



## Office of the Inspector General

# Procurement Bulletin



Dear Public Officials:

Happy New Year! Congratulations to the public officials who earned their Massachusetts Certified Public Purchasing Official (MCPPO) designation in 2018. This achievement exemplifies your commitment to conducting fair, open and competitive procurements. For a list of our newest MCPPO designees, which is now published biannually in the *Procurement Bulletin*, please see pages 17-18.

In 2018, over 2,700 professionals took our MCPPO classes and attended our speaking engagements on a range of topics designed to help you provide assistance to the citizens whom we serve. Thanks to the generosity of the communities across the Commonwealth, we were able to offer our classes and speaking engagements throughout Massachusetts last year. I am grateful to our hosts, facilitators, instructors and students for their time, commitment and earnest support. Working together to protect taxpayer funds and public property, and improve accountability, integrity and transparency in government requires dedication.

In 2019, the MCPPO program will continue to develop its curriculum and the materials we publish to meet your needs as local government professionals. To that end, you likely noticed that the look of the *Procurement Bulletin* is changing and the content is expanding. For example, in response to your requests, the *Procurement Bulletin* will now include fraud prevention and best practice tips. We want to provide you with guidance as well as compliance and technical assistance because these are the most important tools for fighting fraud, waste and abuse. We are also expanding our e-learning capabilities to provide you with the most efficient and convenient ways to access our educational opportunities. Look for our new videos this spring and our new on-line courses in the fall.

In the coming year, we will also continue to provide technical assistance on how to implement internal controls to prevent and detect fraud, waste and abuse. Check our [website](#) regularly for compliance and prevention tips in our reports, advisories, letters and the *Procurement Bulletin*. We want to help you protect your communities in different ways with a variety of tools.

Finally, in this issue of the *Procurement Bulletin*, you will find helpful information, including fraud prevention and best practice tips, answers to frequently asked procurement questions and announcements from the Office of the Attorney General and the Massachusetts School Building Authority.

As always, thank you for your time and consideration in reviewing our publications. I wish you all a happy and healthy 2019.

Sincerely,

Glenn A. Cunha  
Inspector General

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## HELP RECOVER PUBLIC FUNDS BY REPORTING FRAUD, WASTE OR ABUSE OF PUBLIC FUNDS OR RESOURCES

Do you know of a vendor that failed to show up for work as scheduled? Has a vendor requested payment for work with false or inflated invoices? Is a public employee in your community conspiring with a vendor to undermine open and fair competition for work with a public agency? Contact the Office of the Inspector General's (OIG) confidential fraud hotline at 1 (800) 322-1323 or email at [IGO-FightFraud@state.ma.us](mailto:IGO-FightFraud@state.ma.us). You can make a difference.

For example, in February 2017, Massachusetts taxpayers recovered \$420,380 in a settlement based on potential charges related to false and inflated invoices. These invoices were submitted by contractors for the public construction project at Assembly Square Station in Somerville, Massachusetts. This recovery started with a telephone call to the OIG's confidential fraud hotline.

In fact, complaints to the OIG's confidential fraud hotline often result in investigations that show how public jurisdictions can improve operations and limit waste. Investigations also aid in the recovery of stolen money, support criminal charges against wrongdoers and lead to civil recovery actions or settlements. In 2018, the OIG received and responded to over 1,000 fraud hotline calls.

If you suspect fraud, waste or abuse on public construction projects, by vendors doing public business or by public employees, contact the OIG's confidential fraud hotline. Your call can help protect public funds. All calls and emails are treated confidentially, and individuals may choose to remain anonymous.

Learn more about our confidential fraud hotline and how the OIG protects Massachusetts communities against fraud, waste and abuse in the expenditure of public funds by visiting our [website](#).

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### BEST PRACTICE TIP: CHECK ALL CONTRACT TERMS AND CONDITIONS

All public organizations rely on vendors to provide the supplies and services needed to operate effectively and efficiently. Recently in Massachusetts, a vendor offered a significant cost savings on supplies a local jurisdiction needed. The jurisdiction placed an order with the vendor for these supplies because of the competitive low per-unit price. After contracting with the vendor, however, the local jurisdiction began receiving large quantities of supplies that it had not ordered. When the jurisdiction tried to reduce the quantity of future deliveries, the vendor threatened to charge the jurisdiction a higher non-bulk rate. The vendor claimed that the lower per-unit price was only for bulk purchases.

*(Continued on page 3)*

### PROTECT YOUR COMMUNITY

If you suspect fraud, waste or abuse of public funds or property, you can confidentially report your concerns.



Call the 24-Hour Hotline at  
**(800) 322-1323**



Call the 30B Hotline at  
**(617) 722-8838**



Send us an Email at  
**IGO-FightFraud@state.ma.us**

### CONNECT WITH US



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Office of Massachusetts  
Inspector General



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Office of the Inspector  
General of Massachusetts

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The jurisdiction became suspicious, researched the vendor and found no registration information on file with the Secretary of Commonwealth. The jurisdiction stopped making payments to the vendor and began to investigate whether it entered into some sort of bulk purchasing scheme.

Before engaging with any vendor, do your research and review your contract closely. Make sure the vendor is legitimate, responsible, has acceptable references and is properly registered to conduct business in Massachusetts. You must ensure that the vendors you are doing business with are legitimate and responsible. Remember to check debarment lists, as well as the Secretary of the Commonwealth's business registration database or a local municipal clerk's office to determine if a business is properly registered to conduct business within Massachusetts. If a vendor is not registered – beware. It is a red flag that the business may not be legitimate or well established. And always carefully read all contract terms before entering into any contract.

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## CYBER-SECURITY FRAUD ALERT

### Use Extreme Caution Before Opening Any Email Attachments

Cybercriminals are aggressively using spoofing and phishing emails in an effort to infiltrate public computer networks, including municipal-level government.

The Office of the Comptroller of the Commonwealth of Massachusetts recently issued a cyber-security alert to state agencies about dangerous and evolving spoofing and phishing efforts linked to attempts to launch malware that seeks to gain access to the Commonwealth's financial information and systems.

Phishing and spoofing efforts against the Commonwealth often use names of known state employees, vendors or banks that you recognize in combination with terminology that would attract the attention of state employees. These efforts may include well-disguised, phony emails; links to fraudulent websites; or actual fraudulent telephone calls to state agencies from cybercriminals posing as state vendors or state employees. Beware because this may be happening at the municipal level too.

On the surface, email addresses and website links may seem legitimate. But always remember that Massachusetts agencies, banks and vendors will never send an email asking for sign-in or account details, passwords or other sensitive data. Additionally, these entities will never call you asking for sign-in or account details, passwords or other sensitive data. If you receive such a telephone call or email and you do not personally recognize the caller, you should immediately contact your network security team and law enforcement. You may also report these attempts to the FBI's Internet Crime Complaint Center [here](#).

Recent attacks and attempts at phishing and spoofing used phony invoices from one state agency to another. If you inadvertently open an email attachment and are prompted to enable content, activate macros, allow scripts or other similar requests, close the attachment immediately. Contact your network security team and disconnect your device from the network right away.

Taking extra time to verify an attachment, sender or link is never a bad idea. Verification can save you and your organization from significant financial, data and reputational loss.

As fraud schemes evolve and become more sophisticated and targeted, vigilance at all levels of your organization is key to preventing successful attacks that are only a click away.

## OFFICE OF THE INSPECTOR GENERAL FINDS WAYS TO PREVENT WASTE BY STRENGTHENING CONTRACT ADMINISTRATION AND OVERSIGHT

The Office of the Inspector General's Internal Special Audit Unit (ISAU) recently reviewed change orders and contract overruns for the design and final phase of construction of the Veterans Memorial Bridge, which crosses the Taunton River in Bristol County. The ISAU identified opportunities for the Massachusetts Department of Transportation (MassDOT) to strengthen contract administration procedures for large-scale construction projects, with an increased focus on design errors and cost recoveries. The following is a summary of the ISAU's recommendations:

1. Monitor and enforce contract terms and conditions to prevent change orders and cost overruns.
2. Hold parties accountable for errors and omissions on large-scale construction projects and pursue cost recovery where practicable.
3. Consider consultant contracts that are not time-and-materials-based unless the basis for payment can be validated.
4. Consider a contractor's past performance when evaluating bids and also monitor and document contractor performance throughout the term of the contract.
5. Reinforce coordination among all relevant parties, including, but not limited to, state agencies, design firms, construction contractors, permitting boards, utility companies and local municipalities. Such coordination during the design and preconstruction phases may allow the agency to anticipate and address project issues before construction begins. This could help avoid schedule delays and added costs.
6. Resolve major construction issues (for example, permitting) before purchasing equipment and initiating construction.

MassDOT hired an architecture and civil engineering firm (the "bridge designer") to design the Veterans Memorial Bridge at a cost of \$7 million. During construction, however, MassDOT paid the same firm \$9.2 million in additional consulting fees. These fees were largely to address problems with its own design; however, the designer's contracts with MassDOT required the designer to provide such services without additional payment. Further, during the final phase of construction, MassDOT also paid the bridge contractor an additional \$7.4 million primarily for costs that the contractor allegedly incurred because of design errors; MassDOT should have held the designer responsible for these added costs.

In its review of change orders, the ISAU found the designer, without seeking pre-approval from the state plumbing board, specified using a natural gas system as the bridge's backup power source. The general contractor installed the generators, but the state plumbing board then rejected the design, leading MassDOT to switch to a diesel fuel system at an additional cost of \$1.98 million. Although MassDOT stated that the design firm should have sought pre-approval from the state plumbing board, the agency did not seek to recover any portion of the \$1.98 million in added costs from the bridge designer. The ISAU also identified other potential cost savings, including the painting of the bridge's steel superstructure even though MassDOT's own specifications called for unpainted steel.

*(Continued on page 5)*



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During the last phase of construction, MassDOT engineers identified almost \$16 million in potential cost recoveries related to design errors and omissions. However, MassDOT did not pursue any cost recoveries from the design firm. After inquiries by the ISAU about MassDOT's cost recovery efforts, the agency reinstituted its cost recovery process, and appointed a full-time cost-recovery administrator. At the close of ISAU's review, the committee had determined that fifty-six extra work orders warranted further pursuit and successfully recovered \$2.28 million from design firms on seven different projects. However, MassDOT indicated it would not pursue recoveries on closed contracts, such as its contracts with the bridge designer for the Veterans Memorial Bridge.

As part of its commitment to better contract administration, MassDOT also created a *Construction Management Certificate Program* with the Wentworth Institute of Technology. Successful candidates receive the newly created Construction Management Certificate after completing seven courses over a three-month period. The program's curriculum is customized for MassDOT and provides in-classroom activities, case study practice's and team exercises to grow employees' knowledge, skills and abilities in construction management.

To learn more, see: [A Review of Design and Construction Costs for MassDOT's Veterans Memorial Bridge, October 2018.](#)

Summary of Missed Opportunities to Best Use Taxpayer Funds	
\$9.2M	Paid to bridge designer largely to address problems with its own design.
\$7.4M	Paid to the construction contractor largely for costs related to errors and omissions in design plans.
\$1.98M	Costs to switch the bridge's backup power source from natural gas to diesel.
\$1M	MassDOT and bridge designer wrongly directed the contractor to paint bridge steel beams.
<b>\$19.58M</b>	Total
\$16M	Potential cost recoveries due to bridge designer's design errors and omissions that MassDOT identified but did not pursue.

*An announcement from the Massachusetts School Building Authority*

## **SCHOOL FURNITURE EXHIBITION MARCH 27, 2019**

The Massachusetts School Building Authority (MSBA), in conjunction with the regional conference of the Association for Learning Environments (A4LE) invites you to attend, free of charge, a school furniture manufacturers' exhibition to gain firsthand experience with various furniture options to outfit your new school.

Date: Wednesday, March 27, 2019  
Time: 9:30 a.m. to 6:00 p.m.  
Location: 1 Design Center Place, Suite 500, Boston, Massachusetts  
Fees: Free to all school district personnel

The furniture exhibition will provide attendees with educational information about manufacturers' products that may be best suited for your school building project. Often school personnel rely exclusively on interior design professionals to provide product information. It is our belief that education about products and manufacturers makes you better stewards of taxpayer money. You will learn about many product options available for your consideration and price points that you may not otherwise have known.

There are two terrific guest speakers:

- 10:00 a.m. to 11:00 a.m.: [Dr. Daniel Wilson](#), Director of Project Zero, Harvard Graduate School of Education
- 1:00 p.m. to 2:00 p.m.: [Dr. RJ Webber](#), Assistant Superintendent of the Novi Community School District

Please share this invitation with your colleagues and plan to join the MSBA for a fun morning, afternoon or all-day learning experience. Please contact Barbara Hansberry with your questions at [Strategy@Massschoolbuildings.org](mailto:Strategy@Massschoolbuildings.org).

To register for the free Furniture Fair, you must go to the A4LE Northeast Conference website and "Sign-in."

## AN IMPORTANT REMINDER ABOUT YOUR OBLIGATIONS ON ALL PUBLIC WORKS PROJECTS

*From the Office of the Attorney General*

The prevailing wage law applies to all covered public works projects, *regardless of the cost or size of the project* and applies to projects that are exempt from bidding requirements.

As an awarding authority, you must:

- *Request official prevailing wage rate schedules* from the Department of Labor Standards (DLS) before bids or quotes are solicited for public works projects. Requesting a rate schedule is easy. Visit [www.mass.gov/dols/pw](http://www.mass.gov/dols/pw) to register and get more information about the automated system.
- *Make copies available* (free of charge) to all bidders or persons providing price quotes. Since DLS does not issue wage rate schedules directly to contractors, the awarding authority must provide them to all bidders.
- *Ensure that all bids reflect prevailing wage rates.* Review all bids carefully.
- *Include the wage rate schedule in the contract*, once a contractor has been selected.
- *Check the debarment lists.* Office of the Attorney General (OAG) [website](#) posts the latest debarment list which you should use to ensure that no contractor with whom you are engaging is debarred from engaging in public work. Please be aware other state agencies have lists of debarred, suspended or decertified contractors.
- *Monitor the contractors' compliance with the prevailing wage laws.* For construction projects, weekly certified payroll records (CPRs) must be collected from all contractors (and subcontractors) and kept on file. You are encouraged to notify the [AGO's Fair Labor Division](#) if contractors fail to comply with this provision or if you believe that a contractor is not paying prevailing wages.

Non-compliance with the law subjects the contractor to *potential civil and criminal liability* as well as debarment and stop work orders. The awarding authority may also, under certain circumstances, be subject to civil liability. M.G.L. c. 149, § 28.

Municipal and state auditors, accountants, attorneys and managers are further reminded that in accordance with M.G.L. c. 149, §§ 27F, 27G and 27H, any agreement, order or requisition which does not contain a stipulation requiring the payment of the prescribed prevailing wage rates shall be invalid, and no payment shall be made thereunder.

*Department of Labor Standards* is responsible for issuing wage schedules and job classifications and making determinations on the applicability of the prevailing wage. Appeals of prevailing wage rate schedules may be made to [DLS](#).

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<sup>1</sup> See M.G.L. c. 149, §§ 26-27D, 27F, 27G, 27H, M.G.L. c. 71, §7A, M.G.L. c. 121B, § 29, Chapter 195 of the Acts of 2014, M.G.L. c. 6C, § 44.

## FREQUENTLY ASKED QUESTIONS RELATING TO PROCUREMENT

**Q1:** My town would like to enter into a five-year contract for office supplies. Is that permissible under Chapter 30B?

**A1:** Yes. Chapter 30B does not place a limitation on the length of a contract. However, Section 12(b) of Chapter 30B requires your town's governing body to authorize any contract that is longer than three years. This also includes options to renew that would add up to more than three years (*e.g.*, a two-year term with two, one-year extensions or options to renew).

**Q2:** I am procuring ambulance services for my town, which I expect to cost \$11,000 a year. I know ambulance services are exempt under Section 1(b)(24) of Chapter 30B, but Section 17(a) of Chapter 30B requires a written contract for purchases of \$10,000 or more. Does this requirement apply to exempt services?

**A2:** No. If the supply or service you are purchasing is exempt from Chapter 30B, then you are not required to follow any of the sections of the statute. Section 1(b) of Chapter 30B states "this chapter shall not apply to" and lists the specific exemptions to Chapter 30B. Since ambulance services are one of the listed exemptions in Section 1(b)(24), Chapter 30B does not apply.

As a sound business practice, however, jurisdictions should have written contracts for all service contracts. Written contracts protect your jurisdiction in a number of ways, including clarification of what the vendor agreed to provide your jurisdiction at what cost. Well-written agreements often prevent disputes related to performance, should one arise in the future. Additionally, you must still comply with all other applicable laws, such as your town's charter and bylaws. For example, your local rules may require written contracts or that you competitively procure services even when they are ex-

empt from Chapter 30B. If your jurisdiction has its own rules regarding requirements for written contracts, then you must follow those rules.

**Note:** Only ambulance services are exempt from Chapter 30B. The purchase of any ambulance vehicles and any related supplies remain subject to Chapter 30B.

**Q3:** I am purchasing printers and related supplies for my local jurisdiction and wish to enter into a two-year contract. At this point, the exact quantity of the supplies we need – including printers, cables and ink cartridges – is unclear, and my jurisdiction does not know the cost of these items. If I solicit written price quotations from at least three vendors, but all of the written offers come in over \$50,000, may I award the contract to the vendor that offers the lowest price even though I did not issue an invitation for bids?

**A3:** No. If the total cost of the supplies is over \$50,000, you must cancel your solicitation of price quotations and either issue an invitation for bids or request for proposals. Remember that Section 17(b) of Chapter 30B prohibits paying a vendor if the procurement did not comply with the statute. So, make sure you choose the right procurement method.

As a best practice, research the cost of printers and the related supplies before you conduct your procurement. This will help you better assess the value of the supplies or services you are purchasing so you can select the appropriate Chapter 30B process.

*(FAQs continued on page 9)*



*(FAQs continued from page 8)*

**Q4:** My town plans to buy food for the school cafeteria's breakfast and lunch program. Because the estimated cost of the food is less than \$50,000, we will prepare a written purchase description and solicit at least three written price quotations. May we establish a quality requirement for taste in the purchase description to ensure that the selected vendor offers food options that our students will want to eat?

**A4:** Yes, your town may include quality requirements related to taste. The solicitation must specify in the purchase description the criteria you will use to evaluate the taste of the food and what will be considered "acceptable." This will ensure that your jurisdiction conducts a fair evaluation process. There are different ways that you can do this. You may require vendors to provide "samples" for taste

testing by a selection committee. The committee may include students. If using this method, you may specify, for example, that at least four out of five taste testers must find that the food tastes "acceptable." This way, "acceptable taste" becomes a quality requirement for the written price quotation process.

You may also include additional quality requirements, such as incorporating local seasonal produce, gluten-free or vegetarian options. Like any other procurement, to be considered responsive, vendors must meet all quality requirements. Keep in mind, when soliciting price quotations for your school cafeteria's breakfast and lunch program you must award the contract to the responsive and responsible vendor offering the lowest quote. See M.G.L. c. 30B, § 4(b).

## Chapter 30B Hotline: (617) 722-8838

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### FREQUENTLY ASKED QUESTION RELATING TO PUBLIC MEETING LAW

*From the Office of the Attorney General*

**Q1:** I would like to attend a public meeting. Am I required by the Open Meeting Law to identify myself at the meeting?

**A1:** The Open Meeting Law does not require a member of the public to identify themselves, either verbally or by registering on an attendance sheet, to attend the meeting. Be advised, however, that it may be permissible for a public body to meet in a location that requires you to present a photo identification or sign in for entrance into the building. See OML 2015-92. Please feel free to contact the [Attorney General's Division of Open Government](#) for more information about the open meeting law. To review additional Open Meeting Law determinations check [here](#).



## MCPPO PROGRAM POLICY REMINDERS AND ANNOUNCEMENTS

### Registration Policy

All registration forms must be mailed to the Office and accompanied by your payment. Registration forms received via fax cannot be accepted. Purchase orders are not sufficient forms of payment. We thank you for your cooperation and continued support.

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### 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, it must be notarized and you must include a copy of a valid, government-issued photo identification. You may also submit CORI Acknowledgement 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](#).

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### Inclement Weather and Cancellation Policy

Are you registered currently for an MCPPO class? Please note that winter weather cancellations and delays will be announced only on the MCPPO's weather line at (617) 722-8831 or posted on our:

- Office's [website](#)
-  [Twitter](#)
-  [LinkedIn](#)

**\*We will no longer email students individually about weather-related cancellations**

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### Join our team!

Work in a collaborative and inclusive environment, while helping improve state and local government. Current opening with the MCPPO program include:

- [Program Administrator](#)

Visit our [website](#) for more information about all employment opportunities with the Office of the Inspector General. We are especially interested in qualified candidates with ongoing commitment to supporting a diverse and inclusive work and educational environment.

The Office of the Inspector General and the Massachusetts School Building Authority present:

**OPERATION MATTERS:**  
***Understanding Your New Building's  
Equipment and Systems***

9 West Street  
Auburn, Massachusetts

**May 1, 2019**



Are you planning a new public building in your community? The Massachusetts School Building Authority (MSBA) and the MCPPO program are collaborating once again on a *Story of a Building*. This semester's class is focused on operating your new building's sophisticated systems and equipment and is relevant for all public building projects.

If you partner with the MSBA on a new school building or Core Program renovation project, the MSBA hires a commissioning agent to ensure the new building's systems and equipment are programmed correctly and fully synchronized. However, when the consultant leaves and your facility's team now oversees operations, what's the plan if there is a system or equipment failure down the road? How do you ensure that your staff is ready to take control? Join us for discussions with owners and practitioners on best practices to help ensure smooth operation of your new building. MSBA staff, commissioning agents and facilities staff from other school districts will share their experiences – good and bad – and provide strategies and information that may be immediately useful.

This year's day-long training will be hosted at the Auburn Middle School on Wednesday, May 1, 2019, from 8:30 a.m. to 4:00 p.m. We will tour the school with the architect and building team and learn about the design decisions. The district will share their own insights into operational challenges and answer your questions. Lunch will be provided in the cafeteria. The event is free for two staff from those schools working with the MSBA's grant program. (Please mark your registration form "complimentary.") Please [register](#) on our website. Remember to please let the MSBA know who from your district will be attending by emailing their names and titles to: [strategy@massschoolbuildings.org](mailto:strategy@massschoolbuildings.org).

## STORY OF A BUILDING: STOUGHTON PUBLIC LIBRARY

84 Park Street  
Stoughton, Massachusetts 02072

**Tuesday, March 12, 2019**

8:30 a.m. - 4:00 p.m.

Please join the Massachusetts Certified Public Purchasing Official (MCPPO) program, in collaboration with the town of Stoughton, for the *Story of a Building: Stoughton Public Library* on Tuesday, March 12, 2019, at the Stoughton Public Library. Planning and implementing the design and construction of a public building requires a vision, time, financing and a strong team comprised of public officials and private contractors. Often, cities and towns have to balance the jurisdiction's interests, budgetary constraints and regulatory requirements, all of which affect the scope of a project. This class is designed to give you the tools to plan and manage your public building projects.

During the morning segment, learn how Stoughton town officials developed their vision for the renovation and expansion of the library, applied for grants and developed their project team. The program includes time for questions and answers, as well as a tour of the library. In the afternoon, panelists, including town officials, key members of the building committee, contractors, a representative of the Massachusetts Board of Library Commissioners, and others, will present guidance on decisions related to operating and maintaining a newly-renovated public building. The panelists will also discuss some of the challenges, success and lessons learned during the building project. Lunch will be provided.



Please visit the MCPPO program [page](#) to register.

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## Classes Required for Charter School Procurement Officials

Chapter 46 of the Acts of 1997 requires charter school procurement officials to attend classes offered by the Massachusetts Certified Public Purchasing Official (MCPPO) program. Charter school procurement officials must attend either Public Contracting Overview or Charter School Procurement.

Visit our [website](#) to learn more about all our MCPPO classes and our complete class schedule. Please see the upcoming classes for charter school officials:

- Public Contracting Overview: March 27 - 29, 2019, in Boston, Massachusetts and other locations by videoconference
- Charter School Procurement: May 2 - 3, 2019, in Hudson, Massachusetts



## Office of the Inspector General

*Glenn A. Cunha, Inspector General*

The Massachusetts Certified Public Purchasing Official (MCPPO) Program

# CONSTRUCTION MANAGEMENT AT-RISK UNDER M.G.L. c. 149A

**PREREQUISITE: NONE**

**COURSE LEVEL: BASIC**

**INSTRUCTIONAL METHOD: GROUP-LIVE**

**ADVANCED PREP: NONE**

This 1-day class is designed for public officials who do not specialize in managing public construction projects. The participants will learn about the legal requirements of Chapter 149A, sources of risk and best practices for effectively managing CM at-risk projects. Prior completion of *Design and Construction Contracting* is recommended, but not required.

**CLASS DATE:**

**FEBRUARY 14, 2019**

**8:30 a.m. – 3:30 p.m.**

**MCPPO Classroom**

**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:**

- Comparing CM at-risk projects with design-bid-build projects
- Reviewing the two-phase procurement processes for selecting the CM at-risk firm and trade contractors
- Examining the roles of the owner's project manager, designer and CM at-risk firm
- Contracting and monitoring requirements for CM at-risk contracts

This class qualifies for 6 continuing professional education (CPE) credits and 6 professional development points (PDP).

To access the registration form, please visit our [website](#). For additional information on the MCPPO program or information regarding refunds, complaints or program cancellations, please contact us 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**

## Advanced Topics: Clarifying Chapter 30B Terms, Misconceptions and Practices

**Prerequisite:** *Public Contracting Overview or Charter School Procurement*

**Course Level:** Intermediate

**Advanced Prep:** None

**Method:** Group-Live

This one-day class will clarify certain Chapter 30B terms, misconceptions and practices, which are found in the day-to-day work of public purchasing officials and those working in positions within any area of the public procurement process.

### Class Date:

**March 25, 2019**

**8:30 a.m. – 3:30 p.m.**

**Quinsigamond Community College**

**Harrington Learning Center (Building # 15)**

**Conference Room HLC 109 A+B**

**670 West Boylston Street**

**Worcester, MA 01606**



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:

- Surplus supplies
- Exemptions and exceptions
- Sole source procurements
- Procurement files
- 25 percent rule
- Reasonable investigations
- Cooperative contracts

This class qualifies for 6 continuing professional education (CPE) credits and 6 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 information regarding refund, complaint and program cancellation policies, please email [MA-IGO-Training@state.ma.us](mailto:MA-IGO-Training@state.ma.us).

## MASSACHUSETTS CERTIFIED PUBLIC PURCHASING OFFICIAL PROGRAM

### REGISTRATION FORM *January—June 2019*

Please complete the fields below and indicate your class selection(s) on page two.  
Select one location per date.

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

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

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

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

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

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

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

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

**DO NOT WRITE IN THIS BOX**  
**MCPPO OFFICE USE ONLY**

#### CLASS INFORMATION:

All classes will be confirmed based on a minimum of 25 participants.

#### GOVERNMENT/NON-PROFIT COURSE PRICE:

Government employees shall include all employees of the Commonwealth, the Commonwealth's political subdivisions, other state governments and 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:

Space is limited. Each class is filled on a first-come, first-served basis. Transfer of a registration within your organization is possible with prior notice, one time only. The Office of the Inspector General reserves the right to cancel or reschedule any class and is not responsible for any costs incurred by registrants. Terms and conditions may change without notice.

#### CORI NOTICE:

Please be advised that all applications for MCPPO Designation must 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 about MCPPO program policies, such as complaint and refund resolution, please email [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).

**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 MCPPO programs may be addressed to the MCPPO 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).

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

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

**TYPE OF PAYMENT:\***

☐ Check/Money Order

☐ State agencies: payment via IE/ITA

\*ALL CHECKS AND IE/ITA PAYMENTS MUST BE RECEIVED PRIOR TO THE START OF THE CLASS

Additional Class Information

CLASS	DATES AND LOCATIONS: <i>Select one location per date</i>	COST
<b>PUBLIC CONTRACTING OVERVIEW (PCO)</b> No Prerequisite 3-day class	<b>JANUARY 22, 23, 24</b> <input type="checkbox"/> BURLINGTON <b>MARCH 27, 28, 29</b> <input type="checkbox"/> BOSTON <input type="checkbox"/> HUNTINGTON (VIDEOCONFERENCE) <input type="checkbox"/> HAVERHILL (VIDEOCONFERENCE) <b>MAY 8, 9, 10</b> <input type="checkbox"/> BOSTON	\$595 for government/non-profit employees \$750 for all others
<b>CHARTER SCHOOL PROCUREMENT</b> No Prerequisite 2-day class	<b>MAY 2, 3</b> <input type="checkbox"/> HUDSON	\$400 for government/non-profit employees \$600 for all others
<b>SUPPLIES &amp; SERVICES CONTRACTING</b> Prerequisite: Public Contracting Overview or Charter School Procurement 3-day class	<b>FEBRUARY 26, 27, 28</b> <input type="checkbox"/> BOSTON <input type="checkbox"/> LOWELL (VIDEOCONFERENCE) <b>APRIL 9, 10, 11</b> <input type="checkbox"/> BOSTON <input type="checkbox"/> HUNTINGTON (VIDEOCONFERENCE)	\$595 for government/non-profit employees \$750 for all others
<b>DESIGN &amp; CONSTRUCTION CONTRACTING</b> Prerequisite: Public Contracting Overview or Charter School Procurement 3-day class	<b>FEBRUARY 5, 6, 7</b> <input type="checkbox"/> BOSTON <b>MAY 28, 29, 30</b> <input type="checkbox"/> BOSTON <input type="checkbox"/> HAVERHILL (VIDEOCONFERENCE)	\$695 for government/non-profit employees \$850 for all others
<b>RECERTIFICATION FOR MCPPO</b> Prerequisite: Valid MCPPO Designation 2-day class	<b>MARCH 20, 21</b> <input type="checkbox"/> LOWELL <b>MAY 14, 15</b> <input type="checkbox"/> FALMOUTH	\$495 each participant
<b>CONSTRUCTION MANAGEMENT AT RISK</b> No Prerequisite 1-day class	<b>FEBRUARY 14</b> <input type="checkbox"/> BOSTON	\$200 each participant
<b>STORY of a BUILDING: Stoughton Public Library</b> No Prerequisite 1-day class	<b>MARCH 12</b> <input type="checkbox"/> STOUGHTON	\$200 — Obtain CPEs \$75 — No CPEs
<b>ADVANCED TOPICS: CHAPTER 30B TERMS, MIS-CONCEPTIONS AND PRACTICES</b> Prerequisite: PCO or Charter School Procurement 1-day class	<b>MARCH 25</b> <input type="checkbox"/> WORCESTER	\$200 each participant
<b>INVITATIONS FOR BIDS / REQUESTS FOR PROPOSALS</b> No Prerequisite 1-day class	<b>APRIL 30</b> <input type="checkbox"/> BOSTON	\$200 each participant
<b>STORY of a BUILDING: Auburn Middle School</b> No Prerequisite 1-day class	<b>MAY 1</b> <input type="checkbox"/> AUBURN	\$200 — Obtain CPEs \$75 — No CPEs
<b>ADVANCED TOPICS UPDATE-Spring</b> No Prerequisite 2-day class	<b>MAY 16, 17</b> <input type="checkbox"/> BOSTON	\$400 for government/non-profit employees \$600 for all others
<b>PRIVATE SECTOR</b>		
<b>CERTIFICATION FOR SCHOOL PROJECT DESIGNERS &amp; OWNER'S PROJECT MANAGERS</b> No Prerequisite 4-day class	<b>MARCH 6, 7, 14, 15</b> <input type="checkbox"/> BOSTON <b>JUNE 5, 6, 12, 13</b> <input type="checkbox"/> BOSTON	\$1350 each participant
<b>RECERTIFICATION FOR SCHOOL PROJECT DESIGNERS &amp; OWNER'S PROJECT MANAGERS</b> Prerequisite: Certification for School Project Designers & Owner's Project Managers 1-day class	<b>MARCH 21</b> <input type="checkbox"/> BOSTON <b>JUNE 14</b> <input type="checkbox"/> BOSTON	\$550 each participant

**On-site address:** OFFICE OF THE INSPECTOR GENERAL, One Ashburton Place, Room 1306, Boston, MA 02108  
**Off-site addresses:** FALMOUTH, MASBO Institute, Sea Crest, 350 Quaker Road, North Falmouth, MA 02631  
 BURLINGTON, Grandview Farm, 55 Center Street, Burlington, MA 01803  
 HUDSON, Massachusetts Charter Public School Association, 43 Broad Street, Suite C401, Hudson, MA 01749  
 STOUGHTON, Stoughton Public Library, 84 Park Street, Stoughton, MA 02072  
 AUBURN, Auburn Middle School, 9 West Street, Auburn, MA 01501  
 WORCESTER, Quinsigamond Community College, 670 West Boylston Street, Worcester, MA 01606  
**Videoconference addresses:**  
 HUNTINGTON, Gateway Regional School District, 12 Littleville Road, Huntington, MA 01050  
 HAVERHILL, Northern Essex Community College, Hartleb Technology Center, TC213, 100 Elliott Street, Haverhill, MA 01830  
 LOWELL, UMass Lowell, Campus Recreation Center, (CRC111), 322 Aiken Street, Lowell, MA 01851

## CONGRATULATIONS TO THE NEW DESIGNEES!

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*The following is a list of the MCPPO Program's new Designees based on applications reviewed between July 1, 2018 and December 31, 2018:*

### MCPPO

*Michael Alves, Acushnet Police Dept.*  
*Eric Arbeene, S.E. Reg. Plann. & Econ. Dev. Dist.*  
*Alyssa Bosse, Weymouth Public Schools*  
*Catherine Carney, Town of Norwood*  
*Thupten Chukhatsang, City of Somerville*  
*Danielle Collins, Methuen Public Schools*  
*Michael Connelly, North Reading Public Schools*  
*Lauren Cooney, MassBay Comm. College*  
*Catherine Cooper, S.E. MA Educational Collab.*  
*Lucas Dean, MA College of Art and Design*  
*Glenn Ferguson, Town of Norwell*  
*Ryan Ferrara, Town of Boxborough*  
*David Flaherty, Town of Raynham*  
*John Foster, Dartmouth Fire Dist.*  
*Michael Gallagher, Town of North Attleboro*  
*Lisa Green, Town of Whitman*  
*Andrew Hall, Town of Belmont*  
*Lincoln Heineman, Town of Hanover*  
*Shabnam Khan, City of Medford*  
*Jennifer Kelson, Buzzards Bay Water Dist.*  
*Aaron Miklosko, Town of Maynard*  
*Rebecca Meekins, Town of Grafton*  
*Daniel Menard, Town of Acushnet*  
*Michael Miller, Lawrence Municipal Airport*  
*Robert Penagos, Taunton Housing Authority*  
*Heath Petracca, Westwood Public Schools*  
*Pamela Perez, City of Cambridge*  
*Christopher Plourde, Plymouth Housing Authority*

*Laura Powers, Braintree Public Schools*  
*Susan Rothermich, Hopkinton Public Schools*  
*Jeffrey Sands, Hamilton-Wenham Reg. School Dist.*  
*Kevin Sbardella, Fall River Housing Authority*  
*William Sedewitz, City of Framingham*  
*Patrick Shield, Town of Walpole*  
*Kathleen Silva, Town of Acushnet*  
*Goran Smiljic, Cambridge Housing Authority*  
*Steven Souza, Buzzards Bay Water Dist.*  
*Chelsea Stevens, Town of Hanover*  
*Stacy Toczylowski, Town of North Attleboro*  
*Kristine Trierweiler, Town of Medfield*  
*Arlyn Zuniga, Town of Milton*

### MCPPO for Design & Construction

*Collette Blais, Dept. of Correction*  
*Anthony DiStefano, Dept. of Public Health*  
*Yvelisse Duvergé, MBTA*  
*Kristine Marcotte, Dept. of Correction*  
*Sean McDonnell, MBTA*  
*Jeanne Savoie, Nashoba Valley Tech. High Sch. Dist.*  
*David Verdolino, Acton-Boxborough Reg. Sch. Dist.*  
*Cecelia Wirzbicki, Auburn Public Schools*

### MCPPO for Supplies & Services

*Michael Andersen, Town of Wellesley*  
*Marcia Birmingham, Town of Rockland*

*(Continued on page 18)*

*(Continued from page 17)*

### **Associate MCPPO**

*Jennifer Barrett, Town of Boxborough*  
*Jeffrey Baxter, Chelmsford Housing Authority*  
*Glenn Cannon, Town of Bourne*  
*Robert Cassano, City of Somerville*  
*Gregory Caswell, Taunton Housing Authority*  
*Adrienne Danner, Taunton Housing Authority*  
*Paul Donnelly, Boston Public Facilities Dept.*  
*Kate Ferreira, S.E. Reg. Capital Asst. Team*  
*Peter Franciosi, UMass Boston*  
*Andrew Garofalo, Melrose Housing Authority*  
*Daniel Grover III, City of Malden*  
*Matthew Haffner, Norfolk Public Schools*  
*Kai Hodge, Town of Nantucket*  
*Ryan Johnson, Bridgewater State University*  
*Kerry Kearns, Greater Lowell Tech. High School*  
*Stephen Leone, City of Framingham*  
*Andrew Marron, Town of Braintree*  
*Melissa Martel, Town of Concord*  
*Patrick Mulvey-Welsh, Boston Public Facilities Dept.*  
*John O'Leary, Pioneer Valley Planning Comm.*  
*Thomas Percoco, City of Cambridge*  
*Christopher Rais, City of Somerville*  
*Susan Rice, Boston Public Facilities Dept.*  
*Connor Robichaud, Cent. MA Reg. Planning Comm.*  
*David Ruliera, Boston Water and Sewer Comm.*  
*Melissa Richard, Needham Public Schools*  
*Zummalina Salvez, MassBay Comm. College*  
*Keree Simmons, Conservatory Lab Charter Sch.*  
*Dolores Sharek, South Middlesex Reg. Voc. Tech. Sch. Dist.*

*Piola Smith, Boston Public Facilities Dept.*  
*Richard Souza, Town of Rockport*  
*Stephen Stephanou, City of Boston*  
*Justin Sultzbach, Town of Tyngsborough*  
*Cynthia Sylvester, UMass Lowell*  
*Prajakta Waditwar, City of Somerville*  
*Danielle Wagner, MassBay Comm. College*  
*Philip Wartel, City of Greenfield*  
*Charles Young, Town of Weston*

### **Associate MCPPO for Design & Construction**

*Stephen Gagosian, Town of Wellesley*  
*Michael Haines, Town of Lincoln*  
*Fatima Pecanha, MBTA*

### **Associate MCPPO for Supplies & Services**

*Jacqueline Bresnahan, Town of Wenham*  
*Julie Hebert, Town of Acushnet*  
*Brian Jackson, Holyoke Comm. College*  
*Bridget O'Brien, Watertown Public Schools*



## **SUBSCRIPTION INFORMATION**

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*If you have any other questions, please contact (617) 727-9140.*

### **Contact Information**

#### **Massachusetts Office of the Inspector General**

##### **Address:**

1 Ashburton Place, Room 1311, Boston, MA 02108

##### **Phone:**

Main Office: (617) 727-9140

Fraud, Waste, and Abuse Hotline: (800) 322-1323

MassDOT Fraud Hotline: (855) 963-2580

Chapter 30B Assistance Hotline: (617) 722-8838

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##### **Emails:**

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Training/MCPPO Inquiries: [MA-IGO-Training@state.ma.us](mailto:MA-IGO-Training@state.ma.us)

Employment Inquiries: [IGO-Employment@state.ma.us](mailto:IGO-Employment@state.ma.us)

##### **Fax:**

(617) 723-2334