



Office of the Inspector General

PROCUREMENT BULLETIN

Dear Public Officials:

Happy New Year! I am delighted to announce that 2017 marks the 20th anniversary of the Massachusetts Certified Public Purchasing Official (MCPPO) program. When it began in 1997, the MCPPO program offered two courses and taught 544 participants. Twenty years later, we now offer eighteen courses and have taught more than 17,000 participants (over 1,700 in 2016 alone). With your help and collaboration, we also provide videoconferences and live classes across the Commonwealth, which allow us to reach even more students and provide even more training and education. The MCPPO program adapts its curriculum to the changing needs of local government and expands its educational offerings because of your commitment to using public funds appropriately. Congratulations to our MCPPO program administrators, instructors, coordinators, partner agencies, designees and you – our participants. I commend you for your dedication and service to the Commonwealth.

In the same spirit of collaboration, our Office recently participated in an important training program organized by the Commonwealth's Operational Services Division (OSD) entitled "Neighbor-to-Neighbor: Working Together to Achieve Procurement Success." Through this training program, instructors from our Regulatory and Compliance Division traveled with OSD staff to 10 regions across the Commonwealth to provide public procurement officials with the tools they need to comply with the recent changes to public bidding laws. The trainings reached approximately 400 attendees from 165 communities in the Commonwealth.

We also hosted the 20th anniversary conference of the Association of Inspectors General (AIG) in Boston this past November. As we enter into a new year, we will be applying lessons learned at the conference, where members of the inspectors general community from across the country exchanged ideas, experiences, best practices and expertise related to preventing and detecting fraud, waste and abuse in the expenditure of public funds. Please see page 2 for more information on the AIG conference.

Likewise, in this issue of the Bulletin, you will find helpful compliance information and procurement tips, including articles about legislative changes to banking service procurements, notice requirements on the COMMBUYS system, and the difference between snow hauling and snow plowing.

Lastly, I would like to congratulate our most recent MCPPO designees. This achievement exemplifies the designees' commitment to conducting fair, open and competitive procurements. Please see page 17 for the list of designees.

As always, thank you for your time and consideration in reviewing our publications. I wish you all a happy and healthy 2017.

Sincerely,

Glenn A. Cunha
Inspector General

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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

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



The 20th Anniversary Conference of the Association of Inspectors General Boston, Massachusetts

The Association of Inspectors General (AIG) is a nonprofit organization with approximately 1,500 members, including individuals from the criminal justice and law enforcement communities throughout the nation. It is dedicated to promoting good government, including enhancing transparency and accountability in the expenditure of public funds and resources. The AIG also provides general support and assistance to the inspector general community, including education, outreach and peer reviews.

In November 2016, the Massachusetts Office of the Inspector General hosted the AIG's 20th anniversary conference in Boston, Massachusetts, with almost 300 attendees from around the world. Public officials, accountants, investigators and other criminal justice and law enforcement professionals shared their expertise on how to best prevent and detect fraud, waste and abuse of government resources. The Office of the Inspector General for the Commonwealth of Massachusetts highlighted its efforts to prevent fraud, waste and abuse with segments such as "Training and Outreach: Powerful Fraud Prevention Tools." Attendees learned, for example, that with proper training and education, procurement officials are better able to comply with the public procurement laws, conduct open and fair competition for public contracts, and identify financial fraud or other misconduct when it occurs.

The three-day conference addressed a wide variety of other topics, including strategies for preventing waste; common "red flags" for fraud; and the importance of contract monitoring, including checking invoices once a contract is secured to ensure that the jurisdiction pays only for the goods or supplies it bargained for and actually received.

The AIG conference was well-received and was an excellent opportunity for professionals in the inspector general community to share best practices and strategies for achieving their shared mission of preventing fraud, waste and abuse in the expenditure of public funds.



(From left to right): First Assistant Inspector General Natalie Monroe, AIG President Stephen Street, Mayor of Boston Marty Walsh, and Inspector General Glenn Cunha



The Massachusetts Office of the Inspector General's Local Planning Committee for the AIG:

Top: Inspector General Glenn Cunha

Bottom, from left to right: Rose Roy, Liz Powers, Natalie Monroe, Nataliya Urciuoli, Leigh Pell, Will Bradford, Neil Cohen, Joyce McEntee Emmett, Alex Spangler, Mary Beth Farrelly, Ashley Amado, Judi Cimildoro and Diane Volpe.

Not pictured: Judi Goldberg and Patty Callahan



Advisory Related to Contracts for “Energy or Energy-Related Services”

Commonwealth cities, towns and housing authorities need to purchase electricity and natural gas for public facilities, just like homeowners need to buy energy for their homes. The Office of the Inspector General (Office) recently reviewed energy purchases of electricity and natural gas by public awarding authorities to identify any systemic vulnerabilities and opportunities for improvements related to this complex industry. The review examined public awarding authorities’ use of energy professionals (primarily energy brokers) that are compensated for their assistance with the purchase of electricity and natural gas.



The Office found that many public awarding authorities did not use competitive processes when procuring service contracts with energy professionals, including energy brokers. The Office also found that energy brokers’ compensation rates were typically tied directly to the amount of energy public awarding authorities used. The majority of public awarding authorities paid the same usage-based rate (\$0.001 per kilowatt-hour for electricity and \$0.015 per therm for natural gas). As a result, municipalities with many public facilities paid substantially more to energy brokers than municipalities with fewer public facilities – even though energy brokers performed the same services.

The Office also found that public awarding authorities’ contracts with energy brokers typically spanned the duration of the energy supply agreement, and when new supply agreements were executed, public awarding authorities extended brokers’ contracts without any competitive procurement process.

While most awarding authorities use the same compensation model – based on energy usage – several other payment models exist. These include (1) a negotiated one-time fee, (2) an hourly rate and (3) a usage-based rate with a fee cap. The Office, therefore, recommends that public awarding authorities negotiate the fees paid to energy professionals based on the service provided instead of the amount of energy used.



The Office made additional recommendations based on its findings and encouraged public awarding authorities to use competitive processes to procure energy professionals, including brokers. Additionally, once a contract is awarded, public awarding authorities should keep detailed records of the services performed by and payments made to these energy professionals. For the full report, see <http://www.mass.gov/ig/publications/guides-advisories-other-publications/advisory-for-municipalities-and-other-public-awarding-authorities-using-energy-broker-services-october-2016.pdf>.



Banking and Financial Planning Services **Are Subject to Chapter 30B**

If your jurisdiction pays a fee of any amount for a banking service, including but not limited to debit card services, lock box services or checking account services, Chapter 30B is applicable. Additionally, service agreements related to financial planning, financial advising or investment guidance are subject to Chapter 30B's procurement procedures as well.

Recently, *An Act to Modernize Municipal Finance and Government* eliminated the exemption for compensating balance agreements related to banking services under Section 1(b) (23) of Chapter 30B. A compensating balance agreement is an arrangement by which a city, town, or district maintains municipal funds on deposit in return for designated banking services. Under such an arrangement, the earnings retained by the bank on the account balances compensate the bank for the services provided. As a result of this legislative change, the scope of all banking service agreements — including those with compensating balances — are subject to competitive procurement processes under Chapter 30B. Stated differently, Chapter 30B is now applicable to procurements related to all banking services that impose fees of any value.



Therefore, if a jurisdiction estimates the total value of its banking services (including deposit amounts and corresponding interest rates) to have a value of more than \$50,000, the jurisdiction must follow the procedures required for a sealed competitive process in the form of an invitation for bids or a request for proposals. *See* M.G.L. c. 30B, §§ 5 and 6. If a jurisdiction estimates the value of its banking services to be at least \$10,000 but not more than \$50,000, the jurisdiction must use a written purchase description and solicit three written quotes from banking institutions, awarding the contract to the lowest responsive and responsible bank offering the lowest written price quotation for the needed services. *See* M.G.L. c. 30B, § 4. Finally, if the jurisdiction estimates the value of its banking services to be less than \$10,000, the jurisdiction must use “sound business practices” when contracting for these services. *See* M.G.L. c. 30B, § 4(c). Section 2 of Chapter 30B defines “sound business practices” as ensuring the receipt of favorable prices by periodically soliciting price lists or quotes. This may entail reviewing a variety of banks’ fee and interest rate structures for the type of accounts or banking services your jurisdiction needs.

The Office previously reviewed banking service procurements together with the Commonwealth’s Department of Revenue’s Division of Local Services, the Massachusetts Collectors’ and Treasurers’ Association, and the State Treasurer’s Office. This review examined banking service agreements related to (1) the maintenance and collection of deposits; (2) billing and lock-box services; (3) over-the-counter payments; (4) night depository services; (5) disbursements from regular checking accounts; (6) wire transfers; (7) payroll; (8) vendor payables services and bookkeeping; (9) daily account notification; (10) check sorting and account reconciliation; (11) incidental computer services; and (12) compensating balance agreements.

(continued on page 5)



(Banking and Financial Planning Services, continued from page 4)

The joint review found substantial savings when jurisdictions applied the competitive procurement procedures of Chapter 30B to acquire banking services. While the review was conducted when the thresholds for Chapter 30B procedures were different, the underlying recommendation of using competitive procedures for the procurement of banking services still applies today. For more information, see the Office's report, which is available at <http://www.mass.gov/ig/publications/guides-advisories-other-publications/bankadv.pdf>.

Like banking services, both financial and investment advising services are subject to Chapter 30B's procurement procedures. These services are not exempt from Chapter 30B. Likewise, Certified Public Accountants (CPAs) may provide financial advising services, but the use of a CPA in this context does not trigger the CPA exemption under Section 1(b)(15) of Chapter 30B. This exemption is narrow and relates to work that only a CPA can perform, such as preparing a jurisdiction's annual financial statement. Chapter 30B requires a competitive procurement process for non-CPA work, including financial planning or consulting services.

For further questions on financial or banking services, please contact the Chapter 30B Hotline at (617) 722-8838.

Publication of Legal Notices

On January 21, 2017, pursuant to Section 13 of Chapter 4 (enacted by Chapter 174 of the Acts of 2016, entitled *An Act Relative to Electronic Publication of Certain Legal Notices*), the law related to publishing legal notices will change. Although the new provisions primarily affect newspapers, public entities may need to make changes to their current practices to ensure compliance with the new law.



Currently, legal notices are typically published in print. Starting January 21, 2017, newspapers will have to ensure that a public entity's legal notice is published (1) in print; (2) on the newspaper's website, if it has one; and (3) on the Massachusetts Newspaper Publishers Association's (MNPA) website (<http://masspublicnotices.org/>). Newspapers are responsible for forwarding the legal notices to the MNPA for posting on its website. Moreover, if a newspaper does not have its own website, the print publication notice must reference the MNPA's website.

What does this mean for public entities? At a minimum, the Office recommends two practices: (1) public entities should include a reference to the MNPA's website in their legal notices; and (2) public entities should check the MNPA's website to confirm that their legal notices have been posted. These recommendations may change as we learn more about the implementation of the new law, so please check future editions of the *Bulletin* for updates.



FREQUENTLY ASKED QUESTIONS RELATING TO PROCUREMENT

Q1: Did the “Municipal Modernization Act” create new notice requirements for the procurement of goods or services estimated to cost more than \$50,000 under Chapter 30B?

A1: Yes. Under Section 5 (competitive sealed bids) and Section 6 (competitive sealed proposals) of Chapter 30B, all jurisdictions must now advertise bids or proposals for goods or services estimated to cost more than \$50,000 on the COMMBUYS system administered by the Commonwealth’s Operational Services Division. The bid or proposal must be advertised on the COMMBUYS system at least once, not less than two weeks before the bid or proposal is due. This notice requirement is *in addition to* advertising invitations for bids or requests for proposals estimated to cost more than \$50,000 in (1) a conspicuous place that is open to public viewing in your town or city hall, such as a public bulletin board outside of your procurement office or school department office, for a minimum of two weeks; (2) a newspaper of general circulation that serves your municipality (at least one time, 2 weeks before the bid or proposal due date); and (3) if the cost of the services is \$100,000 or more, in the *Goods and Services Bulletin*, which is published by the Secretary of State’s Office.



Please note that your jurisdiction is not statutorily required to link or upload the actual bid or proposal documents on the COMMBUYS system. You may, however, choose to upload bid documents, addenda or proposals, and accept responses through the COMMBUYS system. There are no notice requirements under Section 4 (solicitation of price quotations) of Chapter 30B for goods or services estimated to cost at least \$10,000 but not more than \$50,000.

Q2: May I still use catalogues, flyers or website advertisements when soliciting price quotations for goods or services estimated to cost \$10,000 but not more than \$50,000 under Section 4 of Chapter 30B?

A2: Yes. Pursuant *An Act to Modernize Municipal Finance and Government*, under Section 4 of Chapter 30B, you must comply with new recordkeeping requirements. Section 4 of Chapter 30B requires that you seek written price quotations from at least three vendors customarily providing that good or service. You must record: (1) the names and addresses of all persons from whom quotations were sought, (2) the purchase description used for the procurement, (3) the names of the persons submitting quotations and (4) the date and amount of each quotation.



(continued on page 7)



(FAQs, continued from page 6)

Subsection 23 of Section 7 of Chapter 4 defines a person to include “corporations . . . associations and partnerships.” Therefore, you may use a current catalog, website advertisement or marketing brochure as a price quotation provided by a corporation, association or partnership, as long as the advertised item on the flyer, website or brochure matches your purchase description and contains the information listed above. Remember, you must keep copies of these records in your procurement file for six years from the date of final payment.

Q3: I have recently been hired as the head of my town’s Department of Public Works. I know that snow plowing is an exempt service under Section 1(b)(17) of Chapter 30B. I would like to be prepared in case snow hauling and disposal are necessary this winter. Is this type of service also exempt from Chapter 30B like snow plowing is?



A3: No. Section 1(b)(17) of Chapter 30B is very specific. Under this provision, “a contract for snow plowing by a governmental body” is exempt. Snow hauling is a different service than snow plowing. Therefore, snow hauling is subject to the provisions of Chapter 30B.

In extreme circumstances, however, snow hauling may be necessary to protect the health and safety of people or property. In these situations, a jurisdiction could be allowed to procure hauling services under the emergency procurement provisions of Section 8 of Chapter 30B. For a detailed explanation of your obligations with respect to emergency-related procurements under Chapter 30B, please see this Office’s *Chapter 30B Manual: Procuring Supplies, Services and Real Property*.

Q4: I am procuring school furniture through a statewide contract. In checking references, some of the feedback on the vendor’s past performance has not been positive. I have decided to do further research. Is it my responsibility as the procurement officer or the responsibility of the Operational Services Division (OSD) to ensure that the vendor has not been debarred by a state or federal agency?



A4: It is the awarding authority’s responsibility to ensure that a vendor has not been debarred by a state or federal agency. This review is part of the responsibility determination that every awarding authority must conduct in order to deem a vendor as a “responsible bidder or offeror,” which is defined as “a person who has the capability to perform fully the contract requirements and the integrity and reliability which assures good faith performance.” See M.G.L. c. 30B, § 2.

(continued on page 8)



(FAQs, continued from page 7)

Although you may reject a vendor based on negative feedback from references only, you should also research the vendor's debarment history as a best practice before making a determination about whether the vendor is responsible. State and federal debarment lists are available on the state's website at <http://www.mass.gov/anf/property-mgmt-and-construction/design-and-construction-of-public-bldgs/vendor-debarment.html>.

Q5: We would like to hire an executive search firm to aid us in our search for candidates for a number of executive level positions in our town, including a Town Administrator and new Superintendent of our public schools; is this service exempt from Chapter 30B?

A5: No. An agreement by a city or town with an executive search firm is not exempt from Chapter 30B. Section (1)(b)(22) of Chapter 30B exempts certain service contracts related to employment, including "job-related training, educational or career development services," but these services apply only to the "employees of a governmental body." This exemption does not include services related to recruiting prospective employees. Therefore, you must secure executive search firm or recruiting services in accordance with the competitive procurement procedures, based on the estimated value of the contract, outlined in Chapter 30B.

Chapter 30B Hotline: (617) 722-8838



Office of the Inspector General

January 2017

Volume 23, Issue 1

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

STORY OF A BUILDING

hosted at **Bay Path Regional Vocational Technical High School**

57 Old Muggett Hill Road
Charlton, MA 01507



Monday, February 6, 2017

8:30 a.m.— 4:30 p.m.



Please see our registration form on page 15.



IS IT TIME TO REPAIR OR REPLACE A SCHOOL IN YOUR DISTRICT?

The Massachusetts School Building Authority (MSBA) invites you to join us for the upcoming Massachusetts Certified Public Purchasing Official program's *Story of a Building* seminar scheduled on Monday, February 6, 2017, at **Bay Path Regional Vocational Technical High School** in Charlton, MA. The MSBA will provide helpful information on how its funding program works, as well as insights from school advocates about lessons learned in the planning, designing and building phases for Bay Path Regional Vocational Technical High School's addition and renovation project.

We will share:

- strategies used by the Bay Path Regional Vocational Technical School District (Bay Path Regional) to pass (on its second try) a vote in its 10-town region to fund its addition and renovation costs;
- features of the Bay Path Regional educational program afforded by the project's completion;
- submission requirements for educational programs for every major repair or new construction project considered by the MSBA Board;
- ideas on collaborating with other school districts when working with the MSBA to procure certain items to outfit new or newly-renovated schools; and
- guidance related to more accurately predicting MSBA reimbursements for a school district's building project.

Please join us for a day of touring Bay Path Regional's excellent academic and vocational technical programs and learning about the MSBA's funding process through Bay Path Regional's recent experience.

We look forward to seeing you there!

Jack McCarthy, MSBA Executive Director/Deputy CEO



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.

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



Liz Unger, MCPPO instructor, at the *Contract Administration* class hosted by the Town of Stoughton in 2016.

Updated Manuals Are Now Available

The Office's *Chapter 30B Manual: Procuring Supplies, Services and Real Property* has been updated and is available on the Office of the Inspector General's website at <http://www.mass.gov/ig/publications/manuals/30bmanl.pdf>. Please refer to the 2016 8th Edition of the *Chapter 30B Manual* for the most current and up-to-date procurement requirements and best practices related to purchasing goods or services for your jurisdiction.

The *Designing and Constructing Public Facilities* manual has also been updated and is available on our website at <http://www.mass.gov/ig/publications/manuals/dcmanual.pdf>. Please refer to the 2016 9th Edition manual when you need procurement information related to public construction projects, including schools, police and fire stations, roads, bridges and wastewater treatment plants.

The Chapter 30B Manual: Procuring Supplies, Services and Real Property

- Legal Requirements
- Recommended Practices
- Sources of Assistance

Designing and Constructing Public Facilities

- Legal Requirements
- Recommended Practices
- Sources of Assistance



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.



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

CONSTRUCTION MANAGEMENT AT RISK UNDER M.G.L. c. 149A: LEGAL REQUIREMENTS AND PRACTICAL ISSUES

PREREQUISITE: NONE

COURSE LEVEL: BASIC

INSTRUCTIONAL METHOD: GROUP-LIVE

ADVANCED PREP: NONE

This 1-day seminar is designed for procurement officials who do not specialize in managing public construction projects. The attendees will learn about the legal requirements of Chapter 149A, the roles of major participants, 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.

COURSE DATE:

March 7, 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.

Topics covered include:

- Comparison of CM-at-risk projects with design-bid-build projects
- The role of the construction manager on a CM-at-risk project
- The procurement process, including the requirements for selecting an owner's project manager and the two-phase selection process
- Contracting requirements
- Planning the CM-at-risk project and monitoring the resulting contract

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. For additional information on the MCPPO Program or 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.



Office of the Inspector General

Glenn A. Cunha, Inspector General

The Massachusetts Certified Public Purchasing Official (MCPPO) Program

CHARTER SCHOOL PROCUREMENT

PREREQUISITE: NONE

COURSE LEVEL: BASIC

INSTRUCTIONAL METHOD: GROUP-LIVE

ADVANCED PREP: NONE

This 2-day course is designed to assist charter schools to comply with Section 11 of Chapter 46 of the Acts of 1997, which requires certain charter school administrators to earn a certificate of completion from the Massachusetts Certified Public Purchasing Official (MCPPO) program. Charter schools are subject to certain state procurement laws, are exempt from others, and are always responsible for sound business practices and best value procurement. Efficient, effective and ethical contracting practices are essential for charter schools working to achieve their goals and objectives in a cost-effective manner. *Charter School Procurement* concludes with a written examination.

COURSE DATES:

April 6 and 7, 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.

Topics covered include:

- Massachusetts procurement laws applicable to Commonwealth charter schools
- Recommended procurement practices
- Overview of legal requirements for public contracts
- Procuring supplies and services
- Buying, leasing, acquiring or disposing of real property
- Legal requirements and best practices for procuring construction services

This course qualifies for 20 continuing professional education (CPE) credits, 20 professional development points (PDP) and 17 MCPPO credits toward recertification.

To register, please visit our website at www.mass.gov/ig. For additional information on the MCPPO Program or 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.



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, 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 tools necessary 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

*One Ashburton Place, Room 1306
Boston, Massachusetts*



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.

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. 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.



Office of the Inspector General
Glenn A. Cunha, Inspector General
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.

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 or go to our website at 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
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
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

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

CREATING A 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

February 15, 16, March 1, 2 ☐ BOS

May 11, 12, 18, 19 ☐ BOS

RECERTIFICATION for School Project Designers & OPMs

March 9 ☐ BOS

June 2 ☐ 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

Additional Seminar Information



PUBLIC CONTRACTING OVERVIEW <i>No Prerequisite</i>		Tuition: \$595 for government/non-profit employees \$750 for all others
February 7, 8, 9 March 1, 2, 3 March 28, 29, 30	<input type="checkbox"/> BOSTON <input type="checkbox"/> HUNTINGTON <input type="checkbox"/> BOSTON <input type="checkbox"/> NORTHERN ESSEX CC*	May 8, 9, 10 June 6, 7, 8 <input type="checkbox"/> BOSTON <input type="checkbox"/> BOSTON
		3-day seminar
CHARTER SCHOOL PROCUREMENT <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
SUPPLIES & SERVICES CONTRACTING <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 April 25, 26, 27 May 2, 3, 4	<input type="checkbox"/> BOSTON <input type="checkbox"/> HUNTINGTON <input type="checkbox"/> BOSTON <input type="checkbox"/> NORTHERN ESSEX CC*	June 13, 14, 15 <input type="checkbox"/> BOSTON
		3-day seminar
DESIGN & CONSTRUCTION CONTRACTING <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 March 15, 16, 17 April 25, 26, 27	<input type="checkbox"/> BOSTON <input type="checkbox"/> HUNTINGTON <input type="checkbox"/> BOSTON <input type="checkbox"/> NORTHERN ESSEX CC*	May 24, 25, 26 June 20, 21, 22 <input type="checkbox"/> BOSTON <input type="checkbox"/> COMM
		3-day seminar
STORY OF A BUILDING <i>No Prerequisite</i>		Tuition: \$200 each participant
February 6	<input type="checkbox"/> BAY PATH RVTHS	1-day seminar
CONSTRUCTION MANAGEMENT AT RISK <i>No Prerequisite</i>		Tuition: \$200 each participant
March 7	<input type="checkbox"/> BOSTON	1-day seminar
INVITATIONS FOR BIDS & REQUESTS FOR PROPOSALS NEW <i>No Prerequisite</i>		Tuition: \$200 each participant
April 4	<input type="checkbox"/> BOSTON	1-day seminar
PROCUREMENT FRAUD <i>No Prerequisite</i>		Tuition: \$200 each participant
April 5	<input type="checkbox"/> BOSTON <input type="checkbox"/> HUNTINGTON*	1-day seminar
REAL PROPERTY TRANSACTIONS <i>No Prerequisite</i>		Tuition: \$200 each participant
April 11	<input type="checkbox"/> BOSTON	1-day seminar
ADVANCED TOPICS UPDATE <i>Prerequisite: Supplies & Services Contracting or Design & 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
CONTRACT ADMINISTRATION <i>No Prerequisite</i>		Tuition: \$200 each participant
May 16	<input type="checkbox"/> BOSTON	1-day seminar
ARE YOU A MEMBER OF A PUBLIC BOARD OR COMMISSION? KNOW YOUR RESPONSIBILITIES <i>No Prerequisite</i>		Tuition: \$200 each participant
May 23	<input type="checkbox"/> BOSTON	1-day seminar
CREATING A PROCUREMENT OFFICE <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
DRAFTING A MODEL IFB <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
PRIVATE SECTOR TRAINING		
CERTIFICATION for School Project Designers & Owner's Project Managers		Tuition: \$1350 each participant
February 15, 16, March 1, 2 May 11, 12, 18, 19	<input type="checkbox"/> BOSTON <input type="checkbox"/> BOSTON	4-day seminar
RECERTIFICATION for School Project Designers & Owner's Project Managers <i>Prerequisite: Certification for School Project Designers & Owner's Project Managers</i>		Tuition: \$550 each participant
March 9 June 2	<input type="checkbox"/> BOSTON <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 October 1, 2016 and December 31, 2016:

MCPPO

*Jacqueline Beebe, Town of Eastham
Olga Correia, City of Fall River
James Holt, Melrose Housing Authority
Susan Inman, Town of Boxford
Martha Leavitt, Northern Essex Community College
Ann Martin, Fitchburg State University
Julie Martinos, City of Waltham
Robert McGee, Town of Medway
James McQueen, City of Boston
Joseph Murray, Town of Wellesley
Donald Ouellette, Town of Greenfield
Robin Pease, Mohawk Trail Reg. Sch. Dist.
Jackson Restrepo, Worcester Housing Authority
Nadine Rodriguez, Bridgewater State University
Elizabeth Rourke, Town of North Reading*

MCPPO for Design & Construction

Avi Urbas, Manchester Essex Reg. Sch. Dist.

MCPPO for Supplies & Services

None

Associate MCPPO

*Yeimi Colón, City of Salem
Patricia Duffy, Revere Housing Authority
Lori Esposito, Town of Southborough
Paul Ferland, City of Fall River
Elia Gjanci, Town of Framingham
James Kane Jr., Town of Natick
Paul McGonagle, Reading Municipal Light Department
Michelle Miller, Town of Westwood
Katherine Moskos, Town of Burlington
James Novello, Lowell Housing Authority
Denise Ryan, Lowell Housing Authority
Sharon Spanos, City of Lowell
Tammy Veracka, Carver Public Schools*

Associate MCPPO for Design & Construction

None

Associate MCPPO for Supplies & Services

Karen Switzer-Neff, Town of Acton





SUBSCRIPTION INFORMATION

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

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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
ATTN: Alexandra Spangler**