



# Office of the Inspector General

## PROCUREMENT BULLETIN

Dear Public Officials:

Congratulations to the public officials who recently attained the Massachusetts Certified Public Purchasing Official (MCPPO) designation. This achievement exemplifies your commitment to conducting fair, open and competitive procurements. For a list of new MCPPO designees, please see page 19.

In February 2017, the MCPPO program held its seventh *Story of a Building* class at Bay Path Regional Vocational Technical High School in Charlton, Massachusetts. The Office collaborated with the Massachusetts School Building Authority on this course, which provides comprehensive training concerning public school building projects. Nearly 100 participants attended. Please see page 11 for more information on this class.

Our MCPPO staff also enjoyed the opportunity to interact directly with class participants from surrounding jurisdictions at Gateway Regional School District (Gateway) in Huntington, Massachusetts this semester. Since 2009, Gateway has served as a videoconference site for MCPPO classes taught at our Boston location. Class participants at Gateway voiced appreciation for the opportunity to receive and participate in trainings provided by our faculty in person. The Office looks forward to bringing future classes to Huntington and other locations throughout the Commonwealth. One goal of the MCPPO program is to reach as many procurement officials as possible with training and educational opportunities to assist them in fulfilling their responsibilities. Please see page 17 of the *Bulletin* for the full schedule of our spring courses, including *Running a Successful Procurement Office*, a class designed for experienced procurement officials as well as those who are new to the procurement field.

Excellence in public service applies to more than the proper procurement of goods and services and extends broadly to all expenditures of public funds, including employment practices. Some jurisdictions may not consider an employee's time as having the same calculable value as a tangible asset. As a result, jurisdictions may not implement proper internal controls or provide oversight related to their employees' time and attendance. Many jurisdictions implement robust internal controls that prevent the theft of petty cash or the loss of other tangible assets, but unfortunately do not apply the same appropriate oversight to prevent the fraud, waste or abuse of time scheduled for work. Implementing a policy that requires the use of timesheets signed by employees certifying the hours worked is one step toward preventing the improper payment of public funds related to time fraud. Please see page 7 of the *Bulletin* for additional tips about preventing time fraud and abuse.

Also in this issue of the *Bulletin*, you will find information pertaining to whistleblower protections, a piece on the high cost of using proprietary dispensers for janitorial supplies, an article addressing bid tailoring, and helpful answers to frequently asked procurement questions.

Thank you for your time and consideration in reviewing our Office's publications. Please do not hesitate to contact the Office with comments or questions regarding our programs and resources or to report fraud, waste or abuse in the use of public funds.

Sincerely,

Glenn A. Cunha  
Inspector General

### INSIDE THIS ISSUE:



Letter from Inspector General Glenn Cunha	Page 1
Promote Robust Competition	2-3
You Can Help Now	4-5
Cleaning Up Your Act	5-6
Detecting Time Fraud	7
Procurement FAQs	8-9
MASSBUYS Attendee Registration	10
Story of a Building	11
On the Road with MCPPO	12
MCPPO Designation Application Reminder	12
MCPPO Policies	13
MCPPO Flyers	14-16
MCPPO Registration Form	17-18
New MCPPO Designees	19
Subscription Information	20

### IMPORTANT NOTICE

To report fraud, waste or abuse, please see the following contact information:

**By 24-Hour Hotline:**  
(800) 322-1323

**By Email:**  
[IGO-FightFraud@state.ma.us](mailto:IGO-FightFraud@state.ma.us)

**By U.S. Mail:**  
Office of the Inspector General  
One Ashburton Place, Room 1311  
Boston, MA 02108



## **Promote Robust Competition Among All Qualified Vendors by Addressing Any Inadvertent or Intentional Bid Tailoring**

When conducting a public procurement, the government acts as an agent for the taxpayers, and, therefore, procurement officials must comply with both the letter and the spirit of public procurement laws. All public procurement processes must be conducted in a fair and open manner that maximizes competition among all qualified vendors. Why is this a fundamental principle in public procurement? Because the goal of the public procurement process is twofold: (1) to ensure that taxpayers (and other stakeholders) get the best prices for the goods or services needed; and (2) to provide an equal opportunity to all qualified vendors interested in bidding.

Some procurement officials may not be aware of this duty while others simply neglect it. Neglect may be rooted in a desire to move the process along quickly or a mistaken belief that an open, competitive process will not result in the best deal. Some procurement officials may intentionally avoid a fair and open process because they want to ensure that a favored vendor wins the bid. In the worst cases, this conduct constitutes procurement fraud.



A common form of procurement neglect or fraud is bid tailoring. Bid tailoring happens when specifications, qualifications or other bid or contract requirements favor one or more vendors and effectively exclude others. Sometimes this tailoring is intentional; other times it is inadvertent. For example, a procurement official mistakenly believes that a service provider requires professional licensure, and includes this requirement in the bid specifications. In fact, the type of service does not *require* the provider to be licensed, but only two of eight local vendors happen to be licensed. Adding this particular licensing qualification might have been a mistake based on misinformation or lack of research. As a result, the procurement official effectively limited the local bidder pool to only two vendors.

Consider the following examples of bidder requirements:

- A bidder must have a minimum of 40 years of experience in the trade.
- Any firm submitting a bid must have an industry market share of more than 50%.
- Vendors must have a facility within five miles of Town Hall.
- Providers must be equipped with Acme products.
- Vendors must own all equipment.

After reviewing the examples above, you may see how such requirements might severely restrict competition while adding little to no benefit to the supply or service. If there is no legitimate business reason to include these requirements, then reconsider their inclusion in your bid specifications.

*(Continued on page 3)*



*(Promote Robust Competition, continued from page 2)*

Even if there is a legitimate reason for the requirements, if they are detrimental to a fair, open and competitive process, you should re-examine whether these requirements are really necessary for a successful contract.

Procurement officials make mistakes like we all do, but what appears to be a mistake can also be procurement fraud. For example, a request for proposals (RFP) for landscaping states that vendors must have a facility within five miles of Town Hall. The official who included the requirement claims that it is to ensure a quick response time from the vendor. However, response time is not a significant factor in the contract (in fact, the landscaping work will not be done at Town Hall). Further, while many potential vendors are located between six and ten miles of Town Hall, only one vendor – who also has personal ties to the official – is within five miles. In such a situation, what appears to be a poorly drafted RFP could actually be procurement fraud.



To help deter or detect procurement fraud based on bid tailoring, you may:

- 1) Question a requirement in the bid package that could limit competition. Make sure you know (1) what the reason is for including it; (2) whether the reason is logical; and (3) if the requirement is necessary.
- 2) Listen to vendor complaints. Most vendors want to increase their business by submitting bids. Vendors therefore often pinpoint the specification requirement that deters or limits competition.
- 3) If you receive only one bid or a very small number of bids, review your bid specifications. The same is true if you receive bids from the same vendor(s) all the time. If you are using a fair and open competitive process, then you should generate robust competition. If you are not, then check your requirements for anything that might be deterring competition. If the bidder pool is severely limited, that may be a red flag indicating some sort of bid tailoring.
- 4) Compare your requirements to those of other jurisdictions purchasing the same goods or services. Compare their competitive pool of vendors to yours.
- 5) If vendors are not bidding, then ask them why they are not.



Ask questions and obtain satisfactory answers. If the answers you get are not satisfactory or if there is something about your procurement process that does not seem to comply with the law or sound procurement principles, then call this Office. We have a confidential 24-hour hotline: (800) 322-1323. You may also email our office at [IGO-FightFraud@massmail.state.ma.us](mailto:IGO-FightFraud@massmail.state.ma.us). Procurement fraud is a crime. Please report it.



## **You Can Help Now**

### **Report Fraud, Waste or Abuse Related to the Expenditure of Public Funds or Resources**

*It is the duty of every citizen to communicate to his government any information which he has of the commission of an offense against its laws. To encourage him in performing this duty without fear of consequences, the law holds such information to be among the secrets of state, and leaves the question how far and under what circumstances the names of the informers and the channel of communication shall be suffered to be known, to the absolute discretion of the government, to be exercised according to its views of what the interests of the public require. Worthington v. Scribner, 109 Mass. 487, 488–89 (1872).*

### **Report Fraud, Waste or Abuse to the Office of the Inspector General**

Concerned citizens and public employees should call the Office's 24-hour Confidential Fraud Hotline at (800) 322-1323 or email the Office at [IGO-FightFraud@massmail.state.ma.us](mailto:IGO-FightFraud@massmail.state.ma.us) to report suspected fraud, waste or abuse in the expenditure of public funds, or other wrongdoing related to the use of public resources.

### **Whistleblowers Are Protected**

A person who reports suspicions regarding illegal activity by an individual or organization is a whistleblower. Whistleblower laws are designed to encourage disclosure and protect people who report illegal activity.

### **Whistleblowers' Identities Are Protected Under Massachusetts General Laws Chapter 12A**

Under the law, the Office of the Inspector General is able to protect whistleblowers' identities. A person may choose to remain anonymous, and provide as much information as possible to support the reasonable belief that an illegal activity is underway. M.G.L. c. 12A, § 14(b).

### **Whistleblowers Are Protected From Retaliation When They Report Fraud, Waste or Abuse to the Inspector General Under Massachusetts General Laws**

The law also protects whistleblowers from retaliation. The law states that public employees with authority over personnel actions may not "take or threaten to take any action against any employees as a reprisal for a complaint or disclosing information to the [I]nspector [G]eneral, unless the complaint was made or the information disclosed with the knowledge that it was false or with willful disregard for its truth or falsity." M.G.L. c. 12A, § 14(c).

*(Continued on page 5)*



*(You Can Help Now, continued from page 4)*

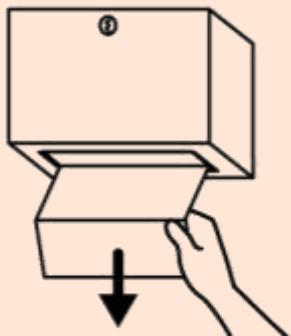
## Threats or Retaliation Against Witnesses or Potential Witnesses Are Crimes

In Massachusetts, witness intimidation is a crime. It is unlawful for anyone to directly or indirectly threaten a witness or potential witness in a civil or criminal investigation conducted by the Office of the Inspector General. Similarly, it is unlawful for anyone to attempt to cause injury or intimidate or harass a witness or potential witness in a civil or criminal investigation conducted by the Office of the Inspector General. M.G.L. c. 268, § 13B.



*This notice is not legal advice.*

## Cleaning Up Your Act



You probably would not buy a paper towel holder that could only be used with one brand of paper towels. The same is true for other household items, such as a soap dispenser or toilet paper holder. Clearly, by limiting yourself to one brand, you miss out on savings when other brands go on sale. Nor can you switch to a better-performing product that comes on the market. Unfortunately, many municipalities and other jurisdictions find themselves in just that position: they are often locked into purchasing one brand or type of refill for hand soap, toilet paper, cleaning liquid, toilet paper or other janitorial supply. This limits competition and costs the jurisdictions thousands of dollars per year. Fortunately, as discussed below, there is a solution.

The problem begins with the jurisdiction's initial purchase of a proprietary dispenser, *i.e.*, a dispenser that can only be used with one brand of refill (in fact, some vendors offer these dispensers for free). Once the jurisdiction has the proprietary dispensers, it must purchase refills that fit them. This not only limits the jurisdiction to that exact brand of toilet paper (for instance), but often, only one distributor sells the refill that fits the proprietary dispenser. Consequently, even though the jurisdiction puts the refills out to bid, only one vendor can supply the item. Thus, the jurisdiction purchases the same refills from the same vendor for years with virtually no competition. Further, the cost of the refills for these dispensers are often significantly marked up, resulting in substantial waste over time.

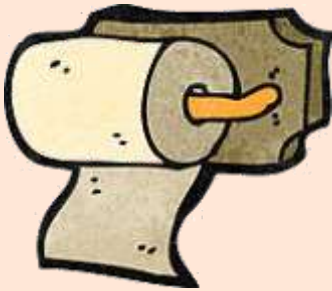
*(Continued on page 6)*





*(Cleaning Up Your Act, continued from page 5)*

The solution: universal dispensers, which can be used with a variety of brands. If, for example, a jurisdiction installs universal toilet paper dispensers that work with several brands of toilet paper, many vendors can bid to supply the refills. This not only increases competition, it can save the jurisdiction a substantial amount of money. One small city near Boston recently switched to universal dispensers for some of its public buildings and instantly



saved \$7,000 on fifteen items in the paper towels and toilet paper category upon rebidding and awarding the contract. Based on the number of proprietary toilet paper dispensers in this city, the cost savings may be closer to \$50,000 per year for these items if the city converts all of its school buildings to universal dispensers before the next school year. This is just one example of how a universal dispensing system, whether it is for hand soap, paper towels or toilet paper, could save a jurisdiction thousands of dollars per year.

As a starting point, jurisdictions should determine whether they are using proprietary or universal dispensers for any of their janitorial supplies. This Office reviewed several jurisdictions' procurement files related to custodial supplies and found that many specifications were for proprietary refills. When the Office spoke with procurement officials and advised them of the situation, most indicated that they did not realize that their jurisdictions' bid specifications included proprietary products.

Jurisdictions that are using proprietary dispensers should consider issuing a request for information (RFI) from vendors to determine the replacement costs and functional aspects of universal dispensers. The RFI could include a requirement that vendors demonstrate how a dispenser works and whether it is compatible with multiple brands of refills. The RFI could also ask the vendor to demonstrate how much product is needed per use, or in the case of chemical concentrate, how much product is needed per application. Such a process will enable procurement officials to draft effective, open and competitive specifications for universal dispensers that result in many bids instead of just one or two bids.



A jurisdiction may be reluctant to switch out dispensers due to the perceived cost or labor involved. However, if a true comparison is made in costs between transferring to universal dispensers that accept a variety of refills versus maintaining the proprietary dispensers, jurisdictions will see that it is more cost-effective over the long term to switch to universal dispensers. Often times, when submitting a bid for product refills, the vendor will even agree to switch to universal dispensers at its own cost in order to compete for the contract.

Every jurisdiction should weigh these considerations in a cost-benefit analysis in order to obtain as "clean" and open bid specifications as possible for the next round of solicitations for custodial and toiletry products. For further information or assistance, please call our Chapter 30B Hotline at (617) 722-8838.



## **Detecting Time Fraud**



Fraud, waste and abuse of public resources can take many forms. Consider a public employee's time and work schedule. Just like a public jurisdiction's tangible assets, a public employee's scheduled work time and benefits should be properly accounted for in a systematic manner with internal controls. For example, consider employees who leave work early one hour each week without properly attributing it as vacation or personal time. What is that time worth to the jurisdiction? If an employee's average hourly wage (including benefits) is \$40.00 per hour and ten employees cut an hour from their work schedule each week, the jurisdiction's calculable loss would be in excess of \$20,000 over a period of one year.

Jurisdictions should implement strong internal controls to prevent time fraud. For instance, jurisdictions should adopt clear, written policies that, among other things, outline how leave time is accrued, how it may be used and how it is recorded, including the use of vacation and sick time. The policies should also outline any limits on carrying over leave time from one year to the next.

Furthermore, the use of paper or electronic timesheets help protect against time fraud or the misuse of time. Jurisdictions can easily implement a two-step time-and-attendance system structured around the use of paper or electronic timesheets. First, employees record their time on a timesheet and certify that the time recorded accurately reflects the time worked, as well as any sick, vacation or other leave time that was used. Next, supervisors should review their employees' timesheets, verify that the employees' recorded time is accurate and sign off on the timesheet.



Finally, jurisdictions must enforce their policies. This includes taking appropriate action if, for instance, an employee is misusing sick time or is not actually working the number of hours recorded on his timesheets. Work time is an asset and jurisdictions should ensure that the hours worked and the benefits used, including vacation and sick time, are accounted for accurately.



## FREQUENTLY ASKED QUESTIONS RELATING TO PROCUREMENT

Q1: As a Chief Procurement Officer (CPO), may I elect to issue a request for proposals (RFP) under Section 6 of Chapter 30B when the estimated cost of the supplies or services is between \$10,000 and \$50,000?

A1: No. You must apply the procurement procedures required by Section 4 of Chapter 30B for supplies or services estimated to cost at least \$10,000 but not more than \$50,000. That provision gives you two options. First, you may solicit price quotations based on a written purchase description and award the contract in accordance with Section 4(b), which states that a “procurement officer **shall** award the contract to the responsible person [or vendor] offering the needed quality of supply or service at the **lowest** [written] quotation.” M.G.L. ch. 30B, § 4(b) (emphasis added).



Second, under Section 4(a) of Chapter 30B, “a governmental body may require that any procurement in an amount of not more than \$50,000 be subject to [S]ection 5.” M.G.L. ch. 30B, § 4(a). As a result, your local jurisdiction may choose to issue an invitation for bids (IFB) under Section 5 of Chapter 30B to procure supplies or services that are estimated to cost at least \$10,000 but not more than \$50,000. Section 4 of Chapter 30B does not provide for any other procurement procedure. Therefore, jurisdictions may not elect to use an RFP to procure supplies or services estimated to cost at least \$10,000 but not more than \$50,000.



Q2: I am the Chief Procurement Officer for a town. A benefactor bequeathed land to my town with a restriction that limits use of the land to agricultural purposes. A resident has asked the town for permission to plant a community vegetable garden on the property. Can the town lease the land to the resident for purposes of cultivating a community vegetable garden without following a formal disposition under Chapter 30B since the intended use of the property falls within the restriction?

A2: No. Chapter 30B establishes specific procedures that governmental bodies must follow regarding the acquisition and disposition of real property. Although the land was bequeathed with an agricultural restriction, the jurisdiction must follow Chapter 30B if it decides to sell, lease or grant an easement on the property. Specifically, Section 16 of Chapter 30B requires the town to declare the property available for disposition and to specify any reuse restrictions on the property. The town must also determine the value of the property using procedures customarily accepted as valid by the appraising profession. If the value of the property is determined to be greater than \$35,000, the town must solicit proposals following the advertising requirements set forth in Section 16(d). Note that the town must open the proposals publicly; it also must submit the name of the selected party to the transaction and the amount of the transaction to the Secretary of the Commonwealth for publication in the *Central Register*.



(Continued on page 9)





(FAQs, continued from page 8)

If the town decides to dispose of the property for less than the determined value, the town must also publish a notice of this decision in the *Central Register* explaining the reason for its decision and disclosing the difference between the determined value and the price to be received.

In this case, the town also should consult local counsel to ensure that the transaction does not violate the terms and conditions of the bequest or any local by-laws.



Q3: My school district needs twenty-five standard “all-in-one” printers that include color copiers, scanners and refillable ink cartridges. The estimated value of this procurement is \$85,000. We would like to procure this equipment from a vendor that will lease the equipment directly to my jurisdiction for the next three years. Is this procurement exempt from Chapter 30B because a lease agreement is a type of financing?

A3: No. Under Section 2 of Chapter 30B, the definition of “procurement” includes the “buying, purchasing, renting or leasing, or otherwise acquiring a supply or service.” Additionally, Section 2 of Chapter 30B further defines “supplies” as “all property, other than real property, including equipment, materials, printing, and insurance and services incidental to the delivery, conveyance and installation of such property.” *Id.* Therefore, Chapter 30B applies to procurements for equipment that will be leased. Based on the estimated dollar value of this procurement, your jurisdiction could use either an invitation for bid or a request for proposals.



Chapter 30B Hotline: (617) 722-8838



## **AN ANNOUNCEMENT FROM THE COMMONWEALTH'S OPERATIONAL SERVICES DIVISION**



### **MASSBUYS Attendee Registration**

The Operational Services Division (OSD) cordially invites you to attend MASSBUYS XIX on April 27 at Gillette Stadium, home of five-time Super Bowl Champions, the New England Patriots! MASSBUYS is 100% exhibitor funded and free to attend for Massachusetts public procurement and purchasing professionals.

Now in its 19th year, the MASSBUYS EXPO is the largest business to government event in the Commonwealth of Massachusetts. MASSBUYS is OSD's annual meeting for Statewide Contract Vendors and Massachusetts government officials. Each year, the MASSBUYS EXPO demonstrates the importance and effectiveness of public procurement initiatives and we expect MASSBUYS XIX to continue this tradition.

In addition to visiting with Statewide Contract Vendors in the Exhibit Hall, the MASSBUYS EXPO also offers attendees a full slate of workshops designed to improve their purchasing skills, professional development, and update their knowledge of procurement laws, to name a few. This year, the workshops also feature tracks associated with **Schools** and **Safety & Security** featuring topics tailored for these audiences. Space is limited, so we ask that you register only for workshops you plan to attend and cancel if plans change.

Once registered, join the [MASSBUYS EXPO LinkedIn group](#) for regular updates and event information! If you have any questions about the MASSBUYS EXPO, please contact Susan Aalpoel at (617) 720-3149 or [massbuysadmin@state.ma.us](mailto:massbuysadmin@state.ma.us).



## **Bay Path Regional Vocational Technical High School** **Story of a Building**

On February 6, 2017, the Office, in collaboration with the Massachusetts School Building Authority (MSBA), presented the seventh *Story of a Building* at the Bay Path Regional Vocational Technical High School (Bay Path), located in Charlton, Massachusetts. This one-day class – which is presented at different locations every year – immerses attendees in a public construction project, from the early planning stages through construction to the building “coming to life” when it is ultimately opened to the public. This year’s class examined Bay Path’s utilization of the construction manager at-risk delivery method to build an addition and renovate existing classrooms, shop space and science labs.



Inspector General Glenn Cunha opens the seventh *Story of a Building* class at Bay Path Regional School District on February 6, 2017.

Barbara Hansberry, Director of Strategic Planning for the MSBA, moderated the class and John Lafleche, Superintendent and Director of the Southern Worcester County Regional Vocational School District, graciously hosted it. School officials, MSBA staff, architects, engineers and others participated in panel discussions that



From left to right: John Lafleche, Superintendent/Director of the Southern Worcester County Regional Vocational School District; Barbara Hansberry, Director of Strategic Planning for the MSBA; and Daniel Doucette, Purchasing Agent for the City of Peabody.

addressed different aspects of a public school building project, including strategies for obtaining approval for construction costs from voters, collaborating with the MSBA, the relationship between the building design and the school’s educational plan, working with other school districts to purchase furniture and fixtures, and calculating MSBA reimbursements. Participants also received a tour of the school, as well as a catered lunch in the school’s student-run restaurant, “The Hilltop.” Nearly 100 participants attended the class.

The Office sincerely appreciates the assistance and cooperation from the staff and students at Bay Path. Likewise, the Office greatly values its collaboration with the MSBA and thanks the MSBA’s staff, including Jack McCarthy, MSBA’s Executive Director, and Barbara Hansberry, MSBA’s Director of Strategic Planning.



## On the Road with MCPPO

Are you interested in hosting a one-day MCPPO class in your city or town? We take care of everything, including advertising, registration, instructors and class materials; you just provide the learning space. As a thank you for hosting, you and two guests may be eligible to attend the class free of charge and acquire recertification credit, if applicable!

If you are interested, please contact Joyce McEntee Emmett, Director of the MCPPO Program, at: (617) 722-8835 or at [Joyce.Emmett@state.ma.us](mailto:Joyce.Emmett@state.ma.us).

We would also like to extend our gratitude to the following jurisdictions for hosting an On the Road class this Spring:

- Northern Essex Community College, *Contract Administration*
- Town of Barnstable, *Procurement Fraud*
- Town of North Attleborough, *Procurement Fraud and Contract Administration*

We look forward to coming to your city or town soon!



Liz Unger, MCPPO instructor, at the *Contract Administration* class hosted by Northern Essex Community College on April 6, 2017.

## MCPPO Designation Application Reminder

Upon successful completion of the required MCPPO courses (*Public Contracting Overview*, *Supplies and Services Contracting*, and/or *Design and Construction Contracting*), you do not automatically receive an MCPPO designation. You will, however, receive a certificate of completion for each class. A certificate of completion and an MCPPO designation are not the same thing. To apply for an MCPPO designation, please fill out an Application for Designation, and mail it into the Office along with all required documents stated on the application.

Please read the application carefully. Incomplete applications are returned to the sender and will not be considered until all the necessary materials have been provided. Once you have been awarded an MCPPO designation, we require you to complete the required additional coursework and submit an Application for Recertification every three years. Please visit our website to learn more about MCPPO designation requirements, and to fill out the application:

<http://www.mass.gov/ig/mcpo/designation-and-recertification/mcpo-designation-generic.html>







### **REMINDER**

#### **MCPPO Program Registration Policy**

All registration forms must be mailed in and accompanied by your payment. Registration forms received via fax can no longer be accepted. Purchase orders are not considered to be sufficient forms of payment. We thank you for your cooperation and continued support.

### **MCPPO DESIGNATIONS**

#### **Application Policy**

As a reminder, the Office accepts CORI Acknowledgement Forms and MCPPO designation applications by mail. If you submit the CORI Acknowledgement Form by mail, you must first notarize the form and include a copy of your valid government-issued photo identification. You may also submit CORI Acknowledgment Forms and MCPPO designation applications in person at the Office of the Inspector General. CORI Acknowledgment Forms and designation applications can be found on our website at the following link:  
[www.mass.gov/ig/publications/forms/mcpdesig.pdf](http://www.mass.gov/ig/publications/forms/mcpdesig.pdf).



### **REMINDER**

#### **Inclement Weather Advisory**

The MCPPO Program follows the Boston Public School system's weather closure policy. If Boston Public Schools are closed due to inclement weather, all MCPPO classes – including at videoconference locations – falling on the same day will be rescheduled. For students attending a videoconference class, please be advised that MCPPO classes in the specified city or town will also be postponed if that city or town's school system is closed. The class will be rescheduled to another date and we will notify participants of the new date.





# Office of the Inspector General

*Glenn A. Cunha, Inspector General*

The Massachusetts Certified Public Purchasing Official (MCPPO) Program

## RUNNING A SUCCESSFUL PROCUREMENT OFFICE

**PREREQUISITE: NONE**

**COURSE LEVEL: BASIC**

**INSTRUCTIONAL METHOD: GROUP-LIVE**

**ADVANCED PREP: NONE**

This 2-day course is designed for those who are new to the procurement field, as well as for experienced procurement officials. Attendees will gain the skills and knowledge necessary to run a successful procurement office. The course will cover procurement policies and procedures, contract administration, legal requirements and other important factors for effectively running a procurement office for a state or local governmental entity, district or authority. Attendees will also learn how to incorporate recent developments and changes in the Commonwealth's procurement laws (the Municipal Modernization Act) into bidding processes and contracting practices.

### **COURSE DATES:**

**May 31 and June 1, 2017**

**8:30 a.m. – 4:30 p.m.**

**MCPPO Classroom (group-live)**  
*One Ashburton Place, Room 1306*  
*Boston, MA 02108*



The Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) 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 for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.NASBARegistry.org](http://www.NASBARegistry.org).

### Topics covered include:

- Advantages and challenges of centralized and decentralized procurement systems
- Consistent application of bidding policies across department lines
- Developing standardized documents to facilitate bidding procedures
- Professional collaborations with other procurement officials and jurisdictions
- Working with state administrative and investigatory agencies
- Contracting terms and conditions for better results
- Developing a succession plan for procurement offices
- Dealing with challenging vendors
- Recent legal developments, including the Municipal Modernization Bill
- Making responsibility and responsiveness determinations
- Managing procurement files and contract records in the electronic age

This course qualifies for 14 continuing professional education (CPE) credits, 14 professional development points (PDP) and 14 MCPPO credits toward recertification.

To register, please visit our website at [www.mass.gov/ig](http://www.mass.gov/ig). For additional information on the MCPPO Program or for information regarding refunds, complaints, and program cancellation, please contact Joyce McEntee Emmett, MCPPO Director, at (617) 722-8835 or via email at [MA-IGO-Training@state.ma.us](mailto:MA-IGO-Training@state.ma.us).



# Office of the Inspector General

*Glenn A. Cunha, Inspector General*

The Massachusetts Certified Public Purchasing Official (MCPPO) Program

## RECERTIFICATION FOR SCHOOL PROJECT DESIGNERS & OWNER'S PROJECT MANAGERS

**PREREQUISITE:** *CERTIFICATION FOR SCHOOL PROJECT DESIGNERS & OWNER'S PROJECT MANAGERS*

**COURSE LEVEL:** ADVANCED

**INSTRUCTIONAL METHOD:** GROUP-LIVE

**ADVANCED PREP:** NONE

The Massachusetts School Building Authority (MSBA) requires designers and owner's project managers on school projects to renew their MCPPO certification every three years. To meet MSBA's requirement for recertification, the MCPPO Program has added this 1-day course. More municipalities are also requiring designers and owner's project managers to have an MCPPO certification before undertaking public construction projects within their city or town.

### **COURSE DATE:**

**June 2, 2017** (max. capacity)  
8:30 a.m. – 4:30 p.m.

**MCPPO Classroom (group-live)**  
*One Ashburton Place, Room 1306  
Boston, MA 02108*

**June 12, 2017**  
8:30 a.m. – 4:30 p.m.

**MCPPO Classroom (group-live)**  
*One Ashburton Place, Room 1306  
Boston, MA 02108*



The Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) 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 for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.NASBARegistry.org](http://www.NASBARegistry.org).

### Topics covered in this seminar include:

- Design and construction law: review and statutory changes
- Recent court cases and opinions from the Office of the Attorney General
- Changes to MSBA regulations
- Key practices for successful MSBA collaborations
- Contract administration required for MSBA funding, such as:
  - Change-order approval
  - Monthly reporting to MSBA
  - Schedule monitoring
  - Evaluations and case studies

This course qualifies for 7 American Institute of Architects (AIA) credits, 7 continuing professional education (CPE) credits and 7 professional development points (PDP).

To register, please visit our website at [www.mass.gov/ig](http://www.mass.gov/ig). For additional information on the MCPPO Program or for information regarding refunds, complaints or program cancellations, please contact Joyce McEntee Emmett, MCPPO Director, at (617) 722-8835 or via email at [MA-IGO-Training@state.ma.us](mailto:MA-IGO-Training@state.ma.us).



# Office of the Inspector General

*Glenn A. Cunha, Inspector General*

The Massachusetts Certified Public Purchasing Official (MCPPO) Program

## ARE YOU A MEMBER OF A PUBLIC BOARD OR COMMISSION? *Know Your Responsibilities*

**PREREQUISITE: NONE**

**COURSE LEVEL: BASIC**

**INSTRUCTIONAL METHOD: GROUP-LIVE**

**ADVANCED PREP: NONE**

This 1-day course is essential for every member of a public board, commission, committee or authority (collectively, “public board”), as well as for public officials who regularly interact with public boards. All members of public boards have a duty to actively oversee the officials who report to them and to ensure that the public monies they administer are spent appropriately. Attendees will learn the necessary tools to successfully fulfill these duties. Attendees will also learn about the keys to effective supervision; identifying fraud, waste and abuse; and the legal requirements applicable to board and commission members. Take this class and walk away armed with the knowledge and skills to be a highly effective member of a public board, commission, committee or authority.

**COURSE DATE:**

**May 23, 2017**

**8:30 a.m. – 3:30 p.m.**

**MCPPO Classroom (group-live)**

*One Ashburton Place, Room 1306  
Boston, MA 02108*



The Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) 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 for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.NASBARegistry.org](http://www.NASBARegistry.org).

Topics covered include:

- Fiduciary duties and responsibilities
- Tools for effective oversight
- Essential terms for executives’ employment contracts
- Preventing and detecting fraud, waste and abuse
- Ethics requirements for members of boards and commissions
- Public Records Law and Open Meeting Law

This course qualifies for 6 continuing professional education (CPE) credits, 6 professional development points (PDP) and 6 MCPPO credits toward recertification.

To register, please visit our website at [www.mass.gov/ig](http://www.mass.gov/ig). For additional information on the MCPPO Program or information regarding refunds, complaints and program cancellations, please contact Joyce McEntee Emmett, MCPPO Director, at (617) 722-8835 or via email at [MA-IGO-Training@state.ma.us](mailto:MA-IGO-Training@state.ma.us).





Office of the Inspector General  
Glenn A. Cunha, Inspector General  
[MA-IGO-Training@state.ma.us](mailto:MA-IGO-Training@state.ma.us) Tel: (617) 727-9140

**MASSACHUSETTS CERTIFIED PUBLIC PURCHASING  
OFFICIAL PROGRAM**

**REGISTRATION FORM January-June 2017**

Please complete below and indicate seminar selection on the right:

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

ORGANIZATION/JURISDICTION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP CODE: \_\_\_\_\_

Do you require any reasonable accommodations? \_\_\_\_\_

**HOW TO REGISTER:** Please mail a completed registration form accompanied with a check or money order made payable to:

Office of the Inspector General  
One Ashburton Place, Room 1311  
Boston, MA 02108  
ATTN: MCPPPO Program

**TYPE OF PAYMENT:**

☐ Check/Money Order \_\_\_\_\_ ☐ State agencies: payment via IE/ITA \_\_\_\_\_

**NONDISCRIMINATION POLICY:** The Massachusetts 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 or 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; see Section 504 of the Rehabilitation Act of 1973. Inquiries pertaining to the Office's nondiscrimination policy relating to MCPPPO programs may be addressed to Joyce McEntee Emmett, Director of the MCPPPO Program, at (617) 727-9140.

The Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) 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 for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.NASBARegistry.org](http://www.NASBARegistry.org).

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

**COURSE 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, the Commonwealth's political subdivisions, other state governments, the federal government, as well as employees of any other municipality, county, or local district. Non-profit employees include any employee of a 501(c)(3) corporation. Proof of government or non-profit status must be provided with this registration form in order to receive the government rate.

**SUBSTITUTIONS/CANCELLATIONS:**

Each seminar is limited and filled on a space-available basis. No refunds for cancellations. Registrations transferred within your organization are possible with prior notice. The OIG reserves the right to cancel or reschedule any seminar and is not responsible for any costs incurred by registrants. Terms and conditions may change without notice.

**CORI NOTICE:**

Please be advised that the Office of the Inspector General has reinstated the requirement that all applications for MCPPPO Designation include a completed Criminal Offender Record Information (CORI) Acknowledgement Form. You do not need to include a CORI form with this registration form.

For more information regarding administrative policies, such as complaint and refund resolution, please email Joyce McEntee Emmett, Director of the MCPPPO Program, at [MA-IGO-Training@state.ma.us](mailto:MA-IGO-Training@state.ma.us) or go to our website at [www.mass.gov/ig](http://www.mass.gov/ig).

**WINTER/SPRING 2017 SCHEDULE**

**PUBLIC CONTRACTING OVERVIEW**

February 7, 8, 9 ☐ BOS ☐ NECC\*  
March 1, 2, 3 ☐ HUNT  
March 28, 29, 30 ☐ BOS ☐ UML\*  
May 8, 9, 10 ☐ BOS  
June 6, 7, 8 ☐ BOS

**CHARTER SCHOOL PROCUREMENT**

April 6, 7 ☐ BOS

**SUPPLIES & SERVICES CONTRACTING**

March 21, 22, 23 ☐ BOS ☐ NECC\*  
April 25, 26, 27 ☐ HUNT  
May 2, 3, 4 ☐ BOS ☐ UML\*  
June 13, 14, 15 ☐ BOS

**DESIGN & CONSTRUCTION CONTRACTING**

January 31, February 1, 2 ☐ BOS  
March 15, 16, 17 ☐ HUNT  
April 25, 26, 27 ☐ BOS ☐ NECC\*  
May 24, 25, 26 ☐ BOS ☐ COMM\*  
June 20, 21, 22 ☐ BOS ☐ UML\*

**STORY OF A BUILDING**

February 6 ☐ BAY PATH RVTHS

**CONSTRUCTION MANAGEMENT AT RISK**

March 7 ☐ BOS

**INVITATIONS FOR BIDS & REQUESTS FOR PROPOSALS**

April 4 **NEW** ☐ BOS

**PROCUREMENT FRAUD**

April 5 ☐ BOS ☐ HUNT\*

**REAL PROPERTY TRANSACTIONS**

April 11 ☐ BOS

**ADVANCED TOPICS UPDATE**

April 12, 13 ☐ BOS ☐ HUNT\*

**CONTRACT ADMINISTRATION**

May 16 ☐ BOS

**ARE YOU A MEMBER OF A PUBLIC BOARD?**

May 23 ☐ BOS

**RUNNING A SUCCESSFUL PROCUREMENT OFFICE**

May 31, June 1 ☐ BOS

**DRAFTING A MODEL IFB**

Self-paced ☐ AT YOUR DESK

**PRIVATE SECTOR TRAINING**

**CERTIFICATION for School Project Designers & OPMs**

May 11, 12, 18, 19 ☐ BOS

**RECERTIFICATION for School Project Designers & OPMs**

March 9 ☐ BOS  
June 2 ☐ BOS  
June 12 ☐ BOS

**On-site location:**

**BOSTON:** One Ashburton Place, Room 1306, Boston, MA

**\*Videoconference locations:**

**BAY PATH:** Bay Path Reg. Voc. Tech. High School, Charlton, MA

**COMM:** COMM Fire District, Centerville, MA

**HUNT:** Gateway Regional School District, Huntington, MA

**NECC:** Northern Essex Community College, Lawrence, MA

**UML:** University of Massachusetts, Lowell, MA

Additional Seminar Information



<b>PUBLIC CONTRACTING OVERVIEW</b> <i>No Prerequisite</i>			Tuition: \$595 for government/non-profit employees \$750 for all others
February 7, 8, 9	<input type="checkbox"/> BOSTON	<input type="checkbox"/> NORTHERN ESSEX CC*	May 8, 9, 10 <input type="checkbox"/> BOSTON
March 1, 2, 3	<input type="checkbox"/> HUNTINGTON		June 6, 7, 8 <input type="checkbox"/> BOSTON
March 28, 29, 30	<input type="checkbox"/> BOSTON	<input type="checkbox"/> UMass Lowell*	3-day seminar
<b>CHARTER SCHOOL PROCUREMENT</b> <i>No Prerequisite</i>			Tuition: \$400 for government/non-profit employees \$600 for all others
April 6, 7	<input type="checkbox"/> BOSTON		2-day seminar
<b>SUPPLIES &amp; SERVICES CONTRACTING</b> <i>Prerequisite: Public Contracting Overview or Charter School Procurement</i>			Tuition: \$595 for government/non-profit employees \$750 for all others
March 21, 22, 23	<input type="checkbox"/> BOSTON	<input type="checkbox"/> NORTHERN ESSEX CC*	June 13, 14, 15 <input type="checkbox"/> BOSTON
April 25, 26, 27	<input type="checkbox"/> HUNTINGTON		3-day seminar
May 2, 3, 4	<input type="checkbox"/> BOSTON	<input type="checkbox"/> UMass Lowell*	
<b>DESIGN &amp; CONSTRUCTION CONTRACTING</b> <i>Prerequisite: Public Contracting Overview or Charter School Procurement</i>			Tuition: \$695 for government/non-profit employees \$850 for all others
January 31, February 1, 2	<input type="checkbox"/> BOSTON		May 24, 25, 26 <input type="checkbox"/> BOSTON <input type="checkbox"/> COMM*
March 15, 16, 17	<input type="checkbox"/> HUNTINGTON		June 20, 21, 22 <input type="checkbox"/> BOSTON <input type="checkbox"/> UMass Lowell*
April 25, 26, 27	<input type="checkbox"/> BOSTON	<input type="checkbox"/> NORTHERN ESSEX CC*	3-day seminar
<b>STORY OF A BUILDING</b> <i>No Prerequisite</i>			Tuition: \$200 each participant
February 6	<input type="checkbox"/> BAY PATH RVTHS		1-day seminar
<b>CONSTRUCTION MANAGEMENT AT RISK</b> <i>No Prerequisite</i>			Tuition: \$200 each participant
March 7	<input type="checkbox"/> BOSTON		1-day seminar
<b>INVITATIONS FOR BIDS &amp; REQUESTS FOR PROPOSALS</b> <b>NEW</b> <i>No Prerequisite</i>			Tuition: \$200 each participant
April 4	<input type="checkbox"/> BOSTON		1-day seminar
<b>PROCUREMENT FRAUD</b> <i>No Prerequisite</i>			Tuition: \$200 each participant
April 5	<input type="checkbox"/> BOSTON	<input type="checkbox"/> HUNTINGTON*	1-day seminar
<b>REAL PROPERTY TRANSACTIONS</b> <i>No Prerequisite</i>			Tuition: \$200 each participant
April 11	<input type="checkbox"/> BOSTON		1-day seminar
<b>ADVANCED TOPICS UPDATE</b> <i>Prerequisite: Supplies &amp; Services Contracting or Design &amp; Construction Contracting</i>			Tuition: \$400 for government/non-profit employees \$600 for all others
April 12, 13	<input type="checkbox"/> BOSTON	<input type="checkbox"/> HUNTINGTON*	2-day seminar
<b>CONTRACT ADMINISTRATION</b> <i>No Prerequisite</i>			Tuition: \$200 each participant
May 16	<input type="checkbox"/> BOSTON		1-day seminar
<b>ARE YOU A MEMBER OF A PUBLIC BOARD OR COMMISSION? KNOW YOUR RESPONSIBILITIES</b> <i>No Prerequisite</i>			Tuition: \$200 each participant
May 23	<input type="checkbox"/> BOSTON		1-day seminar
<b>RUNNING A SUCCESSFUL PROCUREMENT OFFICE</b> <i>No Prerequisite</i>			Tuition: \$400 for government/non-profit employees \$600 for all others
May 31, June 1	<input type="checkbox"/> BOSTON		2-day seminar
<b>DRAFTING A MODEL IFB</b> <i>No Prerequisite</i> <i>Requires Microsoft Word 7.0 or higher</i>			Tuition: \$75 each participant
	<input type="checkbox"/> AT YOUR DESK		Self-paced
<b>PRIVATE SECTOR TRAINING</b>			
<b>CERTIFICATION for School Project Designers &amp; Owner's Project Managers</b>			Tuition: \$1350 each participant
May 11, 12, 18, 19	<input type="checkbox"/> BOSTON		4-day seminar
<b>RECERTIFICATION for School Project Designers &amp; Owner's Project Managers</b> <i>Prerequisite: Certification for School Project Designers &amp; Owner's Project Managers</i>			Tuition: \$550 each participant
March 9	<input type="checkbox"/> BOSTON		
June 2	<input type="checkbox"/> BOSTON		
June 12	<input type="checkbox"/> BOSTON		1-day seminar



## CONGRATULATIONS TO OUR NEW DESIGNEES!

*The following is a list of the MCPPO Program's new Designees based on applications reviewed (not received) between January 1, 2017 and March 31, 2017:*

### MCPPO

Michael Boyle, University of MA Medical School  
Senga Densmore, Westfield State University  
Timothy Gordon, Town of Holbrook  
Daniel Haynes, Ralph C. Mahar Reg. School Dist.  
James Hellen, Town of Franklin  
Donna Kalinick, Town of Brewster  
Kimberly Lavigne, Taunton Housing Authority  
James Marathas, Quincy Housing Authority  
Phyllis Marshall, Town of Belmont  
Ulrike Monzillo, MHEC  
Amanda Pham, City of Springfield  
Tara Pirraglia, Town of Middleborough  
Nicole Potter, Fairhaven Public Schools  
Ronald Rix, Westfield Public Schools  
Jared Stanton, Peabody Public Schools  
Mimi Spahr, Town of Sandwich  
Michael Sulprizio, City of Boston  
Beverly Tefft, Central Mass. Collaborative  
Steven Tyler, Town of Spencer

### MCPPO for Design & Construction

None

### MCPPO for Supplies & Services

Kelley Cronin, Acton Housing Authority  
Patricia McKim, The Education Cooperative  
Susan Rothermich, Sudbury Public Schools  
James Ryan, Town of Wellesley

### Associate MCPPO

Shannon Barry, Westfield Public Schools  
Bryan LeBlanc, Town of Natick  
Grace McAuliffe, Quincy Housing Authority  
Dennis Sheehan, Town of Watertown  
Raemarie Walker, City of Springfield  
Brian Wyncoop, Town of Belmont  
Jennifer Young, Pathfinder School District

### Associate MCPPO for Design & Construction

None

### Associate MCPPO for Supplies & Services

Wendy Boulay, City of Gardner  
Katie Day, Springfield Public Schools  
Barbara Kempken, Dept. of Elem. and Secondary Ed.  
Alexandra Mascaro, Springfield Public Schools  
Donna McHugh, Dept. of Elem. and Secondary Ed.  
Sue Ellen Ramos, Springfield Public Schools  
Ronald San Angelo, Town of Southbridge





**SUBSCRIPTION INFORMATION**

*The Office of the Inspector General publishes the Procurement Bulletin on a quarterly basis. There is no charge to subscribe.*

*To receive the Procurement Bulletin electronically, please send an email containing your first and last name to [Alexandra.Spangler@state.ma.us](mailto:Alexandra.Spangler@state.ma.us).*

*If you prefer to receive a printed copy via first-class mail, please indicate this in the email and provide your mailing address.*

*If you previously subscribed to the Procurement Bulletin and have not received a copy or have any other related questions, you may contact Alexandra Spangler at (617) 722-8889.*

**Office of the Inspector General  
One Ashburton Place, Room 1311  
Boston, MA 02108  
(617) 727-9140  
[www.mass.gov/ig](http://www.mass.gov/ig)  
ATTN: Alexandra Spangler**