

## PLEASE READ BEFORE USING

This template MGL c. 30B compliant request for proposals (RFP) for procurement of turn-key electric school bus service is provided as a resource to municipalities and school districts in Massachusetts.<sup>1</sup> This document is meant to serve as a starting point for municipalities and school districts to develop their own RFPs. This should not be used as a final or complete document and municipalities and school districts should do their own due diligence in the development of an RFP. It is strongly recommended that municipalities and school districts review the accompanying Guidance Document before using this template RFP. **Please note that to enter into a contract for a lease agreement longer than three years, approval will need to be given by the governing body that has authority either in advance of the procurement or prior to the award of a contract.**

**This request for proposals is intended to serve solely as a guidance resource and it should not be applied by municipalities and school districts as a final document.**

**For questions regarding this document, please contact Alison Felix, Principal Planner, Metropolitan Area Planning Council (MAPC) at (617)-451-2770.**

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<sup>1</sup> Please note that this RFP does not include the installation of charging infrastructure.

[MUNICIPAL OR SCHOOL DISTRICT SEAL GOES HERE]

[NAME OF MUNICIPALITY OR SCHOOL DISTRICT]

[NAME OF SOLICITATION]

**REQUESTS FOR PROPOSALS DUE:**  
**[Day of the Week, Month DD, YYYY@12:00 A.M.]**

Electronic submissions via CommBUYS Market Center and email lockbox \_\_\_\_\_

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## Legal Notice of Invitation for Bids for Procurement of a Turn-Key Electric School Bus Service

The [Name of Municipality or School District], pursuant to M.G.L. c. 30B, is seeking sealed proposals [length of term, quantity, and items being procured]. Proposals will be evaluated against quality requirements and evaluation criteria set out in the RFP, and by considering the prices offered. The Proposer identified as being responsible and responsive and offering the most advantageous proposal against these factors will be awarded a single contract.

The term of any contract resulting from this RFP will be effective as of the date of execution. In no event, shall the termination or expiration of a contract occur during school year. [Name of Municipality or School District] reserves the right to cancel all or part of this solicitation and to reject in whole or part any and all proposals. A bid deposit is required in the amount of \$\_\_\_\_\_.

Boston Herald Published:

CommBUYS Published:

Goods & Services Bulletin Published (if contract value exceeds \$100,000):

\_\_\_\_\_ Website Posted:

## General Information

This is a Request for Proposals (RFP) issued by [Name of Municipality or School District]

Proposal Due Date:

Proposal Subject:

RFP Number:

RFP Availability:

The RFP may be obtained by contacting \_\_\_\_\_, by email at \_\_\_\_\_ or after \_\_\_\_\_, 202X at \_\_ (am or pm)

Proposers Conference and Site Visit A mandatory Proposers Conference and Site Visit will be held \_\_\_\_\_, 202X at \_\_\_\_\_ (am or pm)  
(in person, Zoom or hybrid)

Questions Questions must be submitted by \_\_\_\_\_, (am or pm)  
to: \_\_\_\_\_

Responses \_\_\_\_\_ will provide all Proposers responses to questions by both email and through CommBUYS by \_\_\_\_\_ (am or pm)

Return RFPs to Digitally via CommBUYS and through the \_\_\_\_\_ email lockbox  
\_\_\_\_\_

Please read this entire document before submitting questions.

## General Bid Submission Requirements

Competitive proposals for the goods and services specified below will be received by \_\_\_\_\_ electronically via the CommBUYS Procurement Market Center **AND** the designated email lockbox until the time and date cited. Faxed or emailed submissions sent to the wrong email address will not be accepted. Proposals must be submitted prior to the exact time and date indicated above according to the CommBUYS Procurement Market Center and the receipt time listed for the email. Late proposals will not be considered. Submission procedures are subject to change via RFP Addenda. Any questions or concerns about the content and procedures set forth of this RFP, including relating to whether this RFP and related process complies with applicable laws, should be raised with [Name of Municipality or School District] as soon as possible and in any event prior to submission of a response.

Proposers must submit all materials requested in accordance with the requirements of this RFP and in the order and format requested to be considered complete and responsive. Only those Proposers whose proposals are complete and meet Minimum Quality Requirements will have their proposals reviewed.

Meeting Minimum Quality Requirements does not mean that a Proposer will be selected for the project.<sup>2</sup>

M.G.L. c. 30B § 6(b)(3) requires the separate submission of price. Do **not** make reference to price in the Technical Proposal. Failure to adhere to this requirement will result in disqualification.

Proposals must include the unaltered signed forms provided in this RFP.

The following general requirements and cautions apply to proposal preparation.

- The awarded Proposer must be registered at the time of the proposal submission to do business in Massachusetts either as a domestic entity or a foreign entity doing business in Massachusetts.
- For purposes of this RFP, the Proposer is the vendor who submits a proposal in response to this solicitation and any of its wholly-owned or controlled affiliates that will be the party executing a contract.
- M.G.L. c. 30B § 6(b)(3) requires the separate submission of price. Price Proposals and Technical Proposals must be submitted as separate documents.
- The proposal documents must be submitted with original ink signatures, where indicated, by the person authorized to sign the proposal (blue ink is preferred). [Name of Municipality or School District] will accept electronic signatures in accordance with Massachusetts state law.

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<sup>2</sup> [Name of Municipality or School District] reserves the right to waive or allow for late submission of any listed documents identified herein. However, Proposers must include the Non-Collusion form and the Certificate of Tax Compliance form with their bids. Failure to include either form shall result in immediate bid disqualification.

- Proposals must be signed by a duly authorized officer(s) eligible to sign contract documents for the Proposer. Proof of such authorization must be included.
- Consortiums, joint ventures, or teams submitting proposals will not be considered responsive unless it is established that all contractual responsibility rests solely with one legal entity.
- The proposal must indicate the responsible entity, which must also be the signatory on all documents.
- Proposers should be aware that joint responsibility and liability will attach to any resulting contract and failure of one party in a consortium, joint venture, or team to perform will not relieve the other party or parties of total responsibility for performance.
- All forms must be signed by the same authorized person for the Proposer who will be signing the contract.
- Erasures between the lines, insertions or other modifications to a proposal must be initialed in original ink by the authorized person signing the offer.
- Periods of time, stated as a number of days, shall be calendar days unless otherwise indicated.
- It is the responsibility of all Proposers to examine the entire RFP packet and seek clarification of any item or requirement that may not be clear and to check all responses for accuracy before submitting a proposal. Negligence in preparing an offer confers no right of withdrawal after the proposal due date.
- Accuracy and completeness are essential. Omissions and ambiguous or equivocal statements will be viewed unfavorably and will be weighed as such in the evaluation phase.
- Since all or a portion of the successful RFP response may be incorporated into any ensuing contract, all prospective Proposers are further cautioned not to make claims or statements that cannot be subsequently included in a legally binding agreement.
- In all cases where a Proposer offers a product or service, including, but not limited to warranty, that exceeds any standards or specifications or requirements set out in this RFP, such offers will be considered binding obligations requiring performance by the Proposer.
- [Name of Municipality or School District] does not assume liability for and will not reimburse any costs or expenses incurred by any Proposer (whether or not selected) in developing proposals in response to this RFP.
- Proposals will remain in effect for a period of \_\_\_\_\_ days from the deadline for submission of proposals, until Notice of Award is made, or this RFP is canceled, whichever comes first.

- Proposers must follow the instructions for preparing the Technical proposals and the Price proposals.
- Bid Bond. Each proposal must be accompanied by a Bid Bond issued by a qualified surety company licensed by the Division of Insurance to transact business in the Commonwealth of Massachusetts. The Bid Bond must be five (5) percent of the total contract value. Any proposer who fails to execute a contract after an award will forfeit the Bid Bond as liquidated damages to the [Name of Municipality or School District]. Upon execution of a contract, Bid Bonds will be returned to the unsuccessful Proposers.
- Performance Bond. Each proposal must be accompanied by a Performance Bond issued by a qualified surety company licensed by the Division of Insurance to transact business in the Commonwealth of Massachusetts. The Performance Bond must be one hundred (100) percent of the total contract value. Any proposer who fails to materially perform any contract requirement during the contract period, will have the bond exercised by the [Name of Municipality or School District].

## Decision to Use Request for Proposals

The [Name of Municipality or School District] Chief Procurement Officer has determined in accordance with M.G.L. c. 30B, § 6(a) that the procurement of electric school buses and related services and electrical charging infrastructure is best served by utilizing a quality-based RFP process. Such a process will enable [Name of Municipality or School District] to evaluate key factors such as Proposer qualifications, commitment to service, as well as the availability of a range of suitable products. It is important that [Name of Municipality or School District] has the ability to select the most advantageous proposals based on such factors in addition to cost.

Past performance, withdrawal of proposals due to reckless bidding, cancellation of orders due to poor or unsatisfactory delivery, and substitutions not approved by the Awarding Authority may be cause for non-acceptance of proposals.

## Contract

The awarded Proposer is obligated to enter into the contract provided herein as a Sample Contract. No material changes to the contract are acceptable. Failure to enter into the contract agreement without a material change may be cause for a bid to be disqualified. The contract may be amended as necessary to secure financing.

A sample copy of the [Name of Municipality or School District] contract can be found in Appendix D. Proposers must be willing to sign [Name of Municipality or School District] contract as is. [Name of Municipality or School District] will not accept a Proposer's own terms and conditions. This RFP document, any Addenda issued, all included forms and requirements, and Proposer's proposal will be incorporated by reference into any resulting contract, provided that where conflicts are present, terms, conditions and requirements peculiar to the specifications shall supersede.



All relevant correspondence giving rise to obligations of the parties or clarification of the business relationship defined by the aggregation of RFP related documents will be incorporated by reference into any resulting contract.

The awarded Proposer's proposals, including price proposals, must remain in effect for \_\_\_\_\_ days from the date of the Proposal Due Date. [Name of Municipality or School District] will make all reasonable efforts to award a contract within \_\_\_\_\_ days of the Proposal Due Date. The time for award may be extended for up to an additional thirty days, for a total of \_\_\_\_\_ days, by mutual agreement between [Name of Municipality or School District] and the awarded Proposer.

[Name of Municipality or School District] is under no obligation to proceed with this project and may cancel this RFP at any time without the substitution of another, if such cancellation is deemed in the best interest of the [Name of Municipality or School District]. [Name of Municipality or School District] is not responsible for any costs incurred by Proposers in preparing and submitting their proposals. [Name of Municipality or School District] reserves the right to reject any or all proposals, as well as the right to waive minor informalities in offers received. Furthermore, [Name of Municipality or School District] may issue a new or modified RFP, if doing so is found to be in the best interest of [Name of Municipality or School District].

## Introduction

[Name of Municipality or School District] is seeking a turn-key electric school bus procurement to be entered into under a single contract. This RFP is based on a template that was developed as the result of engagement with an array of industry and municipal stakeholders. No Proposer will be unfairly advantaged.

[Include any introductory material you feel is relevant for your municipality in this section. Potential topics could include: commitment to electrification or climate action, size of current fleet, makeup of current fleet, depot location of current fleet, ownership structure of vehicles, ownership structure of depot, and information about electrical infrastructure at the fleet depot. This information will also be provided in Appendix B. Be sure to reference Appendix B in this intro paragraph. Also indicate that bus route info is provided in Appendix C].

## Scope of Services for Procurement

The [Name of Municipality or School District] is seeking proposals for the [lease term, quantity, and type of all electric school bus bus(es)] as specified in this RFP, including all charging, relevant maintenance services, charging infrastructure, and managed charging. The selected Provider will be required to select, implement, operate, and design the layout of charging stations, with input from [Name of Municipality or School District]; pay all project related upfront costs including but not limited to the vehicles and electric vehicle supply equipment (EVSE), all infrastructure required for the EVSE, and all other project costs; and deliver a robust vehicle charging and charge management strategy that ensures vehicle uptime and guaranteed operating cost. The [Name of Municipality or School District] will continue to manage all aspects of dispatching, driving, and associated administration in-house.

- a) **Equipment.** The equipment shall include [number and type of bus(es)], associated EVSE, related infrastructure, and related electric and communications equipment installed by the Provider to support the operations of the electric buses. The all-electric range of the electric buses(s) should be sufficient to meet the operational needs specified in Appendix C throughout the duration of the agreement, including in below freezing temperatures and as the battery degrades over time. All electric school buses must be constructed to meet or exceed all Federal Motor Vehicle Safety Standards (FMVSS) and the Commonwealth of Massachusetts Regulations specifications in effect at time of manufacture. [Name of Municipality or School District] specifications are attached in Appendix A. All specifications here in are associated with a typical [TYPE A, TYPE C, TYPE D] electric school bus. Proposed Providers are allowed to make alterations/ modifications to these specifications to accommodate electrification, but final specifications will be reviewed and approved by [Name of Municipality or School District]. The buses will be delivered operable with all requested equipment or suitable replacements and registered in Massachusetts.
- b) **Ownership.** The Provider shall own all equipment (e.g., vehicles and EVSE and contract as service (or lease) to [Name Municipality or School District] for its use in pupil transportation activities.
- c) **Agreement Length.** The municipality is seeking a [ten/fifteen] year agreement.
- d) **Charging.** The [Name Municipality or School District] requires that the Provider enable the [NUMBER OF VEHICLES] electric buses to be charged sufficiently for each route. The Provider shall design, engineer, install, commission, monitor, operate, and maintain the EVSE and related equipment, which may be in partnership with a separate EVSE service provider (EVSE Partner), in each case ethically and skillfully, in accordance with prudent industry practices in the state in which the Premises are located, and in compliance with all applicable rules, regulation and local building codes. For the avoidance of doubt, the Provider shall manage commissioning of all EVSE and related equipment at the designated bus depots, schools, or other parking/charging locations. The Provider or EVSE Partner shall secure from the electric utility company all necessary utility services to support the installation and operation of the charging infrastructure and equipment, if required. Provider will not preclude future vendors or [Name of Municipality or School District] from accessing the electrical infrastructure

necessary to install additional charging stations. The Provider or EVSE Partner shall manage, in partnership with [Name of Municipality or School District], the charging of each vehicle on a daily basis, ensuring the charge is sufficient for the vehicle's designated route(s), as outlined in Appendix C. [Name of Municipality or School District] will give the Provider reasonable access to each depot, school, or other parking/charging location for planning, construction, and operations. The cost of charging the buses should be included in the total cost of the proposal. [Providers may include unidirectional and/or bidirectional (i.e., V2G or V2B capable either Level 2 or Level 3) charging options in their submissions and related pricing for each option.]

- e) **Maintenance.** The Provider will be responsible for the cost of inspections and routine maintenance of the electric buses, as well as all significant maintenance costs associated with the electric buses and charging equipment. Subject to the Provider's cost responsibility, the [Name of Municipality or School District's] maintenance staff or outside service providers will perform all vehicle maintenance for the electric buses. For the avoidance of doubt, the cost of all spare parts and labor shall be borne by the Provider and included in the proposed scope of turn-key services. The Provider shall also deliver a manufacturer's warranty or equivalent comprehensive parts and services maintenance contract covering all major vehicle and charging equipment components for the duration of the agreement. The Provider will also include details about how they will ensure vehicle uptime (e.g., require dealer technicians to fix issues on-site within 24 hours).
- f) **Training.** The Provider shall be responsible for the training of [Name of Municipality or School District] essential operations staff, bus maintenance, and leadership staff on various aspects of the relevant equipment and use of the electric buses, charging infrastructure, and related equipment. The scope of this training will be defined in the applicable contract between the [Name of Municipality or School District] and the Provider.
- g) **Data/ Electrification Operations Management.** The [Name of Municipality or School District] requires the Provider to include a robust fleet charge management system and telematics software dashboard, preferably cloud-based, that can be viewed by [Name of Municipality or School District]. [Name of Municipality or School District] shall have access to data associated with the project and may share data with a regional planning organization, grant and incentive providers for reporting purposes, and other third-parties as applicable and agreed under the contract.
- h) **Pricing.** The [Name of Municipality or School District] requires the Provider to bundle the price payable by the [Name of Municipality or School District] to cover both the lease of the electric buses, charging infrastructure, and related equipment, and the provision of related services as described in this Solicitation. The Provider's pricing proposal shall be a firm-fixed annual price contract for the bundle of deliverables provided by a single Provider as outlined in this Solicitation as follows: leasing to [Name of Municipality or School District] electric buses and related infrastructure and equipment; reimbursing [Name of Municipality or School District] for bus maintenance costs; and providing [Name of Municipality or School District] fleet charging services. Provider's pricing proposal shall identify how any applicable grants or incentives associated with vehicles, chargers, construction or other aspects of the

project will be allocated as between Provider and with [Name of Municipality or School District].

- i) **Price Mitigation.** The Provider is expected to utilize all available resources to reduce the cost to the [Name of Municipality or School District] to the maximum extent possible based on applicable incentives and will be responsible for administration of relevant programs. This could include vehicle-to-grid (V2G) or vehicle-to-building (V2B) programs (i.e., Connected Solutions and Clean Peak Standard) and federal, state, and utility incentive programs. The Providers shall disclose to [Name of Municipality or School District] the value generated by participating in all federal, state, and utility incentive programs. Provider shall also address any potential future incentive programs (known and unknown) and how the value associated with such programs will be maximized and allocated.
- j) **Existing Bus Depot and Fleet Information.** The Provider shall base any proposal on the information described in the appendices, including information on the bus specifications (Appendix A), existing bus depot (Appendix B), and anticipate route information (Appendix C).
- k) **Planned Deployment Schedule.** The Provider shall base any proposal on the following deployment schedule. [SAMPLE PROVIDED BELOW].

	2023	2024	2025	2026
Type C	3	2	2	3
Type D	0	2	2	2
<b>Total</b>	<b>3</b>	<b>4</b>	<b>4</b>	<b>5</b>

## Evaluation Criteria

### Minimum Qualifications

1. Proposals will be considered only from vendors who offer equipment that is manufactured by companies that are known to be skilled and have been regularly engaged in the manufacture of equipment of the type, class and size specified herein for a period of at least two (2) years.
2. The equipment provided must meet all relevant federal and state regulations and standards.
3. Vendors of the equipment must certify that it meets key performance characteristics of the vehicles and EVSE solutions including range and V2G capabilities.
4. Vendors of equipment shall warrant that they are the lawful owners or licensors of the technology incorporated in their equipment and fully indemnify and hold harmless [Name of Municipality or School District] of all claims of infringement of Intellectual Property rights made by third parties.
5. Vendors agree that [Name of Municipality or School District] shall have the right to take such steps as it deems necessary to determine the ability of the Proposer to perform its obligations under the contract, and the Proposer shall furnish the [Name of Municipality or School District] all such information and data for this purpose as it may request, including references.

### 1 Evaluation Criteria

Proposals that meet the Minimum Quality Requirements will be evaluated according to the comparative evaluation criteria.

The Technical Proposals will be evaluated in the following categories:

- *Section 1.1 Experience and Qualifications*
- *Section 1.2 Service and Support*

Described below are the characteristics that would make up a *Highly Advantageous*, *Advantageous*, *Not Advantageous*, and *Unacceptable* response in each of those categories.

## 1.1 Experience and Qualifications

“In the Line of Business” refers to the manufacturing, servicing and sales of electric school buses and associated charging infrastructure.

### 1.1.1 Service Provider’s Experience in the Line of Business

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	The Proposer has been in the line of business for five (5) or more years.
<i>Advantageous</i>	The Proposer has been in the line of business at least two (2) and less than five (5) years.
<i>Not Advantageous</i>	The Proposer has been in the line of business for less than two (2) years.
<i>Unacceptable</i>	Either the Proposer has no experience in the line of business or documentation from which a reasonable assessment could be made was not provided in the proposal.

## 1.2 Service & Support

### 1.2.1 Location of Service Facility

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	The Proposer has or has access to one (1) or more service facilities located within twenty-five (25) miles of the municipality or school district.
<i>Advantageous</i>	The Proposer has or has access to at least one (1) service facilities located between twenty-six (26) to forty-nine (49) miles of the municipality or school district.
<i>Not Advantageous</i>	The Proposer has or has access to at least one (1) service facility located between fifty (50) to ninety-nine (99) miles of the municipality or school district.
<i>Unacceptable</i>	Either the Proposer has or has access to a service facility that is one hundred (100) or more miles from the municipality or school district or documentation from which a reasonable assessment could be made was not provided in the proposal.

1.2.2 Services

Rating	Criteria
<i>Highly Advantageous</i>	The Proposer is able to perform on-site all warranty and non-warranty service on the vehicle. Warranty and non-warranty services not performed by the Proposer on-site are performed by other qualified subcontractors that are identified in the Technical Proposal. *Excludes any warranty service that must be performed by an authorized component warranty service provider (e.g., authorized warranty service center).
<i>Advantageous</i>	The Proposer is able to perform on-site most, but not all warranty and non-warranty service on the vehicle. Warranty and non-warranty services not performed by the Proposer on-site are performed by other qualified subcontractors that are identified in the Technical Proposal. *Excludes any warranty service that must be performed by an authorized component warranty service provider (e.g., authorized warranty service center).
<i>Not Advantageous</i>	The Proposer is able to perform on-site only minimal warranty and non-warranty service on the apparatus. Warranty and non-warranty services not performed by the Proposer on-site are performed by other qualified subcontractors that are identified in the Technical Proposal. *Excludes any warranty service that must be performed by an authorized component warranty service provider (e.g., authorized warranty service center).
<i>Unacceptable</i>	Either the Proposer does not directly perform on-site any warranty and non-warranty services, or they did not provide information in the Technical Proposal for providing qualified subcontractors or supporting information and/or documentation from which a reasonable assessment could be made was not provided in the proposal.

### 1.2.3 Technical Support

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	The response demonstrates the Proposer’s ability to provide technical support within twenty-four (24) hours. Qualified staff capable of performing troubleshooting and repairs for hardware and software are based within Massachusetts, and a 24/7 technical support call center is provided.
<i>Advantageous</i>	The response demonstrates the Proposer’s commitment to provide technical support within a forty-eight (48) hour time period. Qualified staff capable of performing troubleshooting and repairs for hardware and software can arrive on site within a reasonable timeframe, and a 24/7 technical support call center is provided.
<i>Not Advantageous</i>	The response fails to demonstrate the Proposer’s ability to provide technical support within a forty-eight (48) hour time period. A 24/7 technical support call center is not included in the response.
<i>Unacceptable</i>	Either the Proposer does not provide technical support or documentation from which a reasonable assessment could be made was not provided in the proposal.

### 1.2.4 Access to Replacement Parts

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	Parts are available to the customer within twenty-four (24) hours or less.
<i>Advantageous</i>	Parts are available to the customer within forty-eight (48) hours or less, but more than twenty-four (24) hours.
<i>Not Advantageous</i>	Parts are available to the customer within seventy-two (72) hours or less, but more than forty-eight (48) hours.
<i>Unacceptable</i>	Either parts are available to the customer in more than seventy-two (72) hours, or proposal does not include access to parts, or documentation from which a reasonable assessment could be made was not provided in the proposal.



### 1.2.5 Prescheduled Repair and Service Turnaround Time

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	The Proposer guarantees same day service for all pre-scheduled repairs and service.
<i>Advantageous</i>	The Proposer guarantees service within twenty-four (24) hours for all pre-scheduled repairs and service.
<i>Not Advantageous</i>	The Proposer guarantees service within forty-eight (48) hours for all pre-scheduled repairs and service.
<i>Unacceptable</i>	The Proposer's does not provide guaranteed pre-scheduled repairs and services, or the proposer exceeds forty-eight (48) hours for pre-scheduled repairs and services, or documentation from which a reasonable assessment could be made was not provided in the proposal.

### 1.2.6 Training of Municipal/School District Staff

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	The Proposer has performed three (3) or more trainings of a similar scope within the last two (2) years.
<i>Advantageous</i>	The Proposer has performed between two (2) or one (1) trainings of a similar scope within the last three (3) years.
<i>Not Advantageous</i>	The Proposer has performed one (1) trainings of a similar scope within the last three (3) to four (4) years.
<i>Unacceptable</i>	The Proposer has not performed any trainings of a similar scope or documentation from which a reasonable assessment could be made was not provided in the proposal.

### 1.2.7 Qualifications of Technicians

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	Three (3) or more of the Proposer's technicians have the skills and knowledge to perform maintenance and repairs regarding chargers, charging infrastructure and charge management platform.
<i>Advantageous</i>	Two (2) of the Proposer's technicians have the skills and knowledge to perform maintenance and repairs regarding chargers, charging infrastructure and charge management platform.
<i>Not Advantageous</i>	Only one (1) of the Proposer's technicians has the skills and knowledge to perform maintenance and repairs regarding

	chargers, charging infrastructure and charge management platform.
<i>Unacceptable</i>	Either none of the Proposer’s technicians have the skills and knowledge to perform maintenance and repairs regarding chargers, charging infrastructure and charge management platform or documentation from which a reasonable assessment could be made was not provided in the proposal.

1.2.8 Technicians Trained by Manufacturer

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	Three (3) or more of the Proposer’s technicians have received direct training by the Manufacturer and relevant certification regarding chargers, charging infrastructure and charge management platform.
<i>Advantageous</i>	Two (2) of the Proposer’s technicians have received direct training by the Manufacturer and relevant certification regarding chargers, charging infrastructure and charge management platform.
<i>Not Advantageous</i>	Only one (1) of the Proposer’s technicians has received direct training by the Manufacturer and relevant certification regarding chargers, charging infrastructure and charge management platform.
<i>Unacceptable</i>	Either none of the Proposer’s technicians have received direct training by the Manufacturer or documentation from which a reasonable assessment could be made was not provided in the proposal.

1.2.9 Data/Electrification Operations Management

<b>Rating</b>	<b>Criteria</b>
<i>Highly Advantageous</i>	The response provided a detailed description about the Proposer’s ability to provide fleet charge management and telematics software dashboard for use by municipal/school district staff.
<i>Advantageous</i>	The response provided did not give details about the Proposer’s ability to provide fleet charge management and telematics software dashboard for use by municipal/school district staff.
<i>Not Advantageous</i>	The response provided failed to give details about the Proposer’s ability to provide fleet charge management and

	telematics software dashboard for use by municipal/school district staff.
<i>Unacceptable</i>	The response did not provide information from which a reasonable assessment could be made of the Proposer’s ability to provide fleet charge management and telematics software dashboard for use by municipal/school district staff.

1.2.10 Price Mitigation

Rating	Criteria
<i>Highly Advantageous</i>	The Proposer’s response provided numerous resources (e.g., grants) to reduce the cost of the services.
<i>Advantageous</i>	The Proposer’s response provided few resources (e.g., grants) to reduce the cost of the services.
<i>Not Advantageous</i>	The Proposer’s response provided no resources (e.g., grants) to reduce the cost of the services.
<i>Unacceptable</i>	The response did not provide information from which a reasonable assessment could be made of the Proposer’s ability to provide resources to reduce the cost of the services.

1.2.11 Deployment Schedule

Rating	Criteria
<i>Highly Advantageous</i>	The proposed deployment schedule demonstrates the ability to achieve the requested deployment target.
<i>Advantageous</i>	The proposed deployment schedule has minor differences from the request deployment targets but demonstrates the ability to achieve the modified schedule.
<i>Not Advantageous</i>	The proposed deployment schedule has significant differences from the requested deployment targets or does not demonstrate the ability to meet the requested deployment target.
<i>Unacceptable</i>	Documentation from which a reasonable assessment could be made was not provided in the proposal.

## Instructions to Proposers

### Proposal Components

The RFP response must include:

1. **Minimum Qualifications.** The Proposal must include that the Proposer meets all minimum qualifications identified above.
2. **Proposal Summary.** The Proposal Summary should provide an overview of the services to be provided.
3. **Implementation Plan.** The Implementation Plan should include an outline of key milestones, a planned timeline, and how the Proposer will deliver the requested services. The implementation plan should include information on options for dealing with vehicle charging equipment at the end of the agreement.
4. **Pricing Sheet.** The proposal prices must be clearly typed in the spaces provided on the official Price Sheet. Proposal shall be construed to cover all costs incurred by the Proposer to furnish the vehicles in accordance with the specifications, including travel and mileage, proper packing, and cost of delivery.

### Additional Equipment and Services

Additional vehicles and equipment not itemized in a Proposer's Price Proposal cannot be purchased from an awarded contract. Any additional equipment or services not itemized in a Proposer's Price Proposal, but which a Proposer will provide and/or install at additional cost to the Buyer, must still be otherwise acquired by the Buyer in compliance with applicable Massachusetts procurement laws. Buyers must by law competitively procure goods and/or services costing \$10,000 and over.

### Modification of Proposals

A Proposer may correct, modify, or withdraw a proposal by written notice received by the [Name of Municipality or School District] Purchasing Agent prior to the time and date set for the proposal opening. Proposal modifications must be submitted through CommBUYS and the submission email address specified earlier in the RFP. Each modification must be numbered in sequence and must reference the original RFP.

After the proposal opening, a Proposer may not change any provision of the proposal in a manner prejudicial to the interests of the [Name of Municipality or School District] or fair competition. Minor informalities may be waived, or the Proposer may be allowed to correct them. If a mistake on the Proposal is clearly evident the [Name of Municipality or School District] will allow the mistake to be corrected to reflect the correct information or documentation.

### Withdrawal of Proposals

Proposals may be withdrawn prior to the time established for the opening of proposals only on written request to the staff person identified as the contact in the RFP.

## General Conditions

### Licensing

The Proposer shall possess all required and necessary licenses as may be specified by federal, state and/or local authorities, related to the handling of the products and services referred to in this proposal.

### Award of Contact

The [Name of Municipality or School District] will be the Awarding Authority. The [Name of Municipality or School District] will award the contract to the most advantageous Proposer. The Awarding Authority may exercise any or all of the options listed below before awarding a contract.

1. A visit to the Proposer's place of business.
2. Requests to provide additional information to clarify the Proposer's proposal.

The written contract shall include the [Name of Municipality or School District's] standard terms and conditions, with the possibility of amendments agreed to by the [Name of Municipality or School District]. Attached hereto as Appendix D are the [Name of Municipality or School District's] standard terms and conditions. Note further that the [Name of Municipality or School District] will not agree to a contract that disclaims warranties, waives the [Name of Municipality or School District's] right to a jury trial or any rights under the Uniform Commercial Code, requires payment of Proposer's attorneys' fees or interest, limits the [Name of Municipality or School District] damages, requires indemnification by the [Name of Municipality or School District] or releases, limits or waives the [Name of Municipality or School District's] any right and remedy available by law.

In accordance with M.G.L. c. 30B, a Proposer will only be awarded a contract in excess of 3 years upon a vote of [Name of Municipality or School District] governmental body. All contracts are subject to appropriation.

### Breach of Contract

In the case of failure on the part of the Proposer to execute its obligations under a Contract, [Name of Municipality or School District] reserves the right to terminate the contract and collect any and all damages identified in the Contract.

### Payments

The [Name of Municipality or School District] shall make the lease payments annually upon accepted delivery of vehicle/s and equipment. The [Name of Municipality or School District] is exempt from federal, state, and/or local sales and excise taxes.

### Proposal Responses

All proposals and related documents submitted in response to this RFP are subject to the Massachusetts Public Records Law, M.G. L. c. 66, s. 10(a) and c. 4, s.7(26), regarding public access to such documents.

Statements or endorsements inconsistent with those statutes will be disregarded.

Catalog numbers and brand names, if used, are only to indicate the type and to set standards. Proposers are at liberty to offer proposals on substitute material, which must be of equal quality. Proposals must state, however, all cases where substitutes are offered and pertinent information must be supplied with the proposal.

Please provide material safety data sheets for all products for which there are material safety sheets.

Any questions regarding this proposal should be written and directed to: [Name, Title, and email address of applicable Municipal or School District staff member] identified in this RFP.

## Certificate of Non-Collusion

### **Mandatory Form – Failure to Include this Form will Result in Bid Disqualification**

#### CERTIFICATE OF NON-COLLUSION

The undersigned certifies under the penalties of perjury that this response has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of Individual Signing Response: \_\_\_\_\_

Name of Business: \_\_\_\_\_

Date: \_\_\_\_\_

## Statement of Tax Compliance

### **Mandatory Form – Failure to Include this Form will Result in Bid Disqualification**

#### STATEMENT OF TAX COMPLIANCE

Pursuant to M.G.L. Chapter 62C, Section 49A, I certify under the penalties of perjury that I, to my best knowledge and belief, have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Social Security or Federal Identification Number: \_\_\_\_\_

Signature of individual signing response: \_\_\_\_\_

Date: \_\_\_\_\_



## Price Sheet

A separately attached Price Sheet provided in Excel must clearly specify bus type(s)/model(s), charging equipment, maintenance services, and repair services (hourly rate) to comport with Massachusetts Municipal Procurement Law. Municipalities and School Districts are strongly encouraged to either have on staff or engage a qualified consultant to serve as an expert on electric school buses and EV charging equipment.

## Price Sheet Example

Description
Proposal Due Date
Respondent

Electric School Bus Costs Inclusive of Any and All Regular and All Bus Manufacturer Recommended Maintenance								
Type/Model	Manufacturer	Vehicle	Body	Description	MSRP	Bid Price	\$ Difference	% Difference
Manufacturer Options								
Replacement Parts (manufacturer cost X __%) – bidder needs to fill in all upcharges as a percentage value								
Charging Equipment Inclusive of Any and All Regular and All Electric Manufacturer’s Recommended Regular Equipment Maintenance								
Description (e.g., L2 charging station)				Manufacturer/Brand		Bid Price	Price/per unit	
Repair Services (include hourly rates)								

# Price Proposal Signature Page

The undersigned proposes to provide products and services to the [Name of Municipality or School District] in accordance with the Request for Proposals (RFP) cited above. The Price Proposal attached to this page includes all products and services offered in Respondent’s Technical Proposal per the terms and specifications stated in the RFP and incorporated into the Technical Proposal. The prices offered are guaranteed not to change except as permitted by the terms and conditions of the RFP and the signed contract. The prices offered account for all charges to be expected by Buyers. No other charges will be invoiced to Buyers under this Proposal and any resulting contract.

- The attached document recites all pricing in the manner required by the RFP.
- The electronic files required by the RFP are enclosed.

Authorized Agent of the Respondent:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (as used for tax filing)

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
SS# or Federal ID#

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

## APPENDIX A – Bus Specifications

**[This Appendix should include all required bus specifications. Please see companion document for more guidance on providing bus specifications.]**

## APPENDIX B – Existing Bus Depot

**[This Appendix should include as much information as possible about the existing bus depot, or wherever the bus(es) will be garaged. This information should include specifics on existing electrical infrastructure and diagrams marking the location of existing electrical infrastructure and parking locations. The Appendix should also include a copy of a recent electric bill for the existing bus depot.]**

## APPENDIX C – Bus Route Information

**[This Appendix should include information on the planned routes of the buses. At a minimum, this should include the time of day (school year and, if applicable, summer sessions), distance, and estimated duration of each route. Anticipated field trip and after school usage should identified as well.]**

## APPENDIX D – Sample Contract

**[This Appendix should include the Municipality or School District’s Sample Contract standard terms and conditions.]**

## APPENDIX E - Reference Form

Proposers must provide at least three (3) written references from buyers within the last three (3) years. Proposers must use the questions below and the reference must complete and sign the form.

Answer the following questions:

- a. Please describe your experience working with the Proposer. For how long? Does it continue today?

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- b. Please detail what services the Proposer has provided to you in the past.

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- c. Were there any times where the quality of the products or installations were of poor quality? If so, how was it handled?

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d. Were deliveries delayed during your agreement with the Proposer? If so, how were they handled?

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e. How would you describe the Proposer's reliability in delivering what was ordered, on time and within cost?

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f. Please describe billing/invoicing practices: Any inaccuracies? Any unforeseen costs?

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g. What was the Proposer's response time and resolution time for any questions or complaints?

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h. How would you describe your customer service experiences?

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i. How would you rate the Proposer's overall performance?

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j. Anything else you would like to share that would be helpful. Feel free to make additional comments below.

---

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---

Reference Signature

---

Reference Printed Name

---

Reference Company

---

Reference Title

---

Reference Email

---

Date

---

## APPENDIX F - OSD CommBUYS Instructions

Please see the attached instruction PDF that is intended to aid Proposers in their CommBUYS Bid submission.

## Job Aid: Create a Quote in COMMBUYS

### This Job Aid shows how to:

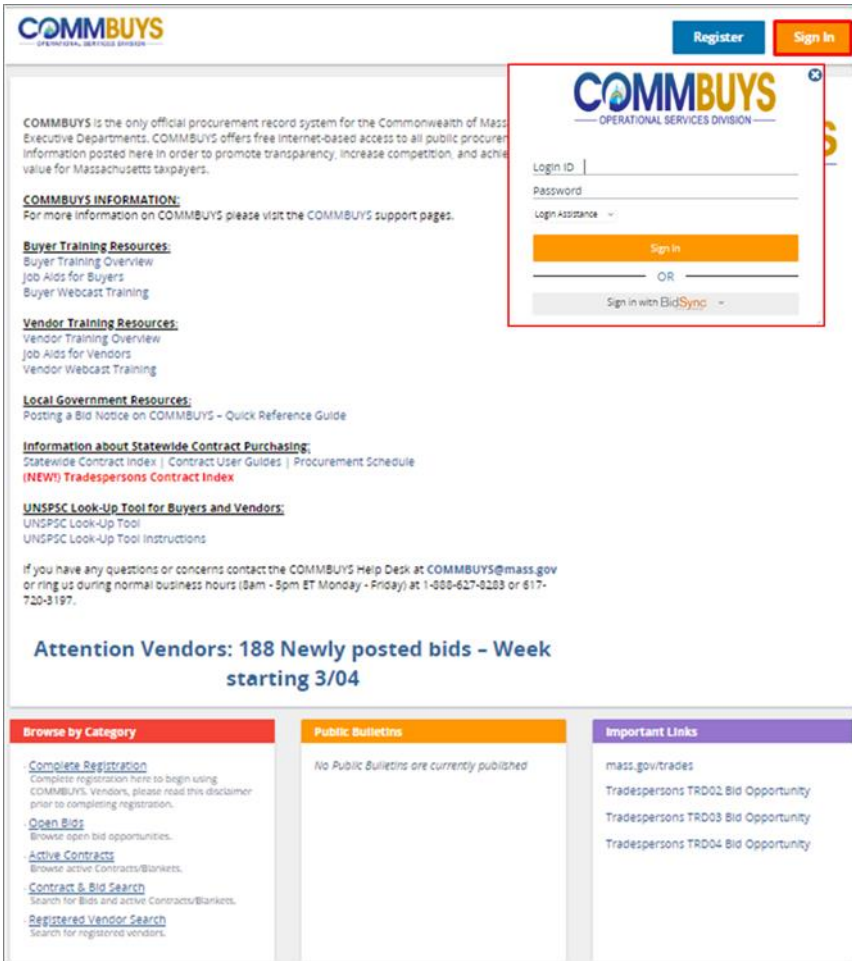
- Create a quote in response to a bid solicitation in COMMBUYS

### Of Special Note:

It is the vendor's responsibility to read the bid solicitation and any attachments (including the Request for Response) in their entirety prior to creating and submitting a quote.

OSD recommends you create a bid specific folder that is easily accessible with any completed documents or forms that must accompany the quote. Be sure to follow any file upload instructions provided by the buyer (e.g. naming convention, file description, or file size).

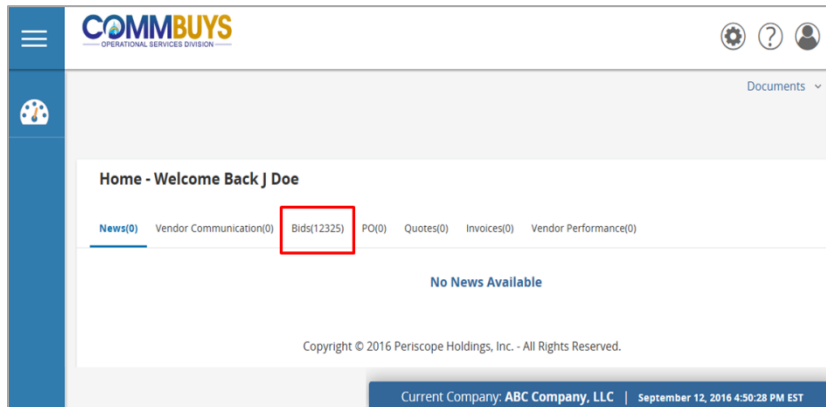
Only users with Seller privileges can create a quote in COMMBUYS. These instructions assume the logged in user has Seller credentials.

Screenshot	Directions
	<h3>Step 1: Launching COMMBUYS</h3> <ol style="list-style-type: none"> <li>1. Enter the uniform resource locator (URL) address for COMMBUYS (<a href="https://www.commbuys.com">https://www.commbuys.com</a>) or (<a href="https://commbuys.com">commbuys.com</a>) in your browser.</li> <li>2. Once the COMMBUYS landing page displays click on the <b>Sign In</b> button.</li> <li>3. Enter your <b>Login ID</b> and <b>Password</b> and sign in to COMMBUYS.</li> </ol>

## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions



#### Step 2: Accessing Bids

1. From the Homepage click on the **Bids** tab to view bids that have been sent to your company.

Home - Welcome Back J Doe

News(0) Vendor Communication(1) **Bids(12347)** PO(S) Quotes(5) Invoices(0) Vendor Performance(0)

**Request For Revision**

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
QT-1080-OSD07-OSD07-15666-R1	Operational Services Division	BD-17-1080-OSD07-OSD07-8393	09/15/2016 11:47:15 AM	09/15/2016 11:42:55 AM

**Bids / Bid Amendments (Un-Acknowledged)**

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Holder
BD-17-1080-OSD07-OSD07-8397	Operational Services Division		Regina Kinney	Landscaping / Green Roof Products, Playground Equipment	09/21/2016 12:00:00 AM	List
BD-17-1080-OSD07-OSD07-8393	Operational Services Division		Regina Kinney	RFR for Temp Help	09/15/2016 11:47:15 AM	List

**Open Bids**

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid O & A	Create Quote /View Auction	Bid Holder
BD-17-1080-OSD07-OSD07-8455	Operational Services Division		Regina Kinney	Print, Copy & Mail Services, and Printed Promotional Products	09/28/2016 12:00:00 AM	View	Create Quote	List
BD-17-1080-OSD07-OSD07-8454	Operational Services Division		Regina Kinney	Foodservice Supplies and Equipment, Institutional Commercial Grade	09/28/2016 12:00:00 AM	View	Create Quote	

**Open/Rolling Enrollment Bids**

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid O & A	Create Quote /View Auction	Bid Holder
BD-17-1080-1080C-1080L-8433	Operational Services Division		Samuel Lee	Samtest	09/28/2016 10:39:55 AM	View	Create Quote	
BD-17-1080-OSD06-OSD06-8418	Operational Services Division		Donna Ellis	PHI-DA-Open_Rolling-A001	09/15/2017 12:00:00 AM	View	Create Quote	

#### Step 3: Opening Bids

1. Click on the hyperlinked **Bid #** to open and review a bid in the **Bids/Bid Amendments (Un-Acknowledged), Open Bids, or Open/Rolling Enrollment Bids** sections.

#### Acknowledge Receipt and View Solicitation

**Bid #** BD-17-1080-OSD07-OSD07-8455  
**Bid Description** Print, Copy & Mail Services, and Printed Promotional Products

Click Yes to acknowledge the download of the bid. When you acknowledge a bid, you may receive any future correspondence regarding this document. If you do not want to acknowledge click No, and the bid will be displayed. Do you want to continue?

Yes

No

Copyright © 2016 Periscope Holdings, Inc. - All Rights Reserved.

#### Step 4: Acknowledging Receipt of Bids

1. Click the **Yes** button to acknowledge and access the bid.

**Note:** In this acknowledgement you agree to receive any future correspondence regarding this bid.

If you select **No** you may still view the bid but will not receive any notifications regarding updates or amendments.

## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions

Bid Solicitation: BD-17-1080-OSD07-OSD07-8455

---

**Header Information**

<b>Bid Number:</b> BD-17-1080-OSD07-OSD07-8455	<b>Description:</b> Print, Copy & Mail Services, and Printed Promotional Products	<b>Bid Opening Date:</b> 09/28/2016 12:00:00 AM
<b>Purchaser:</b> Regina Kinney	<b>Organization:</b> Operational Services Division	
<b>Department:</b> OSD07 - OSD TRAINING	<b>Location:</b> OSD07 - OSD TRAINING	
<b>Fiscal Year:</b> 17	<b>Type Code:</b> SS - Statewide Solicitation	<b>Allow Electronic Quote:</b> Yes
<b>Alternate Id:</b>	<b>Required Date:</b>	<b>Available Date :</b> 09/22/2016 10:54:04 AM
<b>Info Contact:</b>	<b>Bid Type:</b> OPEN	<b>Informal Bid Flag:</b> No
<b>Purchase Method:</b> Open Market	<b>Rolling Enrollment Enabled:</b> <input type="checkbox"/>	<b>Open Enrollment Enabled:</b> <input type="checkbox"/>

**Pre Bid Conference:**

**Bulletin Desc:**

<b>Ship-to Address:</b> OSD Training 1 Ashburton Place Suite 1017 Boston, MA 02108 US Email: test@periscopeholdings.com Phone: (123)456-7890	<b>Bill-to Address:</b> Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@periscopeholdings.com Phone: (123)456-7890	<b>Print Format:</b> Bid Print
---	--	--------------------------------

**File Attachments:** Standard Contract Form  
Request for Response (RFR)  
Business Reference Form

**Form Attachments:**  
SBPP (Small Business Purchasing Program) NO  
Eligible?:

**Item Information**

---

**Item # 1: (82-12 - 15) Printing Services**

U N S P S C Code: 82-12-15  
Printing

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0		EA - Each				
<b>Manufacturer:</b>		<b>Brand:</b>		<b>Model:</b>		
<b>Make:</b>		<b>Packaging:</b>				

### Step 5: Reviewing Bids

- Review the following information displayed on the bid's Summary tab:
  - Bid Number:** COMMBUYS-generated document number.
  - Description:** the information displayed in this section varies according to Buyer input. It could be the agency's internal bid number, a brief description of the bid, or keywords that describe the goods or services being procured.
  - Bid Opening Date:** date the bid may be opened for evaluation. Also the date the bid closes to vendor quote submission. It's the deadline for submission.
  - Purchaser:** contact person and/or the creator of the bid.
  - Organization, Department, Location:** agency information.
  - Type Code:** will either be **SW** (for Statewide bids) or **NS** (for Non-Statewide/Departmental bids).
  - Allow Electronic Quote:** In order for vendors to submit quote responses through COMMBUYS, this must be marked **Yes**.
  - Required Date:** date agency requires the goods or services being procured. Follow up with bid contact.
  - Available Date:** date bid was posted on COMMBUYS.
  - Info Contact:** contact person for the bid.
  - Bid Type:** will either be **Open** (any vendor can respond) or **Closed** (only selected vendors can respond).
  - Informal Bid Flag:** will either be **Yes** (buyer can see quotes before the Bid Opening Date) or **No** (buyer cannot see quotes before the Bid Opening Date).
  - Purchase Method:** will either be **Open Market** (one time bid solicitation) or **Blanket** (contract).
  - Pre-Bid Conference Details**
  - Ship-to and Bill-to Addresses**
  - File Attachments:** bid documents and forms uploaded by the agency. Be sure to read all attachments and complete/submit forms/documents as instructed.
  - Item Information:** item description, UNSPSC code, and other criteria entered by the buyer.

# Job Aid:

## Create a Quote in COMMBUYS

### Screenshot

### Directions

**Item Information**

---

**Item # 1: (82-12 - 15) Printing Services**

U N S P S C Code: 82-12-15  
Printing

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0		EA - Each				

Manufacturer: \_\_\_\_\_ Brand: \_\_\_\_\_ Model: \_\_\_\_\_  
Make: \_\_\_\_\_ Packaging: \_\_\_\_\_

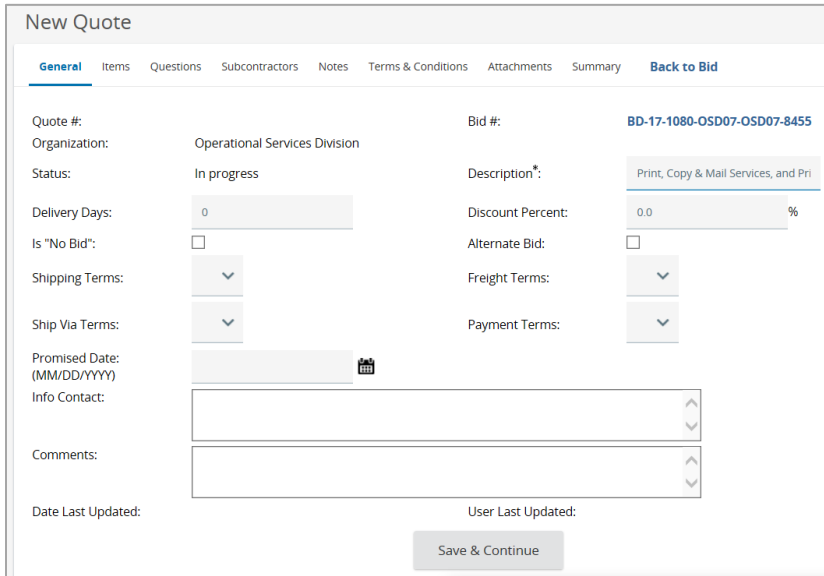
### Step 6: Creating Quotes

1. Click the **Create Quote** button at the bottom of the **Bid Summary** page to open the **New Quote** page.

## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions



### Step 7: Entering General Quote Information

1. The General Tab is populated with some information from the bid. In most cases, vendors are not required to edit the information. Read the RFR for guidance. Available fields include:
  - **Description:** Defaults to the description of the bid. This can be edited.
  - **Delivery Days:** Days to deliver goods or services upon successful awarding of bid/purchase order.
  - **Discount Percent:** If entered, will automatically be applied to all items on quote. This can be done on an item by item basis on the item tab.
  - **Is "No Bid":** Checkmark to formally declare that you will not be submitting a quote for this bid.
  - **Alternate Bid:** Checkmark to formally flag a quote as an alternate bid if this is the second quote for the vendor (if allowed by the buyer).
  - **Shipping Terms:** Defaults from the vendor profile.
  - **Freight Terms:** Defaults from the vendor profile.
  - **Ship Via Terms:** Defaults from the vendor profile.
  - **Payment Terms:** Defaults from the vendor profile.
  - **Promised Date:** Date to deliver items to the buyer.
  - **Info Contact:** Contact information for questions regarding quote. This field is limited to 400 characters.
  - **Comments:** Field to enter in notes to the buyer. This field is limited to 400 characters.
2. Click the **Save & Continue** button to save your updates and generate a **Quote Number**.



## Job Aid: Create a Quote in COMMBUYS

### Screenshot

**Quote Validation Errors**  
Terms & Conditions is not acknowledged.

**Quote Validation Warnings**  
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

[General](#) [Items](#) [Questions](#) [Subcontractors](#) [Notes](#) [Terms & Conditions](#) [Attachments](#) [Summary](#) [Back to Bid](#)

Quote #:	QT-1080-OSD07-OSD07-15710	Bid #:	<b>BD-17-1080-OSD07-OSD07-8455</b>
Organization:	Operational Services Division		
Status:	In progress	Description*:	<a href="#">Print, Copy &amp; Mail Services, and Pr</a>
Delivery Days:	<input type="text" value="0"/>	Discount Percent:	<input type="text" value="0.0"/> %
Is "No Bid":	<input type="checkbox"/>	Alternate Bid:	<input type="checkbox"/>

### Directions

#### Step 8: Reviewing System Messages

1. Once you click **Save & Continue** the page will refresh itself and display two system messages and a **Quote Number**.
2. The following messages will be displayed:
  - A red error message with steps that must be taken before a quote can be submitted. Following the steps in this Job Aid will resolve the errors.
  - A yellow warning that reads: **Your quote has not been submitted.** There is no further action required to resolve this informational message.
3. Click on the **Items** tab to continue creating your quote.

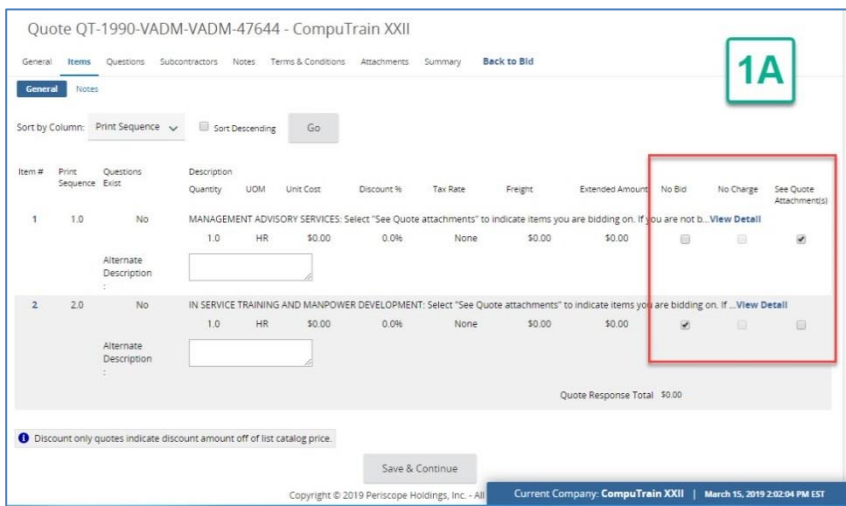


# Job Aid:

## Create a Quote in COMMBUYS

### Screenshot

### Directions



### Step 9: Complete the Quote Items tab

1. Responding to Items. Instructions for completing the Items tab will vary depending upon how the Bid issuer configures it. Read the instructions given in the RFR to determine how best to complete the Quote Items tab.

Depending upon the nature of the Bid Solicitation, the Items tab is the area to:

- ✓ indicate which item(s) are being Quoted
- ✓ make reference to **See Quote Attachment(s)** for quote costs or other requested documents (if applicable)
- ✓ enter unit cost per Bid Item(s) (if applicable)

A) If the **See Quote Attachment(s)** box is pre-selected, the **No Charge** and **Unit Cost** selections are disabled.

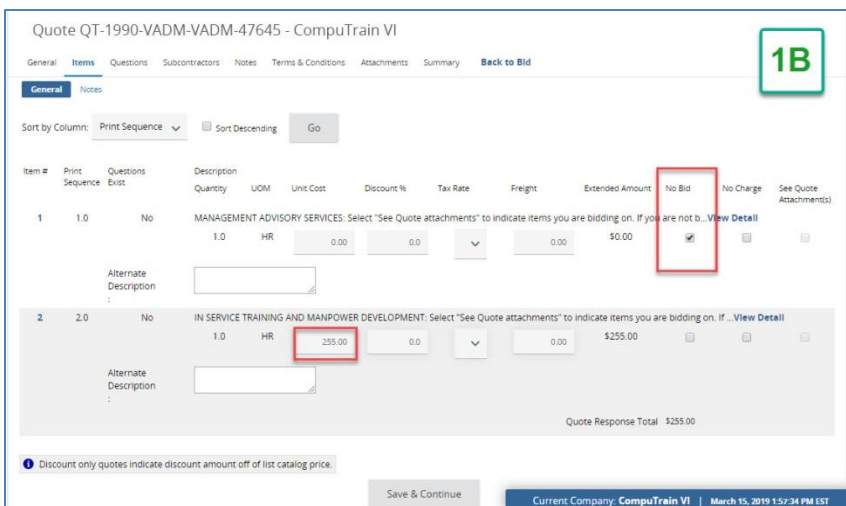
- ✓ Ensure the **See Quote Attachment(s)** indicator is selected for each Bid Item for which you wish to be considered.
- ✓ Based on instructions from the RFR, be sure to upload response files on the Attachments tab (see Step 11).
- ✓ Select **No Bid** for items you are not responding to.

B) If the **No Bid** column is pre-selected, the **No Charge** and **Unit Cost** selections are editable; the **See Quote Attachment(s)** column is disabled.

- ✓ Ensure **Unit Cost** is entered or **No Charge** indicator is selected for each Item you are bidding on.
- ✓ Leave the selection **No Bid** for items you are not bidding on.
- ✓ Based on instructions from the RFR, be sure to upload response files on the Attachments tab (see Step 11).

2. To view additional details about an item, click on the blue hyperlinked Item #.
3. Once all information has been completed on the **Items** tab, click **Save & Continue**. Click on the **Terms & Conditions** tab.

**NOTE:** In all cases, a checkmark in an item's **No Bid** box indicates that you are not bidding on that item.



## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions

**Quote Validation Errors**  
Terms & Conditions is not acknowledged.

**Quote Validation Warnings**  
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes **Terms & Conditions** Attachments Summary [Back to Bid](#)

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
Standard Contract Form ()	Commonwealth Terms and Conditions	12,567 bytes
Request for Response (RFR) ()	Specifications and Requirements for Bid Submission	12,574 bytes
Business Reference Form ()	Provide at least 3 recent (w/in 12 months) customers' contact info	12,574 bytes

Do you accept the terms & conditions of the bid?

Yes  Yes with exceptions  No

If you do not fully accept the terms & conditions, please note the exceptions below:

[Save & Continue](#)

### Step 10: Accepting Terms & Conditions

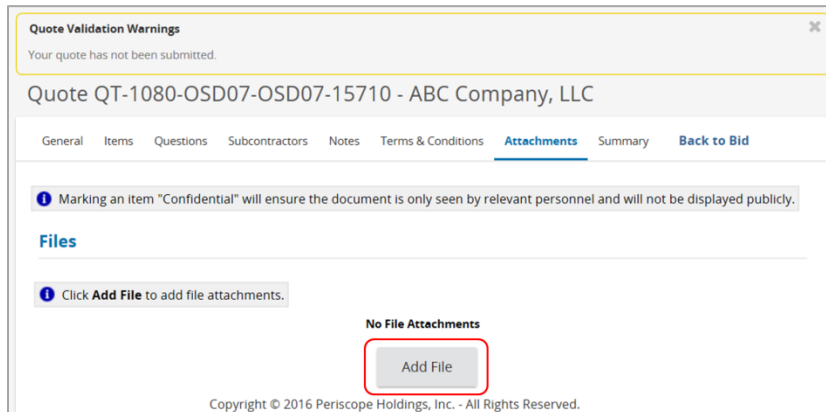
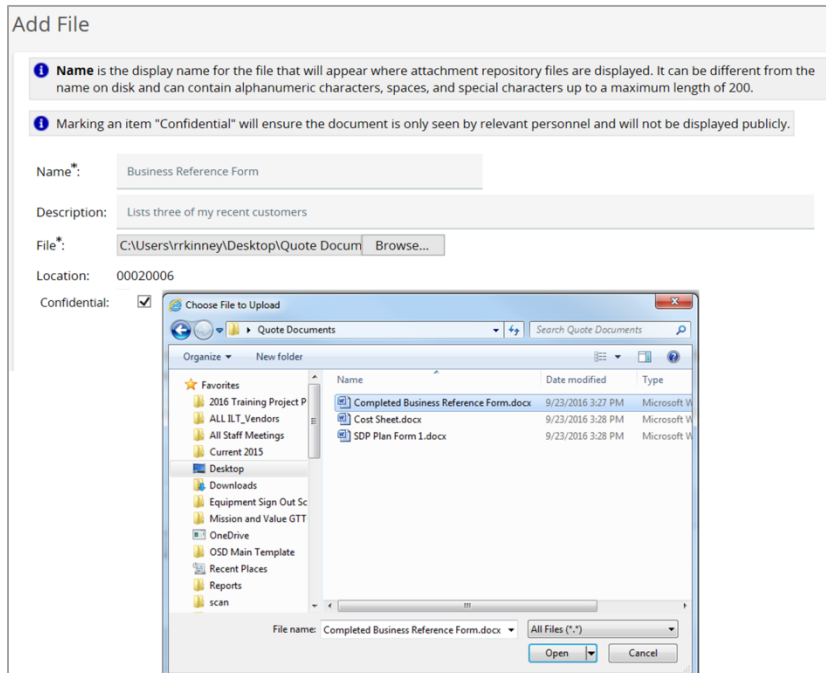
1. Click the radio button next to **Yes** to accept the Terms & Conditions.
2. Click **Save & Continue**.
3. Click on the **Attachments** tab.

Note: Any files attached to the Bid Solicitation (such as the RFR) can also be found on the **Terms & Conditions** tab.

## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions

### Step 11: Attaching Documents to Quote

1. Click on **Add File**.
2. Click on **Browse** to locate the file you wish to upload.
3. Once the correct file is located, click **Open** to return to the **Add File** page.
4. By default, the file's name is populated into the **Name** field. This can be edited to reflect the file name to display when the file is posted. The **Name** field is limited to 200 characters and can contain alphanumeric characters, spaces, and special characters.
5. The **Description** field is optional and it allows you to briefly describe the attached file.
6. Check off the **Confidential** box to designate an attachment as confidential.

Mark only those documents that contain confidential information not subject to the Massachusetts Public Records Law (e.g., those containing your Tax ID, bank account information, etc.) as confidential.

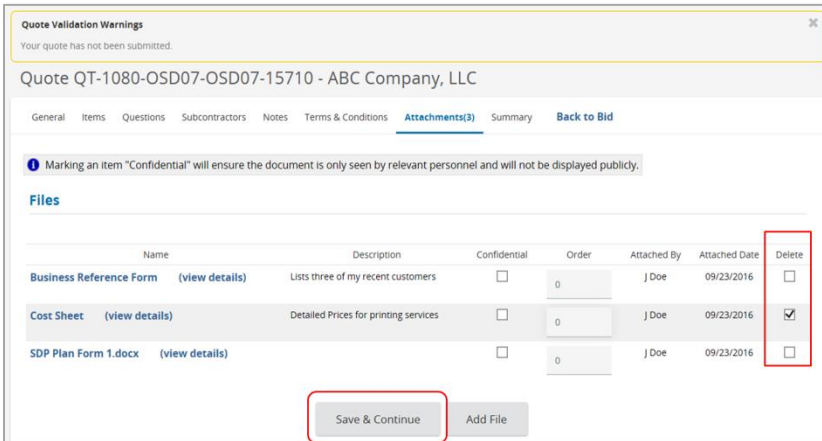
7. Once you are done naming and describing your file, click **Save & Exit** to return to **the Attachments** tab.

**Note:** Each document must be added one at a time. To add additional attachments repeat the actions 1-6 within this step.

## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions



Quote Validation Warnings  
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions **Attachments(3)** Summary Back to Bid

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

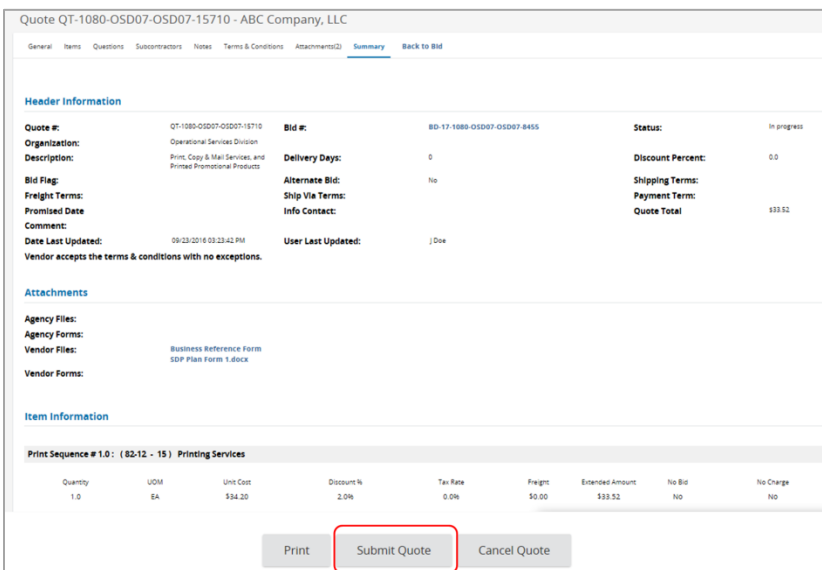
**Files**

Name	Description	Confidential	Order	Attached By	Attached Date	Delete
Business Reference Form (view details)	Lists three of my recent customers	<input type="checkbox"/>	0	J Doe	09/23/2016	<input type="checkbox"/>
Cost Sheet (view details)	Detailed Prices for printing services	<input type="checkbox"/>	0	J Doe	09/23/2016	<input checked="" type="checkbox"/>
SDP Plan Form 1.docx (view details)		<input type="checkbox"/>	0	J Doe	09/23/2016	<input type="checkbox"/>

Save & Continue Add File

#### Step 12: Removing Attachments

1. Check the box in the **Delete** column next to the file you wish to remove.
2. Click **Save & Continue** to remove the file from the attachment list.
3. Click the **Summary** tab to review your quote information.



Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions Attachments(2) **Summary** Back to Bid

**Header Information**

Quote #: QT-1080-OSD07-OSD07-15710 Bid #: BID-17-1889-OSD07-OSD07-8455 Status: In progress  
 Organisation: Operational Services Division  
 Description: Print, Copy & Mail Services, and Printed Promotional Products Delivery Days: 0 Discount Percent: 0.0  
 Bid Flag: Alternate Bid: No  
 Freight Terms: Ship Via Terms: Shipping Terms:  
 Promised Date: Info Contact: Payment Term:  
 Comment: Quote Total: \$33.52  
 Date Last Updated: 09/23/2016 09:23:42 PM User Last Updated: J Doe  
 Vendor accepts the terms & conditions with no exceptions.

**Attachments**

Agency Files:  
 Agency Forms:  
 Vendor Files: Business Reference Form, SDP Plan Form 1.docx  
 Vendor Forms:

**Item Information**

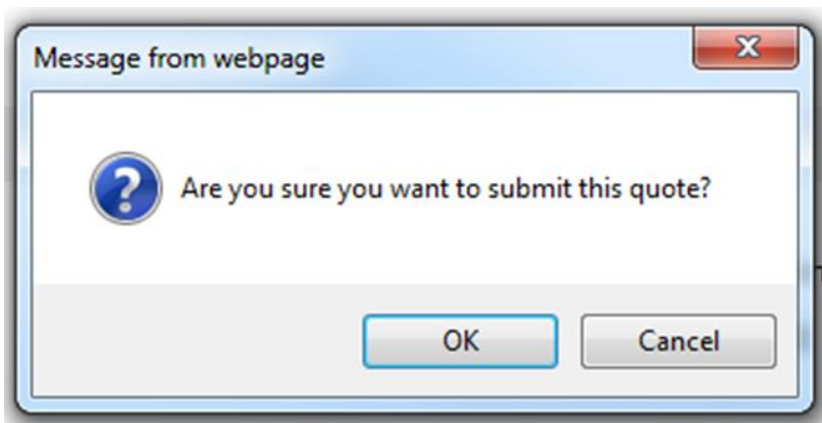
Print Sequence # 1.0: ( 82-12 - 15 ) Printing Services

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	EA	\$34.20	2.0%	0.0%	\$0.00	\$33.52	No	No

Print Submit Quote Cancel Quote

#### Step 13: Reviewing and Submitting Quotes

1. Review the quote information displayed on the **Summary** tab, and edit as needed by clicking on the tab that requires updating.
2. If no updates are required, click the **Submit Quote** button at the bottom of the page.



Message from webpage

Are you sure you want to submit this quote?

OK Cancel

#### Step 14: Confirming Quote Submission

1. Click **OK** on the popup message window to proceed with submitting your quote.

## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions Attachments(2) **Summary** Back to Bid

**Header Information**

<b>Quote #:</b> QT-1080-OSD07-OSD07-15710	<b>Bid #:</b> BD-17-1080-OSD07-OSD07-8455	<b>Status:</b> Submitted
<b>Organization:</b> Operational Services Division	<b>Delivery Days:</b> 0	<b>Discount Percent:</b> 0.0
<b>Description:</b> Print, Copy & Mail Services, and Printed Promotional Products	<b>Alternate Bid:</b> No	<b>Shipping Terms:</b>
<b>Bid Flag:</b>	<b>Ship Via Terms:</b>	<b>Payment Term:</b>
<b>Freight Terms:</b>	<b>Info Contact:</b>	<b>Quote Total</b> \$33.52
<b>Promised Date</b>	<b>Comment:</b>	
<b>Date Last Updated:</b> 09/23/2016 04:07:34 PM	<b>User Last Updated:</b> J Doe	

Vendor accepts the terms & conditions with no exceptions.

**Attachments**

Agency Files:  
Agency Forms:  
Vendor Files: [Business Reference Form](#)  
[SDP Plan Form 1.docx](#)

**Item Information**

Print Sequence # 1.0: ( 82-12 - 15 ) Printing Services

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	EA	\$34.20	2.0%	0.0%	\$0.00	\$33.52	No	No

Print Withdraw Quote

### Step 15: Withdrawing Quotes After Submission

1. The **Summary** tab redisplay with an updated status for the quote: **Submitted**.
2. From the **Summary** tab of the quote, you can **withdraw** the quote at any time before the **Bid Opening Date** or before the quote is viewed by the buyer.

For more information on withdrawing quotes, please read the **Withdraw, Reopen, and Resubmit a Quote in COMMBUYS** job aid.