

Procurement Bulletin

Massachusetts Office of the Inspector General

Congratulations to New MCPPOs!

Inspector General Robert A. Cerasoli extends his congratulations to the most recent recipients of MCPPO designations based on applications reviewed between January 1, 2001 and April 30, 2001.

MCPPO

Donna R. Anderson, READS Collaborative

Francis L. Avilla, Jr., City of Taunton

Michael C. Blatus, Middlesex County Sheriff's Department

Janice M. Brady, MWRA

Daniel C. Cahill, Town of Swampscott

Patricia B. Callinan, City of Somerville

Brian M. Cangiamila, Operational Services Division

Christopher Thomas Coleman, Town of Lincoln

Russell J. Dean, Town of Reading

Dr. Lincoln A. DeMoura, Norton Public Schools

Joseph V. Elia, Woburn School Department

Walter H. Fender, Marshfield DPW

David C. Geanakakis, Town of Brookline

Cynthia H. Griffin, City of Cambridge

George E. Howe, Town of Ipswich

Michael Karagosian, DOR/ DLS

Pamela A. Leduc, Town of Webster

Kathleen A. Macedo, Freetown-Lakeville RSD

Patricia E. Majenski, South Shore Tri-Town Development Corp.

Paul A. Martin, New Bedford Public Schools

John M. Mitchell, Town of Walpole

Everett V. Olsen, Jr., Westford Public Schools

Arlene S. Robinette, City of Fall River

Douglas R. Stewart, Town of Wellesley DPW

Arthur F. Sullivan, Abington Public Schools

John P. Touhey, Milford Fire Department

Associate MCPPOs

Andrea J. Brown, Dedham DPW

Paula Ann Carey, City of Worcester

David F. LeBlanc, Lawrence Public Schools

Kertland R. Robblee, Woburn Public Schools

Ron Sanda, Town of Harwich

Daniel G. Smith, City of Gloucester

MCPPO for Supplies and Services Contracting

Richard H. Choate, Town of Tyngsborough Water District

Charlene C. Job, Suffolk County Sheriff's Department

Johanne Keville Mulkern, Boston Public Schools

Timothy J. O'Connor, Old Rochester RSD

Linda M. Swotchak, Ludlow Public Schools

Carol J. Zablowsky, Bristol-Plymouth RSVD

MCPPO for Design and Construction Contracting

Roy O. Gilbert, Town of Winchendon

Inside this issue:

A few words about using vendor-supplied IFBs

Using the Multi-State EMail

How the Internet can help your procurement process

M.G.L. c. 30B Questions and Answers

How can I use the power of the Internet to simplify M.G.L. c. 30B procurements?

There are several ways you can use the Internet to simplify your procurement procedures for supplies and services contracts:

For purchases under \$25,000, you may obtain price quotations via e-mail.

For purchases of \$25,000 or more, you may distribute IFBs, RFPs, and addenda via e-mail. You may also

post IFBs, RFPs, and addenda on your Website.

Your Website may be used to announce the availability of surplus supplies. However, if the net value of the surplus supply is \$5,000 or more, you must still comply with the newspaper advertising requirements in M.G.L. c. 30B, and you must dispose of the surplus supply by soliciting sealed bids or through a public auction.

If you register to join the Commonwealth's Multi-State EMail, you may make purchases for commodities on-line from vendors who have statewide contracts. If you make a purchase from a vendor with a statewide contract, that purchase is exempt from the requirements of M.G.L. c. 30B. Visit <http://www.emall.isa.us> for more information about the Multi-State EMail.



Many Resources Available on the IG Website

There are many resources available on the Inspector General's website. The address is www.state.ma.us/ig.

Every report issued by the IG's office since July 1991 is listed on the website, and most of the recent reports can be downloaded. You will also find every issue of the *Procurement Bulletin* and useful procurement manuals, such as *Municipal,*

County, District, and Local Authority Procurement of Supplies, Services, and Real Property and *Designing and Constructing Public Facilities*.

You will also find the course descriptions, dates, and times of seminars offered through the Massachusetts Certified Public Purchasing Official program.

The IG's website also contains a list of legislation filed by the IG's office, along with summaries and full text.

So the next time you are online, be sure to visit our website. You may find some useful information or publications!



A Few Words About the Use of Vendor-Supplied Invitations for Bids

If you are considering using a vendor-supplied invitation for bids (IFB) for a competitive procurement, think again. Vendor-supplied IFBs may restrict or even eliminate competition, and they may not adequately protect your interests. A recent case is instructive of some of the problems that may arise from their use.

This Office learned of an instance in which a town used an IFB supplied by a vendor for furniture and equipment. The vendor offered to put together the IFB for this large, multi-item bid at “no charge.” While the town may have believed that the service provided by this vendor would save time and money, the actual result would have been reduced competition and higher prices.

The IFB was advertised as a bid for “furniture and equipment furnishings.” The specifications included items one would expect to

find in such an IFB such as tables, chairs, and filing cabinets, but it also included a large number of unrelated items. Examples included flags, pencil sharpeners, cameras, a labelmaker, and a piano. Many vendors selling such items would not pick up specifications for an IFB entitled “furniture and equipment furnishings.” Furthermore, other interested vendors, who did not have advance knowledge of the many items that were included, were not afforded the same opportunity to submit competitive bids as the vendor who wrote the IFB.

The IFB also grouped different items together in a “lot” and asked for one price for the lot, with no price breakdown for individual items included in the lot. If the town later wanted to purchase more of one item, it could not make additional purchases because it would have no unit price for the item. The “25% rule” under M.G.L. c. 30B requires addi-

tional purchases to be made at the same unit price or less.

Finally, the IFB stated that “awards may be made on unit, group, or total bid basis, whichever is more advantageous to the [town].” Such an indefinite rule for award jeopardizes fair competition and invites a bid protest.

To promote full competition and to adequately protect your interests, we recommend using vendor-supplied IFBs only as a starting point for writing your own purchase description or scope of services. Of course, you should always write your own business terms, such as when supplies will be accepted and payments made. Any IFB that you develop should be advertised so as to generate competition for all items purchased and should include unit pricing and a clear rule for award.



30Beans

by Helen Flaherty



Looking for continuing education credit? Join us for any of these one-day seminars!

One-Day Continuing Education Seminars

The following one-day seminars provide participants with continuing education credit and do not include an examination.

Spotlight on Schools: Procurement Issues, Challenges, and Trends

Learn more about specialized issues and challenges confronting school business officials and staff members. During this six-hour seminar, participants will apply the principles of M.G.L. c 30B to traditional and emerging areas of school procurement. Topics covered include revenue-producing arrange-

ments, technology purchases, proprietary and sole source procurements for schools, generating competition for school transportation contracts, and professional service procurements.

Bidding for Better Results

This six-hour course covers three important procurement related topics. First, you will refine your specification-writing skills during this hands-on seminar. Second, you will learn what to do when a bid arrives on time but is not opened on time. Third, you will learn how to

avoid the appearance or allegation of bid splitting.

Local Government Real Property Transactions Under M.G.L. c. 30B

In this five-hour seminar, you will learn the step-by-step process for acquiring and disposing of land and buildings using the M.G.L. c. 30B, §16 request for proposals process.

For dates and locations of these seminars, see the registration form on page seven, or call 617-523-1205 to schedule one of these seminars in your jurisdiction.

Training at Your Convenience: OIG Hits the Road



The Office of the Inspector General has been visiting communities that have requested procurement training. Last year, *Bidding Basics and Contract Administration* was presented to over 15 communities and one professional association. Here is what participants are saying about the class:

“This was one of the best seminars I have ever been to. It was very informative and very relevant to my job. Thank you. I can’t wait to attend the three-day seminar in March.”

“I feel the seminar was very

helpful and increased my knowledge of the purchasing and bidding process.”

“I would recommend this to any other municipality.”

“Great seminar for beginners and for those of us that need a refresher course.”

Topics covered in this four-hour training include the differences between the major public bidding laws; when to use each of these laws; the quote and bid process; record keeping requirements; the importance of, and keys to, effective contract administration; how and when you can amend a supply or ser-

vice contract; and support services available to you.

Why not offer this training to your jurisdiction’s staff or to your professional association members? All you need to do is provide a minimum of 35 participants and a location for the training. The training can be held anywhere in the state. The cost of the course is \$40 per person. You may join together with neighboring communities to meet the minimum participant requirements. Call Anne Tierney at 617-523-1205 for more information or to schedule a date for the training.

Local Officials Bring IG Training to Their Jurisdictions

Two Massachusetts communities, the City of Gloucester and the Town of Harwich, recently hosted the IG's *Bidding Basics and Contract Administration* training for their municipal staff. We interviewed Everett Brown, Purchasing Agent for the City of Gloucester and Ron Sanda, Assistant Town Administrator for the Town of Harwich to find out why they arranged for this training in their communities and whether their expectations were met. This is what they told us:

Mr. Brown said that the City of Gloucester chose to have approximately 100 employees attend this training because "Mayor Tobey identified the municipal procure-

ment function as an area presenting opportunities to improve operationally and financially. He [the Mayor] approved a procurement task force which focused on the need for professional procurement training."

When asked what value Mr. Brown expected to get out of having so many employees attend the class he stated, "The City of Gloucester is sending a message of commitment to our staff: to deliver an efficient and effective procurement team, we must invest time, effort, and money to provide quality ongoing training for all employees."

According to Mr. Sanda, the Town of Harwich expected to

save time and money by doing more prudent procurements and by avoiding bid protests.

Mr. Sanda and Mr. Brown were asked how they convinced their jurisdictions to provide this training. Mr. Sanda said, "I called the department heads and asked if they thought they could benefit from this kind of one-day training. Several were relieved to know we had thought of them enough to assist them and attempt to correct some past discrepancies. Every department gladly paid for this training out of their budget."

Mr. Brown told us that the Gloucester Procurement Task Force made the fund-

ing immediately available and that "the Purchasing Department is now preparing a request to include a training line item in the City's FY 2002 annual budget to allow specialized training for primary procurement personnel. If our presentation to the City Council is approved, the City will be sending several employees to the multi-day seminars offered by the Inspector General's Office."

If you can assemble 35 participants from your jurisdiction, neighboring communities, or professional associations, contact Anne Tierney at 617-523-1205 to schedule *Bidding Basics and Contract Administration* in your community.

Designation Requirements for MCSPO Announced

The Office of the Inspector General recently established the experience and education requirements for receipt of the Massachusetts Certified State Purchasing Officer (MCSPO) designations.

To earn a designation as an **MCSPO**, you must meet the work experience requirements, possess at least a high school diploma or equivalent, and successfully complete the *State Contracting Overview* seminar, the *Design and Construction Contracting* seminar, *Comm-*

PASS Overview training, and *Introduction to the RFR Process* training.

Comm-PASS Overview training is offered by the Operational Services Division (OSD). *Introduction to the RFR Process* training is offered by the Human Resources Division (HRD).

To earn a designation as an **MCSPO for Supplies and Services**, you must meet the experience requirements, possess at least a high school diploma or equiva-

lent, and successfully complete the *State Contracting Overview* seminar, *Comm-Pass Overview* training, and *Introduction to the RFR Process* training.

To earn a designation as an **MCSPO for Design and Construction**, you must meet the work experience requirements, possess at least a high school diploma or equivalent, and successfully complete the *State Contracting Overview* seminar and the *Design and Construction Contracting* seminar.

For questions about MCSPO certification, please contact Anne Tierney or Patrice Buchanan at 617-523-1205.

Or, visit our website at www.state.ma.us/ig.



**Massachusetts Certified Public Purchasing Official
Massachusetts Office of the Inspector General**

State House Station
P.O. Box 270
Boston, MA 02133
(617) 727-9140
(617) 523-1205

Who Should Attend

Local government officials and others interested in local government contracts for supplies, services, real property, and construction

**Earn Professional
Certification**

For an in-depth description of courses offered, please visit our website at www.state.ma.us/ig and download a course catalog, or you may call 617-523-1205 to request a catalog, or fax a request to 617-723-2334.

Courses available in your own city or town:

Bidding Basics and Contract Administration

This brief four-hour course is packed with the basics you need to begin understanding public purchasing for local governmental bodies in Massachusetts. You may earn .4 CEUs and 4 CPEs for completion of this course. This course does not contain an examination and may not be applied toward MCPPO recertification. You will receive a certificate of completion. This seminar can be offered at a location in your jurisdiction with a minimum of 35 attendees. Call Anne Tierney to schedule a seminar in your area.

Bidding For Better Results

Participants in this six-hour seminar will practice writing and critiquing specifications to maximize best value for supplies and services. Participants will also learn the best way to handle late bids and how to avoid the appearance of bid splitting. There is no written examination. This seminar qualifies for 6 continuing education credits that may be applied toward MCPPO and MCSPO recertification.

POLICY OF NON-DISCRIMINATION:

The Office of the Inspector General does not discriminate on the basis of race, color, national origin, ancestry, religion, sex, age, disability, sexual orientation, political affiliation, or Vietnam-era or disabled veteran status in its employment, admission policies, or in the administration or operation of, or access to its programs and policies. The Office of the Inspector General does not discriminate on the basis of disability in violation of Section 504 of the Rehabilitation Act of 1973. Inquiries pertaining to the Office's non-discrimination policy for MCPPO programs may be addressed to Anne Tierney, Program Director, at 617-523-1205.



The Massachusetts Office of the Inspector General has been reviewed and approved as an Authorized Provider of continuing education and training programs by the International Association for Continuing Education and Training. Authorized Provider #101811.



Registered with the National Association of State Boards of Accountancy as a sponsor of continuing professional education on the National Registry of CPE sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses. Complaints regarding sponsors may be addressed to NASBA, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417, (615) 880-4200. Membership #103866.



The Massachusetts Office of the Inspector General is part of the American Council on Education's College Credit Recommendation program.



The Massachusetts Office of the Inspector General is a registered provider with the American Institute of Architects Continuing Education System. Please notify us of your AIA membership number so that we can notify AIA of your participation.



The Massachusetts Office of the Inspector General is registered with the Department of Education to award professional development points (PDP).



**MASSACHUSETTS CERTIFIED PUBLIC
PURCHASING OFFICIAL PROGRAM
REVISED REGISTRATION 2001**

**Office of the Inspector General
(617) 727-9140 or (617) 523-1205 Fax: (617) 723-2334**

REGISTRATION INFORMATION:

Registration and payment must be received 10 days prior to course date in order to process a confirmation.

OFF-SITE REGISTRATION AND PAYMENT MUST BE RECEIVED 30 DAYS PRIOR TO SEMINAR DATE IN ORDER FOR THIS OFFICE TO CONFIRM SEMINAR. **Off-site seminars will be confirmed based on a minimum of 50 registrants.** In the event of cancellation of an OFF-SITE location, an alternate date will be offered. Confirmation letters, with directions, will be mailed 10 days prior to seminar.

RESERVE SEATING:

To reserve seating, fax registration and purchase order to (617-723-2334).

MAIL ORIGINAL TO:

Commonwealth of Massachusetts
Office of the Inspector General
P.O. Box 270- State House Station
Boston, MA 02133
ATTN: MCPPO

MAKE CHECK PAYABLE TO: OIG

SUBSTITUTIONS/CANCELLATIONS:

Each seminar is limited and filled on a space available basis. No refunds for cancellations. Registration transfer to someone in your organization is possible with prior notice. The OIG reserves the right to cancel/reschedule any seminar and is not responsible for any costs incurred by registrants. Terms and conditions may change without notice. Alternate course dates may be substituted in the event of an emergency, upon notification. Change in seminar date and/or cancellations received (BY FAX) less than 2 business days prior to the seminar date are subject to a \$25 transfer fee - NO-SHOWS WILL BE INVOICED A \$50 SERVICE CHARGE.

FOR MORE INFORMATION:

Please contact the Program Director Anne Tierney at (617) 523-1205.

THIS FORM MAY BE DUPLICATED

PAYMENT:

- CHECK/M.O.
- PURCHASE ORDER #
- I E/IV

PUBLIC CONTRACTING OVERVIEW

3-day seminar

Tuition: \$250

EARN 20 CPE and 2 CEU CREDITS and QUALIFY FOR PDP and LU hours

- AUGUST 14-16, 2001 BOSTON
- SEPTEMBER 18-20, 2001 TAUNTON
- OCTOBER 2-4, 2001 BOSTON
- DECEMBER 4-6, 2001 BOSTON

STATE CONTRACTING OVERVIEW

4-day seminar

Tuition: \$375

EARN 26 CPE and 2.6 CEU CREDITS and QUALIFY FOR PDP and LU hours

- JULY 17 & 18, 24 & 25, 2001 BOSTON
- OCT 31-NOV 1, NOV 7 & 8, 2001 BOSTON

DESIGNED FOR STATE EMPLOYEES

SUPPLIES & SERVICES CONTRACTING

3-day seminar

Prerequisite: Public Contracting Overview

Tuition: \$250

EARN 20 CPE and 2 CEU CREDITS and QUALIFY FOR PDP and LU hours

- OCTOBER 24-26, 2001 TAUNTON
- NOVEMBER 28-30, 2001 BOSTON

DESIGN & CONSTRUCTION CONTRACTING

3-day seminar

Prerequisite: Public or State Contracting Overview

Tuition: \$350

EARN 20 CPE and 2 CEU CREDITS and QUALIFY FOR PDP and LU hours

- SEPTEMBER 12-14, 2001 AMHERST
- NOVEMBER 13-15, 2001 TAUNTON
- DECEMBER 12-14, 2001 BOSTON

LOCAL GOVERNMENT REAL PROPERTY TRANSACTIONS UNDER M.G.L. c. 30B

1-day seminar

Tuition: \$75

EARN 5 CPE and .5 CEU CREDITS and QUALIFY FOR PDP and LU hours

- OCTOBER 16, 2001 BOSTON

BIDDING FOR BETTER RESULTS

1-day seminar

Tuition: \$90

EARN 6 CPE and .6 CEU CREDITS and QUALIFY FOR PDP and LU hours

- JUNE 14, 2001 TAUNTON
- OCTOBER 17, 2001 BOSTON
- DECEMBER 19, 2001 BOSTON

DRAFTING A MODEL IFB

Self Paced BY MAIL Program

Tuition: \$60

EARN .4 CEU CREDITS

- Disk Program requiring Microsoft Word 7.0 or higher
- Registration for this course must be accompanied by a check

SPOTLIGHT ON SCHOOLS: PROCUREMENT ISSUES, CHALLENGES, AND TRENDS

1-day seminar

Tuition: \$90

EARN 6 CPE and .6 CEU CREDITS and QUALIFY FOR PDP and LU hours

- JUNE 6, 2001 TAUNTON
- OCTOBER 10, 2001 MARLBORO (ASSABET VALLEY RSVD)
- NOVEMBER 20, 2001 BOSTON

NAME: _____ PHONE: _____

SIGNATURE OF APPLICANT: _____ E-MAIL: _____

ORGANIZATION/JURISDICTION: _____

TITLE: _____ FAX: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

HOW LONG HAVE YOU BEEN EMPLOYED AS A PURCHASING OFFICIAL? _____

American Institute of Architects (AIA) members must provide a membership number for LU credit. _____



**Revised MCPPPO Course Schedule
and Registration Form Inside!**

Massachusetts Office of the Inspector General
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(617)727-9140
www.state.ma.us/ig