team will revise (add, subtract, aggregate, re-categorize, etc.) as deemed appropriate given discussions between project team, key agency stakeholders, and the Consultant. The Consultant and State project team will determine scope of transportation infrastructure to be included in the resilient infrastructure design standards.
 - 2) Compile list of existing design manuals within each sector which are currently used in professional practice in Massachusetts as well as guidance/best practices for resilient infrastructure design standards. Identify whether the manuals are regulatory in nature.
 - 3) Identify climate-relevant design metrics which are required or recommended by the manual for use in design. Here, "climate-relevant" means any design metric which is influenced by characteristic meteorological, coastal, or hydrologic conditions and variability therein. These include metrics based on typical meteorological variables (e.g., temperature, precipitation, wind, humidity, etc.) and those influenced by meteorological variables (e.g., streamflow statistics, wildfire risk, etc.). Explicitly identify conflicts between state and federal regulations or regulatory frameworks and existing best practices/guideline resources. If there are discrepancies, consult with relevant agencies to understand why this may be the case. Document any aspects of the regulatory or guideline design values which reflect a specific level of risk tolerance for the completed design (example: An event with annual exceedance probability of 1%).
 - 4) Review manuals, guidelines, and other resources on incorporating resilience considerations in design by municipalities, other states, other countries, and additional entities within and beyond Massachusetts. Identify resilient design concepts in these manuals which could apply to resilient infrastructure standards in Massachusetts.
 - 5) With the Office of Climate Science (OCS), review the products of Task 1.3 and identify currently effective climate-relevant design metrics which correspond directly to existing projections datasets and those which do not.

Deliverable:

- Inventory containing, by infrastructure sector:
 - All climate-relevant design metrics currently in effect or in guidance/best practices documents
 - The design manual or guidance document in which they are referenced

- The level(s) of risk tolerance at which they are used
- The potential source of projected values of the metric identified by OCS if applicable

8.1.2 Task 2: Engagement with relevant agencies and individuals representative of the resilient infrastructure standards' audience (municipal staff, practicing engineering consultants, etc.)

- 1) Between the start of contract and September 2026, the Consultant Team will engage relevant agencies and other individuals representative of the resilient infrastructure standards' audience (municipal staff, practicing engineering consultants, etc.). The Consultant Team will be supplied with an initial contact list for state agency staff to engage throughout the project timeline, which they will add to with other professionals representative of the standards' target audience including staff at quasi state agencies, municipal governments, water and wastewater districts, investor-owned utilities, MLPs, and others as deemed appropriate.
- 2) Within four (4) weeks of the start of the contract, review stakeholder list compiled by MEMA/EEA and augment as necessary to include perspectives from municipalities (department of public works, city/town engineer, etc.) and private industry (engineering consultants, contractors, water and wastewater districts, investor-owned utilities, MLPs, etc.), within and/or beyond Consultant team.
- 3) Hold small-group focus meetings to solicit feedback on compiled list of design manuals (Task 1 deliverable) within each infrastructure type.
- 4) Hold small-group focus meetings by infrastructure sector to solicit feedback on potential resilient infrastructure design standards guide format & strategies for incorporating climate change considerations (Task 3). Use meetings to identify potential regulatory and logistical conflicts between existing regulatory design standards or design guidance and potential guidelines for incorporating resilience.
- 5) Develop, circulate, and collect asynchronous engagement materials such as surveys as necessary to solicit feedback on potential resilient infrastructure standards format, strategies for incorporating climate change considerations, and to identify potential regulatory and logistical conflicts.
- 6) Circulate draft resilient infrastructure standards technical document to stakeholder groups for feedback before finalizing the document.

Deliverables:

- Brief stakeholder engagement plan outline for each task
- Augmented stakeholder contact list
- Small group meeting notes, attendee lists, and outcome summaries
- Draft survey(s)
- Survey data and findings summary
- Feedback on draft documents

8.1.3 Task 3: Development of a strategy for incorporating climate change resilience considerations into existing design standards

The Consultant team will assess findings from Task 1 and subtasks 2.1 and 2.2, and within ten (10) months of the start of the contract, develop a strategy for integrating climate change considerations into existing design frameworks and requirements for each infrastructure sector. The strategy for integrating climate change into culvert design shall be completed first, within eight (8) months of the start of contract. Specific sub-tasks include:

- 1) Review the inventory developed in Task 2.1 and assess data gap between climate-relevant design metrics used in currently effective design manuals and sources for projected values of those design metrics. Identify how many metrics have readily available projections-based resources and how many metrics do not. For design metrics which do not have readily available projections, review (or draft) alternative means of accommodating climate change influence on these metrics without projections. Whenever appropriate, consider methods which are already embedded in the Climate Resilience Design Standards tool.
- 2) Review the inventory developed in Task 1 and assess (a) level of risk tolerance embedded in current effective design standards/guidelines; (b) current practices for incorporating ecological considerations; (c) current practices for addressing environmental justice. Identify scenarios in which the level of risk tolerance, method for incorporating ecological considerations, or method for addressing environmental justice concerns in current design standards/guidelines may be inappropriate based on input from internal project team, agency experts, and stakeholders. Identify opportunities in which a tiered approach to criticality designations beyond what already exists in effective design manuals may be necessary/appropriate.
- 3) Develop alternative strategies for incorporating climate change into existing design frameworks for each infrastructure sector. Alternatives may include existing strategies for incorporating climate change if already used in practice. Consider resilient design manuals & best practice resources developed through Task 1. Consider also stakeholder feedback collected through Task 2, the level of data gap between design values in current design manuals and available projections datasets (1.5, 3.1), any potentially problematic risk tolerance levels in effective design manuals (3.2), scenarios in which incorporating climate change into existing design manuals may be ineffective, the potential additional cost of complying with the resilient infrastructure standards, and any other considerations identified through Task 2 (Stakeholder Engagement). Identify and document any alternative strategies which may result in design practices that conflict with state or federal regulations, and refine the strategies to address these conflicts (or identify potential changes to standards, if necessary). Develop alternative strategies including decision trees and add-ons to existing technical manuals for infrastructure resilience evaluation, addressing site appropriateness, feasibility constraints, and conceptual approach to addressing cases in which designing according to the recommended design parameter(s) is not practicable.
- 4) Develop criteria the Consultant team will use to select one framework/strategy for incorporating climate change into design standards/guidelines for the final report deliverable. Criteria should address lifecycle cost-effectiveness, site-specific feasibility, criticality, alignment with regulatory requirements, and adaptability of infrastructure designs.
- 5) Assess alternative strategies according to the criteria developed in Task 3 Part 4; select and refine one of the alternative strategies developed in Task 3 Part 3 using criteria developed in Task 3 Part 4.

Deliverables:

- A summary background memo documenting:
 - Effective design manuals by sector
 - Types of pre-design climate-influenced infrastructure strategy decisions by sector
 - Key climate-informed design parameters by sector
 - By each sector, highlight:
 - Instances in which levels of risk tolerance in current effective design manuals may be inappropriate
 - Instances in which integration of ecosystem considerations in effective design manuals may be inappropriate
 - Instances in which integration of environmental justice considerations in effective design manuals may be inappropriate
- A summary of strategies and recommendations memo documenting:
 - Alternative strategies for incorporating climate change into existing design standards and practices for each sector, which consider also (independent of climate change) changes to design specifications' embedded risk tolerance, ecological considerations, and environmental justice considerations as necessary
 - Alternative selection process
 - Alternative selection criteria
 - Selected strategy and why it was chosen
 - (if relevant) Possible future changes to standards/regulations to consider

8.1.4 Task 4: Creation of a public-facing Technical Guide to Incorporating Resilience into Existing Infrastructure Standards and Content and Mock-up for a public-facing Resilient Infrastructure Design Technical webpage, as well as an internal Summary of Recommendations for Implementing Resilient Infrastructure Design Standards.

By September 2026, the Consultant Team will produce a technical document to be used by engineers and designers statewide as a reference for incorporating climate resilience considerations into existing design practices within each infrastructure sector included in the project. The section on culverts should be reviewed and completed first, by July 2026. Specific sub-tasks include:

- 1) Scope format for the technical guide to incorporating resilience into existing infrastructure design standards deliverable based on stakeholder feedback compiled in Task 2; selected strategy for incorporating climate change developed in Task 3. Identify any additional funding, training programs, personnel/expertise, or time which may be needed to produce a resilient infrastructure design standards deliverable, if applicable.
- 2) Create content for a public-oriented summary document and web page on the resilient infrastructure design standards motivation and format.
- 3) Create a draft (July 2026) technical document, oriented toward a technical/engineering audience, documenting the recommended resilient infrastructure design standards and how to use them in their own area of practice. This technical guide should clearly outline sector-specific, climate-informed design criteria including climate metrics, adaptive design procedures, resilience performance benchmarks, and clear illustrative examples to help inform design. The section on guidance for culverts standards should be particularly well developed. Circulate the draft document for review by internal and external stakeholders (see Task 2 Part 4).
- 4) Integrate feedback from reviewers and create a final guidance document (by September 2026), oriented toward a technical/engineering audience, documenting the recommended resilient

infrastructure design standards and how to use them in their own area of practice. This should clearly outline sector-specific, climate-informed design criteria including climate metrics, adaptive design procedures, resilience performance benchmarks, and clear illustrative examples.

- 5) Develop public-facing summary for resilient infrastructure design standards project.
- 6) Develop recommendations for technical assistance and/or additional resources which may be needed to successfully implement the resilient infrastructure standards in MA.

Deliverables:

- Draft Technical Guide to Incorporating Climate Resilience into Existing Infrastructure Design Standards document for internal and stakeholder review, culverts section
- Draft Technical Guide to Incorporating Climate Resilience into Existing Infrastructure Design Standards document for internal and stakeholder review, other infrastructure sectors
- Full Technical Guide to Incorporating Climate Resilience into Existing Infrastructure Design Standards reference document, intended for the public
- Mockup for resilient infrastructure design standards technical webpage
- Resilient Infrastructure Design Standards Technical web tool (optional) designed to aid infrastructure standards users
- Memorandum to State project team including:
 - Recommended additional resources needed to more completely implement resilient infrastructure standards, if applicable, or possible changes to existing standards to consider.
- Public-facing project summary intended for a general audience

8.1.5 Task 5: Creation of standardized project delivery templates to incorporate climate resilience into key infrastructure project types to be grouped by sector and compiled into public-facing, user-friendly toolkit documents

- 1) By November 2026, the Consultant team will identify key resilient infrastructure types and develop standardized, pre-approved project delivery templates to accompany the resilient infrastructure design standards guide. These universal project templates will streamline capital projects by reducing administrative burden (particularly for smaller or under-resourced communities) and facilitate more consistent and resilient infrastructure projects across the Commonwealth. Specific sub-tasks include:
- 2) Review the seven key resilience measures identified in the Resilience Finance Strategy (e.g., significant and high hazard dams, small bridges and culverts, coastal and riverine wetlands and floodplains, forest conservation, strategic transportation infrastructure, critical public infrastructure, and heat preparedness) and the infrastructure sectors confirmed in Task 1. Identify up to 8 specific infrastructure project types across the infrastructure sectors. Project types should represent projects that state funding programs see community demand for. The Consultant team should also review the MAPC Resilience Playbook for relevant project blueprints this effort could expand upon.
- 3) Hold small-group focus meetings with stakeholder groups to gather feedback on the resilient infrastructure project types and solicit input on the type of information most helpful to include in a standardized, pre-approved project delivery template. This task could be completed in tandem with Task 2 above, adding additional stakeholders to the audience as appropriate.

- 4) Develop project delivery templates for each project type that include standard scopes of work, budget range, bid and contracting language, a procurement framework, and reporting formats, among other recommendations derived from the stakeholder group in 5.2 and as recommended by the Consultant team. Templates could also include suggested data sources, scenario parameters, or certain required alternatives for running H&H models (if applicable to the infrastructure project type). Project delivery templates for culvert replacement should be prioritized. The Consultant team should consider existing models and templates from other State programs such as SRF, DER technical guidance, MassDOT project delivery resources, and relevant national best practices when developing the templates.
- 5) Create a modular implementation toolkit document for each infrastructure sector. The user-friendly toolkit should include the standardized project delivery templates for that sector, overall project schedule, pre-approved design standards or guidance (as defined in other tasks, if relevant), permitting checklists and timeline, technical specifications, and real-world case studies. The goal with the implementation toolkits is to offer pre-vetted scopes of work, procurement language, and technical standards tailored to common project types to help municipalities and regional entities streamline resilience project funding applications and delivery.

Deliverables:

- Stakeholder engagement plan
- Stakeholder contact list
- Small group meeting notes, attendee lists, and outcome summaries
- List of infrastructure project types for each infrastructure sector that were considered, the final proposed project types for template development, and a short rationale for each.
- Draft project delivery templates for internal and stakeholder review
- Draft implementation toolkit document for each infrastructure sector for internal and stakeholder review
- User-friendly implementation toolkit documents for each infrastructure sector that include the final project delivery templates

8.2 Project Management

The Consultant Team will provide a highly experienced project manager who is well-versed in engineering design standards and permitting. This person will serve as the main point of contact to EEA and provides 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 – SUPPLIER DIVERSITY PROGRAM

10

10.1 Supplier Diversity Program

10.1.1 Program Background

Pursuant to, [Executive Order 599](#) the Commonwealth's [Supplier Diversity Program](#) (SDP) promotes business-to-business relationships between awarded Contractors and diverse businesses and non-profit organizations ("SDP Partners") certified or recognized by the [Supplier Diversity Office \(SDO\)](#). [All Bidders and Contractors are strongly encouraged to create a profile on the SDO's Supplier Diversity Hub to access the Commonwealth's supplier diversity resources and tools.](#)

10.1.2 Financial Commitment Requirements

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

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

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

10.1.3 Eligible SDP Partner Certification Categories

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

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

10.1.4 Eligible Types of Business-to-Business Relationships

Bidders and Contractors may engage SDP Partners in the following two ways:

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

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

10.1.5 **Program Flexibility**

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

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

10.1.6 **SDP Plan Form Requirements**

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

Bidders may propose SDP Partners that are:

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

It is the responsibility of the Contractor to ensure that their proposed SDP Partners obtain such certification or recognition by the SDO after contract award (if any). The issuing department and the SDO will not conduct outreach to proposed SDP Partners to ensure their certification. Furthermore, no guarantee may be made that a proposed SDP Partner will be certified, or regarding the time it may take to process a proposed SDP Partner certification. Contractors may direct partners to the SDO's homepage, www.mass.gov/sdo and the [Certification Self-Assessment Tool](#) for guidance on applying for certification.

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

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

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

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

10.1.7 Evaluation of SDP Forms

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

10.1.8 SDP Spending Reports

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

10.1.9 SDP Spending Compliance

Only spending with SDP Partners that appear in the [SDO Directory of Certified Businesses](#) or in the [SBA Veteran Small Business Certification \(VetCert\)](#) directory shall be counted toward a Contractor's compliance with their SDP Commitment. Spending with SDP Partners that do not appear in the directories above shall not be counted toward meeting a Contractor's SDP Commitment.

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

10.1.10 SDP Spending Verification

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

10.1.11 Program Resources and Assistance

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

11 APPENDIX 4 – 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.

Supplier Diversity Program (SDP). Massachusetts Executive Order 565 reaffirmed and expanded the Commonwealth's policy to promote the award of state contracts in a manner that develops and strengthens certified Minority Business Enterprises (MBEs), Women Business Enterprises (WBEs), Minority and Women Nonprofit Organizations (M/WNPOs), Veteran Business Enterprises (VBEs), Service-Disabled Veteran-Owned Business Enterprises (SDVOBEs), Disability-Owned Business Enterprises (DOBEs), and Lesbian, Gay, Bisexual and Transgender Business Enterprises (LGBTBEs).

Partnerships with certified diverse businesses: All bidders are required to make a significant financial commitment to partner with certified M/WBEs, M/WNPOs, VBEs, SDVOBEs, DOBEs and/or LGBTBEs certified or verified by the Supplier Diversity Office (SDO). Bidders must identify a commitment in the form of a specific percentage of sales made under the resulting contract that will be spent with an SDP Partner(s) on a Massachusetts fiscal year basis, using SDP Plan Form #1 – SDP Plan Commitment. This percentage commitment will extend for the life of any resulting contract.

This requirement extends to all bidders regardless of their certification status, and no bidder will be awarded a Contract unless and until the above requirement is met. Bidders may not list themselves or affiliates as SDP Partners. In order to ensure compliance with this section and encourage bidder participation, SDP Plans will be evaluated at 10% or more of the total evaluation score for all for Large Procurements (those with a total value of greater than \$150,000). SDP Plan submission is encouraged but not required for Small Procurements (those with a total value equal to or less than \$150,000).

Once an SDP commitment is approved, the agency will monitor the Contractor's performance, and use the Contractor's reported expenditures with M/WBEs, M/WNPOs, VBEs and SDVOBEs to fulfill their own SDP expenditure benchmarks. The Commonwealth reserves the right to contact SDP Partners at any time to request that they attest to the amounts reported to have been paid to them by the Contractor.

SDP Forms: Unless otherwise specified in the RFQ, the following [SDP forms](#) are required to be submitted by the deadlines noted below in order to meet the mandatory participation requirements of the SDP:

SDP Plan Form #/Name	Submitted By	When Submitted
SDP Plan Form #1 – SDP Plan Commitment	All Bidders	With Bid Response
SDP Plan Form #2 – Declaration of SDP Partners	Newly Awarded Contractors	Within 30 days of contract execution
SDP Plan Form #3 – SDP Spending Report	Contractors	Within 45 days of the end of each quarter

In addition to the requirements above, all bidders must follow the requirements set forth in the Supplier Diversity Program (SDP) Plan Section of the RFQ. During the life of the contract, the Commonwealth reserves the right to expand the range of certified business categories available for SDP partnerships to all those mentioned above and/or request reports on the Contractors' spending with such certified business categories.

Supplier Diversity Program (SDP) Resources: Bidders may refer to the SDP Resources for Vendors and Contractors webpage for additional program information, training and compliance resources.

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.

12 APPENDIX 5 – 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.