

Massachusetts Office of the Inspector General

Procurement Bulletin

Letter from the Inspector General

Greetings from the Inspector General's Office. This is the first issue of the *Procurement Bulletin* since the passage of Chapter 193 of the Acts of 2004, entitled "An Act Further Regulating Public Construction in the Commonwealth." As you probably know by now, this Act made significant revisions to the Commonwealth's public design and construction laws. My Office has been very involved in outreach and education efforts on the new law. Additional training opportunities in the MCPPO program have been scheduled and we are in the process of revising the *Designing and Constructing Public Facilities* manual to reflect changes in the law.

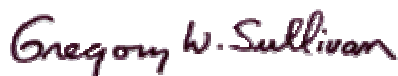
This *Bulletin* includes an article on implementation issues of the public construction reform law and a questions and answers section on "M.G.L. c. 30B—Public Construction Contracts." In addition, this *Bulletin* also includes articles on Chapter 30B procurement issues and highlights several advisories recently published by my Office.

Further, the Office is conducting a survey of the use of M.G.L. c. 30B for procuring exempt supplies and services. If you bid exempt supplies and/or services, I encourage you to complete and return the survey to my staff.

Finally, I'd like to congratulate the new MCPPOs and those who have been recertified.

Please feel free to contact the Office for additional information on the MCPPO program and my Office's other activities. Also, I encourage you to visit our website periodically for the most up-to-date information.

Sincerely,



Gregory W. Sullivan
Inspector General

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Massachusetts Construction Reform Procurement Laws—An update on Public Construction Reform Implementation

Since the passage of Chapter 193 of the Acts of 2004, entitled "An Act Further Regulating Public Construction in the Commonwealth," the Office of the Inspector General ("Office") and other agencies and groups have been meeting on a regular basis to continue discussions on implementing the new law. Now that the law has been in effect for approximately six months and projects are underway, early challenges of implementing the new provisions of the law are becoming apparent. In some instances the issues are specific to individual projects; in other cases, the issues are broader and could affect many projects and varying entities. Over time, as successful projects are completed, the promises intended by the reforms to promote increased accountability, provide flexibility, and increase inclusion and competition on public construction projects should become evident.

Some of the issues the implementation group has addressed include:

Technical and non-technical amendments to the law. With any major piece of legislation there are often minor edits and corrections necessary to "clean up" the bill. In the interests of clarity, the group has developed and proposed technical amendments to the Special Commission on Public Construction Reform for deliberation and submission to the General Court for a vote. Three of the most pressing

issues were addressed with passage of Chapter 507 of the Acts of 2004 that was enacted on January 13, 2005. Chapter 507 amended M.G.L. c. 149 in two sections relative to the prequalification process and delayed implementation of subcontractor certification by the Division of Capital Asset Management (DCAM) until December 31, 2005. For up-to-date information on legislative action, go to www.mass.gov/legis.

In future meetings, the implementation committee plans to discuss unanticipated consequences of the new law and resulting issues that have arisen on a few projects that have proceeded under the new reforms. Those discussions may result in suggestions for further amendments to the law.

Prequalification. The new prequalification requirements have been in effect since July 19, 2004 for projects estimated to cost \$10 million or more. (Prequalification is optional for projects between \$100,000 and \$10 million.) The implementation group has reviewed DCAM's draft prequalification regulations. The draft regulations will receive a public hearing shortly before promulgation in final form. The regulations will provide valuable guidance and information to awarding authorities.

DCAM is also developing a form to be used during the evaluation of contractors that will assist awarding authorities to implement and conduct a fair and consistent prequalification process. Additionally, in December 2004, DCAM conducted a prequalification process for two state police station projects using the process prescribed by the re-

forms. DCAM's request for qualifications (RFQ) is a good model that may be useful to you on your own projects. The RFQ is available on Comm-PASS at www.comm-pass.com.

General contractor and subcontractor certification. DCAM, with input from members of the implementation committee, developed regulations and guidelines for obtaining certification and receiving a Certificate of Eligibility. Certification is required of general contractors on public building construction contracts estimated to exceed \$100,000 and of sub-bidders where the contract might exceed \$20,000 for the filed sub-bid work. [See M.G.L. c. 149, §44F.] On January 13, 2005, with enactment of Chapter 507 of the Acts of 2004, the start date for sub-bidder certification was changed to allow DCAM to complete subcontractor certification for each of the seventeen trades. Now, sub-bids must include a certificate of eligibility and update statement starting on January 1, 2006. The requirements and application forms are available at DCAM's website - www.mass.gov/cam/Creform.

For projects of less than \$100,000 there is no longer a requirement that general contractors be certified. Therefore, you have the authority to determine the qualifications necessary for contractors to perform your job. The law still requires that you award to the lowest responsible and eligible bidder.

We recommend that you include in your bid package a requirement that bidders submit a comprehensive list of ongoing projects, similar projects completed within the past

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five years, and project contact names and telephone numbers. You can then check a selected list of project references. You might also consider using DCAM's application for certification as a model and modifying it to your needs.

Owner's Project Manager. The implementation group has had many discussions on the importance of the role of the owner's project manager (OPM) on public building projects valued at \$1.5 million or more. Based on those discussions, there was a consensus that awarding authorities would find it useful to have more guidance on the owner's project manager component. DCAM has published on its public construction reform web page, a matrix listing the services that are mandated for the OPM and those services that optionally might be a part of an OPM contract.

Small Construction Projects. One issue that has come up frequently at the implementation group meetings and other venues has been the change to the law that requires the solicitation and documentation of three quotes for building projects of less than \$10,000. An amendment that would change the required quote threshold for projects over \$5,000 received consensus at a recent implementation group meeting.

If the Legislature changes the threshold, you will be able to rely on "sound business practices" to obtain contractors up to \$5,000. To ensure a fair and consistent process, this Office still would recommend that you periodically solicit and document at least three informal quotations and select the qualified contractor offering to perform

the contract at the lowest price or award annual contracts based on estimated budgets or estimated quantities of the required labor and materials.

Other timely issues. The implementation group will continue to discuss important issues that arise during the next few months and develop policies and procedures, guidelines, and plans to assist local jurisdictions and state agencies and authorities to affect a smooth implementation of the new requirements. Keep checking DCAM's and the Office's website for updated information.

Inspector General Office's Role in Alternative Delivery Methods

With Chapter 193, the Office has additional roles in the public construction arena, particularly with regard to alternative delivery methods. Under M.G.L. c. 149A, the new statute created by Chapter 193 of the Acts of 2004, you may elect to use construction management at risk (CM at risk) for public building projects and design build for public works projects where the construction is estimated to be \$5 million or more.

The Legislature gave the Office the role of gatekeeper in determining if and when entities may use the two new alternative delivery options. Those gatekeeper responsibilities mean that in order for a municipality to use CM at risk services or the design build process, the municipality must demonstrate to the Office that it has the expertise to successfully implement a project using an alternative delivery method.

To determine whether awarding authorities have an adequate framework in place, the Office has developed an application process. According to the statute, if an awarding authority meets certain requirements, then the Office must issue a notice to proceed. The Office began accepting applications for review on January 3, 2005. For more information regarding the application process, go to www.mass.gov/ig/creform.

Also, to assist jurisdictions in understanding the legal requirements of the new CM at risk law versus the design-bid-build process, addressing certain management issues, and controlling potential project risks, the Office has designed a one-day Massachusetts Certified Public Purchasing Official training course. For information on the class, see the registration form in this *Bulletin* or go to the Office's website.

Procuring Vending Machines Under Chapter 30B

The Office of the Inspector General ("Office") was recently asked whether public procurement procedures apply to vending machine contracts with municipal awarding authorities. The short answer is yes, as vending machine contracts generate revenue and thus have value.

Depending on the value of the contract being awarded, an awarding authority must first determine whether it is necessary to solicit quotes or conduct a formal, advertised procurement. With revenue generating contracts, the starting point for valuing a contract should

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be done by estimating the vendor's annual revenue to be generated in sales. For example, an awarding authority determines that an estimated projection of yearly vending machine sales will total \$25,000 to the vendor per year for three years with 30% of total gross sales being paid to the awarding authority. The contract's value is \$75,000 (\$25,000 in total annual sales x 3 years) and, therefore, the awarding authority must use an Invitations for Bids (IFB) or Requests for Proposals (RFP) process to procure the vending machine(s). In the opinion of this Office, an IFB is the preferred process to use with this type of procurement.

A reasonable estimate of the annual revenue to be generated in sales may be based on yours or another awarding authority's past gross sales, estimated number of customers (students, staff, community) or on industry standards. Within the vending machine industry there are set standards for vendors to use in calculating projected gross sales based on the number of customers. Therefore, an awarding authority's ability to provide current or projected user numbers will be helpful in determining the estimated value of the contract to a vendor. Also, in practical terms, an awarding authority should consider the value of what it is providing "free" to the vendor to enable the vendor to profit from the vending machine contract, such as access to consumers, electricity, and public operating space. It is important for an awarding authority to recognize that it is providing a revenue producing opportunity not only for itself, but also for the vendor.

The vending machine market is di-

verse and highly competitive, which affords awarding authorities an opportunity to benefit from competition among vendors regardless of the contract's value. Vendors frequently provide awarding authorities with diverse product lines, and payment terms that include non-cash items in addition to a percentage of total sales. For instance, more vendors are responding to the needs and nutritional goals of awarding authorities by diversifying their product lines to include water, juice, sugar-free, caffeine-free and calcium enriched items.

Additionally, the Office is aware that some schools in Massachusetts are requesting not only a percentage of total gross sales, but are also requesting scholarships for the student body, scoreboards for the gymnasiums and athletic fields, and uniforms, coolers and water bottles for the sports teams. The value of non-cash items, such as scoreboards and equipment should be added to cash payments to determine the value of the total payment to the awarding authority. The value of the non-cash items is the retail price of the items verified by the manufacturer or distributor. Moreover, as part of the bid pricing sheet, awarding authorities should require vendors to attach and submit such written verification from the manufacturer or distributor for the value of non-cash items.

In exchange for diversified product lines, cash and/or non-cash merchandise, vendors have received all or a combination of the following from awarding authorities: exclusive sales and display rights during the contracted period, public space, certain services and electricity for the machines, and exposure to a

customer base of perhaps students, personnel and the greater community. In this market type, the Office recommends seeking competition, regardless of the projected contract value, to ensure that the highest bidder, offering the greatest value to an awarding authority is accurately identified.

As with all municipal procurements it is necessary to place bidders on equal ground. Accordingly, an awarding authority should treat bidders fairly by specifying in its bid specifications all products, services and/or merchandise it wants to receive in exchange for the placement of vending machines on public property. By doing so, awarding authorities will avoid receiving bids from vendors for items that are not needed and, also, items for which the value is not readily discernible.

Because revenue generating contracts require payment to the awarding authority, the contract should be awarded to a responsive and responsible bidder offering the highest total of cash or cash and non-cash merchandise to the awarding authority, that is, if non-cash items are requested in the awarding authority's specifications.

The Office encourages awarding authorities to actively network with one another in sharing their specifications. Be sure to carefully review the terms and conditions of shared and older specifications before incorporating such into present specifications. Lastly, employing the use of market research and seeking the assistance of municipal legal counsel will ensure a greater likelihood for successful, productive revenue-generating contracts.

Questions & Answers – M.G.L. c. 30B

M.G.L. c. 30B—General

Q: Recently, my town awarded a contract for 50 chairs at \$250 per chair with a service assembly fee of \$10 per chair. However, my town needs an additional five chairs. May the town purchase these additional chairs under the existing contract?

A: Yes. Under Chapter 30B, a governmental body may increase the quantity of supplies and services already specified in a contract, provided that the following four conditions are met:

- the unit prices remain the same or less;
- the procurement officer documents in writing that an increase is necessary to fulfill the actual needs of the jurisdiction and it is more economical and practical than awarding another contract;
- the parties agree to the increase in writing, and
- the increase in the total contract price does not exceed 25 percent.

Therefore, your town's total contract price is \$13,000 (\$250 x 50 chairs = \$12,500, plus \$10 x 50 assembly fees = \$500) and 25 percent of \$13,000 is \$3,250. Thus, your town may purchase the additional five chairs with assembly for a cost of \$1,300 as such cost does not exceed 25 percent of the total contract price.

Q: Are there any types of contracts that are not subject to the 25 percent limitation?

A: Yes. A small number of supply contracts are not subject to the 25 percent limitation on increases. These contracts are for the purchase of gasoline, special fuel, fuel oil, road salt and other ice and snow control supplies. For these contracts, a jurisdiction may increase the quantity by more than 25 percent, however, the first three conditions listed above must be met before these additional supplies may be purchased under the existing contract.

Q: My town has a food services contract with one vendor for its high school. The vendor is doing an excellent job, however, the three-year contract is due to expire in six months, and the contract's terms do not provide for any options to renew. May the town extend the contract period without seeking competition?

A: No. Chapter 30B only allows for options to renew or extend a contract period when such information was originally included in the specifications and incorporated into the executed contract. Although the incumbent vendor is doing an excellent job for the high school, your town's food services contract does not include any options to renew. Therefore, your town will need to issue a new invitation for bids or a request for proposals and award the food services contract to a responsive and responsible vendor offering the best price or the most advantageous proposal.

Q: What are the lengths for short and long-term supplies and services contracts?

A: Short-term supplies and services contracts are for any period of time up to three years, including the term of any renewal, extension, or option year(s).

According to Chapter 30B, long-term supplies and services contracts are for periods of time longer than three years, including any renewal, extension, or option. However, long-term contracts are only permissible if authorized by a majority vote of the jurisdiction's governing body **before the contract is awarded**. Under Chapter 30B, majority vote required to approve long-term contracts must be taken by the following:

- for towns or districts, a duly called town or district meeting;
- for cities, the city council or the city commissioners, with the approval of the mayor if such approval is required under the city's charter;
- for counties, the county commission;
- for regional school districts, an affirmative vote by two-thirds of the members of the school committee; and
- for a redevelopment, housing, or other authority, by the governing body.

Q: By majority vote, my city council and mayor agreed to donate the fire department's 1984 fire truck to a non-United States charity. Is the city's donation allowed under Chapter 30B?

A: No. Chapter 30B requires local authorities to dispose of supplies that have a resale or salvage value. To dispose of surplus supplies at less than fair market value to a charity the following two conditions must be met:

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- the charity has an Internal Revenue Code section 501(c)(3) tax-exempt status and
- the awarding authority received majority vote approval in advance of the disposition.

It is probable that the fire truck has a resale and, also, a salvage value for its mechanical parts. As such, the fire truck is considered a surplus supply and your city officials will not be able to donate it to a non-U.S. tax-exempt charity. Should your city council and mayor remain interested in disposing of the fire truck to a charity, they may dispose of it at less than fair market value, so long as the two conditions outlined above are first met.

Q: I am a purchasing agent for a city that is disposing of office equipment with a fair market value of less than \$5,000 in total. Is there a disposition process for surplus supplies valued at under \$5,000?

A: Yes. Chapter 30B requires you to dispose of surplus supplies, with an estimated net value of less than \$5,000 using written procedures approved by your city's governing body. If your city does not already have written procedures, such must be drafted and approved before you dispose of the office equipment. Your city's written procedures may include a process for advertising surplus supplies in the local newspaper or on the city's web site. In addition, the process may allow your city the options of selling surplus supplies through yard sales, silent auctions in city hall, or by soliciting written quotes. Therefore, your city needs to fashion its own disposition process through approved, written procedures that are kept on record and followed by all city officials.

M.G.L. c. 30B—Public Construction Contracts

Q: I am buying new playground equipment for one of our town parks. The contractor will supply and install the equipment. I expect the total contract to cost \$40,000. Does M.G.L. c. 30B apply to this contract?

A: No. This is a public works contract subject to M.G.L. c. 30, §39M.

Q: I have to procure a small public works project contract that will cost between \$10,000 and \$25,000. May I use the M.G.L. c. 30B, §5 sealed bid process?

A: Yes, you may use M.G.L. c.30B, §5 or M.G.L. c.30, §39M.

Q: Must I obtain a payment bond for a small public works construction contract, which includes both labor and materials?

A: Yes. You must obtain at least a 50 percent payment bond for any construction contract costing more than \$2,000 (\$5,000 for state contracts).

Q: Does M.G.L. c. 30B apply if I am spending \$120,000 on equipment only and I intend to use town employees to provide the labor?

A: Since you are purchasing equipment or materials only, the contract may be procured under either M.G.L. c. 30, §39M or the M.G.L. c. 30B, §5 sealed bid process.

Q: May I use the M.G.L. c. 30B, §5 procedures to solicit building construction contracts of less than \$25,000?

A: No. You may no longer use the M.G.L. c. 30B, §5 procedures for soliciting building construction contracts of any value.

OIG Request for Information

As you may know, there are several categories of supplies and services that are exempt from the procurement procedures set forth in M.G.L. c. 30B. These exemptions are listed in section one of M.G.L. c. 30B and include specific types of supplies and services, such as contracts with lawyers, physicians, certified public accountants, garbage collection, towing, and snow plowing.

The Office is frequently asked how to procure contracts that are exempt from M.G.L. c. 30B to ensure value and integrity. We recommend that you first check your local by-laws, ordinances, or procurement procedures to determine whether your local jurisdiction has set up requirements to procure contracts that are not subject to M.G.L. c. 30B. If there are no local guidelines to handle exempt supplies and services, you may determine the best method to handle the procurement.

This Office is interested in knowing whether municipalities that use a M.G.L. c. 30B process to bid exempt supplies and/or services are getting better prices than if the supply or service was not competitively bid. Trash pick-up is a good example of a service that has many potential vendors who could compete for a municipal contract.

If your jurisdiction uses M.G.L. c. 30B to solicit competition for your trash contract or uses a M.G.L. c. 30B process to procure any other exempt supply or service, please complete the survey below and return it by mail or fax by March 15, 2005 to:

*Neil Cohen, Deputy Inspector General
Office of the Inspector General
John W. McCormack State Office Building
One Ashburton Place, Room 1311
Boston, MA 02108
FAX: 617-723-2334*

Bidding Exempt Supplies and Services

Which exempt supplies and services does your jurisdiction bid using M.G.L. c. 30B?
_____.

Does your invitation for bids (IFB) or request for proposals (RFP) specifically reference M.G.L. c. 30B?_____.

Has your jurisdiction realized any cost savings through procuring exempt supplies and/or services according to M.G.L. c.30B? If yes, over what time period?_____.

How does your jurisdiction measure cost savings?
_____.

Submitted by:

Signature: _____

Print name: _____

Title: _____

Jurisdiction: _____

Date: _____

OIG Publications

Procurement and Administration of Audit Services

The Office of the Inspector General ("Office") recently issued *A Local Official's Guide to Procuring and Administering Audit Services* to clarify the narrow M.G.L. Chapter 30B exemption for services provided by Certified Public Accountants (CPAs). The guide explains circumstances when CPA contracts should be competitively procured and provides recommendations concerning the hiring of audit firms and the administration of audit service contracts.

Chapter 30B requires a competitive procurement process using an Invitation for Bids or Request for Proposals for non-CPA auditing or accounting contracts estimated to cost \$25,000 or more. For contracts estimated to cost less than \$25,000, but more than \$5,000, Chapter 30B requires three price quotations. Contracts costing \$5,000 or less must be entered into using sound business practices.

Although CPAs provide an array of professional services, not all services provided by CPAs are exempt from Chapter 30B. It is the opinion of the Office that the CPA exemption applies only to services that could reasonably be restricted exclusively to CPAs. For example, there would be a reasonable expectation that CPAs would prepare your jurisdiction's annual financial audit, single audit, or attestation service. However, other contracts with CPAs are not exempt simply because a CPA is chosen to perform the service. For example, a CPA contract

to purchase and install accounting software would not be exempt under Chapter 30B. Additionally, the exemption is only applicable if the accounting or auditing professional providing the service is a CPA. If a non-CPA provides the service, the contract is not exempt from Chapter 30B.

Numerous recommendations are provided in the guide for your jurisdiction to follow for all audit, consulting, and accountancy procurements and contracts. For example, the Office recommends that vendor contracts be specific and clearly define all vendor responsibilities.

Cost alone should not be the sole determinate when procuring audit services for your jurisdiction, but cost is a legitimate factor to consider. The quality of the training, expertise, and the credentials of the personnel proposed by the vendor should be considered by your jurisdiction in addition to cost.

The Office recommends you contact the Massachusetts Division of Professional Licensure to verify the registration status of a CPA. The Board grants certificates and licenses to practice public accountancy to individuals who comply with statutory requirements and may revoke, suspend, and/or discipline registrants that did not comply with statutory requirements and/or professional standards.

When a CPA firm is hired, the firm should conform to the requirements of the *Government Auditing Standards* (Yellow Book) published by the Government Accountability Office (formerly the General Accounting Office). The standards outlined in the Yellow Book provide a frame-

work to ensure that governmental auditors have the competency, integrity, and objectivity to plan, conduct, and report their work. Very specific limitations on the types of non-audit services that an audit firm can perform are also explained.

The Office recommends that the vendor conform to the rules and regulations of the Sarbanes-Oxley Act of 2002. Specific selections of the act are outlined in the guide that the Office feels are especially important when procuring audit services. The Audit Committee Institute published *Basic Principles for Audit Committees* in 2002 that offers a foundation for audit committees to establish "best practices." One important principle is the implementation of a monitoring system. A partial listing of these principles is provided in the guide as well as the benefits the Office believes your jurisdiction can gain from the implementation of a system to monitor audit services.

Reporting relationships between audit staff and local officials must be clearly defined to assist in the management of an audit service contract. In most cases, the vendor should report to the governing body of your jurisdiction to avoid conflicts of interest, appearance issues, or any allegations of impropriety.

Organizations like the Government Accountability Office, National Association of Local Government Auditors, the Mid-America Intergovernmental Forum, and the American Institute of Certified Public Accountants have resources for your jurisdiction to use when developing standards, procedures, guidelines, Requests for Proposals, etc. A list-

OIG Publications

ing of these organizations and other helpful resources is provided at the end of the guide to assist your jurisdiction when procuring and administering audit services.

For a complete copy of this guide and other Office publications, please visit our website at www.mass.gov/ig. The Office also has an attorney dedicated to answering Chapter 30B related questions. Questions can be submitted by telephone by calling 617-722-8838 or by mail.

Banking Services Guide for Local Government Treasurers

In November of 2003 the Office of the Inspector General undertook a review of banking services procurement methods used by Massachusetts' municipalities. Municipalities have periodically raised questions to the Office about the procurement and management of banking services. Additionally, in 1985 the Office issued a report on banking service relationships citing poor bank account management practices by municipal treasurers, therefore the Office has maintained an interest in this area.

In the course of examining this issue, the Office sent a survey to the treasurers of all 351 Massachusetts municipalities requesting municipal banking services procurement information. Additionally, this Office attended several Massachusetts Collectors and Treasurers Association meetings in the spring and summer of 2004. Based on the results of the survey, as well as the Office's conversations with local treasurers, the Office concluded that local government treasurers,

particularly new treasurers, would benefit from a banking services procurement guide.

The guide makes recommendations for obtaining best value in banking service procurement as well as provides a brief overview of Chapter 30B and a number of resources for local officials looking to procure banking services. The report strongly recommends that municipal treasurers:

- Ensure that your municipality is getting the best value in banking services by employing the Chapter 30B procurement process even when the fees associated with a given service fall below \$5,000.
- Formalize your municipality's banking service relationship by establishing a written agreement or contract between your municipality and your municipality's bank.
- Generate competition by periodically reviewing (every one to three years) and re-procuring (every three years) your municipality's banking services.
- Review if the current number of your municipality's bank accounts is necessary, and consolidate accounts wherever possible.
- Follow all record-keeping practices required by Chapter 30B and the Secretary of State.
- Limit risk when investing by conducting a thorough review of the qualifications, experience, and expertise of your municipality's financial/investment advisor

and/or consultant; and by always exercising sound business practices and prudence when using the advice and services offered by your municipality's financial/investment advisor and/or consultant.

OIG Advisories

Prevailing Wage Rate as Applied to School Bus Contracts

Generally, public officials and others associate prevailing wage rates with construction contracts. However, M.G.L. c. 71, §7A also requires that school bus drivers be paid a prevailing wage under certain circumstances. As you may know, school bus contractors are very experienced in the requirements applicable to procurements for school bus services. The Office recently issued an advisory to help cities and towns determine when the prevailing wage rate applies to its contracts for school bus services and to assist cities and towns to avoid bid protests by vendors. The advisory outlines the following information applicable to school bus contracts awarded pursuant to M.G.L. c. 30B:

- When M.G.L. c. 71, §7A applies to school bus contracts;
- The role of the Division of Occupational Safety (“DOS”), the governmental agency responsible for the establishment of prevailing wages;
- The criteria used by DOS in determining whether a jurisdiction must pay prevailing wage rates to school bus drivers;
- Contact information for DOS for clarification on whether DOS will establish a wage rate and what it will be; and
- How to request a letter from DOS to determine whether or not the prevailing wage is applicable to your school bus contract and if so, what the rate will be.

Guide to Writing Effective Travel Policies

The *Guide to Writing Effective Travel Policies* helps public officials to write travel policies and assists public employees comply with their jurisdiction’s established travel policies. It is ultimately the discretion of each state agency or jurisdiction to establish specific travel policies in addition to the general guidelines set by the Massachusetts Executive Office of Administration and Finance.

Travel policies can cover a wide range of topics including reimbursement procedures for travel expenses. Costs incurred may include the cost of attending a training session as well as the cost of transportation, meals, parking, hotel, and other accommodations. The guide presents information that can assist public officials when preparing written travel policies, provides suggestions for public employee compliance with travel policies, and provides a list of references to assist with the writing of and complying with travel policies. The information in this guide, however, is not meant as a substitute for an established travel policy. A copy of this guide can be downloaded by visiting www.mass.gov/publ/travad.pdf.

Guide to Administering and Complying with Vehicle Management Policies

The *Guide to Administering and Complying with Vehicle Management Policies* is a resource for municipalities that need to develop policies for fleet administration or who wish to re-examine their current policies. The guide is also a resource for public employees who manage and/or operate municipal vehicles. This Office developed this guide to help prevent municipal vehicle misuse. The first step to prevent this misuse is the existence of adequate vehicle policies. The guide provides recommendations for public officials that may help to prevent vehicle misuse. Additionally, the guide lists numerous operator responsibilities. The information in this guide, however, is not meant as a substitute for an established vehicle management policy. A copy of this guide can be downloaded by visiting www.mass.gov/publ/vmadv.pdf.



Massachusetts Certified Public Purchasing Official Program

Massachusetts Office of the Inspector General

One Ashburton Place, Room 1311

Boston, MA 02108

(617) 727-9140

Congratulations to New MCPPOs!

The Office of the Inspector General extends congratulations to the most recent recipients of MCPPO designations based on applications reviewed between January 2004 and February 2005.

MCPPO

Amy Bragan Weatherbee, City of Lawrence DTD
Richard P. Dalrymple, Sturgis Charter School
Mary A. Delaney, City of Gardner
Denise G. Devlin, Town of Barnstable DPW
Stephen F. Dockray, Blue Hills RSD
John F. Flynn, Boston Water & Sewer Comm.
Mark J. Giordano, Town of Barnstable
Brent T. Goins, Dept. of Integrated Solid Waste Management
Michael F. Gray, MWRA
Pamela D. Hagler, Town of Plymouth
Timothy P. Hansen, Town of Ayer
Eric A. Hart, Town of Rockland
Mark P. Hawke, City of Gardner
Raymond W. Houle, Jr., Town of Blackstone
Jana Hunkler Brule, Town of Florida
David J. Marciello, Town of Rehoboth
Mary Ellen Normen Dunn, Natick Public Schools
Cliff C. O'Neill, Gloucester Housing Authority
Jason H. Peterson, UMASS Boston
Jennifer P. Petit, Town of Chatham
Charles Seelig, Town of Halifax
Beverly A. Tefft, Fitchburg, MA
Francis F. Whitty, Quincy Housing Authority

MCSPPO

Diane Chagnon, Bridgewater State College
Mark E. Rousseau, Division of Emp. & Training

MCPPO for Supplies and Services

Monique J. Hicks, Northeast Metro. RSVD
Dorothy M. Jay, Town of Ashland
Debra J. McCrevan, River Valley Charter School

MCPPO for Design and Construction

Frederick J. Yule, Mass. Bay Comm. College

MCSPPO for Design and Construction

Patrick J. Hurley, DEP-BWSC-CPM

Associate MCPPO

Susan S. Beaulieu, Lynnfield Public Schools
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Associate MCPPO for Supplies and Services

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Associate MCPPO for Design and Construction

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Associate MCSPPO for Design and Construction

Rose D'Andrea, Quinsigamond Comm. College



MASSACHUSETTS CERTIFIED PUBLIC PURCHASING OFFICIAL PROGRAM REGISTRATION FORM

Office of the Inspector General
Gregory W. Sullivan, Inspector General
Phone: (617) 727-9140 Fax: (617) 723-2334

REGISTRATION INFORMATION:
All seminars will be confirmed based on a minimum of 20 participants.

GOVERNMENT/NON-PROFIT COURSE PRICE:

Government employees shall include all employees of the commonwealth, employees of the commonwealth's political subdivisions, employees of other state governments, employees of the federal government and employees of any other municipality, county, or local district. Non-Profit employees include any employee of a 501 (c)(3) corporation. Proof of non-profit status must be provided with registration.

RESERVE SEATING:

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ATTN: MCPPO Program

MAKE CHECK PAYABLE TO: OIG

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PUBLIC CONTRACTING OVERVIEW No Prerequisite <input type="checkbox"/> MARCH 22,23,24—2005	3-day seminar BOSTON	Tuition: \$400 for government/non-profit employees \$600 for all others
SUPPLIES & SERVICES CONTRACTING Prerequisite: Public Contracting Overview <input type="checkbox"/> APRIL 13,14,15—2005	3-day seminar BOSTON	Tuition: \$400 for government/non-profit employees \$600 for all others
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ADVANCED TOPICS UPDATE <input type="checkbox"/> APRIL 28, 29—2005	2-day seminar BOSTON	Tuition: \$300 for government/non-profit employees \$500 for all others
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DRAFTING A MODEL IFB Disk program requiring Microsoft Word 7.0 or higher	<input type="checkbox"/> Self-paced	Tuition: \$60 ea. for gov./non-profit employees \$200 for all others

***Registration for this course must be accompanied by a check**

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