



The Commonwealth of Massachusetts  
Executive Office of Elder Affairs  
One Ashburton Place, 5th Floor  
Boston, Massachusetts 02108

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**To:** Councils on Aging in the Commonwealth of Massachusetts

**From:** Rachel Goldstein, Chief Financial Officer, EOE  
Carole Malone, Assistant Secretary, EOE

**Date:** February 22, 2022

**RE:** Important Changes in FY22 COA Formula Grant Contract Process

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The Executive Office of Elder Affairs (EOEA) issued the Fiscal Year 2022 formula grant funding to all Massachusetts Councils on Aging on February 15, 2022. This memorandum is intended to provide information on important administrative changes to this process. We encourage you to read this carefully and reach out with any questions or items of clarification.

The administrative changes that have been implemented this year are beneficial to both EOE and the Councils on Aging. They will help EOE to distribute the money faster and make the contract execution process much easier for Councils on Aging. **These changes are solely administrative in nature and have no impact on the amount each Council on Aging receives; that funding amount has been, and will continue to be, established in the state's annual budget.**

We are pleased to have finalized this important step to simplify the process for Councils on Aging to access this important funding.

#### **FORMULA GRANT ALLOCATIONS**

- As always, EOE follows the requirements established in each year's state budget to calculate the Council on Aging formula grant awards. In Fiscal Year 2022, this is calculated as \$12 per older adult with a minimum contract amount of \$6,000.00. EOE has published the Fiscal Year 2022 funding amounts for each Council on Aging in the Formula Grant Award Spreadsheet (located at <https://coadmin.800ageinfo.com/>).

- *Note:* The funding allocation is the same in Fiscal Year 2022 as it was in Fiscal Year 2021. Every Council on Aging is getting exactly the same amount of money as last year.

#### ADMINISTRATIVE CONTRACT CHANGES

- EOEa divided the group of 350 contracts into four (4) separate PDF files, organized alphabetically based on the name of the city or town (letters A-D, E-L, M-R, and S-Z). Councils on Aging should follow the instructions on the website to locate and return their signed contract.

When completed, please submit your **signed** and **hand-dated** contract to:

Executive Office of Elder Affairs  
1 Ashburton Place, Rm 517  
Boston, MA 02108  
ATTN: FY22 Formula Grant Contract

- Starting with Fiscal Year 2022, EOEa established the formula grant contracts as rate contracts. A rate contract distributes funding according to a standard payment rate (i.e. \$12/older adult, with a \$6,000 minimum contract amount). Here is some important background about how rate contracts work:
  - Rate contracts cite the source where the payment rate is established (in this case, the state budget), rather than listing an annual contract dollar amount for each vendor. **This is why there is no total dollar amount on the Fiscal Year 2022 Standard Contract Form. Do not write in the amount on the contract.**
  - Rate contracts can be established for multiple years. Since the COA Formula Grant is a longstanding line item in the budget, EOEa established this contract for a 10-year period. **This is why the contract end date on the contract is listed as June 30, 2032. Do not edit this section of the contract.**
- These changes are going to simplify the process for future fiscal years. Starting next year, Councils on Aging can expect the following process:
  - EOEa will post a memorandum on our website announcing the Council on Aging Formula Grant awards. An email will go out to the COA contact person of record to let you know the announcement is posted, which initiates the award process. Award amounts will be calculated using the payment rate established in that year's state budget, and will serve as the official notification of how much each Council on Aging will receive.
  - From Fiscal Year 2023 until Fiscal Year 2032, COAs will not need to sign a Standard Contract form each year to receive the funding. EOEa will simply make a payment to each Council on Aging for the appropriate award amount.
  - While Councils on Aging will not need to submit a Standard Contract Form, **it is important that each city and town continues to utilize the funding consistent with the purpose of the line item in the budget and follow all relevant finance requirements. It is also important for Councils on Aging to maintain their official contact, location, and**

**banking information with both the Office of the State Comptroller and EOEa.** If this information is not kept up to date, payments will be delayed due to these errors.

#### **PAYMENTS**

- Starting in Fiscal Year 2021, EOEa eliminated the requirement to submit invoices in order to be paid. EOEa will issue payment to each Council on Aging based on their award amount in the Formula Grant Award Spreadsheet (located here: <https://coadmin.800ageinfo.com/>). **Councils on Aging do not need to submit an invoice for their formula grants.**
- Starting in Fiscal Year 2021, EOEa also eliminated the requirement to report final grant balances from the prior year. This continues not to be required.
- **Councils on Aging are still required to submit an annual report to the program team at EOEa** describing the impact of the formula grant funds. Instructions for this process are issued by the EOEa program team each year.

If you have any questions or concerns, please contact Adam Frank at (617) 222-7428 or [adam.frank@mass.gov](mailto:adam.frank@mass.gov).

Thank you for all that Councils on Aging have done and continue to do to serve older adults in the Commonwealth.

# COA Administrator

Councils on Aging in Massachusetts

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## **FY2022 Formula Grant Contracts**

INSTRUCTIONS: updates enclosed

The section of the Standard Contract Form (SCF) for Formula Grants to Councils on Aging (COAs) entitled "BRIEF DESCRIPTION OF CONTRACT PERFORMANCE or REASON FOR AMENDMENT" provides a description of the terms to which a Council on Aging (COA) or municipality is bound. The SCF also incorporates Commonwealth Terms and Conditions. Each COA or municipality shall print a copy of the Commonwealth Terms and Conditions ([also linked here](#)) and maintain the Commonwealth Terms and Conditions as part of the relevant contract file. Allocations to each COA are included in a separate Excel spreadsheet ([click to download FY22 Formula Grant Amounts.xlsx](#)).

- The authorized signatory shall sign and date this contract as an original; wet signatures and dates are required
- An authorized signatory is an individual legally certified to execute contracts on behalf of the municipality
- Each municipality must file an updated Contractor Authorization Listing Form (CASL) with the Secretary of State's Office at the beginning of each fiscal year. [Please access more information on the CASL form here.](#)
- Each municipality must include a copy of the CASL form with contract document submission to EOEA.

Please locate your municipality's contract in the document group provided below for printing and signature.

<b>Contract</b> <b>(click to download PDF)</b>	<b>Number</b>	<b>Municipality names starting</b> <b>with the letters:</b>
<a href="#">FY22 Formula Grant Contract MA 1</a>	02082200000000000006	A-D
<a href="#">FY22 Formula Grant Contract MA 2</a>	02082200000000000007	E-L
<a href="#">FY22 Formula Grant Contract MA 3</a>	02082200000000000008	M-R
<a href="#">FY22 Formula Grant Contract MA 4</a>	02082200000000000009	S-Z

*Contract is attached*

**Example – Town of Oak Bluffs would be under FY22 Formula Grant Contract MA 3: 02082200000000000008**

- EOEA countersigns in the lower right field corner; do not mark or make any changes in that area.
- The address in the upper left-hand corner box of the SCF is the current legal address of the relevant municipality on file with the Office of the State Comptroller.
- If you would like an original executed contract for your files, please send in two (2) original signed contracts and a self-addressed envelope. EOEA will mail the contract to the [name and address provided on the self-addressed envelope](#).
- [Please do not make any changes to the contracts EOEA has uploaded for signature.](#) Should you need to advise EOEA of administrative updates (contact name, legal address, etc.), please do so by including a memo with requested changes. Please return the memo with the signed FY22 Formula Grant contract.
- Upon receipt of the properly signed contract, EOEA will issue a payment in the amount indicated for your municipality in the FY22 Formula Grant Amounts spreadsheet.

**Please expedite finalization of your contract to the extent possible.**

Return the document(s) to:

Executive Office of Elder Affairs

1 Ashburton Place, Rm 517

Boston, MA 02108

ATTN: FY22 Formula Grant Contract

Posted on February 15, 2022 in [Formula Contract, FY 2022](#) | [Permalink](#)

## FY2021 Council on Aging Formula Grant Signed Contracts

Updated Oct 22, 2021.

Below are downloadable copies of FY2021 Council on Aging Formula Grant signed contracts, as signed by both parties, received by EOEA on or before March 28, 2021.

If you have any questions please contact Adam Frank at [adam \(dot\) frank \(at\) mass \(dot\) gov](mailto:adam(dot)frank(at)mass(dot)gov).

[Continue reading "FY2021 Council on Aging Formula Grant Signed Contracts" »](#)

Posted on May 7, 2021 in [Formula Contract, FY 2021](#) | [Permalink](#)

## FY2021 Formula Grant Contracts

[Download FY21 FORMULA GRANT.Final Upload \(pdf\)](#)

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### Instructions

Instructions have been updated this year, please read carefully.

The COA/Municipality shall make no changes to the contract!

\*Due to the high volume of contracts, scanned copies will not be accepted.

Do not scan or email the formula grant contract

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The contract section entitled "BRIEF DESCRIPTION OF CONTRACT PERFORMANCE or REASON FOR AMENDMENT" provides a description of the terms of the Contract the COA/Municipality is bound. In addition, incorporated into the contract are the Terms and Conditions uploaded with the Contract. The COA/Municipality is to print a copy of the Terms and Conditions and maintain as part of the Contract.

<http://www.macomptroller.info/comptroller/docs/forms/contracts/CommonwealthTermsAndConditions.pdf>

- The address in the upper left hand corner box of the contract may not be the COA's address; it is the current legal address of the municipality on file with the Office of the State Comptroller.
- The Executive Office of Elder Affairs countersigns in the lower right field corner; do not mark or make any changes in that area.
- 1. The authorized signatory shall sign and date this contract as an original, PLEASE note the date *cannot* be typed. The COA director or COA board chair should print the signatory's name and title in the field located at the bottom left section of the form. Only the chair of the select board, executive secretary, mayor or someone legally authorized to sign contracts, may sign on behalf of the municipality.
- 2. An original Contractor Authorization Signatory Listing (CASL) form is expected. Please disregard the note referring to page 2 as being optional. **Page 2 is REQUIRED.** Send the original CASL form with your executed contract.  
<http://www.macomptroller.info/comptroller/docs/forms/contracts/casl-form.docx>

3. If the COA requests an original signed copy of the contract, two original signed signature pages are to be returned to EOEa with a self-addressed envelope. One signed copy of the Contract with original signatures will be returned to the COA/Municipality.
4. Changes made to the contract will not be accepted. Please include a memo advising ELD of any updates you wish to include going forward and enclose the memo when mailing in your contract.
5. As noted in the Brief Description of the Contract Performance or Reason for Amendment field, upon receipt of the properly signed contract, EOEa will issue a payment in the amount noted in the Compensation Field.
6. Please submit as soon as practical. You need NOT overnight the contract. Return the document to:

Executive Office of Elder Affairs  
1 Ashburton Place, Rm 517  
Boston, MA 02108  
ATTN: Stacey O'Connell

Posted on January 14, 2021 in [Formula Contract, FY 2021](#) | [Permalink](#)

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# COMMONWEALTH OF MASSACHUSETTS ~ STANDARD CONTRACT FORM



This form is jointly issued and published by the Office of the Comptroller (CTR), the Executive Office for Administration and Finance (ANF), and the Operational Services Division (OSD) as the default contract for all Commonwealth Departments when another form is not prescribed by regulation or policy. The Commonwealth deems void any changes made on or by attachment (in the form of addendum, engagement letters, contract forms or invoice terms) to the terms in this published form or to the Standard Contract Form Instructions and Contractor Certifications, the Commonwealth Terms and Conditions for Human and Social Services or the Commonwealth IT Terms and Conditions which are incorporated by reference herein. Additional non-conflicting terms may be added by Attachment. Contractors are required to access published forms at CTR Forms: <https://www.macomptroller.org/forms>. Forms are also posted at OSD Forms: <https://www.mass.gov/lists/osd-forms>.

<b>CONTRACTOR LEGAL NAME: TOWN OF PELHAM</b> (and d/b/a):		<b>COMMONWEALTH DEPARTMENT NAME: Executive Office of Elder Affairs</b> <b>MMARS Department Code: ELD</b>	
<b>Legal Address: (W-9, W-4): 351 AMHERST RD, MA 01002-9714</b>		<b>Business Mailing Address: 1 Ashburton Pl, Boston MA 02108</b>	
<b>Contract Manager: TRACY OSBAHER</b>	<b>Phone: 413-253-0512</b>	<b>Billing Address (if different):</b>	
<b>E-Mail: tosbahr7@gmail.com</b>	<b>Fax:</b>	<b>Contract Manager: Stacey Anne O'Connell</b>	<b>Phone: 617-222-7419</b>
<b>Contractor Vendor Code: VC6000191937</b>		<b>E-Mail: Stacey.oconnell@mass.gov</b>	<b>Fax: 617-727-9368</b>
<b>Vendor Code Address ID (e.g. "AD001"): AD 001</b> (Note: The Address ID must be set up for EFT payments.)		<b>MMARS Doc ID(s): 02082200000000000008</b>	
<b><input checked="" type="checkbox"/> NEW CONTRACT</b> <b>PROCUREMENT OR EXCEPTION TYPE: (Check one option only)</b> <input type="checkbox"/> Statewide Contract (OSD or an OSD-designated Department) <input type="checkbox"/> Collective Purchase (Attach OSD approval, scope, budget) <input type="checkbox"/> Department Procurement (includes all Grants - 815 CMR 2.00) (Solicitation Notice or RFR, and Response or other procurement supporting documentation) <input type="checkbox"/> Emergency Contract (Attach justification for emergency, scope, budget) <input type="checkbox"/> Contract Employee (Attach Employment Status Form, scope, budget) <input checked="" type="checkbox"/> Other Procurement Exception (Attach authorizing language, legislation with specific exemption or earmark, and exception justification, scope and budget)		<b><input type="checkbox"/> CONTRACT AMENDMENT</b> Enter Current Contract End Date <u>Prior</u> to Amendment: _____, 20____. Enter Amendment Amount: \$ _____. (or "no change") <b>AMENDMENT TYPE: (Check one option only. Attach details of amendment changes.)</b> <input type="checkbox"/> Amendment to Date, Scope or Budget (Attach updated scope and budget) <input type="checkbox"/> Interim Contract (Attach justification for Interim Contract and updated scope/budget) <input type="checkbox"/> Contract Employee (Attach any updates to scope or budget) <input type="checkbox"/> Other Procurement Exception (Attach authorizing language/justification and updated scope and budget)	
The Standard Contract Form Instructions and Contractor Certifications and the following Commonwealth Terms and Conditions document are incorporated by reference into this Contract and are legally binding: (Check ONE option): <input type="checkbox"/> Commonwealth Terms and Conditions <input checked="" type="checkbox"/> Commonwealth Terms and Conditions For Human and Social Services <input type="checkbox"/> Commonwealth IT Terms and Conditions			
<b>COMPENSATION: (Check ONE option):</b> The Department certifies that payments for authorized performance accepted in accordance with the terms of this Contract will be supported in the state accounting system by sufficient appropriations or other non-appropriated funds, subject to intercept for Commonwealth owed debts under 815 CMR 9.00. <input checked="" type="checkbox"/> <b>Rate Contract.</b> (No Maximum Obligation) Attach details of all rates, units, calculations, conditions or terms and any changes if rates or terms are being amended.) <input type="checkbox"/> <b>Maximum Obligation Contract.</b> Enter total maximum obligation for total duration of this contract (or new total if Contract is being amended). \$ _____.			
<b>PROMPT PAYMENT DISCOUNTS (PPD):</b> Commonwealth payments are issued through EFT 45 days from invoice receipt. Contractors requesting accelerated payments must identify a PPD as follows: Payment issued within 10 days ___% PPD; Payment issued within 15 days ___% PPD; Payment issued within 20 days ___% PPD; Payment issued within 30 days ___% PPD. If PPD percentages are left blank, identify reason: <input checked="" type="checkbox"/> agree to standard 45 day cycle <input type="checkbox"/> statutory/legal or Ready Payments (M.G.L. c. 29, § 23A); <input type="checkbox"/> only initial payment (subsequent payments scheduled to support standard EFT 45 day payment cycle. See Prompt Pay Discounts Policy.)			
<b>BRIEF DESCRIPTION OF CONTRACT PERFORMANCE or REASON FOR AMENDMENT:</b> This 10-year contract will cover grant funds to municipal Councils on Aging (COA) of the Commonwealth authorized through the annual GAA and other sources. The activity performance period for year one of this contract is 7/1/2021-6/30/2022. The COAs established by MGL provide social and support services to older adults, their families and caregivers. The annual award is determined by the number of elders per municipality as per the most recent census data, at a current rate of \$12 per person. This contract will cover any rate adjustment or increase during the 10-year period. Each municipal COA will complete an annual fiscal report describing how these grant funds were applied. All approved obligations incurred prior to the latest signature date are intended to be part of this agreement and the amount of the prior obligation for year one is funded in the FY22 award. The deadline to submit the signed contract is 6/30/22. MA #3.			
<b>ANTICIPATED START DATE: (Complete ONE option only)</b> The Department and Contractor certify for this Contract, or Contract Amendment, that Contract obligations: <input type="checkbox"/> 1. may be incurred as of the Effective Date (latest signature date below) and <b>no</b> obligations have been incurred <b>prior</b> to the Effective Date. <input type="checkbox"/> 2. may be incurred as of _____, 20____, a date <b>LATER</b> than the Effective Date below and <b>no</b> obligations have been incurred <b>prior</b> to the Effective Date. <input checked="" type="checkbox"/> 3. were incurred as of <u>July 1, 2021</u> , a date <b>PRIOR</b> to the Effective Date below, and the parties agree that payments for any obligations incurred prior to the Effective Date are authorized to be made either as settlement payments or as authorized reimbursement payments, and that the details and circumstances of all obligations under this Contract are attached and incorporated into this Contract. Acceptance of payments forever releases the Commonwealth from further claims related to these obligations.			
<b>CONTRACT END DATE:</b> Contract performance shall terminate as of <u>June 30, 2032</u> , with no new obligations being incurred after this date unless the Contract is properly amended, provided that the terms of this Contract and performance expectations and obligations shall survive its termination for the purpose of resolving any claim or dispute, for completing any negotiated terms and warranties, to allow any close out or transition performance, reporting, invoicing or final payments, or during any lapse between amendments.			
<b>CERTIFICATIONS:</b> Notwithstanding verbal or other representations by the parties, the "Effective Date" of this Contract or Amendment shall be the latest date that this Contract or Amendment has been executed by an authorized signatory of the Contractor, the Department, or a later Contract or Amendment Start Date specified above, subject to any required approvals. The Contractor certifies that they have accessed and reviewed all documents incorporated by reference as electronically published and the Contractor makes all certifications required under the Standard Contract Form Instructions and Contractor Certifications under the pains and penalties of perjury, and further agrees to provide any required documentation upon request to support compliance, and agrees that all terms governing performance of this Contract and doing business in Massachusetts are attached or incorporated by reference herein according to the following hierarchy of document precedence, the applicable Commonwealth Terms and Conditions, this Standard Contract Form, the Standard Contract Form Instructions and Contractor Certifications, the Request for Response (RFR) or other solicitation, the Contractor's Response (excluding any language stricken by a Department as unacceptable, and additional negotiated terms, provided that additional negotiated terms will take precedence over the relevant terms in the RFR and the Contractor's Response only if made using the process outlined in 801 CMR 21.07, incorporated herein, provided that any amended RFR or Response terms result in best value, lower costs, or a more cost effective Contract.			
<b>AUTHORIZING SIGNATURE FOR THE CONTRACTOR:</b>  X: _____, Date: _____ (Signature and Date Must Be Captured At Time of Signature)  Print Name: _____ Print Title: _____		<b>AUTHORIZING SIGNATURE FOR THE COMMONWEALTH:</b>  X: _____, Date: _____ (Signature and Date Must Be Captured At Time of Signature)  Print Name: _____ Print Title: _____	