



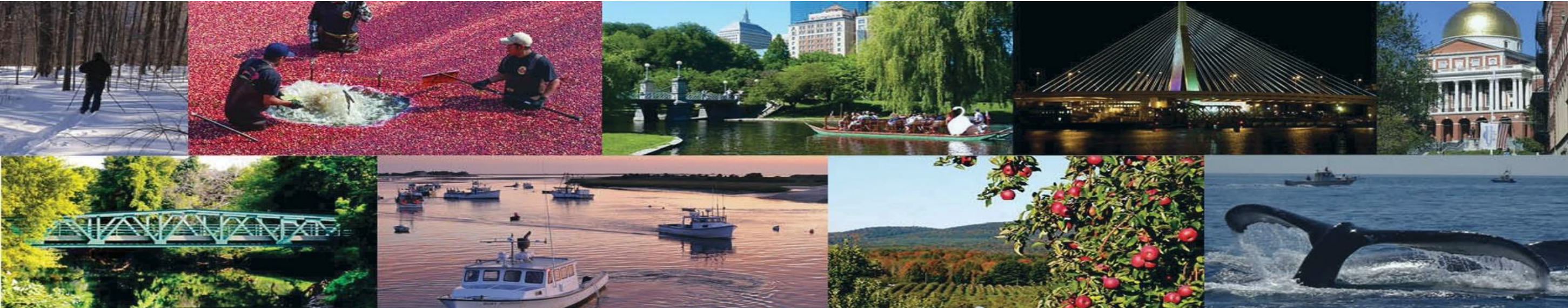
OPERATIONAL SERVICES DIVISION

Simplifying IT Procurements: Request for Quote (RFQ) Templates

Andrew Cheng, Contract Manager and Special Counsel (TSS)

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Julia Wolfe, Director, Environmental Purchasing (OSD)

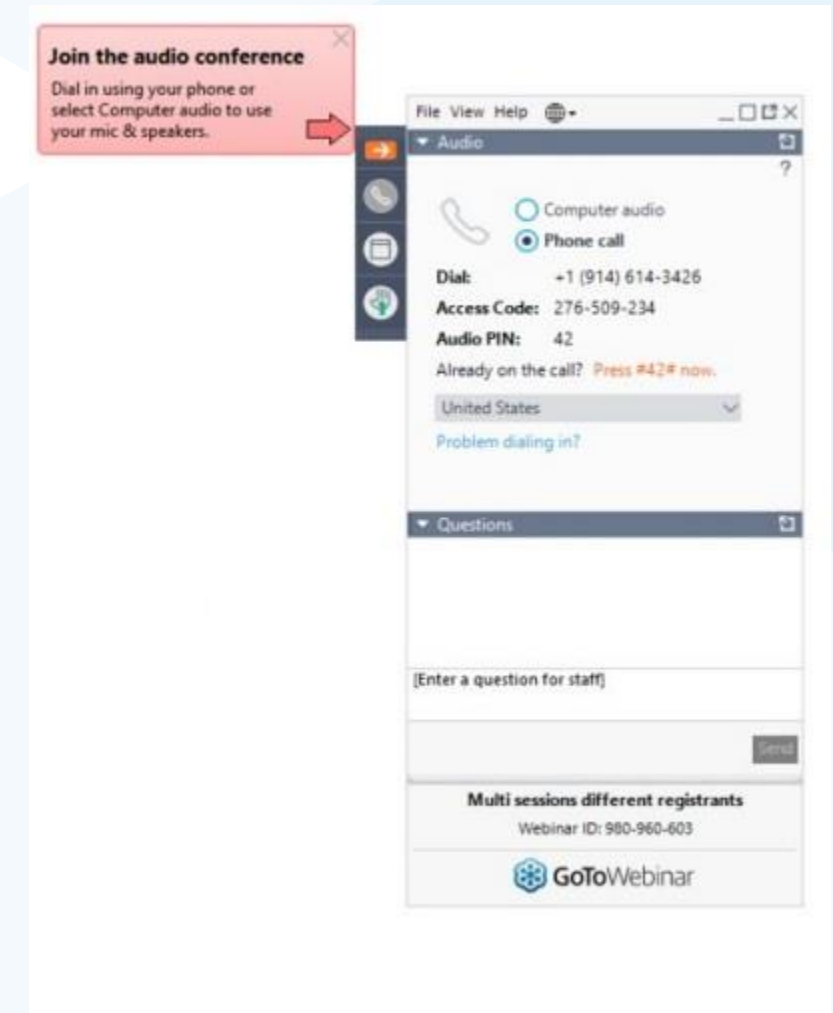


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Agenda



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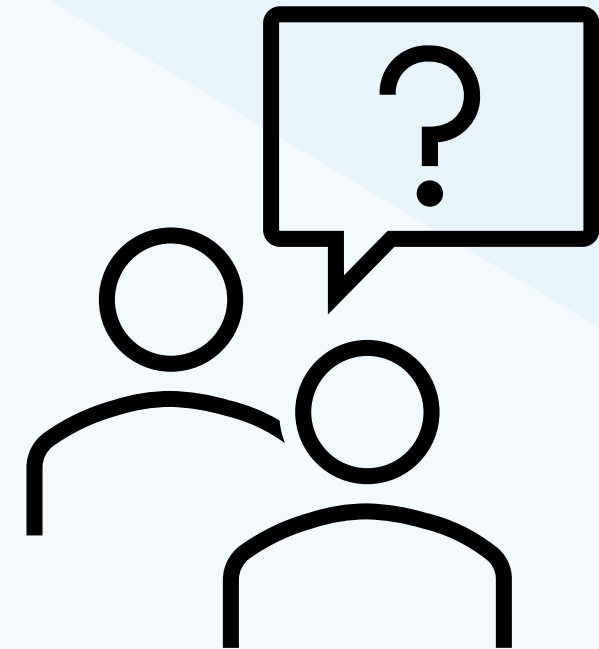
- I. Accessing and Using RFQ IT Templates
- II. Determining Solicitation Duration
- III. Datatype Considerations
- IV. Environmental Considerations
- V. License, Service, Subscription, and Maintenance Agreements
- VI. Small vs. Large Purchasing Mandates for Executive Agencies
- VII. Vendor Response Forms
- VIII. What to Look for in Bidder Proposals
- IX. Evaluation Criteria
- X. Summation
- XI. Q/A
- XII. Resources

Questions?



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- Live Chat during Webinar
- Email Us
 - OSDlegal@mass.gov
 - ITcontracts@mass.gov
- Submit a Request for Assistance
 - [Chapter 30B Technical Assistance Form](#)



RFQ Templates: Access



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Templates can be accessed via the mass.gov website on the OSD Forms page

- Posted under [Bid Development and Evaluation Forms](#)
 - [IG RFQ for Services](#)
 - [IG Services and SaaS](#)
 - [RFQ Services](#)
 - [RFQ Template Software as a Service SaaS](#)
 - [SoW T&M](#)
 - [SoW Fixed Price](#)
- EOTSS Cloud Terms Templates
 - Executive Department Agencies
 - IT Services *ONLY*
 - IT Services including Cloud products (SaaS, IaaS, Paas)
 - Municipalities and other non-Executive agencies
 - IT Services *ONLY*
 - IT services including Cloud products (SaaS, IaaS, Paas)



RFQ Templates: Using Templates



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SWC #	Title	RFQ Template Applicability
ITS55	IBM Software and Services	N/A – Single Vendor Contract
ITS60	Cloud Solutions	✓ <u>APPLICABLE</u> for customized services with SOW N/A – Product and Standard Support Offerings
ITS61	Accessibility Services	N/A – Customized RFQ on COMMBUYS
ITS64	Oracle Software and Services	N/A – Single Vendor Contract
ITS69	Managed Print Services	N/A – Includes Hardware Leasing Component
ITS74GIS	Geographic Information System Services	✓ <u>APPLICABLE</u>
ITS74ProjSrv	IT Project Service	✓ <u>APPLICABLE</u>
ITS75	Software and Services	✓ <u>APPLICABLE</u> for customized services with SOW N/A – Product and Standard Support Offerings
ITS77	ITS Staff Augmentation	N/A – Customized RFQ on COMMBUYS
ITS78	Data and Cyber Security	✓ <u>APPLICABLE</u> when requesting multiple quotes with SOW
ITS80	IT Research	N/A – Requesting Multiple Quotes Not Required

RFQ Templates: Using Templates

SWCs to use for IT Professional Services



ITS74/ITS78

Use the IT Services template when only services, *not software or cloud products*, are being procured



ITS60/ITS75

Also use this template if procuring services *ONLY*

SWCs to use for SaaS



ITS60/ITS75

Use the IT Services and Cloud template if procuring IT Services and Cloud products

Determining Solicitation Duration

IDENTIFY | DEVELOP | SOLICITATION

- Review gray box at the top of the [Contract User Guide \(CUG\)](#) for contract dates
- OSD may not exercise all possible renewals.
- Also go to “Performance and Payment Time Frames Which Exceed Contract duration”

UPDATED: October 06, 2022	
Contract #:	ITS60
MMARS MA #:	ITS60*
Initial Contract Term:	April 19, 2019 – September 15, 2026
Maximum End Date:	September 15, 2026
Current Contract Term:	April 19, 2019 – September 15, 2026
Contract Manager:	Marge MacEvitt, 617-720-3121, marge.macevitt@mass.gov
This Contract Contains:	Prompt Pay Discount (PPD) and Supplier Diversity Program (SDP)
UNSPSC Codes:	8116000 – Information Technology Services, 81112200 – Software Maintenance and Support

*The asterisk is required when referencing the contract in the Massachusetts Management Accounting Reporting System (MMARS).

Determining Solicitation Duration

IDENTIFY | DEVELOP | SOLICITATION



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IDENTIFY which SWC you are soliciting under and respective end dates:

- Estimated term shall consist of an initial **X-month** term
 - May be renewed or extended upon written agreement by the awarded Bidder and the Purchasing Entity, but no such continuations may extend past [mm/dd/yy]
- Initial term and all renewals or extensions shall be referred to collectively as the “Term”
 - Maximum term length will be governed by the applicable SWC
- For vendors bidding on Statewide Contract ITS X, the Term shall be for X months with a maximum end date of _____
- For vendors bidding on Statewide Contract ITS XY, the Term shall be for X months with a maximum end date of _____



Determining Solicitation Duration

IDENTIFY | **DEVELOP** | SOLICITATION



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DEVELOP further:

Is there an Extend Beyond provision?

- Projects started during a contract term may continue past the end date of that term for the number of months/years listed in that section (the “Extend Beyond” period)
 - End date of the current SWC term, plus the “Extend Beyond” period, is the longest you can count on being able to use the selected vendor’s services under the SWC
- If there is a likelihood that you will not be able to continue with your selected vendor for the amount of time needed to complete your project, consider dividing the project into phases that will allow for transition to a new vendor as well as terms governing a transition, and build transition time (including time for selecting a new vendor via RFQ) into your project timeline, as well as cost.]



Determining Solicitation Duration

IDENTIFY | DEVELOP | **SOLICITATION**



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Are you trying to SOLICIT for duration longer than the parent (Statewide Contract) end date?

- Please include the following language:
“In the event that the awarded vendor is also awarded on the successor contract then the SOW will be amended to transfer the Purchasing Entity’s contract to the successor SWC, with any other adjustments as mutually agreed to address any changes in the SWC’s terms.”

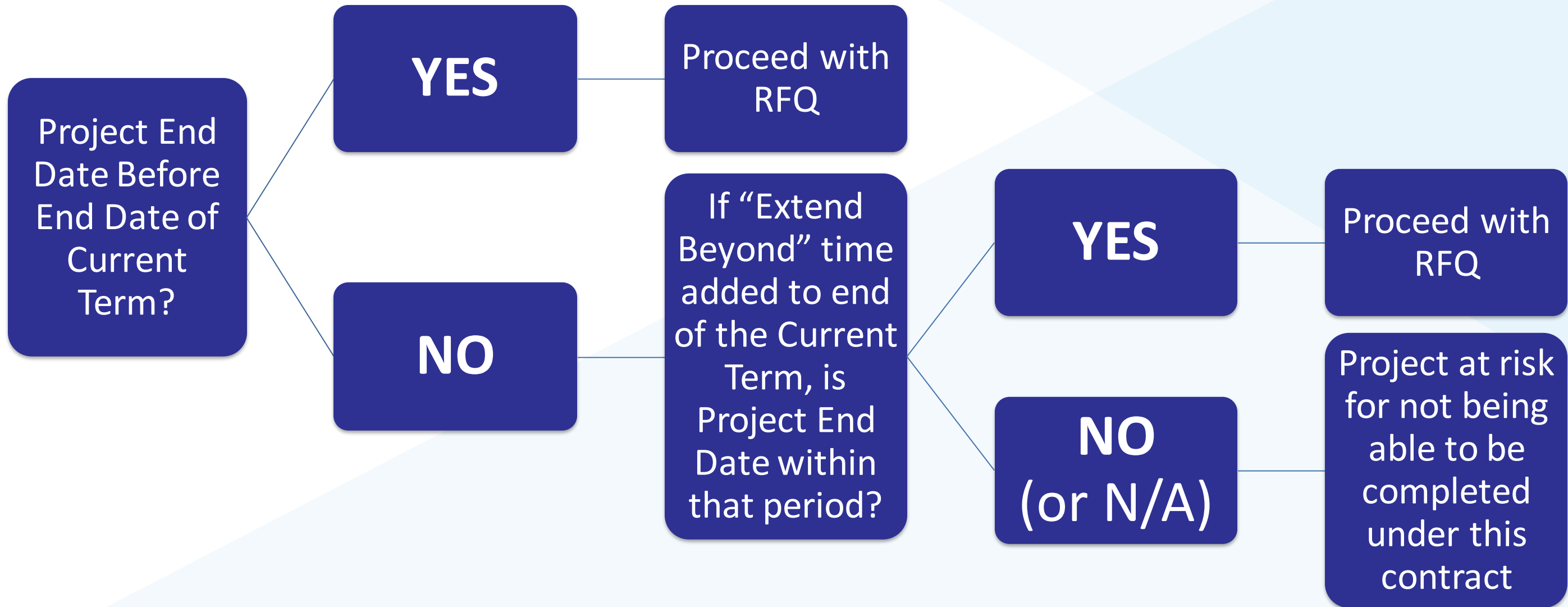
***THIS IS A RISK!** Vendors awarded on one SWC may not be awarded on the successor contract. Buyers should be aware that should they chose to use this language and the vendor is not awarded on the successor, they will need be prepared to conduct another procurement when the predecessor contract expires.



Determining Solicitation Duration



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Datatype Considerations



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Bidder will have access, or potential access, to the following checked data:

DATA TYPE (CHECK ALL THAT APPLY)		APPLICABLE LAWS AND REGULATIONS	ADDITIONAL REQUIREMENTS
Y / N	Personally Identifiable Information	<ul style="list-style-type: none"> • M.G.L. c. 93H • M. G. L. c. 66A 	
Y / N	Payment Card Information	<ul style="list-style-type: none"> • PCI Standards 	
Y / N	Family Educational Rights and Privacy Act Data	<ul style="list-style-type: none"> • Family Educational Rights and Privacy Act 	
Y / N	Protected Health Information	<ul style="list-style-type: none"> • Health Insurance Portability and Accountability Act of 1996 	<ul style="list-style-type: none"> • Commonwealth of Massachusetts Executive Office of Health and Human Services Data Management and Confidentiality Agreement
Y / N	Federal Tax Return Information	<ul style="list-style-type: none"> • Publication 1075 	<ul style="list-style-type: none"> • Publication 1075 Exhibit 7 • Commonwealth of Massachusetts Dept. of Revenue background check
Y / N	Criminal Offender Record Information	<ul style="list-style-type: none"> • FBI Security Addendum • NCIC 2000 Operating Manual • CJIS Security Policy • Title 28, CFR Part 20 	<ul style="list-style-type: none"> • Dept. of Criminal Justice Information Certification • Background Check
Y / N	Criminal Justice Information	<ul style="list-style-type: none"> • FBI Security Addendum • NCIC 2000 Operating Manual • CJIS Security Policy • Title 28, CFR Part 20 	<ul style="list-style-type: none"> • Dept. of Criminal Justice Information Certification • Background Check
Y / N	Social Security Administration Data	<ul style="list-style-type: none"> • Privacy Act • 5 U.S.C. 552a s. 1106 	
Y / N	Other		

Environmental Considerations



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[Home](#) > [Operational Services Division](#) > [Environmentally Preferable Products \(EPP\) Procurement Program](#)

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EPP Program - Environmentally Preferable Products and Services on Statewide Contracts

There are thousands of EPPs available for purchase on statewide contracts, from re-refined motor oil to green cleaning products to alternative fuel vehicles. Explore options in the following document to assist Commonwealth agencies and political subdivisions in identifying and purchasing products made with recycled content and having other environmentally preferable attributes. The products and services listed are those that are available on Commonwealth Statewide and limited use contracts. In addition, detailed information on the following categories may be found in this guide.



[Notices & Alerts](#) [Expand](#)

TABLE OF CONTENTS

- Information Technology (IT)
- PFAS Free Purchasing
- Save Money with EPPs
- Commercial Battery Powered Landscape Equipment
- Green Cleaning Products, Programs, Equipment and Supplies
- Hazardous and Medical Waste
- Integrated Pest Management
- Motor Oil, Re-Refined
- Furniture, Environmentally Preferable
- Remanufactured Toner Cartridges

Global Electronics Council Cloud Service Procurements

OSD EPP IT Specific Web Page

OSD EPP General Web Page

License, Service, Subscription, and Maintenance Agreements



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- To be reviewed and approved by your agency's General Counsel
- Agreements and Negotiated Clarifications must not conflict with or dilute the Terms and Conditions for IT contracts
- Warranty language should be consistent with RFR and RFQ
- Service Level Agreements must be consistent with cloud terms and RFR
- 3rd party End User License Agreements (EULAs) cannot conflict or dilute the Terms and Conditions for IT contract



Small Purchasing Mandates (SBPP)

FOR PROCUREMENTS WITH ANNUAL VALUES < \$250,000



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Massachusetts [Small Business Purchasing Program](#) (SBPP)

- Established pursuant to [Executive Order 599](#)
- To increase state contracting opportunities with small businesses within the Commonwealth
- **Intention to award this small procurement to one or more SBPP participating business(es)**

Program Resources and Assistance

- Bidders and contractors seeking assistance regarding SBPP may visit the SBPP webpage, <http://www.Mass.Gov/sbpp>, or contact the SBPP help desk at sbpp@mass.Gov.
- To learn more about the SBPP, including how to apply, visit the [SBPP webpage](#).



For Executive Departments

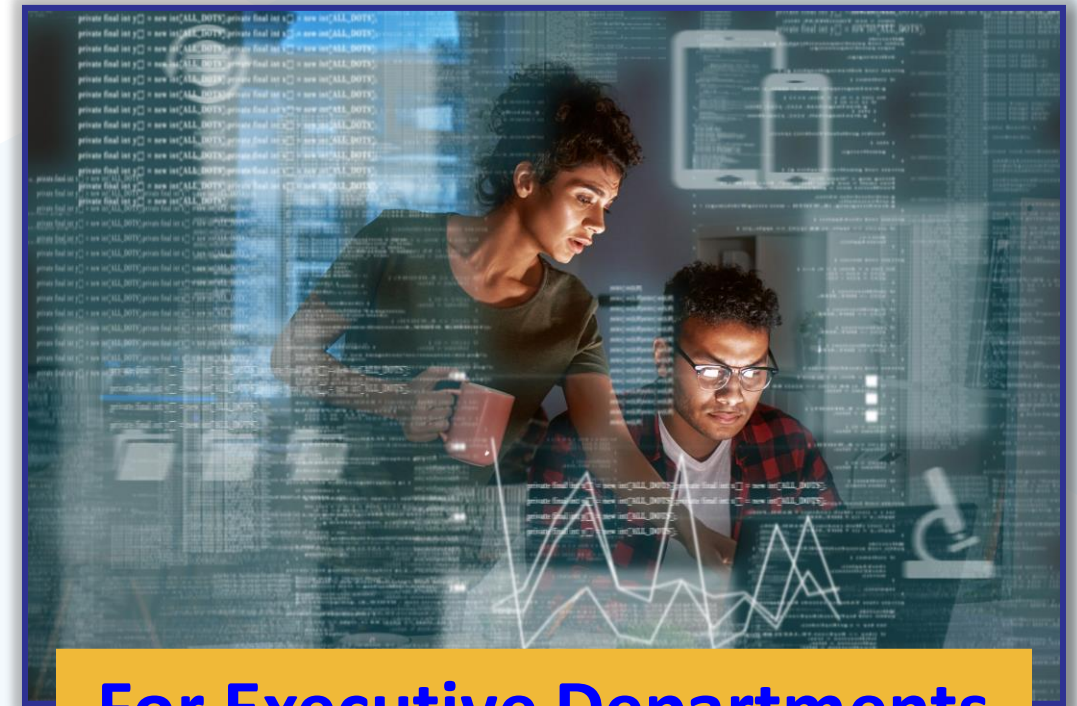
SDP Commitments for Large Purchases

FOR PROCUREMENTS WITH VALUES > \$250,000 (OPTIONAL)



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- Supplier Diversity Program (SDP)
- **OPTIONAL** at the RFQ level for those purchases over \$250,000/yr for the life of the contract
- All SWC vendors have a minimum of 1% of projected future sales are committed to diverse vendors
- Please reach out to the Supplier Diversity Office (SDO) to coordinate additional reporting by the Vendor



For Executive Departments

Vendor Response Form



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FORM 1 – RFQ RESPONSE FORM

Bidders should avoid including additional components in their responses which are not expressly requested in the RFQ. If multiple options are available and responsive to the RFQ, Bidders must clearly identify the differences in cost and functionality of each option.

I. Statement of Interest and Contact Information

Company or Organization Name: _____ (“Bidder”)

Bidder Address:

Bidder Contact(s):

Name: _____

Email: _____

Phone: _____

Name: _____

Email: _____

Phone: _____

By submitting this RFQ Response, the Bidder hereby agrees and acknowledges that any agreement resulting from the RFQ will be subject to the documents incorporated therein, as provided in Section IV (Order of Precedence) of the RFQ. Subject to Section II(F) in this RFQ Response Form, the Bidder agrees to all terms of the RFQ including all documents incorporated into the agreement.

- Provides uniform Vendor response for more easily evaluating proposals
 - Contact Information, References, Data Classification, Business/Technical Response, Requirements, and Cost Response
- Points vendors to specific areas of their proposal that need to be addressed, and any additional agreements should be submitted for review and negotiation

What to Look for in Bidder Proposals



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SCOPE

Clearly outlines the scope of the project, including the specific products or services being offered, as well as any other relevant details such as delivery timelines and performance requirements

PRICING

Proposal includes detailed pricing breakdown that clearly outlines all associated costs

- Includes both fixed and variable costs, as well as any other relevant details (ie. payment terms, conditions, etc.)

QUALIFICATIONS / EXPERIENCE

Proposal provides detailed overview of a bidder's qualifications and experience

- Includes any relevant certifications or licenses
- Assists in determining if bidder has necessary expertise

REFERENCES

Proposal includes references from previous clients or customers

- Assists in evaluating bidder's track record and in determining whether a history of delivering high-quality work exists

Evaluation Criteria: Bidder's Response



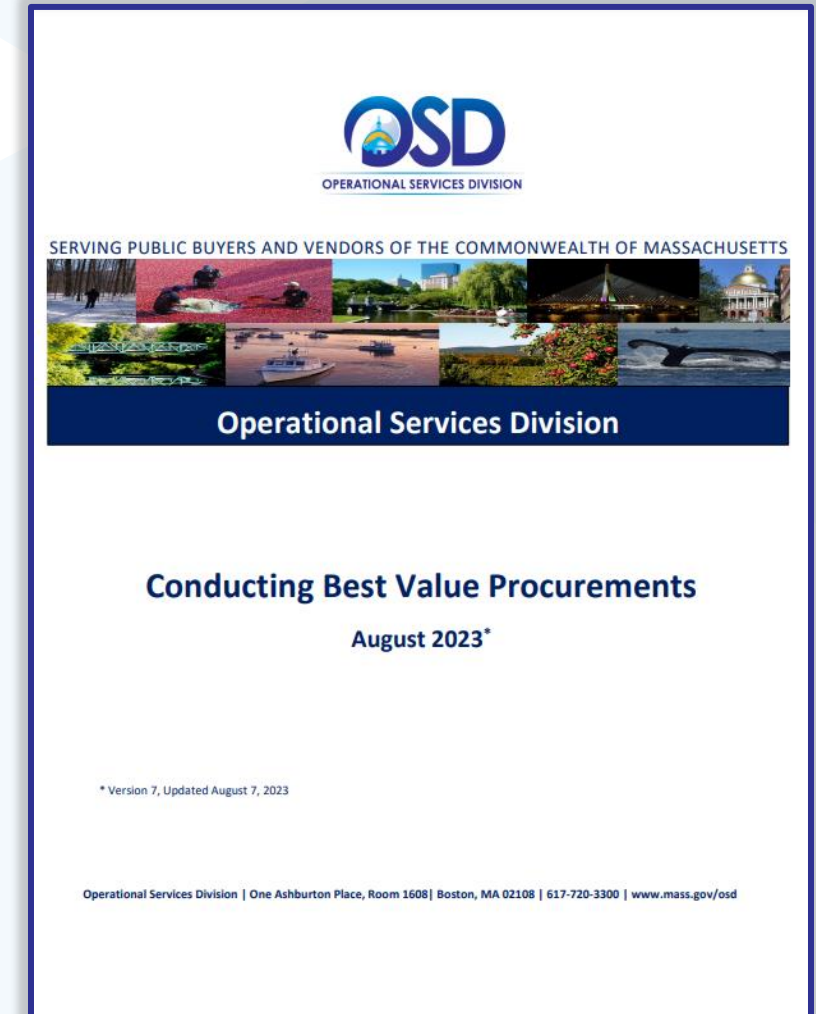
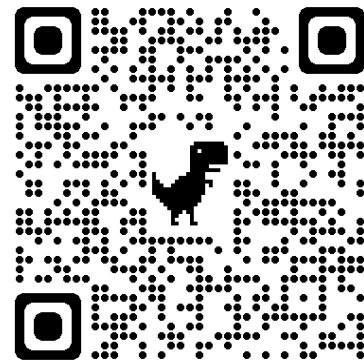
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Evaluation criteria are based on OSD's *Best Value* approach, which considers both price and non-price factors





- Fit to Requirements of the RFQ
- Quality of product functionality
- Time for delivery
- Price as provided in the Cost Table

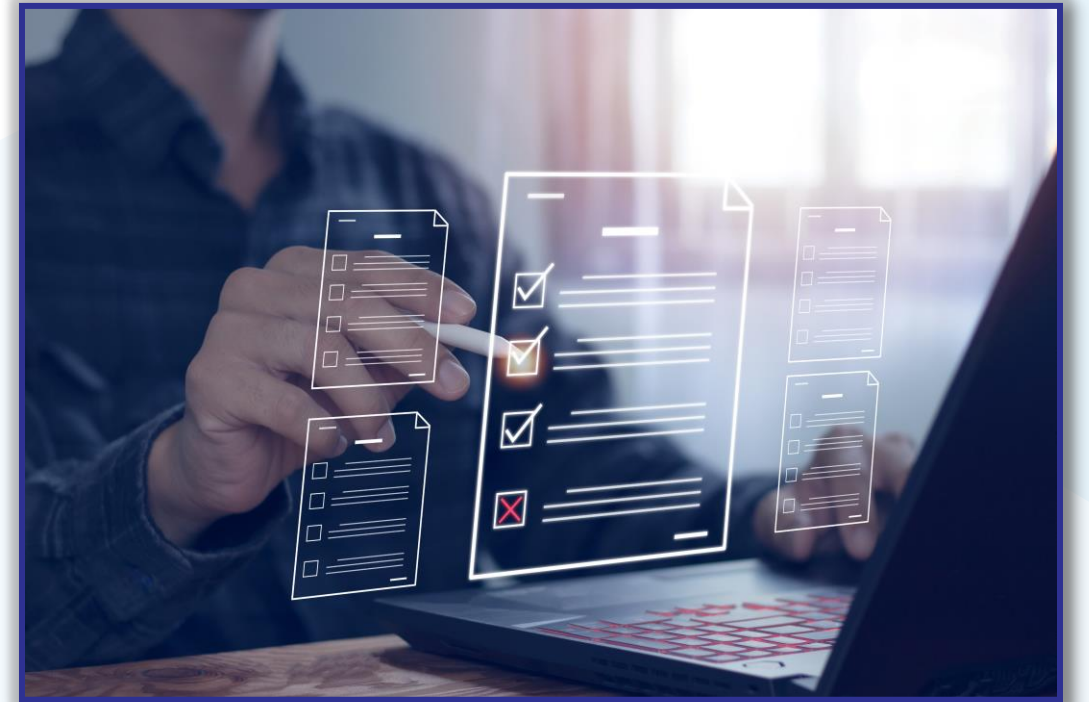
For more information:

[OSD's Best Value Procurements Handbook](#)



Summation

-  **Remove Color Coding & Nonapplicable Language**
-  **Ensure duration dates correspond to SWC post**
-  **Incorporate agency specifications**
-  **Review with agency General Counsel Prior to Posting**

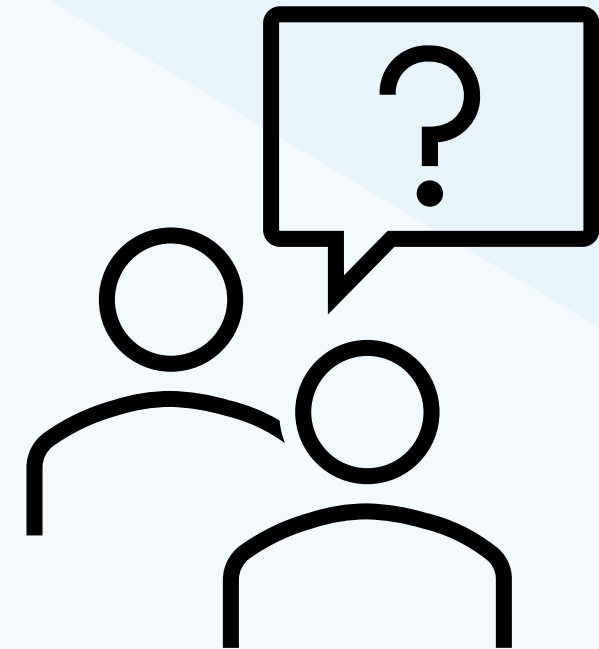


Q & A



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Thank You



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OSD Resources



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Sign up for Communications: bit.ly/OSDsignup

OSD: www.mass.gov/osd

COMMBUYS: www.commbuys.com

OSD Help Desk: 1-888-627-8283 or OSDHelpDesk@mass.gov

OSD Blog: www.mass.gov/collections/procurement-insights

[OSD's Best Value Procurements Handbook](#)



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