

ISSUE DATE:

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RFR Name/Title	Workforce Enhancement, Collaboration, Safety and Resiliency Services RFR
RFR Number	BD-27-1040-1040C-1040L-134366
COMMBUYS Bid Number	BD-27-1040-1040C-1040L-134366

1. Description or Purpose of Procurement:

1.1 Overview

The Executive Office of Aging & Independence (AGE) administers the Massachusetts Protective Services Program for adults age 60 and older through a statewide network of contracted Protective Services Agencies (PSAs). Protective Services staff work in complex home and community settings and may encounter behavioral health concerns, cognitive impairment, family conflict, safety risks, and other circumstances requiring specialized skills and coordinated responses.

AGE seeks to strengthen workforce competency, safety, wellbeing, confidence, and retention through an integrated approach that combines workforce development, de-escalation, resiliency, technical assistance, interdisciplinary collaboration, and evaluation.

AGE also recognizes that effective collaboration with public safety, behavioral health, healthcare, disability services, veteran services, and other community partners can improve coordinated response, reduce worker isolation, and support better outcomes for older adults.

The initiative will initially focus on the Adult Protective Services (APS) Network while establishing a model that may be adapted over time for additional AGE-designated workforces, programs, and provider networks.

1.2 Purpose of Procurement

AGE seeks a qualified Contractor to design, implement, and support a statewide workforce enhancement initiative for the Massachusetts APS Network. AGE is seeking a flexible, evidence-informed approach that establishes core requirements while allowing Bidders to propose the program design, sequencing, methods, and innovations they believe will best meet AGE's objectives.

At a minimum, the initiative shall address the following service areas:

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- De-escalation, crisis response, and worker safety;
- Workforce resiliency, mental wellbeing, and supervisory support;
- Ongoing training reinforcement and technical assistance;
- Interagency and public-safety collaboration;
- Workforce research, evaluation, and continuous improvement; and
- A scalable approach that can be adapted to additional AGE-designated workforces over time.

Bidders are expected to propose a practical Year One program that reflects these requirements, identifies priorities and deliverables, and explains how the model could grow in subsequent years based on demonstrated need, outcomes, available funding, and AGE direction.

1.3 Bidder Qualifications

To be considered for the Contract award pursuant to this RFR, the Bidder, in addition to all other requirements specified herein, must meet the minimum qualifications in the section below. AGE also has a strong preference for the preferred qualifications outlined in the “Preferred Qualifications” section.

The Bidder qualifications are as follows:

A. Minimum Qualifications:

- a. Experience providing workforce development, training, technical assistance, organizational development, or related consulting services in human services, aging services, public health, behavioral health, public safety, social work, or a related field;
- b. Experience designing and delivering professional training programs, including virtual, in-person, and hybrid learning opportunities;
- c. The ability to provide statewide services and technical assistance to multiple organizations and stakeholders;
- d. The ability to comply with all reporting, confidentiality, data security, and Contract requirements described in this RFR;
- e. Demonstrated organizational and financial capacity necessary to successfully perform the services required under this RFR throughout the Contract term;
- f. Proposed staff possess appropriate education, training, certifications, and professional experience necessary to perform the required services; and
- g. The Bidder must not have financial, legal, or ethical interests that conflict with the performance of the services under Attachment A, or must demonstrate measures sufficient to avoid or mitigate actual or perceived conflicts of interest.

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B. Preferred Qualifications:

Preference may be given to Bidders demonstrating a combination of the following:

- a. Experience with APS, aging services, human services, behavioral health, public safety, or comparable community-based systems;
- b. Expertise in de-escalation, crisis response, trauma-informed practice, worker safety, resiliency, mental wellbeing, or related workforce-development areas;
- c. Experience designing and delivering practical, adult-learning-based training using in-person, virtual, hybrid, scenario-based, or other appropriate methods;
- d. Experience facilitating collaboration among governmental, healthcare, behavioral health, public safety, and community partners;
- e. Experience conducting workforce assessment, research, evaluation, data analysis, and translating findings into actionable recommendations; and
- f. Demonstrated capacity to scale programs, maintain quality, and support workforce sustainability over time.

1.4 Definitions

Adult Protective Service (APS) Program: The program administered by the Executive Office of Aging & Independence that responds and investigates cases of neglect, physical, sexual and emotional abuse, as well as financial exploitation and self-neglect.

Bidder: An individual or organization proposing to enter into a Contract to provide a Commodity or Service, or both, to or for the Executive Office of Aging & Independence.

Contract: A legally enforceable agreement between a Contractor and the Executive Office of Aging & Independence.

Contractor: The individual, organization, firm, or other entity selected by AGE and awarded a Contract as a result of this RFR, including its employees, agents, approved subcontractors, consultants, and other personnel performing Services under the Contract, as applicable.

Executive Office of Aging & Independence (AGE): The Executive Office of Aging & Independence, established pursuant to M.G.L. c. 19A § 1, is the Massachusetts state agency responsible for helping to support older adults and people with disabilities in the Commonwealth to live independently and with dignity in the settings of their choice.

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Key Personnel: An individual who holds a critical role in a project or contract and is essential to the project's or contract's success. These individuals typically possess skills, qualifications, or responsibilities that are integral to achieving the objectives of the project or contract.

Older Adult: an individual who is 60 years of age or older.

Protective Service Agency (PSA): Locally based private, non-profit corporations which contract with the Executive Office of Aging & Independence to provide Protective Services screening, investigation and ongoing services to certain eligible individuals in accordance with M.G.L. c. 19A.

Request for Response (RFR): The mechanism used to communicate Procurement specifications and to request Responses or interest from potential Bidders. An RFR may also be referred to as a "solicitation".

Subject Matter Expert (SME): An individual with specialized knowledge, skills, and expertise in a specific field or domain. SMEs are often consulted to provide insights, advice, and guidance on topics within their area of expertise, particularly in projects, training programs, policy development, or technical processes.

2. Applicable Procurement Law

Check Appropriate Box ("X"):	Type of Purchase	Applicable Laws
	Executive Branch Goods and Services	
X	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

3. Acquisition Method:

Check All Applicable ("X"):	Category
X	Fee-For-Service
☐	Outright Purchase
☐	Rental (not to exceed 6 months)
☐	Term Lease
☐	License
☐	Other: [specify, e.g., TELP]

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

Check One ("X"):	
X	Single Contractor
☐	Multiple Contractors

a. Estimated Number of Awards

The target maximum number of Contractors is one (1). The Purchasing Department may award more or fewer contracts, if it is in the best interests of the Commonwealth to do so.

5. Entities Eligible to Use the Resulting Contract

Check One ("X"):	Eligible Entities
☐	Limited User Contract – Restricted to Use by Defined Entities Only. Any Contract(s) resulting from this Bid will be open for use by the issuing Purchasing Department and the following other entities:
X	Limited User Contract – Restricted to Use by Issuing Entity Only.

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

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Contract Duration	Number of Options	Number of Years/Months	Instructions
Initial Duration		2 years, 6 months	Initial duration of contract. The initial contract term is 2 years and 6 months, beginning with an initial 6-month period in FY27, followed by two full years, with the initial term ending in FY29.
Renewal Options	3	1 year	Renewal options. Beginning in FY30, the contract includes three potential one-year extension periods. If all three options are exercised, the contract would continue through FY32.
Total Maximum Contract Duration		5 years, 6 months	Total potential contract duration. The initial 2-year, 6-month term plus all three one-year renewal periods provides for a total potential contract duration of 5 years and 6 months, with the final extension period ending in FY32.

7. Anticipated Expenditures, Funding, or Compensation:

Estimated Total Value of Procurement (if all renewal options are exercised): \$2,750,000.00

Estimated Value per year:

<u>Year</u>	<u>Estimated Expenditure Amounts</u>
Year One	Less than \$200,000
Year Two	Up to \$550,000
Year Three	\$550,000+
Year Four	\$550,000+
Year Five	\$550,000+

The funding for any contract resulting from this procurement is conditioned upon receipt of state funds and subject to appropriation. The expenditure amounts listed in the table above are estimates. This RFR does not guarantee that any Contract resulting from this RFR will contain the estimated amounts, and such amounts are subject to appropriation.

8. Contract Performance and Business Specifications:

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A. Scope of Services:

AGE intends to award a single Contract to a qualified Bidder to provide an integrated workforce enhancement initiative initially focused on the Massachusetts APS Network. The selected Contractor will be expected to combine training, technical assistance, collaboration, evaluation, and related workforce-development strategies into a practical program that can be refined and expanded over time.

Attachment A describes the required service areas and contractual responsibilities. Within those parameters, AGE expects the selected Contractor to work collaboratively with AGE to determine priorities, sequencing, delivery methods, and appropriate opportunities for future growth.

The selected Bidder shall perform the activities requested in this RFR and set forth in Attachment A. Attachment A contains provisions intended to be incorporated into any Contract to be executed between AGE and the successful Bidder resulting from this RFR. AGE reserves the right to modify Attachment A as it deems necessary prior to execution of the Contract. Changes to the Contract after execution by the parties shall be made only by written amendment.

The Contract contains the intended important dates, including Contract start date, implementation date, and others, as well as the intended term of the Contract including any potential extensions. The term of the Contract, including any extensions, is subject to (1) ongoing legislative appropriation; (2) all necessary approvals; and (3) the Contractor's satisfactory performance, as determined by AGE, of all duties and obligations under this Contract.

The anticipated initial term of any Contract resulting from this RFR shall be two (2) years, 6 months. At the sole discretion of AGE, the Contract may be renewed for up to three (3) additional one-year terms. The maximum duration of any Contract resulting from this RFR is expected to be five (5) years, 6 months. AGE, in its sole discretion, reserves the right to have flexible renewal periods, in any time duration.

B. Contractor Responsibilities

In accordance with Attachment A, the Contractor shall design, implement, and continuously improve a statewide workforce enhancement initiative responsive to AGE priorities and the operational realities of APS and other AGE-designated workforces.

The Contractor shall provide, at a minimum:

- a. Evidence-informed workforce training addressing de-escalation, crisis response, worker safety, resiliency, mental wellbeing, and related needs identified by AGE;
- b. Practical opportunities for skill application and reinforcement, which may include scenario-based learning, coaching, virtual reinforcement, technical assistance, supervisor support, or other methods proposed by the Contractor;

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- c. Support for sustained interdisciplinary collaboration with public safety, healthcare, behavioral health, disability services, veteran services, state agencies, and other community partners, including approaches that strengthen relationships, communication, referral pathways, shared learning, and coordinated response;
- d. Workforce research and evaluation sufficient to assess program effectiveness, identify emerging needs, and support continuous improvement;
- e. Regular communication, project management, reporting, and technical assistance to AGE; and
- f. A program structure capable of adapting successful components to additional AGE-designated workforce populations as authorized by AGE.

AGE does not prescribe a single required curriculum, delivery sequence, number of training days, technology platform, or collaboration model. Bidders should propose the combination of services and methods they believe will produce the strongest Year One foundation while meeting the requirements of this RFR and Attachment A.

The Contractor shall work with AGE throughout implementation to refine priorities and activities based on workforce feedback, evaluation findings, emerging needs, Contractor performance, program priorities, and available funding.

C. Fiscal Terms:

Commonwealth Tax Exemption

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

Prompt Payment Discount Form

Pursuant to the Prompt Payment Discount terms set forth in the RFR Required Specifications for Contracts and on the Prompt Payment Discount Form itself, all Bidders must execute this form. After entering the "Bidder Name" and "Date of Offer for Prompt/Early Payment Discount," the Bidder must identify the prompt payment discount(s) terms by indicating the "Percentage Discount off of the Proposed Pricing" and the "Turn-around-time for Payments." In the event of a hardship that prevents the Bidder from offering a prompt payment discount, the Bidder must document this fact and provide supporting information. If awarded a contract, the final negotiated prompt payment discounts should be reflected on the Commonwealth Standard Contract Form.

Bills are payable in accordance with CTR's bill payment policy.

9. Small Business Purchasing Program

The Massachusetts Small Business Purchasing Program (SBPP) does not apply to this procurement. However, AGE encourages small businesses and SBPP-enrolled vendors to apply, and AGE may take this into account during its evaluation.

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Supplier Diversity Program (SDP) Plan

Program Background. Pursuant to Executive Order 599, the Commonwealth's Supplier Diversity Program (SDP) promotes business-to-business relationships between awarded vendors and diverse businesses and non-profit organizations ("SDP Partners") certified or recognized 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 partner with one or more SDO-certified or recognized diverse business(es) or non-profit organization(s). This SDP Commitment must be expressed as a percentage of contract sales resulting from this solicitation that will be spent with the SDP Partner(s). The minimum acceptable SDP Commitment is 1%. Bidders will be awarded additional evaluation points for higher SDP Commitments.

After the 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.

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.

It is the responsibility of the Vendor to ensure they meet their SDP Commitment, and the SDO assumes no responsibility for any Vendor's failure to meet its SDP Commitment

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)
- Veteran Non-Profit Organization (V/NPO)
- Service-Disabled Veteran-Owned Business Enterprise (SDVOBE)
- Disability-Owned Business Enterprise (DOBE)
- Lesbian, Gay, Bisexual, and Transgender Business Enterprise (LGBTBE)

Eligible Types of Business-to-Business Relationships. Bidders and Vendors may engage SDP Partners as follows:

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- **Subcontracting:** Defined as a partnership in which the SDP partner is involved in the provision of products and/or services to the Commonwealth. Such relationships typically, but not always, involve a formal written agreement between the SDP partner and the vendor.
- **Ancillary Products and Services:** In most cases, this type of partnership is related to the prime vendor's general business or operational needs and not directly related to the contract with the Commonwealth. Office supplies, business cards, and promotional items are common examples. Both recurring and one-time expenses qualify.

Other types of business-to-business relationships are not acceptable under this contract. If subcontracting is proposed, it must meet all the subcontracting provisions (if any) listed in this RFR.

Program Flexibility

- 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 Vendor continues to meet its SDP Commitment.

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. An SDP Partner is always another business; it may not be your own company, an affiliate or a subsidiary. Likewise, Vendors certified by the SDO or another recognized certification organization may not list their own organization (or their own subsidiary or affiliate) as an SDP partner and may not meet their SDP Commitment by spending funds internally or with their own subsidiaries or affiliates.

Bidders may propose SDP Partners that are:

- **Certified or recognized by the SDO.** Such partners appear in the [SDO Directory of Certified Businesses](#) or in the [SBA Small Business Search](#) directory. Note: when using the SBA directory, the only SBA certifications recognized by the SDO are Veteran Owned Small Business (VOSB) and Service-Disabled Veteran Owned Small Business (SDVOSB).
- **Not yet certified or recognized by the SDO.** While SDP Partners that are not certified or recognized by the SDO may be listed on the SDP Form, it is the responsibility of the Bidder to ensure that their proposed SDP Partners obtain such certification or recognition by the SDO. There is no guarantee that a proposed SDP Partner will be certified. <https://nmsdc.org/mbes/mbe-certification/> While Bidders may list such proposed SDP Partners on their SDP Plans, spending with such partners will not contribute to meeting the Vendor's SDP Commitment unless they apply for and are granted SDO supplier diversity certification or recognition prior to the end of the fiscal year. If proposed SDP Partners do not receive SDO

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supplier diversity certification or recognition, the Vendor must find alternative SDP Partners to meet the SDP Commitment.

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 and/or collaborating with diverse businesses. Such initiatives may include but not be limited to:

- Providing a mentor in a mentor-protégé relationship where employees offer diverse businesses training and/or guidance in managing their business affairs
- Providing technical and financial assistance to diverse businesses
- Voluntary assistance programs, where employees are loaned to diverse businesses to help with operations

Workforce diversity initiatives **will not** be considered in the evaluation.

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 Form.

SDP Spending Reports and Compliance. After contract award, Vendors must submit reports at least annually to demonstrate compliance with the agreed-upon SDP Commitment. Vendors 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 Small Business Search](#) (VOSB or SDVOSB only) directory shall be counted toward a Vendor's compliance with their SDP Commitment. Spending with SDP Partners that do not appear in these directories shall not be counted toward meeting a Vendor's SDP Commitment.

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 Vendor.

Program Resources and Assistance. Vendors seeking assistance in the development of their SDP Plans or identification of potential SDP Partners should visit the SDP webpage, www.mass.gov/sdp, or contact the SDP Help Desk at sdp@mass.gov.

10. Environmentally Preferable Products

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Products and services purchased by state agencies must be in compliance with [Executive Order 515](#), issued October 27, 2009. Under this Executive Order, Executive Departments are required to reduce their impact on the environment and enhance public health by procuring environmentally preferable products and services (EPPs) whenever such products and services perform to satisfactory standards and represent best value, consistent with 801 CMR 21.00. In line with this directive, all Contracts, whether departmental or statewide, must comply with the specifications and guidelines established by OSD and the EPP Program. EPPs are products and services that help to conserve natural resources, reduce waste, protect public health and the environment, and promote the use of clean technologies, recycled materials, and less toxic products. Bid responses must identify how a contractor meets these goals.

11. Response Requirements and Evaluation Criteria

Contractors must submit responses that meet all the submission requirements of the RFR. Only responsive proposals that meet the submission requirements will be evaluated, and ranked by the evaluation team according to the evaluation criteria. Additional information may be requested for evaluation purposes.

A. PROGRAMMATIC RESPONSE SUBMISSION REQUIREMENTS

All responses for the subsections below will constitute the Bidder's Programmatic Response.

For each applicable Programmatic Response requirement, the Bidder must specify whether services will be performed internally or through a Material Subcontractor. If a Material Subcontractor will be used, the Bidder shall describe the respective roles, rationale, selection process, identity of any selected or proposed subcontractor, and the processes that will be used to monitor and evaluate performance.

Instructions for Submitting the Programmatic Response

The Programmatic Response must demonstrate how the Bidder intends to perform the Contractor responsibilities specified in Attachment A. AGE seeks to determine whether the Bidder has the organizational capabilities, protocols, staffing, and implementation approach necessary to meet the Contract requirements.

Responses must be organized in the order requested, identified by section and subsection number, and clearly labeled. Bidders may cross-reference information that is responsive to more than one section rather than unnecessarily repeating the same content.

1. Organizational Overview (not to exceed 1 page)

The Bidder shall provide its legal and trade names; ownership status; principal address, email, telephone number, and website; Board of Directors, if any; type and jurisdiction of legal entity; and an organizational chart showing key officers, reporting relationships, relevant subsidiaries, and proposed subcontractors.

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2. Conflict of Interests (not to exceed 1 page)

The Bidder shall identify financial, legal, contractual, or other business interests of the Bidder and any Material Subcontractor, affiliate, partner, parent, subsidiary, or related organization that may affect performance under the Contract. Where such interests exist or appear to exist, the Bidder shall describe how the potential or actual conflict will be avoided, mitigated, or remedied. The Bidder shall also submit the signed AGE-Required Bidder Certification Form and any additional information requested by AGE.

3. References

The Bidder shall provide at least one customer reference from an entity with which the Bidder has had business experience within the last ten years, preferably involving services similar to those requested in this RFR, using the Business Reference Form. AGE may contact these references and other relevant individuals or organizations.

4. Background and Experience (not to exceed 3 pages)

The Bidder shall describe relevant organizational experience and demonstrate how it meets the minimum and preferred qualifications in Section 1.3. The response should emphasize experience most relevant to workforce development, de-escalation and safety, resiliency, interdisciplinary collaboration, research and evaluation, statewide implementation, and comparable human-service populations.

5. Proposed Year One Approach (not to exceed 6 pages)

The Bidder shall propose a Year One approach for establishing the workforce enhancement initiative. AGE is intentionally allowing flexibility in program design and seeks Bidders' recommendations regarding the most effective mix and sequencing of activities.

The Year One proposal shall include:

- a. The Bidder's understanding of AGE's workforce needs, the APS network's workforce needs, and the priorities the Bidder recommends addressing first;
- b. The proposed training, resiliency, worker-safety, technical-assistance, and reinforcement activities, including the rationale for the proposed approach;
- c. A proposed approach to interdisciplinary and public-safety collaboration, including how relationships and shared practice would be developed and sustained;
- d. The proposed research and evaluation activities needed to establish a baseline, measure initial outcomes, and inform program improvement;
- e. Key Year One deliverables, milestones, implementation sequence, and anticipated outcomes;

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- f. How AGE, APS agencies, supervisors, staff, and other stakeholders would be engaged in program development and refinement; and
- g. Which elements established in Year One would create the foundation for future growth.

The Bidder may propose additional activities or innovations that it believes would materially advance workforce safety, competency, wellbeing, collaboration, retention, or sustainability.

6. Growth, Scalability and Collaboration Plan (not to exceed 4 pages)

The Bidder shall describe how its proposed Year One model could grow during Year Two, Year Three, and beyond. The response should present a practical concept rather than a fixed commitment and should identify how AGE could expand successful components based on results, priorities, and available funding.

The response shall address:

- a. How services could deepen or expand within APS, including advanced training, additional reinforcement, supervisor development, collaboration, research, or digital learning;
- b. How the model could be adapted for additional AGE-designated workforces such as Home Care staff, outreach workers, case managers, Aging Service Access Points (ASAP) staff, AGE employees, or other provider networks;
- c. How the interdisciplinary collaboration network would grow as new workforce populations are added, including potential regional or statewide partnerships;
- d. What staffing, infrastructure, technology, subject-matter expertise, and project-management capacity would be needed on a larger scale;
- e. Major cost drivers, efficiencies, and decision points associated with growth; and
- f. How the Bidder would use Year One and subsequent evaluation findings to recommend whether, when, and how expansion should occur.

7. Research, Evaluation and Continuous Improvement (not to exceed 3 pages)

The Bidder shall describe a practical approach to evaluating the initiative and using findings to improve it. AGE is interested in meaningful measures of workforce experience and program impact rather than evaluation for its own sake. The response should address baseline and follow-up measurement, appropriate quantitative and qualitative methods, training outcomes, workforce confidence and preparedness, perceived safety, wellbeing, collaboration, retention-related factors where data are available, and how findings will be translated into recommendations for AGE.

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8. Staffing, Technical Assistance and Project Management (not to exceed 4 pages)

The Bidder shall describe the team, management approach, and technical-assistance structure proposed for the work. The response shall identify Key Personnel and relevant expertise; explain how statewide services and regular AGE communication will be maintained; describe technical assistance and issue resolution; address management of subcontractors or subject matter experts, if applicable; and provide a high-level Year One implementation schedule. The Bidder should also explain how staffing and management capacity could expand as the initiative grows.

B. COST RESPONSE

1. Cost Proposal

AGE intends to implement this initiative through a phased model that begins with a focused Year One foundation and may expand over time.

AGE anticipates that Year One expenditures should generally remain below \$200,000. Bidders shall submit a detailed Year One budget tied to their proposed Year One approach and deliverables. AGE is not prescribing a required allocation among training, collaboration (i.e., stakeholder engagement and meetings with AGE), evaluation, technical assistance, or other allowable program components; Bidders should propose the allocation they believe provides the best value and strongest foundation.

Bidders shall also submit a conceptual growth budget for Year Two and Year Three showing how the initiative could expand toward an annual level of up to \$550,000, including the services, capacity, populations, or infrastructure that additional investment would support.

The Bidder shall identify major assumptions, cost drivers, anticipated efficiencies, and optional expansion elements. Beginning in Year Three or thereafter, AGE may consider growth beyond \$550,000 annually if additional workforce populations, programs, provider networks, or initiatives are added and sufficient funding and approvals are available.

Future-year concepts are requested for planning and evaluation purposes only and do not guarantee any level of future funding. AGE may increase, decrease, defer, or modify scope and funding based on need, performance, priorities, available funding, and applicable approvals.

The Bidder must complete Attachment B: Cost Proposal and may include a brief Cost Narrative explaining assumptions and the relationship between proposed investment and program growth.

C. BUSINESS RESPONSE SUBMISSION REQUIREMENTS

The Bidder shall meet all standards and comply with all Business Response submission requirements in this section.

1. Submission of Forms with the Business Response

Commented [JS1]: Suggested location for cost response

Commented [JS2]: Suggest move to the bid requirements (following or part of the programmatic response requirements)

Commented [FS3]: Hi [Cunningham, Bree \(FL1\)](#), Julian had a question about collaboration cost.

is collaboration costs meetings with AGE, or stakeholder engagement, or something else?

Commented [CB4R3]: [Sullivan, Francis P \(FL1\)](#) stakeholder engagement and meetings with AGE

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The forms described below must be completed by the Bidder and signed and submitted with the Business Response. Referenced Commonwealth forms may be downloaded from COMMBUYS as applicable.

- AGE-Required Bidder Certification Form;
- Contractor Authorized Signatory Listing for Corporations or Sole Proprietors, as applicable;
- Supplier Diversity Program (SDP) Plan Forms for Goods and Services;
- Prompt Payment Discount (PPD) Form; and
- Business Reference Form.

The following documents are included for informational purposes or completion upon award, as applicable: Commonwealth of Massachusetts Standard Contract Form; Standard Contract Form Instructions and Contractor Certifications; Commonwealth Terms and Conditions; and Massachusetts Substitute W-9 form.

2. Conflict of Interest

As part of its Business Response, the Bidder, on its own behalf and for any partner or subcontractor, must acknowledge applicable governmental ethics requirements and disclose any potential or actual conflict of interest. If no conflict exists, the Bidder shall so state. Where a relationship or interest exists or appears to exist, the Bidder shall describe how the conflict will be avoided, mitigated, or remedied.

3. Contract Terms

As part of its Business Response, the Bidder must acknowledge that the terms and conditions found in this RFR will apply to any Contract, Statement of Work, or other agreement resulting from this RFR.

Bidders may not condition their Response to this RFR or execution of a Contract with AGE upon AGE's execution of a Bidder contract form or require that other Bidder terms and conditions automatically apply. Bidders must specify any proposed additional contract terms and conditions as part of the Business Response for evaluation. It is expected that Bidders will fully review all required Contract forms, including legal review where appropriate, prior to bid submission, as Commonwealth standard terms are not negotiable.

D. Evaluation Committee

An Evaluation Committee ("Committee") appointed by AGE will evaluate Responses submitted pursuant to this RFR.

1. Response Review Process

All Responses submitted pursuant to this RFR will be reviewed by AGE to determine compliance with the response submission instructions. For Responses that comply with the response submission instructions,

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AGE will review the Business Response. For Responses that comply with the Business Response requirements, the Evaluation Committee will evaluate the Programmatic Response, Cost Response, and Supplier Diversity Program Plan, as applicable.

One or more Bidders may be invited to provide additional information regarding specific provisions of the Response through an oral presentation or additional written material.

2. Evaluation Committee's Evaluation of Programmatic Response

The Evaluation Committee will evaluate the Programmatic Response for demonstrated understanding of AGE's needs; quality and feasibility of the proposed Year One approach; relevant experience and staffing; strength of the collaboration, training, resiliency, and evaluation concepts; scalability and adaptability; measurable outcomes; innovation; and overall responsiveness and value to AGE.

Each Cost Proposal will be reviewed for reasonableness, competitiveness, value to AGE, alignment with the proposed Year One approach, and the credibility and flexibility of the Bidder's growth concept. Cost will be one factor, but not the sole factor, in the Committee's consideration.

3. Response Rating

The Evaluation Committee will evaluate Responses in accordance with the criteria above; assign ratings of Excellent, Very Good, Good, Fair, Poor, or Non-Responsive to applicable Programmatic Response elements; review cost response; assign an overall rating; compare Responses; and rank Responses in order of preference. The Evaluation Committee will also review the cost responses provided by the Bidders. Cost is one factor, but not the sole factor.

4. Oral Presentations

AGE, in its sole discretion, will determine which Bidders, if any, will be asked to make an oral presentation. Oral presentations may clarify details or further inform the Evaluation Committee but may not materially change or correct the original Response.

5. Best Value Selection

AGE will select the Response that, in its sole discretion, demonstrates the best value overall to AGE and the Commonwealth.

6. Recommendation for Award

After completing evaluation, comparison, ranking, and any oral presentations, the Evaluation Committee may recommend one or more Bidders for Contract negotiations. The Secretary of AGE or designee will consider the Committee's recommendation and the best interests of the Commonwealth.

7. Negotiation

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AGE, in its sole discretion, may negotiate with a selected Bidder prior to executing a Contract. A recommendation for award will be contingent upon successful negotiation of Contract terms, including budgets. If AGE does not reach agreement with a selected Bidder, AGE may negotiate with another Bidder, make another selection, or reopen the RFR.

8. Contract Award

The award of a Contract under this RFR is subject to sufficient appropriation, availability of state and federal funds, and all necessary approvals. A selected Bidder must execute the Massachusetts Standard Contract Form and applicable Contract documents, including Attachment A, and comply with the Commonwealth Terms and Conditions without modification.

9. Non-Qualifying Responses

A Bidder's Response may be rejected if the Bidder fails to meet qualifications or RFR requirements; fails to follow submission instructions; receives a Poor or Non-Responsive rating in one or more material Programmatic Response sections; has a disqualifying conflict of interest; fails to participate in a requested oral presentation; receives materially unfavorable reference or presentation results; rejects mandatory RFR provisions; or fails to reach agreement with AGE on Contract terms.

The Evaluation Committee may determine that certain noncompliance is immaterial or insubstantial and may seek clarification, allow minor corrections, apply appropriate evaluation consequences, or use a combination of these remedies.

12. Instructions for Submission of Responses:

Only electronic quotes submitted via COMMBUYS will be accepted in response to this RFR. Responses must be sent via the "Create Quote" functionality in COMMBUYS. For instructions concerning how to submit a Quote, please see Appendix B.

Any submission that 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 may be corrected. In these cases, the evaluation team may allow the vendor to make minor corrections to the submission.

Response Format Requirements

1. Each document submitted must be clearly labeled and must state: (a) the title of the RFR; (b) the Bidder's legal name; and (c) the title of the document.
2. Each document that is not a form must contain a table of contents, and each section of the document must reference the corresponding RFR section number and heading. Each attachment of the response must include the attachment number and heading (for example, "Attachment B: Cost Proposal").

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3. The Bidder must respond to each item in the order in which it appears in the RFR. The Bidder's response to each section must include headings and numbering that match the corresponding section of the RFR.

4. Electronic media submissions will not be accepted other than the required electronic files submitted via COMMBUYS. Facsimile and emailed responses will not be accepted.

5. The Bidder must adhere to the section-specific page limits identified in Section 12. There is no separate aggregate 30-page limit unless otherwise expressly stated. Attachments and supporting documentation specifically permitted or required by this RFR are not counted in calculating the applicable page limits. Narrative submissions must be single-spaced, use 12-point or larger font except charts and tables which may use 10-point or larger font, include page numbers, and use margins of at least 1 inch.

6. The Bidder must include a Cover Letter that clearly states the Bidder's name, principal address, and the name, address, email, and telephone number of the Bidder's contact person. The Cover Letter must: (a) identify the RFR; (b) state that the Bidder accepts the terms of this RFR and Attachment A, including mandatory forms, without substantive change; (c) state that the Bidder's Response will remain in effect until a Contract resulting from this RFR is executed; (d) identify the individual who should be contacted regarding the Response; and (e) be signed by an individual authorized to bind the Bidder and execute a Contract on behalf of the Bidder.

Deadline for Submission

The Bidder must submit its electronic Response (Business, Programmatic, and Cost) via COMMBUYS no later than the date and time specified in Section 14, Estimated Procurement Calendar.

Each Response will be subject to the review and evaluation process described in Section 12 and must meet the criteria established by this RFR and any amendment hereto. AGE will make every effort to timely evaluate all responses received by the submission date and will notify Bidders of their status for the anticipated Contract start date listed in Attachment A.

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13. Estimated Procurement Calendar

Procurement Activity	Date	Time
Announcement of Intent to Procure	September 1, 2026	
Bid Release Date	October 9, 2026	5:00pm
Deadline for Submission of Questions through COMMBUYS "Bid Q&A"	October 16, 2026	5:00pm
Official Answers for Bid Q&A published (Estimated)	October 30, 2026	5:00pm
Deadline for Quotes/Bid Responses ("Bid Opening Date/Time" in COMMBUYS)	November 13, 2026	5:00pm
Oral Presentations for Selected Bidder(s) at AGE discretion		
Notification of Apparent Successful Bidder(s) (Estimated)	December 3, 2026	
Estimated Contract Start Date	January 4, 2027	

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

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a. Online Questions (Bid Q&A)

Written Questions must be entered using the “Bid Q&A” tab for the Bid in COMMBUYS no later than the “Online Questions Due” date and time indicated in the Estimated Procurement Calendar (above). The issuing department reserves the right to not respond to questions submitted after this date. It is the Bidder’s responsibility to verify receipt of questions.

It is the responsibility of the prospective Bidder and awarded Contractor to maintain an active registration in COMMBUYS and to keep current the email address of the Bidder’s contact person and prospective contract manager, if awarded a contract, and to monitor that email inbox for communications from the Purchasing Department, including requests for clarification. The Purchasing Department and the Commonwealth assume no responsibility if a prospective Bidder’s/awarded Contractor’s designated email address is not current, or if technical problems, including those with the prospective Bidder’s/awarded Contractor’s computer, network, or internet service provider (ISP) cause email communications sent to/from the prospective Bidder/Awarded contractor and the Purchasing Department to be lost or rejected by any means including email or spam filtering.

Written Responses to Questions will be released on or about the “Responses to Questions Posted Online” date indicated in the Estimated Procurement Calendar (above).

(Written questions and responses will be posted on the Bid Q&A Tab for this Bid in COMMBUYS.)

b. Bid Amendment Deadline

The Purchasing Department reserves the right to make amendments to the Bid after initial publication. It is each Bidder’s responsibility to check COMMBUYS for amendments, addenda, or modifications to this Bid, and any Bid Q&A records related to this Bid. The Purchasing Department and the Commonwealth accept 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.

c. Quotes (Bid Responses) Deadline (Bid Opening Date/Time)

See the Quotes (Bid Responses) Deadline (Bid Opening) Date and Time indicated in the Estimated Procurement Calendar (above).

d. 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.

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14. Required Forms

Responses to this RFR must contain the following documents

Check if applicable ("X")	Form/Document	Notes/Instructions (If any)
X	Commonwealth Terms and Conditions	
X	Request for Taxpayer Identification Number & Certification (Massachusetts Substitute W-9 Form)	
X	Standard Contract Form and Instructions	
X	Contractor Authorized Signatory Listing	
X	Authorization for Electronic Funds Transfer	Electronic Submission
☐	Additional Environmentally Preferable Products/Practices	Electronic Submission
☒	Supplier Diversity Plan Form (SDP Plan Commitment)	Electronic Submission
X	Prompt Payment Discount Form	Electronic Submission
X	Business Reference Form	Electronic Submission
	AGE-Required Bidder Certification Form	Electronic Submission

The above attachments are available as part of the Bid record on [COMMBUYS \(WWW.COMMBUYS.COM\)](http://WWW.COMMBUYS.COM).

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15. RFR Attachments

Appendix A: Required Specifications

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

Appendix B: Electronic Quote Submission Instructions

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

Attachment A to the RFR: Scope of Service

Attachment B: Cost Proposal

16. Acceptable Forms of Signature

Effective June 15, 2021, for all 1) CTR forms, including the Standard Contract Form, W-9s, Electronic Funds Transfer (EFT) forms, ISAs, and other CTR-issued documents and forms, or 2) documents related to state finance and within the statutory area of authority or control of CTR (i.e. contracts, payrolls, and related supporting documentation), CTR will accept signatures executed by an authorized signatory in any of the following ways: 1. Traditional “wet signature” (ink on paper); 2. Electronic signature that is either: a. Hand drawn using a mouse or finger if working from a touch screen device; or Page 2 b. An uploaded picture of the signatory’s hand drawn signature 3. Electronic signatures affixed using a digital tool such as Adobe Sign or DocuSign. If using an electronic signature, the signature must be visible, include the signatory’s name and title, and must be accompanied by a signature date. Please be advised that typed text of a name not generated by a digital tool such as Adobe Sign or DocuSign, even in computer-generated cursive script, or an electronic symbol, are not acceptable forms of electronic signature.

18. Additional Terms

18.1 Issuing Office

Executive Office of Aging & Independence
One Ashburton Place, 10th Floor
Boston, MA 02108

18.2 Requirements of 801 CMR 21.00 and General Requirements

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. Unless otherwise specified in this RFR, all communications, responses, and documentation must be in English, all measurements must be provided in feet, inches,

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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.

Any additional statutory, regulatory, grant, or funding-source requirements applicable to the resulting Contract will be identified by AGE in the solicitation document or Contract, as applicable.

18.3 Commonwealth of Massachusetts Standard Contract Form and Commonwealth Terms and Conditions

Any Bidder selected as the Contractor shall agree to and abide by the terms of the Commonwealth of Massachusetts Standard Contract Form and Commonwealth Terms and Conditions. AGE is prohibited from amending these documents or agreeing to any change in the language. Any Bidder suggestion or requirement altering these documents will be disregarded.

The order of precedence of Contract documents shall be: (1) Commonwealth Terms and Conditions; (2) Commonwealth Standard Contract Form; (3) this RFR and its Attachments; (4) the Contract and any other terms negotiated by the parties; and (5) the selected Bidder's Response. If provisions conflict, this order of precedence shall apply.

18.4 COMMBUYS

COMMBUYS is the official source of information for this procurement. Bidders are solely responsible for obtaining all information distributed for this procurement through COMMBUYS, including amendments, addenda, modifications, and Q&A records. Bidders must register and maintain an active COMMBUYS Seller account to submit a Response.

Questions specific to COMMBUYS should be directed to the OSD Help Desk at OSDHelpDesk@mass.gov or the applicable telephone support numbers published by OSD.

18.5 Bidder Communications

A. RFR Contact

Bidders are prohibited from communicating directly with any AGE employee regarding this RFR except as specified herein. The designated RFR Contact is: Stacey Sullivan, Director of Fiscal Management, Executive Office of Aging & Independence, One Ashburton Place, 10th Floor, Boston, MA 02108; Stacey.Sullivan2@mass.gov.

B. Electronic Communication/Update of Bidder and Contractor Contact Information

It is the responsibility of the prospective Bidder and, after award, the Contractor to keep current the email address of the Bidder's contact person and prospective Contract Manager and to monitor that email inbox for communications from AGE and the Evaluation Committee.

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C. Reasonable Accommodation

Bidders with disabilities or hardships seeking reasonable accommodation must communicate such requests in writing to the RFR Contact Person. Requests will be addressed on a case-by-case basis.

D. RFR Copies

Bidders should download all RFR documents from COMMBUYS. Paper copies will not be supplied except as part of an approved reasonable accommodation or as otherwise directed by AGE.

18.6 Amendment or Withdrawal of RFR

If AGE decides to amend or clarify any part of this RFR, any written amendment will be posted on COMMBUYS. AGE reserves the right to amend the RFR at any time prior to the deadline for submission of responses and to terminate this procurement in whole or in part at any time. In the event this RFR contains errors, AGE may correct such errors at any time prior to contract execution. Corrections to this RFR will be posted on COMMBUYS.

18.7 Costs

The Commonwealth will not be responsible for any costs or expenses incurred by Bidders responding to this RFR.

18.8 Closing Date

The response due date and time are specified in the timetable in **Section 14**. Individual requests for extension of the time for submitting responses will be denied. All responses become the property of the Commonwealth of Massachusetts.

18.9 Acceptance of Response Content

The entire contents of the Bidder's response shall be binding on the Bidder. The specifications and contents of a successful Bidder's response may be incorporated into the Contract.

18.10 Alterations

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

18.11 Public Records

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All Responses and related documents submitted in response to this RFR are public records subject to applicable Massachusetts Public Records Law. Any inconsistent confidentiality statements in a Response will be disregarded to the extent required by law.

18.12 Response Duration

The Bidder's Response shall remain in effect for at least 90 days from the date of Response submission.

18.13 Program Modification

A. AGE shall have the option, at its sole discretion and subject to applicable requirements, to modify, increase, reduce, or terminate activities related to this workforce enhancement initiative whenever AGE determines that program goals, workforce needs, priorities, funding, or operating conditions require such changes.

B. AGE reserves the right to amend the Contract to implement state or federal statutory or regulatory requirements, judicial orders, settlement agreements, funding requirements, or other initiatives or changes affecting AGE or the Contract.

C. AGE may amend the Contract to support updated or expanded workforce development requirements, including expansion to additional AGE-designated workforce populations, programs, contracted provider networks, training initiatives, research and evaluation activities, digital learning infrastructure, technical assistance, or interagency collaboration activities consistent with the purposes of this procurement.

D. The parties shall negotiate in good faith to implement authorized modifications. The Contractor may request an opportunity to negotiate amendments related to new or modified initiatives; AGE may grant such request in its sole discretion. Any changes are subject to appropriate approvals.

18.14 Incorporation of RFR

This RFR and all Response documents by the selected Bidder may, at AGE's discretion, be incorporated by reference into the resulting Contract.

18.15 Debriefing

Upon notification of AGE's award decision, a non-selected Bidder may make a written request for debriefing within 14 calendar days from the date the notification is posted to COMMBUYS or sent to the Bidder, whichever comes first. Debriefing meetings are held at AGE's discretion and may address any or all of the following at AGE's discretion: evaluation results, weaknesses, and suggestions for future procurements.

18.16 Authorizations and Appropriations

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Any Contract awarded under this RFR is subject to all necessary federal and state approvals, as applicable, and to appropriation and availability of sufficient funding, as determined by AGE.

18.17 Subcontracting

Prior approval of AGE is required for any Material Subcontractor's services under the Contract. Contractors are responsible for satisfactory performance and adequate oversight of their subcontractors.

18.18 Byrd Anti-Lobbying Amendment

If the Contractor receives \$100,000 or more in federal funds through the Contract and the Byrd Anti-Lobbying Amendment is applicable, by signing the Contract the Contractor certified that it has not and will not use federal appropriated funds to pay any person or organization for prohibited lobbying activities in connections with obtaining a federal contract, grant, or other covered award. The Contractor shall disclose lobbying with non-federal funds when disclosure is required by applicable law.

18.19 Privacy and Security

The selected Bidder shall comply with all state and federal laws and regulations applicable to the privacy and security of personal and other confidential information, including applicable HIPAA, Massachusetts privacy and security requirements, and any AGE, EOHHS, or EOTSS requirements incorporated into the Contract. AGE reserves the right to add requirements necessary to comply with changes in applicable law or contractual obligations.

18.20 Prompt Payment Discounts (PPD)

All Bidders responding to this procurement must comply with applicable Commonwealth Prompt Payment Discount requirements unless an approved exemption applies. Bidders must submit the required PPD form. AGE or the Evaluation Committee, as applicable, will review, negotiate, or reject PPD offerings in the best interest of the Commonwealth.

18.21 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 Vendors and the Commonwealth because it ensures fast, safe and reliable payment directly to vendors and saves both parties the cost of processing checks. Vendors are able to track and verify payments made electronically through the Comptroller's Vendor Web system.

The selected Bidder, upon notification of contract award, will be required to enroll in EFT as a contract requirement by completing and submitting the Electronic Funds Transfer (EFT) Authorization

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Agreement, provided by EOHHS at that time, 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 Electronic Funds Transfer (EFT) Authorization Agreement contains banking information, this form, and all information contained on this form, shall not be considered a public record and shall not be subject to public disclosure through a public records request. The requirement to use EFT may be waived by the PMT 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 PMT will consider such requests on a case-by-case basis and communicate the findings with the Bidder.

18.22 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 because use of the coat of arms and Great Seal for advertising or commercial purposes is prohibited by law.

18.23 Publicity

Any Contractor awarded a contract under this Bid is prohibited from selling or distributing any information collected or derived from the Contract, including lists of participating Eligible Entities, Commonwealth employee names, telephone numbers, addresses, or other information except as specifically authorized by the SSST.