

THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF HEALTH AND HUMAN SERVICES
MASSABILITY

40 BROAD ST., BOSTON, MASSACHUSETTS, 02109



Request for Response (RFR)

MassAbility Transition to Adulthood Program 2026
North Shore/Cape Ann & Southeastern Massachusetts

COMMBUYS Bid #: Bid BD-27-1071-AO-CON01-133827

Agency Doc #: MassAbility TAP-2026-2

RELEASE DATE: 09/25/2026

Please Note: This is a single document associated with a complete Bid (also referred to as Solicitation) that can be found on [COMMBUYS](https://www.COMMBUYS.com) (www.COMMBUYS.com). All Bidders are responsible for reviewing and adhering to all information, forms, and requirements for the entire Bid, which are all incorporated into the Bid. Bidders may also contact the OSD Helpdesk at osdhelpdesk@mass.gov or the OSD Helpdesk line at 1-888-MA-STATE. The Helpline is staffed from 8:00 AM to 5:00 PM Monday through Friday Eastern Standard or Daylight time, as applicable, except on federal, state and Suffolk County holidays.

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PROCUREMENT INFORMATION	
RFR Name	MassAbility Transition to Adulthood Program, 2026. North Shore/Cape Ann & Southeastern Massachusetts
Alternate ID (Agency Doc #)	MassAbility TAP-2026-2
Short Description	The Transition to Adulthood Program (TAP) provides services to students with disabilities, helping them prepare for adulthood and achieve greater independence. TAP services are designed for students with disabilities enrolled in high school and/or postsecondary educational programs, ages 14 through 21 (up to their 22nd birthday). This includes students with disabilities who have Individualized Education Programs (IEPs), 504 plans, or any documentation of a disability. Programs must be operated by a recognized Massachusetts Independent Living Center (ILC), provide the five core ILC services, include a peer modeling approach, must be based on the Independent Living philosophy of consumer control, and be cross-disability in scope. TAP programs may only be operated by a Massachusetts recognized Independent Living Center (ILC), and at least 50% of TAP staff must be people with a disability.
RFR Release Date:	Friday, September 25, 2026
Total Procurement Period:	November 1, 2026 – October 31, 2036
Activity Codes	2222
Object Class	MM
Annual Total Contract Value	\$ 252,000.00 Each provider receives \$126,000.00 annually.

PROCUREMENT CALENDAR & DEADLINE FOR RESPONSES	
Response Submission: (Deadline)	Date & Time: Friday, October 16, 2026, by 4:00 pm EST. Vendor should register & submit electronic proposals only to COMMBUYS.
Response Evaluation Period	Estimated Date & Time: Monday, October 19, 2026 – Friday, October 23, 2026.
Notice of Award	Estimated Date & Time: Monday, October 26, 2026, by 4:00 pm EST. All vendors who respond to this RFR will be notified of the outcome of their submission to COMMBUYS.

I. Procurement and Contract Structure

This Request for Response (RFR) incorporates all relevant provisions of 801 CMR 21.00 Procurement of Commodities and Services, the Standard Contract Form and Instructions, the Commonwealth Terms and Conditions for Human and Social Services, the Operational Services Division (OSD) required specifications for Purchase of Service (POS), and any amendments and/or additions to these documents during the life of this RFR. References to MassAbility in this document include all MassAbility offices, programs, and internal departments.

This Request for Response (RFR) is open to vendors that meet the criteria stated in Section 2.0. This is a competitive bid and only 2 awards will be issued, specified in Section III. MassAbility will engage the awarded bidder through a Standard Contract Form with a Maximum Obligation. Pursuant to 801 CMR 21.07(1)(b), the Procurement Management Team (PMT) and the awarded Bidder may negotiate additional language that clarifies their understanding of, but does not change, the language of the contract or contract performance identified in the initiating RFR and awarded Bidder's response.

These clarifications may provide a more detailed description of the language in an RFR and the response as well as to the terms and the meaning of terms in the applicable Commonwealth Terms and Conditions and the Standard Contract Form. Clarifications may only expound and illustrate MassAbility's and the contractor's understanding regarding their respective contract responsibilities. Clarifications may not be used to have the effect of negating, modifying, or replacing language in the applicable Commonwealth Terms and Conditions and the Standard Contract Form.

Through the life of the contract, MassAbility may conduct reviews of services it procured under this RFR and, and where appropriate, may consider corrective action, up to and including cessation or termination of all or part of the services covered under the

contract. Reasons for taking corrective may action include: the contractor has not satisfactorily performed its obligations under the contract; the contractor is unable to meet licensing or certification standards where applicable; or other issues or circumstances related to the Contractor's compliance, processes, or deficiencies that may arise. Generally, unless a termination notice has been given pursuant to the Commonwealth Terms and Conditions for Human and Social Services, the contract will remain in effect for the duration of the procurement. MassAbility reserves the right to make contract awards for a shorter duration when it is in the best interests of the individuals served, MassAbility, or the Commonwealth.

II. Applicable Procurement Law

CHECK ONE ("X")	TYPE OF PURCHASE	Applicable laws
☒	GOODS AND SERVICES	MGL C. 7, § 22; C. 30, § 51, § 52; 801 CMR 21.00
☒	HUMAN AND SOCIAL SERVICES	MGL C. 7, § 22, § 22N; C. 30, § 51, § 52; 801 CMR 21.00; 808 CMR 1.00
☐	LEGAL SERVICES	MGL C. 30, § 51, § 52 AND § 65; C. 7, § 22; AND 801 CMR 21.01(2) (B)
☐	GRANTS	MGL C. 7A, § 7; ST. 1986 C. 206, § 17; 815 CMR 2.00

III. Single or Multiple Contractors

CHECK ONE ("X")	NUMBER OF anticipated CONTRACT(S)
☐	SINGLE CONTRACTOR
☒	MULTIPLE CONTRACTORS

MassAbility anticipates awarding two (2) but reserves the right to award more or fewer contracts, if it is in the best interests of the Commonwealth to do so.

IV. Calendar Rule Type

CHECK ONE ("X")	CALENDAR RULE TYPE	DEFINITION
☒	STANDARD	Vendors bid before the Response deadline date.
☐	OPEN	Vendors can bid when RFR is open again every three months.
☐	ROLLING	Bidders may submit unsolicited proposals at any time.

V. Acquisition Method

CHECK all that apply	CATEGORY
☐	COST REIMBURSEMENT
☒	UNIT RATE (CH 257)
☐	UNIT RATE (NON-NEGOTIABLE)

☐	UNIT RATE (NEGOTIABLE)
☐	ALL-INCLUSIVE RATE (PROJECT-BASED)
☐	Other: Specify Here

VI. Entities Eligible to Use the Resulting Contract

CHECK ONE ("X")	ELIGIBLE ENTITIES
☐	Limited User Contract – Restricted to Use by MassAbility Only
☒	Limited User Contract – Restricted to Use by other designated entity

VII. Expected Duration of Contract:

CONTRACT DURATION	
Initial duration	November 1, 2026 – October 31, 2031
Renewal options	One five-year renewal option
TOTAL maximum DURATION	November 1, 2026 – October 31, 2036

VIII. Funding Provisions

All services provided under this RFR are subject to appropriation and the availability of funds. In the event of a reduction, delay, or reallocation of funding, MassAbility will communicate with Providers as early as practicable and may modify the scope of services, funding levels, or program requirements.

MassAbility may suspend, modify, or terminate a contract, in whole or in part, if the needs of individuals served change such that services can no longer be appropriately provided under the original terms of this procurement, or if other circumstances arise requiring a significant change in services. In such cases, MassAbility will work with the Provider, to the extent feasible, to support an orderly transition that prioritizes the needs of students and continuity of services.

CHECK ONE ("X")	
☐	Contract will NOT have a Maximum Obligation Amount
☒	Contract will have a Maximum Obligation

CHECK ONE ("X")		Will Federal Funds be used to fund any part of Contract(s)?	
☒	No		
☐	Yes		

Any funds designated in the budget that are unspent in any fiscal year will not be available for expenditure in the subsequent fiscal year.

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1.0 Procurement Introduction

a. Scope and Description

MassAbility seeks to identify and qualify a list of organizations interested in and available to provide Transition to Adulthood Program (TAP) for students with disabilities helping them prepare for adulthood and achieve greater independence. This RFR is seeking to provide services in two (2) key areas within the State; North Shore/Cape Ann (Beverly, Danvers, Essex, Gloucester, Hamilton, Ipswich, Lynn, Lynnfield, Manchester by the Sea, Marblehead, Melrose, Middleton, Nahant, North Reading, Peabody, Reading, Rockport, Rowley, Salem, Saugus, Stoneham, Swampscott, Topsfield, Wakefield, Wenham) and Southeastern Massachusetts (Abington, Avon, Bridgewater, Brockton, Carver, Cohasset, Duxbury, East Bridgewater, Easton, Halifax, Hanover, Hanson, Hingham, Holbrook, Hull, Kingston, Mansfield, Marshfield, Middleborough, Norton, Norwell, Pembroke, Plymouth, Plympton, Raynham, Rockland, Scituate, Stoughton, Taunton, West Bridgewater, Whitman).

Services under this RFR are intended for students with disabilities enrolled in high school and/or postsecondary educational or training programs, ages 14 through 21 (up to their 22nd birthday). This includes students who have Individualized Education Plans (IEPs), 504 plans, or any documentation of a disability.

Programs must include a peer modeling approach, must be based on the Independent Living philosophy of consumer control, and be cross-disability in scope. TAP services may only be provided by Independent Living Centers (ILC), with at least 50% of its staff being people with a disability.

Funding will be determined annually based on budgets, utilization, geographic need, and provider performance.

The contents of this RFR reflect the service delivery model of MassAbility.

b. Purpose and Background

MassAbility promotes equality, empowerment, and independence of individuals with disabilities in the Commonwealth of Massachusetts. We work together to break down barriers and make a better state possible for people with disabilities -one that is truly equitable, accessible, and inclusive.

The MassAbility's Transition to Adulthood Program was developed in the 1980's in response to findings that students with disabilities across the Commonwealth lacked knowledge about independent living and transition services.

Forty years after its creation, the TAP continues supporting the growing number of students with disabilities in need of transitional services to independent living. In Massachusetts, students with disabilities have grown from approximately 172,000 (17% of enrollment) in the 2015–2016 school year to an estimated 190,000 (20–21% of enrollment) in 2024–2025 (National Center for Education Statistics, 2024). This upward trend reflects both increased identification rates by schools and a growing population of students requiring specialized support. High school students represent approximately 25–30% of this population, underscoring a significant and sustained need for transition-focused services. In addition, there has been notable growth in students identified with autism and behavioral health-related disabilities, populations that often require enhanced support related to independent living, self-advocacy, and community integration.

Given the continued growth in this population and the increasing complexity of student needs, there remains a critical need for structured TAP services to support successful transition outcomes for students with disabilities across the Commonwealth.

The TAP programs are designed to provide services to students with disabilities, helping them prepare for adulthood and achieve greater independence. Individuals eligible for TAP services are students with disabilities enrolled in high school and/or postsecondary educational programs, ages 14 through 21 (up to their 22nd birthday). This includes students with disabilities who have Individualized Education Plans (IEPs), 504 plans, or any documentation of a disability. There are no financial means criteria needed to receive TAP services. Providers will be expected to serve students with a range of disabilities, skills and interests.

Providers must demonstrate the skills, experience, and organizational capacity necessary to successfully serve these populations. Data and established transition frameworks demonstrate that family engagement is critical to achieving transition goals and that family involvement supports better access to and engagement with services for students, youth, and young adults. Providers must demonstrate the ability to effectively engage families in supporting their young adults in achieving their independent living goals.

MassAbility is committed to ensuring that all students — regardless of disability type, communication needs, or primary language — have equitable access to services. Providers must demonstrate the capacity to effectively serve individuals with a wide range of disabilities, including physical, sensory, intellectual, developmental, psychiatric, and learning disabilities. Services must also be linguistically and culturally accessible, with accommodations made for students who speak languages other than English or

who require alternative modes of communication such as American Sign Language, assistive technology, or plain-language materials.

c. Goals and Objectives

TAP services are designed to prepare students to transition from school into the adult world. By providing independent living skills and setting various goals to help them live independently in the community, TAP supports students in achieving their personal goals and aspirations. The core TAP services include Information and Referral Services, Self-Advocacy and Community Integration Services, Peer Counseling, Independent Living Skills Training, and Transition Services.

MassAbility recognizes that students with disabilities may require coordinated, flexible support that adequately fits their unique needs across all stages of their IL programming—from an early introduction to basic life skills, to preparation of transitioning into the adult world. TAP providers play a central role in delivering or coordinating these supports in partnership with the students and other community stakeholders.

Across all services—TAP services must be individualized, culturally responsive, and person-centered. Providers are expected to collaborate closely with schools, families, and community partners to ensure that support is coordinated, progress is monitored, and each student's path is guided by choice, informed decision-making, and achievable independent living goals.

TAP programs must follow the IL Philosophy of consumer control and be cross-disability in scope. Programming should be focused on consumer choice and the IL goals that were chosen by students, including a peer modeling approach.

2.0 Scope of Services

The Transition to Adulthood Program (TAP) provides individualized independent living skills training and support services to transition-aged students with disabilities preparing for adulthood. Services should take into consideration student strengths, interests, and independent living needs; development of individualized goals and objectives; and ongoing instruction and support designed to increase independence, self-determination, and successful transition outcomes. Providers shall utilize an Independent Living Plan (ILP), or other documented goal-planning process when the ILP is waived by the

student, to guide service delivery and monitor student progress toward identified independent living goals.

TAP services can be delivered in the following ways:

- **Individual service delivery** - TAP services should be individualized to serve each student's needs. It is expected that students will receive primarily 1x1 support to reach their ILP goals.
- **Group service delivery** – TAP services may also be delivered in a group format with other TAP students. Group services should not be utilized as the primary service delivered but rather compliment individual service delivery.

a. Transition to Adulthood Services

Providers must offer and make available the following five (5) categories of TAP services under this procurement:

i. Information and Referral Services

Provide comprehensive information, referral, and service coordination supporting students with disabilities and their families to increase access to community-based resources and independent living opportunities. Services may include information dissemination and referrals related to housing, assistive technology (AT), transportation, career services/vocational rehabilitation, educational support, and other disability-related resources. Technical assistance is also provided to students, families, educators, and community partners to support the students' informed decision-making and access to services.

ii. Self-Advocacy and Community Integration Services

Support students with disabilities in developing self-advocacy, self-determination, and communication skills necessary for successful independent living and community participation. Services may include instruction and coaching on navigating difficult conversations, requesting accommodation, understanding disability rights and protections under applicable laws, and effectively advocating for personal needs in school and community settings. Opportunities for community integration, social engagement, and recreational participation are also provided to enhance independence and inclusion.

iii. Peer Counseling

Provide peer counseling and mentoring services delivered by individuals with lived disability experiences. Peer mentors serve as role models and offer guidance, encouragement, and support related to fostering relationships, socialization, school, disability-related challenges, and everyday life situations. Services are designed to promote self-confidence, problem-solving, independence, and successful community living.

iv. Independent Living Skills Training

Deliver individualized and group-based instruction in skills necessary for independent living and self-sufficiency. Training areas may include daily living skills, social skills development, recreation and community participation, driver's education support, transportation access, money management and budgeting, benefits counseling, health insurance and benefits navigation, housing education, and accessing community resources, along with other training related to students' ILP goals. Services help students build the skills needed to live independently within their communities.

v. Transition Services

Provide transition support and coordination services to assist students with disabilities and their families as they prepare for post-school independent living goals. Services may include participation in Individualized Education Plan (IEP) meetings; resource facilitation; coordination with transition-related community services; and helping students to make connections to Comprehensive Career Services/Transition/Pre-Employment Transition Services (Pre-ETS), assistive technology (AT), career services/vocational rehabilitation, educational supports, and other community-based resources. Supports are designed to promote successful transitions from school to adult life.

b. General Requirements for TAP**i. Development of an Independent Living Plan (ILP)**

The TAP provider is responsible for assisting each student to identify goals, action steps and services necessary to work towards attaining these goals. This will develop into the student's Independent Living Plan, ILP. Providers will be expected to review ILPs on a quarter basis, or more frequently, and revise plans

as the student's goals evolve. Progress and goal achievement must be tracked and documented.

ii. Flexible Service Delivery

Services may be delivered in-person, virtually, or through a hybrid model that combines both formats. Remote services should be provided at the student's request or when circumstances make virtual participation the most effective option.

iii. Collaborative Service Delivery

Service delivery should be grounded in a collaborative team approach that may include school personnel, families, and other relevant stakeholders within the student support network. Regularly scheduled meetings ensure coordinated, student-centered service planning, information sharing, and progress monitoring across all partners.

iv. Intentional Strategies to Recruit, Engage and Retain Students in Services

Providers are expected to recruit students with disabilities through a robust recruitment strategy, including but not limited to: outreach to high schools in the assigned catchment area, outreach to colleges, outreach and partnerships with MassHire to reach students participating in WIOA funded training programs, outreach to Special Ed PACs, home school groups, private and charter schools, community and state colleges, and state agencies including MassAbility, DDS, DMH, DPH, DCF, DTA, and DYS. Social media and online promotion of TAP services is expected.

As families are a critical component and vital resource towards a student's success, providers should create a culture of family inclusivity, create space for family voice, and ensure students know that their families are welcome as part of their service planning team.

Providers are expected to implement intentional, proactive strategies that support student engagement and involvement in services. Engagement efforts should be person-centered, culturally responsive, and aligned with each student's communication style, goals, and support needs. Effective strategies may include outreach and check-ins, flexible scheduling and the use of preferred communication methods (e.g., phone, text, email, or virtual meetings).

Providers should also anticipate and address barriers to participation— such as transportation challenges, technology access, or competing personal commitments—to ensure equitable access to services. The overarching goal is to create a supportive, responsive, and motivating environment that encourages students to remain actively engaged and achieve meaningful outcomes. It is expected that all providers will provide both virtual as well as in-person opportunities for both individual and group services.

v. Flexible Service Coverage & Delivery

Services must be offered in multiple domains. TAP services can be provided within a school setting during a school day when appropriate, but this should not be the only service delivery option. Services must also be delivered during non-school hours—such as after school, during vacations (including summer recess), school breaks, and on weekends—to ensure that students can participate without disrupting their academic schedules. Delivering services during school hours should be considered only when requested by schools or students as MassAbility seeks to minimize removing students from classroom instruction simply for TAP services.

Providers are encouraged to be flexible and creative in meeting the needs of students first. One to one meetings and skills training groups must align with the needs of students, families, schools, and the geographical regions being served, particularly to meet the needs of students in rural communities whose schools may have limited resources or transportation options. When services occur on school grounds, providers must comply with all local education agency requirements, including background and CORI checks, personnel standards, and any other policies governing external partners.

MassAbility encourages services to be provided in community settings to enhance students' involvement in and comfort level within their communities.

vi. Duration of TAP services

Services provided under this procurement are intended to be targeted and time limited. This is to ensure that goals are actively being worked on and in the event a student cannot participate, they are welcome to return later to work on prior or new goals. It is expected that new students will be recruited into the TAP program, so ensuring services are time limited ensures capacity for TAP providers.

i. Transportation

Transportation services shall not be provided as part of TAP services, and transportation-related costs are not allowable expenses under this RFR. Providers are expected to assist students in identifying and accessing appropriate transportation options to support participation in TAP services or deliver services in locations accessible and convenient to the student.

ii. TAP and CCS coordination

MassAbility recognizes that some students may have additional needs related to employment and educational goals and supports. Providers are expected to partner with Comprehensive Career Services (CCS) providers (previously CIES and Pre-ETS providers) and their employment and Pre-Employment transition services programs to connect students to employment related support, as requested by students and families. This may at times require a referral to MassAbility.

MassAbility will support alignment and facilitate collaborative partnerships between Independent Living Centers and CCS and Transition Services providers. It is expected that interested students served by Independent Living Centers will be referred to MassAbility Transition Services or Career Services for employment and educational related goals, and that Transition Services providers will likewise refer interested students to TAP-funded ILCs for IL related goals.

iii. Communication with MassAbility

Communication between TAP providers and MassAbility is an essential element of the partnership needed to provide effective services. It is essential for providers to keep MassAbility updated throughout their work. This includes, but is not limited to:

- Timely completion of Monthly Billing and Associated Reporting.
- Prompt response and collaborative communication with Contract/Program Manager and, or the Business Improvement Partner.

c. Additional Service Models

In addition to the service models described in this section, MassAbility may seek proposals, using an RFQ process, to address student needs that cannot be fully

met through the Transition to Adulthood (TAP) model established in this RFR. Any additional models will be designed to supplement existing services and support specialized or time-limited-service engagements. From time to time, and as funding allows, MassAbility may issue Requests for Quotes (RFQs) under this RFR to solicit proposals from Vendors with active Master Agreements established through this RFR. Each RFQ will define a discrete scope of work and will be issued through a competitive bid process. Only Providers qualified under this RFR are eligible to respond to RFQs issued pursuant to this RFR. The number of awards made under any RFQ may vary. All RFQs will be distributed via COMMBUYS to all qualified Providers and will be posted for a minimum of two (2) weeks. Awards will be made based on the evaluation criteria specified in each RFQ. Contract scope, performance requirements, and payment terms will be defined in the RFQ and finalized through contract execution.

3.0 Compensation

MassAbility will compensate providers using rates established under *Chapter 257*. Rate regulations are promulgated periodically and payments for service models under this RFR will be tied to those promulgated rates. All rates and payment rules are designed to support high-quality service delivery, ensure fiscal accountability, and comply with MassAbility policies.

This is a Unit rate contract with a maximum obligation of \$252,000 (4120-4000). Services are to be billed at the rates established at 101 CMR 424.00: RATES FOR CERTAIN DEVELOPMENTAL AND SUPPORT SERVICES as of 1/01/25, the hourly rate is \$97.92.

Providers must deliver social service programs in conformity with applicable federal and state laws, regulations, quality and safety standards (Commonwealth of Massachusetts, 2019).

a. Billing and Invoicing

All invoicing for services provided to MassAbility students will be conducted through the Enterprise Invoice Management (EIM) system. MassAbility will provide invoicing instructions and documentation requirements prior to the contract start date.

Providers must submit invoices monthly, by the 15th of each month, with proper backup documentation, including an SDR to report monthly attendance for each student

receiving services. Issues and errors raised by MassAbility must be acknowledged and resolved within 10 (ten) business days of inquiry. Unresolved issues/errors may result in the imposition of sanctions and penalties.

All services must be delivered to students by June 30th of that fiscal year in order for payment under this RFR to be honored. All invoices must be received no later than July 31st to be processed.

4.0 Performance Requirements and Monitoring

MassAbility is committed to ensuring that all services purchased through this RFR are delivered with consistency, quality, and measurable impact. MassAbility will set annual goals related to spending, utilization and student participation.

The performance requirements outlined in this section establish clear expectations for service delivery, documentation, collaboration, and the achievement of meaningful results for students.

- Quality measures assess how well services are delivered, focusing on consistency, reliability, and the integrity of service delivery.
- Output measures quantify the volume of services, activities, and deliverables produced, indicating the level of service activity and provider capacity.
- Outcome measures evaluate the impact of services on students' progress, determining whether services achieved meaningful results and supported their IL goals.

MassAbility will finalize performance measures, establish data collection tools, methods, and reporting frequency, and set annual performance targets in collaboration with successful bidders. By submitting a proposal, awarded bidders agree to comply with all performance standards, data reporting requirements, and monitoring activities outlined in this RFR, as well as any refinements developed jointly with MassAbility. Providers awarded contracts under this RFR will be required to participate in ongoing performance monitoring, data reporting, and continuous quality improvement activities as directed by MassAbility.

a. Contract Performance Specifications

Payments will be made out to the Provider upon the successful completion of the following deliverables:

Information and Referral Services

Quality Measures (how well services are delivered)

- Student Satisfaction as measured by an online student survey annually designed and conducted by MassAbility.
- % of students receiving referrals to other services outside of TAP that a student might require. Such as, referral to Career Services, Work without Limits or other organizations.
- Percentage of participants reporting referrals was relevant to their identified needs
- Percentage of staff trained annually on disability resources and service coordination
- Timely submission of monthly progress notes, billing, and statistical reports

Output Measures (what is delivered)

- # of students who received information & referral services
- # of referrals to community resources
- # of referrals to community resources by category

Outcome Measures (what changes for students)

- At least 90% of the students who receive I&R services will report an increased awareness of available community services and support
- At least 90% of the students report improved ability to navigate service systems
- At least 90% of the students/families are connected to at least one new community support resource

Self-Advocacy and Community Integration

Quality Measures

- Percentage of participants receiving individualized self-advocacy instruction
- Percentage of staff trained in disability rights and self-determination practices
- Attendance/participation rates in community integration activities

Output Measures

- Number of self-advocacy training sessions conducted
- Number of participants receiving self-determination coaching
- Number of community integration activities/events conducted
- Number of participants attending social/recreational activities
- Number of disability rights education sessions provided

Outcome Measures

- At least 90% of participants reported stronger social connections/support networks
- At least 90% of students involved will demonstrate increased self-advocacy skills
- 100% of families will be offered opportunities to participate in advocacy program activities.

Peer Counseling Services

Quality Measures

- Participant satisfaction with peer mentoring relationship
- Retention rate of participants engaged in peer counseling services

Output Measures

- Number of peer counseling sessions conducted.
- Number of participants receiving peer mentoring services.

Outcome Measures

- 90% of participants reported increased self-confidence
- 90% of participants demonstrated increased independence
- 90% of participants reporting improved social engagement

Independent Living Skills Training**Quality Measures**

- Attendance/completion rates for training activities
- Participant satisfaction with usefulness of training
- Percentage of participants receiving training in community-based settings
- Timeliness of service initiation following enrollment
- Student Satisfaction as measured by student survey

Output Measures

- Number of instructional hours delivered for each group service/training
- Number of students receiving skills training
- Number of individual and group training sessions delivered
- Number of students successfully completing identified training activities

Outcome Measures

- At least 90% of students will demonstrate increased IL skills
- 100% of training activities will align with student IL goals

Transition Services**Quality Measures**

- Percentage of transition services initiated prior to school exit
- Percentage of participants with documented transition goals/plans
- Frequency of coordination with schools and community partners

➤ Percentage of IEP/transition meetings attended as requested ➤ Timeliness of referrals to adult service systems ➤ Participant/family satisfaction with transition planning process
Output Measures ➤ Number of family consultation sessions completed ➤ Number of referrals made to MassAbility Career Services, Pre-ETS, assistive technology, or other necessary resources for transitioning to adulthood.
Outcome Measures ➤ % of students demonstrating measurable improvement ➤ Provider shall maintain a minimum participant satisfaction rate of 90% ➤ 90% of students or families reporting improved understanding of transition resources/services ➤ Percentage of students successfully linked to career services/vocational rehabilitation or Pre-ETS services ➤ Percentage of students connected to adult service providers prior to school exit

b. Contract Management

Providers are required to meet regularly with MassAbility to review contract performance. At a minimum, Providers must participate in regular performance review meetings, which may occur more frequently during the initial program year or as needed based on performance.

Performance reviews will address key aspects of service delivery and contract compliance, which may include service referrals, utilization and trends; student progress and feedback; performance measures and targets; quality improvement activities; communication and coordination with stakeholders and MassAbility staff; and overall contract compliance and adherence to service specifications.

MassAbility will conduct ongoing contract monitoring, which may include site visits, case reviews, audits, and documentation reviews, as well as interviews with staff and students. Providers must fully cooperate with all monitoring activities and comply with all MassAbility policies and procedures, including any issued during the contract term.

Consistent with MassAbility's commitment to continuous improvement, MassAbility will collaborate with Providers to strengthen performance, improve outcomes, and make data-informed adjustments to service delivery. MassAbility may request additional data or metrics as needed to support monitoring, trend analysis, and performance evaluation.

If performance or compliance concerns are identified through reviews or monitoring, MassAbility will work with the provider to address the issues and may require the development and implementation of a Corrective Action Plan (CAP). Corrective actions are intended to support timely improvement and may include increased monitoring, technical assistance, or other reasonable remedies. If concerns continue, or if serious issues arise, MassAbility may take further action, up to and including modification, suspension, or termination of all or part of the contract.

c. Documentation and Record Keeping Requirements

In accordance with requirements established in the Commonwealth Terms and Conditions for Health and Human Services, providers must maintain records, books, files, and other data as required by 808 CMR 1.00 and as specified in this RFR in such detail as shall properly substantiate claims for payment made under this contract. These records shall be maintained by the provider and must be made available to MassAbility upon request.

5.0 Evaluation Criteria

MassAbility will review responsive proposals using a clear and consistent evaluation process to evaluate whether the proposal meets the goals and requirements of this RFR. Proposals will be assessed based on the criteria outlined in this section, with a focus on program approach, organizational capacity, and the ability to deliver high-quality services. This process is intended to be fair, transparent, and focused on selecting providers that are well positioned to deliver effective services and positive outcomes.

a. Mandatory Minimum Criteria

For proposals to be reviewed and evaluated by a Proposal Review Team, the response must meet the following mandatory minimum requirements:

1. The response includes all required documents as listed on the Bidder's Response Checklist, fully completed and signed. This includes a completed Supplier Diversity Form.
2. Bidders must demonstrate that they are qualified to conduct business in Massachusetts. MassAbility is prohibited from contracting with vendors that have been debarred by federal, state, or local government.

All required documents are identified in the Bidder's Checklist. A completed and marked checklist is also a required form for the response. Mandatory Minimum Criteria will be reviewed by MassAbility's procurement staff to verify compliance prior to assigning responses to the Proposal Review Team.

b. Scoring Criteria

A Proposal Review Team will review, evaluate, and score each proposal based on the requirements listed below.

Response requirements are summarized in the Bidder Response Sheet. Bidders must enter their responses directly into the Bidder Response Sheet and submit the completed document as part of their proposal. Responses must be clear and fully address each required area within the stated page limit. Attachments, appendices, or program descriptions not specifically requested, or that exceed the stated page limits, will not be reviewed.

Proposals will be evaluated primarily on the information provided in the Bidder Response Sheet. Consistent with a best-value procurement approach, MassAbility may also consider documented past performance, when available and relevant, including prior contract compliance, service quality, and demonstrated outcomes.

Requirement 1: Organizational Experience and Capacity

i. Experience in Delivering Comparable Services

Provide specific examples from the past five years demonstrating your organization's experience providing TAP services to students with disabilities. Include experience, if applicable, serving individuals with:

- Intellectual or developmental disabilities (ID/DD)
- Behavioral health needs
- Deafness or hard-of-hearing

- Other under-represented or historically underserved populations

ii. Alignment with Agency Programs

Explain how the proposed services fit within your organization's broader mission and existing programs. Describe how the structure and resources of your organization support effective service delivery, coordination, and quality improvement.

iii. Responsiveness to Emerging Needs

Describe how your organization has adapted to meet evolving needs for students with disabilities as they transition into the adult world.

Requirement 2: Staff Knowledge, Skill and Experience

i. Staff Qualifications and Experience

Describe the skills, professional experience, education, certifications, and—where applicable—lived experience of the staff who will deliver the proposed services. Highlight competencies that align with independent living skills for students with disabilities.

ii. Supervision Structure

Describe the type, frequency, and structure of supervision provided to your staff. Include how supervisors monitor quality, support staff effectiveness, and ensure adherence to service requirements.

iii. Continuity of Services During Staffing Changes

Identify specific strategies your organization uses to manage vacancies and staff turnover while maintaining uninterrupted service delivery.

iv. Training and Professional Development

Describe the initial and ongoing training and professional development provided for staff.

v. Flexible Service Coverage & Delivery

Explain how your organization ensures that staff are available to provide services during non-traditional hours (e.g., evenings, weekends, school vacations) to meet student needs.

Requirement 3: Student Engagement and Empowerment

Students with disabilities often face significant barriers to engaging in services and maintaining consistent participation. Describe how your organization will support students in engaging meaningfully and remain empowered throughout their involvement with services. In your response, address the following:

i. Engagement and Empowerment Strategies

Describe the creative, practical, and person-centered strategies your staff will use to help students:

- Engage in services
- Remain involved over time
- Feel empowered in shaping their goals and decisions

ii. Example of an Intentional Strategy

Provide one example of how your organization has successfully used one of the intentional strategies described above. Explain how you determined the strategy was successful, including any measurable outcomes or indicators.

Requirement 4: Ability to Deliver Transition to Adulthood Program

Services

Describe your capacity to deliver TAP services described in the RFR, including:

i. Five Required TAP Services

Describe in detail the organization's ability to provide the core IL services described in this RFR to students with disabilities. Ensure that you address each individual service category in your response.

ii. Outreach, Marketing, and Recruitment

Describe how your organization will promote TAP services and recruit students from multiple sources, including schools, families, community organizations, and other referral partners. Include strategies for equitable access and engagement of underrepresented groups.

iii. Student Engagement and Instructional Approach

Describe your approach to engaging students and delivering both individual and group services. Describe the delivery methods you will use (in-person, remote, hybrid, community-based), with specific focus on scheduling and format that support accessibility, student needs, and family preferences.

iv. Service Planning and Matching Services to Student Needs

Describe your process for developing individualized living plans (ILP) and determining which TAP services are most appropriate and beneficial for each student.

v. Community-Based Learning

Describe your process for developing and supporting community-based learning opportunities, how you engage with your local communities and current and past relationships you have with the wider community you serve.

vi. Serving a Diverse and Geographically Broad Population

Describe how your organization will deliver high-quality TAP services across a wide geographic region. Include strategies for serving culturally and linguistically diverse students and students with varied accommodation needs and learning styles.

vii. Preparation for Transitioning into Adulthood

Describe how your services prepare students for the adult world and necessary life skills, to foster independence as they transition into adulthood.

Requirement 5: Partnering with MassAbility**i. Experience Working in Multi-Disciplinary Teams**

Describe your organization's experience participating in multi-disciplinary teams. Provide at least one example demonstrating effective collaboration, role clarity, communication, and shared problem-solving.

ii. Staff Preparedness for Reporting and Communication

Describe the training, support, and supervision your organization provides to ensure staff consistently meet MassAbility's expectations for timely reporting, documentation accuracy, and proactive communication.

iii. Referral Management Capacity

Describe your capacity and internal processes for receiving, acknowledging, and responding to referrals in a timely manner. Outline how you track, triage, and assign referrals to ensure prompt engagement and minimize delays in service delivery.

Requirement 6: Ensuring Quality and Enhancing Outcomes Describe your organization's approach to ensuring high-quality service delivery and its commitment to delivering and enhancing high-quality outcomes. In your response, address the following:

i. Process to Ensure Quality and Outcomes

Describe your organization's processes for quality assurance, including:

- a. The types of data collected (e.g., performance outcomes, utilization, student feedback, timeliness, documentation accuracy).
- b. The frequency with which data is reviewed.
- c. The roles of staff responsible for reviewing data and making decisions (e.g., supervisors, program directors, leadership teams).

ii. Use of Outcomes Data

Explain how your organization uses data and outcomes to drive improvements in service delivery. Provide at least one specific example of a service improvement initiative, including:

- a. The issue of data that prompted the change
- b. The actions taken
- c. The results or outcomes
- d. How you continue to measure the impact over time

Requirement 7: Cultural and Linguistic Competency

i. Staff Cultural and Linguistic Capacity & Recruitment Strategies

Describe the cultural and linguistic capacities of your current staff. Include languages spoken, cultural knowledge, lived experience, and relevant training. Additionally, describe your strategies to recruit, hire, and retain staff whose racial, ethnic, linguistic backgrounds and experience reflect the diversity of the students served under this RFR and within your organization's catchment area.

ii. Experience with Language Integration

Describe your staff's experience and comfort with integrating language support into service delivery. Include specific examples of language integration support used in your organization (e.g., working with interpreters, providing bilingual services, using translated materials, or adapting communication for multilingual families and students.)

iii. Culturally Responsive Relational and Soft Skills

Describe the relational and soft skills your staff demonstrate to ensure culturally competent service delivery.

Describe how the current or planned operation of your organization will meet the cultural/linguistic needs of consumers including times when those needs are beyond the internal capacity of your team. Also describe how your organization has handled those situations in the past and how those experiences enhance your organization's approach to cultural/linguistic diversity?

Requirement 8: Supplier Diversity Program (SDP)

- a. Bidders are required to make a meaningful financial commitment (“SDP Commitment”) by partnering with one or more SDO-certified or recognized diverse business enterprise or non-profit organization, including a current fiscal-year commitment, and including prior year-spending information for any existing providers. It is also desirable that all Providers aim to direct at least 1% of their Commonwealth contract revenue toward spending with SDP Partners. The Provider’s percentage of spending with SDP Partner(s) for the prior fiscal year can be seen as “PERCENT (%) OF POS SPEND” on the completed “SDP Plan Form for POS”/” SDP Plan Form for Goods and Services” for that fiscal year.

SDP Plan Form for POS: <https://www.mass.gov/doc/supplier-diversity-program-sdp-form-for-purchase-of-services-pos/download>

Note:

- (1) This will be scored separately, as part of the SDO Plan
- (2) Bidders may identify vendors for SDO partnerships, using the [SDO Directory](#)

c. Rating Scale

Bidder's responses to each requirement will be scored on a five-point scale:

Unsatisfactory	1 Point	Bidder fails to meet the defined criteria.
Below Average	2 Points	Bidder is responsive, but response is lacking in clarity or inadequately addressed the defined criteria
Average	3 Points	Bidder is responsive and adequately addresses the requirements of the criteria
Above Average	4 Points	Bidder is highly responsive, demonstrates an understanding of the topic and clearly demonstrates their ability to satisfy the requirement
Outstanding	5 Points	Bidder's response is outstanding in its clarity, demonstrates a thorough understanding of the requirements, and provides (very) strong evidence of their ability to successfully deliver the desired requirement

6.0 Administrative Requirements

a. Submission of Bidder Response

i. File Format and Naming Conventions

Scanned documents will be accepted and must be scanned in such a way that documents can be read on a computer monitor and printed on 8 1/2" x 11" paper, unless otherwise specified. Zipped files will be accepted and must be in a .zip format when saved. Other zip file formats will not be accepted.

All attachments that are uploaded to COMMBUYS must include the company name of the Bidder and the Solicitation Bid number.

ii. Page Limit Format

Bidder responses must be no more than 12 pages, single spaced with 12-point font. The required organizational charts and the first two summary pages on the Response Sheet are excluded from the page limits.

Required Forms and RFR Submission Checklist

Bidders must comply with the requirements specified in Section 5. The Proposal Review Teams seek to reduce the number of Bidder disqualifications based on incomplete submissions. Therefore, Bidders must complete and submit the RFR Submission Checklist, verifying that the submission contains all documents referenced in the Checklist.

b. Other Forms

Bidders will be required to submit electronic versions of the following forms within five (5) business days after receiving an intent to award under this RFR. If signed versions of any of these forms are on file with the Office of the State Comptroller, please provide us with an electronic copy if it was completed within 6 months prior to your response submission date and/or has not expired.

- Request for Taxpayer Identification Number and Certification (Massachusetts Substitute W-9 Form)
- Electronic Funds Transfer (EFT) Form
- Contractor Authorized Signatory Listing (CASL) Form
- Certificate of Liability Insurance

- Prompt Pay Discount form
- EOHHS Contracting Qualification form
- CORI Assurance form

c. Instructions for Submission of Forms and Questions

All responses must be submitted electronically using the online submission tools available to Bidders registered in COMMBUYS.

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.

MassAbility will process the standard contract form electronically when possible. Bidders should not submit signed copies of the standard contract form or the contractor authorized signatory listing posted on COMMBUYS with their proposal. These forms are posted for informational purposes only.

All Bidders are advised to allow adequate time for submission in consideration of potential online submission impediments including internet traffic, internet connection speed, file size, and file volume. MassAbility is not responsible for delays encountered by Bidders or their agents, or for 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.

d. 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 and Conditions” tab in COMMBUYS. Bidders do this by selecting “Save and Continue” on the “Terms and Conditions” tab after accepting the terms and conditions of the bid. By agreeing to this the submitter attests that they are an agent of the Bidder with authority to sign on the Bidder’s behalf, and that they have read and assented to each document’s terms.

e. COMMBUYS Support

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

Website: Go to www.mass.gov/osd/commbuys and select the COMMBUYS Resource Center link offered under Key Resources.

Email: Send inquiries to the COMMBUYS Helpdesk at COMMBUYS@state.ma.us

Telephone: Call the COMMBUYS Help Desk at 1-888-MA-STATE (1-888-627-8283). The Help Desk is staffed from 8:00 AM to 5:00 PM Monday through Friday Eastern Standard or Daylight time, as applicable, except on federal and state holidays.

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

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

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

Appendix B includes Instructions for Bidders 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.](#)

f. Amendments to Bid

MassAbility reserves the right to make amendments to the RFR after the initial publication. It is each Bidder's responsibility to check COMMBUYS for any amendments, addenda, or modifications to this RFR. MassAbility and the Commonwealth accept no responsibility and will provide no accommodation to Bidders who submit a quote based on an out-of-date RFR or on information received from a source other than COMMBUYS.

g. Alterations

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

h. Ownership of Submitted Quotes

MassAbility shall be under no obligation to return materials submitted by a Bidder in response to this RFR. 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 the Quote is selected for Contract award.

Quotes stored on COMMBUYS in the encrypted lockbox are the file of record. Bidders retain access to a "read-only" copy of this submission via COMMBUYS, as long as their account remains active. Bidders also may 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.

i. Public Records

All information, documents, and attachments submitted as a response to this RFR are considered a public document subject to the Massachusetts Public Records Law, M.G.L., c. 66, s. 10, and to c. 4, sec. 7, sec. 26. Please be aware that checking the "confidential" box in COMMBUYS may not bar these documents from release as a public record pursuant to these statutes once the procurement is awarded, unless statutorily exempt from disclosure.

j. Requests for Correction or Clarification Terms

MassAbility, in its sole discretion and pursuant to [801 CMR 21.06\(8\)](#), may determine whether a Bidder is eligible for a Response correction or clarification.

MassAbility shall determine whether to allow a correction of minor informalities in a Response. Minor informalities are matters of form rather than substance and include clerical errors or minimal or insignificant mistakes that can be corrected without prejudice to other Bidders. MassAbility may, upon written request of a Bidder, allow a correction of a minor informality in a Response which is clear, such as a typographical error, transposition error or arithmetical error where the correct answer is obvious, or if

the mistake is discovered by MassAbility, MassAbility may note the correction on the Response. If MassAbility requires clarification of any section of a Response, MassAbility will provide all Bidders that submitted Responses with the same notice and opportunity for clarification of the identified section in the Response. Clarifications are explanations of what is stated in a Response and may not be used as an opportunity to submit supplemental information or a change to a Response, unless MassAbility specifically requests these submissions or changes as part of the clarification of all Responses. No correction or clarification of Response prices, terms and conditions or the submission of supplemental information prejudicial to the interests of other Bidders or to fair competition shall be permitted.

k. Debriefings and Appeals

Unsuccessful bidders may request a debriefing from MassAbility within fourteen (14) calendar days of the notice from MassAbility regarding an award decision. If you are formally requesting a debriefing, please contact the Procurement contact via email: Jose.L.Samayoa3@mass.gov

Debriefings are intended to provide an open, appropriate, and meaningful exchange of information about the procurement and evaluation process and to help the bidder to understand the results of the process as it applies to their proposal submission only. Unsuccessful POS bidders aggrieved by a MassAbility decision must participate in a debriefing as a prerequisite to an administrative appeal. It is important to note that the purpose of a debriefing is solely to discuss and review MassAbility's decision not to qualify for or award the unsuccessful bidder.

I. Administrative Appeals to the Department

Bidders that have participated in a debriefing and dispute the award decision may request an appeal to MassAbility. The appeal must be filed within fourteen (14) calendar days of the debriefing meeting. The request must be in writing and specify the basis for the appeal. Requests for appeals will only be considered if one or more of the following is alleged:

1. Competitive procurement conducted by the department failed to comply with applicable regulations and guidelines. These would be limited to the requirements of 801 CMR 21.00 or any successor regulations, the policies in the OSD Conducting Best Value Procurement Handbook, subsequent policies and procedures issued by OSD, and the specifications of the RFR; or
2. There was a fundamental unfairness in the procurement process. OSD will presume that departments conducted fair procurement absent documentation to the

contrary. Consequently, a high burden of proof rests with the bidder. Bidder should take care to provide sufficient and specific evidence in support of its claim.

Appeals must specify in sufficient detail the basis for the appeal, including identification of the applicable regulation or guideline that was not complied with or the specific facts that demonstrate that the procurement was unfair. Appeals not based upon the specified grounds above, or those submitted without sufficient detail based on the appeal, shall be denied.

Appeals should be sent to:

Mauricio Vasquez
Chief Financial Officer
40 Broad St, 4th Floor
Boston, MA 02109

A pending appeal shall not prohibit MassAbility from proceeding with the awarding of contracts and contract referrals

m. Acceptance or Denial of Appeal

Within ten (10) business days of the Commissioner's receipt of an appeal, the Commissioner will determine if the appeal meets the requirements set forth by MassAbility and the Operational Services Division. If it does not, the Bidder will be sent written notice that its appeal has been denied. If the requirements are met, written notice of the acceptance of the appeal for review will be sent to the Bidder requesting the appeal, the awarding authority, and the winning Bidder.

n. Review

The Commissioner will appoint a committee of not more than three individuals to review the basis for the appeal as set forth in the appeal request. Upon completion of this review, the committee will submit a written recommendation to the Commissioner and/or designee. The committee reviewing the appeal may (1) review the Procurement file; and (2) interview the appellant, the awarding authority, any member of the Proposal Review Team or any other individual that was involved in the review and selection process. MassAbility may allow the Bidder to make an oral presentation in person to the committee.

MassAbility's final decision will be issued by the Commissioner within sixty (60) business days of receipt of the initial request for appeal. If the Commissioner overturns

the awarding authority's decision, the Commissioner will decide the appropriate action to be taken. Bidders must cooperate in the appeal review.

o. Appeals to the Operational Services Division

Non-successful Bidders that participated in MassAbility's appeal process and remain aggrieved by the Commissioner's final decision may appeal that decision to the Operational Services Division (OSD). For more information see the "Debriefing/Appeals: Administrative Appeals to OSD" section in the OSD RFR - Required Specifications for Purchase of Service, that is included in the Bid's COMMBUYS posting.

p. Debarment

The awarded Bidder certifies that neither it nor any of its subcontractors proposed to perform duties under this RFR, if applicable, are currently debarred or suspended by the federal or state government under any law or regulation including Executive Order 147; M.G.L. c. 29, § 29F; M.G.L. c. 30, § 39R; M.G.L. c. 149 §§ 27C, 44C and 148B; and M.G.L. c. 152, § 25C. The awarded Bidder shall comply with all applicable state laws and regulations stated in the Standard Contract Form Instructions and Contractor Certifications.

q. Enterprise Invoice / Service Management (EIM/ESM)

If MassAbility directs the vendor to access the EIM/ESM service through the Virtual Gateway for the purpose of conducting business with MassAbility, the vendor agrees to use such services as directed and execute all required Use or Service Agreements required by the Virtual Gateway and to comply with all applicable Virtual Gateway, MassAbility and EOHHS policies and procedures related to such services, including policies pertaining to data security and protection of confidential information.

Vendor further agrees to submit all information as directed by MassAbility including, but not limited to, invoices, contracts, and/or other information to MassAbility through these web-based applications. Vendor further agrees to take all necessary steps to ensure that it, and its subcontractors or affiliates, complies with these requirements and has access to and utilize all required web-based services in the Virtual Gateway.

Vendors are required to establish and maintain user accounts in EIM and maintain up-to-date organizational information and appropriately offboard accounts for staff who are no longer employed by the vendor or otherwise do not need to maintain access to EIM.

r. Virtual Gateway Business Services

The Executive Office of Health and Human Services (EOHHS) operate several online business services through Virtual Gateway. These include but are not limited to Vendor Data Management (PDM), Common Intake (IE&R), Enterprise Invoice / Service Management (EIM/ESM), Home and Community Service Information System (HCSIS), Senior Information Management System (SIMS) Service and Transition Planning System (STARS).

These services permit users to access a variety of EOHHS programs and services. Virtual Gateway business services are accessible by end users with web browsers such as Internet Explorer (6.0 or above), and a broadband Internet connection that is capable of high-speed data transmission, such as a Local Area Network (LAN), a cable modem, or DSL.

s. EOHHS Qualification Process

Prior to entering a contract with MassAbility, a Vendor of purchased human and social services must demonstrate that it meets minimum administrative and fiscal standards, established through the Executive Office of Health and Human Services (EOHHS) Vendor qualification policy. Vendor qualification is the process used to evaluate a Vendor's administrative and financial condition. The main objectives of the Vendor qualification process are to determine whether or not the Vendor has (a) the capabilities to comply with the numerous federal and state administrative requirements that surround the expenditure of public funds and (b) sufficient fiscal and administrative capacity to fulfill its contractual obligations.

t. Uniform Financial Statements (UFRs)

Vendors of human and social services to Students must file their Uniform Financial Statements (UFR) and Independent Auditor's Report with the OSD on a yearly basis as outlined under Other Requirements. Vendors must also submit a copy of the current Supplier Diversity Plan (SDP) Plan Form for POS that reflects yearly spending with their UFR as a condition of continuing to do business with the Commonwealth.

u. Criminal Offender Record Check (CORI)

Employees of awarded bidders are also subject to regulations requiring Criminal Offender Record Information ("CORI") checks in accordance with Executive Office of

Health and Human Services (“EOHHS”) regulations at 101 CMR 15.00. A Massachusetts CORI check is required for any person employed by EOHHS or an EOHHS-agency or their vendor programs whose position entails the potential for unsupervised contact with individuals receiving services from MassAbility. Additional guidance, forms, and information for organizations subject to the CORI regulations may be found at 101 CMR 15.00, including guidance on how to properly process EOHHS mandated CORI checks, is available at: <https://www.mass.gov/lists/guidance-and-information-for-organizations-subject-to-the-cori-regulations-at-101-cmr-1500>. A copy of the EOHHS CORI regulations at 101 CMR 15.00 may be accessed at: <https://www.mass.gov/doc/criminal-offender-record-checks-effective-april-21-2017/download>.

v. Privacy and Security

In performance of its duties under the Contract, awarded Bidders shall comply with all obligations, and awarded Bidders must comply with M.G.L. c. 66A, M.G.L. c. 93H, , M.G.L. c. 6, §84, 107 CMR 2.00 et seq.; 34 CFR 361.38; and the HIPAA Privacy and Security Rules (45 CFR Part 160 and Part 164, Subparts A and E), 42 CFR 431, Subpart F, 42 CFR Part 2, and any other applicable federal or state law or regulation pertaining to the use, disclosure, maintenance, privacy, confidentiality or security of Protected Information (“PI”), which shall be defined as any “personal data” as defined in M.G.L. c. 66A, any “personal information” as defined in M.G.L. c. 93H, and any other individually identifiable information that is treated as confidential under State or Federal Law (including, but not limited to, any state and federal tax return information) that the awarded Bidder uses, maintains, discloses, receives, creates, transmits or otherwise obtains in connection with its performance of its duties. Any PI created or maintained by the awarded Bidder pursuant to the Contract, shall only be used for the purposes stated in the Contract. As for the Contract effective date, the awarded Bidder shall implement administrative, physical, and technical safeguards that reasonably and appropriately protect the confidentiality, integrity, and availability of PI and that prevent use or disclosure of such PI other than as provided for the Contract.

w. Best Value Selection and Negotiation

The Procurement Review Team or PRT may select the response(s) which demonstrates the best value overall, including proposed alternatives that will achieve the procurement goals of the department. The PRT and a selected bidder, or a contractor, may negotiate a change in any element of contract performance or cost identified in the original RFR 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.

7.0 Supplier Diversity Program

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 (see below for more information) by the Supplier Diversity Office (SDO).

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(s) or non-profit organization(s). This SDP Commitment must be expressed as a fixed dollar amount percentage of contract sales relating to this RFR 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. **There's no minimum Total SDP Commitment, but bidders are encouraged to propose feasible annual amounts that support diversity across the Commonwealth.** 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.

a. 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)

b. Eligible Types of Business-to-Business Relationships.

Bidders and Contractors may engage SDP Partners as follows:

- **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 RFR applicable to subcontracting shall apply equally to the engagement of SDP Partners as subcontractors.

c. 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.

d. 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.

e. 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 Veterans 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 are 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 the 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 a description of supplier diversity businesses practices. Specifically, listing contact information for the individual or unit responsible for establishing and maintaining supplier diversity relationships and including a written policy for establishing and maintaining supplier diversity relationships.

It is also **desirable** for Bidders to use the SDP Plan Form to describe additional initiatives 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 businesses 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.

f. 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.

g. SDP Spending Reports and Compliance.

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 on the Hub. Contractors must follow report submission instructions from the issuing department and the SDO.

Only spending with SDP Partners that appear in the [SDO Directory of Certified Businesses](#) or in [SBA Veterans 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, and the SDO, and the issuing department, assume no responsibility for any Contractor's failure to meet its SDP Commitment.

h. 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.

i. 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

8.0 OSD Required Specifications

OSD Required Specifications

<https://www.mass.gov/doc/rfr-required-specifications-for-commodities-and-services>

OSD Required Specifications for POS

<https://www.mass.gov/doc/rfr-required-specifications-for-pos>

Electronic Quote Submission Instructions

<https://www.mass.gov/doc/instructions-for-vendors-responding-to-bids>