

**ISSUE DATE: 07/19/2016**

**Amended 07/21/2016. All amendments are shown in red.**

<b>Purchasing Department</b>	<b>Operational Services Division</b>
<b>Address</b>	<b>One Ashburton Place, Room 1017</b>
<b>City, State Zip Code</b>	<b>Boston, MA 02108</b>
<b>Procurement Contact Person</b>	
<b>Telephone Number</b>	
<b>Fax Number</b>	
<b>E-Mail Address</b>	
<b>RFR Name/Title</b>	<b>Small Business Incubator Program for Small-Scale Information Technology Services</b>
<b>RFR Number</b>	<b>SBP01Pilot</b>
<b>COMMBUYS Bid Number</b>	<b>BD-17-1080-OSD04-OSD04-00000009185</b>

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

The Commonwealth of Massachusetts Operational Services Division (“OSD”) seeks to establish a pre-qualified list of Massachusetts-based small businesses capable of performing small-scale Information Technology (IT) professional services. Services may include, but are not limited to, applications/systems design and development, software and systems integration, and information technology planning across a wide range of tools and platforms.

Bidders must possess the following qualifications to be eligible for a contract award:

- Provide small-scale IT professional services (up to \$150,000 per engagement);
- Be a COMMBUYS-verified small business, which requires that the bidder meet each of the following criteria:
  - Have their principal place of business in Massachusetts;
  - Have been in business for at least one year;
  - Currently employ a combined total of 50 or fewer full-time employee (FTE) equivalents;
  - Have gross annual revenues of \$15 million or less, based on a three (3)-year average; and
- In the twelve months preceding the submission of their response to this Bid, have completed at least one project with a client willing to provide a letter of reference.

This procurement represents the Commonwealth’s IT Small Business Incubator pilot. The Pilot aims to reduce barriers to doing business with the Commonwealth, present funded opportunities for participants, expedite contracting, increase access to innovative services, and provide brand recognition for the firms who become part of this new Statewide Contract. Opportunities to work with state and local government and education may be available through this new pilot contracting program.

Bidders placed on the Commonwealth’s IT Small Business Incubator pilot statewide contract will compete to obtain engagements directly from Eligible Entities that include state agencies, local government, education, and other quasi-government entities (see RFR Section 5 for the full list of Eligible Entities). Services to be performed for each specific engagement will be determined by each Eligible Entity using the contract, with pricing established on the basis of a Request for Quote and/or direct negotiation.

Engagements resulting from this contract are limited to \$150,000 or less in value. After each contract engagement, the Purchaser’s satisfaction with the Contractor’s performance will be measured through an online survey and/or an interview. Contractors that complete \$150,000 worth of engagements with good or excellent customer satisfaction results will be offered an opportunity to join a larger statewide contract, which may include additional evaluation criteria and contract terms.

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**2. Applicable Procurement Law**

MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00

**3. Acquisition Method**

This is a fee-for-service contract.

**4. Whether Single or Multiple Contractors are Required for Contract**

Multiple contractors will be awarded. This is a rolling enrollment bid, which means that pre-qualification packages (referred to in COMMBUYS as quotes) may be submitted at any time after the Bid Release date (and before the contract end date) with no submission deadline. After initial contract awards are made, OSD reserves the right to begin evaluating submissions periodically.

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

Any Contract(s) resulting from this Bid will be open for use by OSD and the following other entities:

- Cities, towns, districts, counties and other political subdivisions;
- Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
- Independent public authorities, commissions and quasi-public agencies;
- Local public libraries, public school districts and charter schools;
- Public hospitals owned by the Commonwealth;
- Public institutions of higher education;
- Public purchasing cooperatives;
- Non-profit, UFR-certified organizations that are doing business with the Commonwealth;
- Other states and territories with no prior approval by the State Purchasing Agent;
- Other entities when designated in writing by the State Purchasing Agent.

OSD reserves the right to add or remove additional eligible entities during the contract term. Each eligible entity is responsible for executing its own purchase orders and paying its own invoices for goods and/or services acquired from this Contract. Contractors will be responsible for marketing their goods and/or services to Commonwealth Agencies and other eligible entities.

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

Contract Duration	Number of Options	Number of Years/Months
Initial Duration		12 months
Renewal Options	4	12 months
Total Maximum Contract Duration		60 months

**7. Anticipated Expenditures, Funding or Compensation**

The Commonwealth has identified an estimated \$300,000 that may be available for Contractors during the initial duration of the contract. It is anticipated that this amount will increase as additional Eligible Entities become familiar with this contract and identify their IT needs and available funding.

**8. Contract Performance and Business Specifications**

**Scope of Services:** This contract is for information technology professional services only, but may include the purchase of hardware incidental to the services being provided.

**Specific Project/Engagement Terms:** Eligible Entities may require Contractors to agree to additional terms and conditions applicable to the specific project or engagement.

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**Performance Measures:** After each contract engagement, the Eligible Entity's satisfaction with the Contractor's performance will be measured through an online survey and/or an interview. Satisfactory performance ratings will be a condition of continued contract participation. Performance indicators may include, but may not be limited to:

- Overall quality of service or solution delivered;
- Reasonable pricing and accurate billing;
- Effort required from the Eligible Entity to manage/support the engagement;
- Number of complaints/problems and effectiveness of their resolution;
- Ethical behavior by Contractor and its employees.

**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.

Bidders must submit agreeable terms for Prompt Payment Discount by completing the appropriate questions of the Questions Tab of their Quotes. The evaluation team will review, negotiate or reject the offering as deemed in the best interest of the Commonwealth.

**9. Small Business Purchasing Program**

This is a Small Procurement targeted to verified small businesses participating in the Commonwealth's Small Business Purchasing Program (SBPP). OSD intends to award a contract to multiple SBPP-participating businesses verified through COMMBUYS who submit a quote that meets or exceeds the best value requirements. Subcontracting in SBPP procurements is limited to no more than 20% of the total value of the contract, unless it is with another verified SBPP participant. To determine eligibility and to participate in the SBPP, please review the eligibility criteria and general program information at [www.mass.gov/sbpp](http://www.mass.gov/sbpp).

**10. Estimated Procurement Calendar**

Procurement Activity	Date	Time
Announcement of Intent to Procure	06/28/2016	
Bid Release Date	07/19/2016	
Deadline for Pre-qualification Packages/Quotes ("Bid Opening Date/Time" in COMMBUYS)	<b>None:</b> Responses may be submitted as soon as the Bid is posted.	
Notification of Apparent Successful Bidder(s) (Estimated)	Starting on 08/04/2016 and ongoing thereafter	
<b>Estimated Contract Start Date</b>	08/10/2016	

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

**a. Online Questions (Bid Q&A)**

**Written questions and responses will be posted on the Bid Q&A Tab for this Bid in COMMBUYS.** Bidders must submit written questions by pressing the “Bid Q&A” tab for the Bid in COMMBUYS.

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 OSD, including requests for clarification. OSD 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 OSD to be lost or rejected by any means including email or spam filtering.

**b. Estimated Contract Start Date**

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

**11. Instructions for Submission of Pre-qualification Packages (Quotes)**

Pre-qualification packages must be submitted via the “Create Quote” functionality contained in COMMBUYS. Only electronic quotes submitted via COMMBUYS will be accepted in response to this RFR. For step-by-step instructions concerning how to submit a quote, please see RFR Section 15, Detailed Submission Instructions for Pre-qualification Packages (Quotes).

**Special instructions for specific Quote Tabs:**

- **Items Tab:** Bidders must check the “No Charge” checkbox to create a valid quote for this Bid. The “No Charge” selection will not be construed by OSD to mean an offer to provide services or products at no charge. Please do not leave the Items Tab with “No Bid” selection, unless your intent is to notify OSD that your company has elected not to participate in this procurement.
- **Questions Tab:** This tab is designed for Bidders to enter their bid qualification information (i.e. description of services provided, company and staff professional certifications and affiliations, etc.). All questions on the Questions Tab are required and must be answered according to the instructions provided.
- **Attachments Tab:** The Letter of Reference must be uploaded under the Attachments tab. Bidders are instructed not to submit marketing collateral or any other attachments.

Any submission which fails to meet the submission requirements of the RFR will be found non-responsive without further evaluation unless the evaluation team, at its discretion, determines that the non-compliance is insubstantial and can be corrected. In these cases, the evaluation team may allow the Bidder to make minor corrections to the submission.

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**12. Required Forms**

**a. Information and documents required to be submitted through COMMBUYS as part of the Bidder's Quote:**

Form/Document	Notes/Instructions (If any)
Answers to the Questions Tab of the Bid	Enter into the Response field provided for each Question under the Questions Tab of the Quote.
Letter of Reference (using the Letter of Reference template attached to the Bid)	To be completed by a client and printed out on their organization's letterhead. <b>Attach</b> to the Quote as a PDF file named "reference_letter_YourCompanyName.pdf"

**b. Documents required to be submitted in hardcopy only after contract award (if any):**

Bidders are required to read and agree to the terms of the forms listed below. These forms are included as attachments in the Bid on COMMBUYS for information purposes. Only successful Bidders will be required to complete and submit these forms when they are informed of contract award.

Form/Document	Notes/Instructions (If any)
Commonwealth Terms & Conditions	Submit after award. Wet Ink Signature Required.
Request for Taxpayer Identification Number & Certification (Massachusetts Substitute W-9 Form)	Submit after award. Wet Ink Signature Required.
Standard Contract Form and Instructions	Submit after award. Wet Ink Signature Required.
Contractor Authorized Signatory Listing	Submit after award. Wet Ink Signature Required.
Electronic Funds Transfer Signup Form	Submit after award. Wet Ink Signature Required.

**13. Evaluation Criteria**

Bidders' submissions will be evaluated for compliance with the qualifications stated in RFR Section 1. In order to be evaluated effectively, Bidders must submit responses that meet all the submission requirements of RFR Sections 11 and 12. Only responsive proposals that meet the submission requirements will be reviewed. OSD may request additional information for evaluation purposes.

**14. Additional Terms**

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 RFR 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 RFR. Words used in this RFR shall have the meanings defined in 801 CMR 21.00. Additional definitions may also be identified in this RFR. Other terms not defined elsewhere in this document may be defined in OSD's Glossary of Terms. Unless otherwise specified in this RFR, 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 RFR.

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COMMBUYS Market Center. COMMBUYS is the official source of information for this Bid and is publicly accessible at no charge at [www.commbuys.com](http://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 must register and maintain an active COMMBUYS Seller account, which provides value-added features, including automated email notification associated with postings and modifications to COMMBUYS records. COMMBUYS Registration is also the tool used to determine Massachusetts Small Business status.

All Bidders submitting a pre-qualification package (also referred to as a Quote) in response to this Bid 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; and (4) 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 uses specific 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.

Electronic Funds Transfer (EFT). All bidders responding to this RFR 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](http://www.mass.gov/osd)). Additional information about EFT is available on the VendorWeb site ([www.mass.gov/osc](http://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.



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The requirement to use EFT may be waived by the evaluation team 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 evaluation team will consider such requests on a case-by-case basis and communicate the findings with the bidder.

Public Records. All responses and information submitted in response to this RFR 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 shall be disregarded.

Reasonable Accommodation. Bidders with disabilities or hardships that seek reasonable accommodation, which may include the receipt of RFR 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 RFR. The evaluation team 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.

## **15. Detailed Submission Instructions for Pre-qualification Packages (Quotes)**

### **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](http://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, click on the magnifying glass icon to access Advanced Search.
4. On the Advanced Search page:
  - a. Select "Bids" under "Document Type"
  - b. Once the Bid Search Form appears, enter "SBP01Pilot" under "Bid Description"
5. Clicking on the blue link with the Bid Number to open the Bid.
6. 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.
7. After acknowledgement, the bid will open. Review the Header Information, Item Information, and all File Attachments before creating your quote.
8. Click **Create Quote** at the bottom of the Bid page to begin creating your quote.
9. The **General** Tab for a new quote opens. Click Save & Continue. This bid does not require you to enter any information on the General Tab.

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10. The page refreshes with a Quote Number automatically assigned to your quote and several messages. 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.
11. Click the **Items** Tab. The Items tab displays information about the items requested in the bid. Change the checkbox selection on the right from “No Bid” to “No Charge” and click Save & Continue.
12. Click the **Questions** Tab. Enter answers for **all** questions following instructions provided for each question. Click Save & Continue.
13. 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 RFR, or required Commonwealth standard forms and attachments for the bid. For instance, an RFR may specify that exceptions may or will result in disqualification of your bid.
14. Click on the **Attachments** Tab. Click Add a File and follow the prompts to upload the Letter of Reference. Use the file name “reference\_letter\_YourCompanyName.pdf” and description “Reference Letter.” Click Save & Exit and check that the correct file has been uploaded. This bid does not require you to upload any other files on the Attachments Tab.  
  
**Confidential information:** If the Letter of Reference uploaded in your quote response contains confidential information (proprietary, security-sensitive, personally-identifiable, banking or other confidential information), you must mark this file as “Confidential” by checking the appropriate box on the Add File screen prior to uploading the file. The confidential column on the Attachments view also allows the user to select whether the attached form is confidential or not. Place a check box in the confidential column for the Letter of Reference and click Save & Continue.
15. 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.
16. A popup window displays asking for verification that you wish to submit your quote. Click OK to submit the quote.
17. The **Summary** Tab redisplay with an updated Status for the quote of Submitted.
18. 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 only prior to the opening of your quote by OSD.

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.