



PROCUREMENT BULLETIN

Dear Public Officials:

Greetings. I am pleased to write to you about a new class for members of boards and commissions that the Office will begin offering this fall. In March, the Office collaborated with the Board of Higher Education to offer two trainings for college and university boards of trustees. The trainings, which took place at Massasoit Community College and Holyoke Community College, covered such topics as the fundamentals of trusteeship, fraud prevention, ethics and university foundations. The Board of Higher Education, in conjunction with this Office, the Attorney General's Office and the Ethics Commission, conducted these sessions as part of a multi-agency response to our Office's report on the improper spending of public funds by the former president of Westfield State University. As part of our recommendations in that report, we identified a need for board members to more closely monitor university executives' spending practices and to improve internal controls to help prevent the fraud, waste and abuse of public funds.

These co-sponsored trainings are the first steps we are taking to provide support and training to members of boards and commissions throughout the Commonwealth. As we have reported in the past, board members have a duty to actively oversee the officials who report to them, as well as to ensure that the public money they administer is spent appropriately. In the fall, therefore, we will offer training to the members of all municipal and state boards and commissions. The training will cover such topics as fraud prevention, ethics, contract administration and fiduciary duties. We will provide more information about the class in upcoming publications.

In this issue, you will find frequently-asked questions regarding snow plowing, snow hauling and the timing of bid awards. This issue also contains articles regarding the importance of conducting meaningful reference checks for vendors, the use of credit cards by public agencies, handling emergency procurements, and the importance of procurement planning. Additionally, please see pages 13-14 of this *Bulletin* for the complete spring schedule of MCPPO classes, including those at our four video-conference locations across the state: Centerville, Huntington, UMass Dartmouth and UMass Lowell.

Finally, congratulations to those public officials who have recently earned the Massachusetts Certified Public Purchasing Official designation. This achievement demonstrates the designees' commitment to conducting open, fair and competitive procurement processes that benefit their jurisdictions and that protect public funds from fraud, waste and abuse. The list of new designees can be found on page 15 of this *Bulletin*.

As always, I thank you all for reviewing the Office's publications and wish you better weather this coming spring.

Sincerely,

Glenn A. Cunha
Inspector General

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IMPORTANT NOTICE



Please be advised that we have changed the registration policy for our MCPPO Program. All registration forms must be mailed in and accompanied by payment. Registration forms received via fax or email will no longer be accepted. Please also note that purchase orders (PO) are not considered a form of payment. We are working on the ability to have registrations and payment options available online and hope to have that capacity in the future. We thank you for your cooperation and continued support.





PLANNING YOUR NEXT PROCUREMENT

Submitted By Michael Gauthier, CPCM, MCPPO, Procurement Officer, City of Woburn

On the local level in Massachusetts, procurement professionals operate in accordance with a set of state statutes to procure supplies, services, public works projects, facilities construction, and architectural and engineering services. The statutes provide the legal framework for the procurement process but do not provide guidance on the essential post-award element of contract administration. Contract administration encompasses the time from contract award to contract closeout and involves all the steps a jurisdiction should take to ensure the timely receipt, within budget, of the supply, service or project procured. The goal of this article is to highlight how proper planning in the pre-award phase can aid a jurisdiction in the contract administration phase, helping to ensure a successful procurement.

Proper planning is essential to conducting a successful procurement. Planning gives the individuals involved in a procurement (the stakeholders) both direction and an implementation strategy; it also defines the resources needed to do the job. The plan defines all aspects of the procurement.

Procurement requires planning so all members of the procurement team function collaboratively toward achieving the end goal of a successful project or purchase. Formal planning should begin as early as possible in the procurement process because this will decrease issues during the contract administration phase.

Developing a formal procurement plan requires input from all stakeholders involved in the upcoming project. Stakeholders may include individuals from purchasing, legal, finance, the requesting department and any outside consultants hired to assist the jurisdiction with the procurement. Most of the procurements made to support the day-to-day operations of a local jurisdiction do not require detailed planning. However, even for these simpler procurements, the procurement official should ensure that there is a common understanding and agreement among stakeholders as to the procurement goal, implementation strategy and risks.

For complicated procurements the procurement official should develop a written plan in conjunction with stakeholders to guide the procurement. The depth of the plan depends on the complexity of the procurement. The following topics should be addressed in the plan but they are no means an exhaustive list:

- Identification of the individual(s) responsible for ensuring that the supply, service, or project is received in compliance with the contract terms and conditions
- Description of the supply or service to be procured, including capabilities or performance to be achieved (the procurement goal)
- Factors (budget, personnel issues, etc.) that impact the procurement
- Estimated costs and funding sources
- Delivery terms or performance timeframe including any specific scheduling requirements
- Trade-offs to consider (technical requirements vs. price considerations)
- Risk assessment
- Market research and potential vendors
- Contract plan of action:
 - Specifications or scope of work
 - Proposed contract type
 - Milestones or target dates for completion



A written plan developed by the stakeholders will provide the jurisdiction with a road map to the procurement goal and will allow the procurement official to monitor progress toward that goal during the contract administration phase. Developing the plan should be a collaborative effort, garnering input from all of the stakeholders. Procurement planning is a critical step toward ensuring the jurisdiction attains its procurement goal.



EMERGENCY PROCUREMENTS

When an emergency arises, as occurred with this winter's excessive snow storms, a public jurisdiction may be faced with immediate needs for goods, services, real property acquisitions or design and construction services. The state procurement statutes provide reasonable flexibility with regard to meeting those needs and enabling you to deal with emergency situations. While it is not the case for M.G.L. c. 30B, you will need to seek written approval from state agencies for some emergency procurements. Your local jurisdiction also may have specific rules about who has authority and how to use emergency procurement procedures.



The emergency provisions vary somewhat from statute to statute. Therefore, first you will need to decide which statute is the appropriate procurement statute, so you know which rules to follow. Generally, you must comply with the law to the extent practicable, and you may purchase only what you need to deal with the specific emergency. In most cases, although formal bidding is not required, the awarding authority should solicit multiple quotations or bids whenever possible. Note also that other statutory requirements may apply, including prevailing wage requirements.

Chapter 30B states that if the time required to comply fully with a Chapter 30B requirement would endanger the health or safety of people or their property due to an unforeseen emergency, you may procure the needed item or service without complying with that requirement. (M.G.L. c. 30B, § 8.) But, even under emergency circumstances, you must comply with Chapter 30B to the extent possible. For example, if you do not have time to advertise for two weeks, you can shorten the advertising period; or, if you have no time to advertise, you can solicit quotes. You may procure only those supplies or services necessary to meet the emergency. You must maintain a record of each emergency procurement, documenting the basis for determining that an emergency exists, the name of the vendor, the amount and type of contract, and a list of the supplies or services purchased under each contract. We recommend that you also include in your record all procedures followed to elicit competition. Your record of an emergency procurement must be submitted as soon as possible to the *Goods and Services Bulletin* for publication.



Public jurisdictions should, however, be careful when making emergency procurements. This past winter, larger than normal snow accumulation meant that flat roofs on public buildings carried more weight than was considered safe and there was a need to remove the snow quickly before additional bad weather posed a threat to life or property. While the law exempts snow plowing (M.G.L. c. 30B, § 1(b)(17)),

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EMERGENCY PROCUREMENTS

(Continued from page 3)

manual shoveling of snow is not exempt and these services would be subject to Chapter 30B. While clearing a roof in these circumstances may be an eligible emergency, jurisdictions should not pay exorbitant fees for the removal. It is important to remember that, even in an emergency procurement, you should still exercise sound business judgment.



M.G.L. c. 7C, §§ 44-57, the designer selection law, permits expedited selection of a designer whenever the health or safety of people would be endangered, or when a deadline for action set by a court or federal agency cannot be met, because of the time required by the designer selection procedures. Local governments' designer selection procedures should specify the procedures to be used in an emergency, who has the power to invoke them, and what requirements, if any, may be waived.

For building construction projects subject to M.G.L. c. 149, you may dispense with the normal bidding procedures for work needed to preserve the health or safety of people or property, or to alleviate an immediate security threat. You must get prior approval of the emergency from the Division of Capital Asset Management and Maintenance (DCAMM) unless the urgency of the situation makes it impossible to contact DCAMM in advance. In such a case, you may start the emergency work, but you must contact DCAMM as soon as possible to request approval. If DCAMM determines that an emergency waiver is warranted, DCAMM may waive public notice and public bidding requirements for the work. The waiver must be obtained in writing. For information on how to request an emergency waiver from DCAMM, see: <http://www.mass.gov/anf/property-mgmt-and-construction/info-and-guide-for-municipalities/emergency-waiver-requests-by-public-awarding.html>.

Finally, you may dispense with the normal bidding procedures for public works construction projects and construction materials contracts subject to M.G.L. c. 30, § 39M, only in cases of "extreme emergency caused by enemy attack, sabotage or other such hostile actions or resulting from an immediate security threat, explosion, fire, flood, earthquake, hurricane, tornado and other such catastrophe." Only work or materials necessary for "temporary repair and



restoration to service of any and all public work in order to preserve health and safety of persons and property" may be performed. You must obtain a written waiver of the public notice requirements from DCAMM before the work begins. You may not use Chapter 30B's bidding procedures for emergency public works construction contracts and contracts for construction materials.



VENDOR REFERENCE CHECKS



References are an important part of any bid solicitation. As the purchaser, you need to know if the vendor has the capability, integrity and reliability to fulfill your contract. Information about vendors' past performance can help you make that determination. Unfortunately, obtaining an accurate picture of a vendor's past performance through the use of reference checks can be difficult. Too often, vendors provide only their best references and omit references for contracts that involved performance shortfalls.

To avoid this problem, you might require that vendors submit a complete list of the contracts they have performed that are similar in size and scope to your contract. You may choose to limit this list to contracts performed in the past year or in whatever time period makes sense for your contract. You may also tailor the reference check to get the information that is most important to you. For example, if one of your primary concerns is the durability of the equipment after the first two contract years, then ask for references from all customers who have had the equipment for two years or longer. However you shape your request, by asking for a complete list – rather than allowing the vendor to self-select three or four "good" references – you will get a more accurate picture of the vendor's past performance.



Finally, you should include in your bid solicitation a statement that poor references may be a basis for determining that the vendor is not a responsible bidder.

Here are two examples of requests for references:

Example: Each bidder must submit a complete list of all jobs performed in the past two (2) years that are similar in size and scope to this project. The list must include each customer's full name and address, as well as a contact name and telephone number.

Example: Each bidder must submit a complete list of all current customers who have had the proposed network installed and operational for at least two (2) years. The list must include each customer's full name and address, as well as a contact name and telephone number.

Checking the References

Once you have your references, you can contact all the names on the list or select just three or four if the list is too long. Make sure that you treat all vendors equally by contacting the same number of references for all bidders. It is also important to ask the same objective questions about all bidders. Did the vendor satisfactorily perform the contract? Did the vendor perform on a timely basis? Would the contact person rehire the vendor? Tailor the reference check to get the information that is most important to you. Again, for example, if one of your primary concerns is durability then ask all references about any service problems they encountered after the initial two years of the contract.

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VENDOR REFERENCE CHECKS

(Continued from page 5)

Financial References

You may want to ask for additional reference information in order to assess a vendor's financial viability. Awarding authorities often require vendors to submit audited financial statements or annual reports, from the most recent year-end, with their bids to ensure the vendor is financially viable. However, these materials are only useful if you have the expertise to analyze them. If you lack such expertise, you should consider other means of assessing vendors' financial viability, such as requiring vendors to submit a bonding letter or information from a credit reporting agency (sources include Equifax, Experian, TransUnion and Dun & Bradstreet).

Below are examples of requests for financial references:

Example: Each bidder must submit a credit report from a credit reporting agency containing the bidder's credit history for the last seven (7) years. The credit report must be dated no earlier than 60 days prior to the bid submission date.

Example: Each bidder must submit a business information report or business profile from a credit reporting agency. The report must be dated no earlier than sixty (60) days prior to the bid submission date.

Example: Each bidder must submit an audited or reviewed financial statement, from the most recent year-end, attested to by a certified public accountant (CPA). The CPA must attest that the financial statement is true and accurate to the best of her knowledge.



A thorough check of financial and performance-related references is an essential part of your jurisdiction's evaluation of proposed vendors. It will help avoid surprises and issues later on, and is well worth the time spent before awarding the contract. When requesting references, focus on what distinguishes a "good" performer from a

"poor" performer for the type of supply or service you are seeking. Obtain references from those who will give you the most useful information and ask questions designed to elicit that information. In sum, make a meaningful reference check a part of each bid and submission process in your jurisdiction.





AVOIDING RISKS AND PROTECTING ASSETS:

RECOMMENDATIONS FOR INTERNAL CONTROLS AND BETTER OVERSIGHT

The Inspector General's Office recently concluded a review of a housing authority after receiving allegations that an employee had used the authority's credit card for thousands of dollars of personal charges and had taken home outdoor equipment belonging to the authority. We found that broad internal control weaknesses and oversight deficiencies made the authority susceptible to employees' abuse of the authority's assets and equipment. We recommended that the authority address these vulnerabilities through stricter controls, increased management oversight, and implementation of written policies. These recommendations are applicable to any number of housing authorities, municipalities, or other jurisdictions. Below are some of our recommendations, which may be appropriate for your jurisdiction to consider.

Credit Cards:

1. Establish a written credit card policy that, at a minimum:
 - a. defines appropriate and inappropriate credit card use, including an express prohibition against using the card for personal purchases;
 - b. establishes appropriate and reasonable purchasing thresholds and credit limits;
 - c. requires staff to submit adequate backup documentation to support purchases;
 - d. outlines disciplinary procedures that will result from inappropriate credit card use; and
 - e. outlines a procedure for regularly auditing credit card charges.
2. Require management to pre-approve credit card purchases over a certain amount (*e.g.*, \$1,000).
3. Require management to review and approve monthly credit card charges and backup documentation.
4. Explore replacing credit cards with an employee reimbursement system for incidental purchases and a formal purchasing system for larger acquisitions in lieu of a credit card.
5. Use a fuel management card for gasoline purchases since these cards provide greater control and oversight if monitored effectively.

Use of Public Equipment and Resources:

1. Create a written policy concerning the appropriate use of equipment and other resources that:
 - a. prohibits employees from using your jurisdiction's assets for personal purposes or personal gain; and
 - b. outlines disciplinary procedures for the inappropriate use of public resources.
2. Conduct a comprehensive asset inventory on an annual basis.
3. Require management approval to purchase or dispose of assets valued over a certain amount (*e.g.*, \$50).
4. Discontinue the use of petty cash and, instead, implement an employee reimbursement system.

Financial Interests and Standards of Conduct:

1. Require all employees to disclose any financial interests that could create a real or perceived conflict of interest.
2. Adopt a "standards of conduct" policy that outlines prohibited conduct and the penalties for violating these standards.



Our review illustrated the manner in which a lack of adequate safeguards created significant vulnerabilities for fraud, waste and abuse of public funds. Every jurisdiction is responsible for maintaining a strong system of controls to combat the risk of fraud, waste and abuse. These recommendations are just a few simple steps that you can implement to strengthen your jurisdiction's internal controls.



FREQUENTLY ASKED QUESTIONS RELATING TO PROCUREMENT

Q1: I am the Chief Procurement Officer (CPO) for my town. I issued an invitation for bids (IFB) for supplies that stated the jurisdiction would award the contract within 30 days of bid opening. The town has not been able to award the bid within that time frame due to the severe winter weather. May I extend the time for award?

A1: Yes. Chapter 30B, Section 5(g), addresses the time for acceptance by stating that “[t]he procurement officer shall award the contract by written notice to the selected bidder within the time for acceptance specified in the invitation for bids. The time for acceptance may be extended for up to 45 days by mutual agreement between the governmental body and the apparent lowest responsible and responsive bidder . . .” Therefore, you – as the governmental body – may extend the time for contract award by an additional 45 days from the original date stated in the IFB with the agreement of the apparent lowest responsive and responsible bidder. We recommend that your jurisdiction put this time extension in writing and that both parties sign off on it.



However, please note that Section 5 (invitation for bids) and Section 6 (request for proposals) of Chapter 30B address the time for acceptance differently. Chapter 30B, Section 6(g), states in part that “[t]he chief procurement officer shall award the contract by written notice to the selected offeror *within the time for acceptance specified in the request for proposals. The parties may extend the time for acceptance by mutual agreement*” (emphasis added). Note that this section does not place the same 45-day limitation that appears in Section 5 for IFBs. In either a bid or proposal scenario, always remember to put the agreement regarding the extension in writing.

Finally, the one exception in Section 6 pertains to contracts for recycling or composting solid waste, or for the treatment, composting or disposal of sewage, septage or sludge at a facility to be owned and constructed by a private party. In such contracts, the time for acceptance may be extended for up to 45 days by mutual agreement between the governmental body and the responsible and responsive offeror who submitted the most advantageous proposal as determined by the chief procurement officer. See Chapter 30B, Section 6(j).

Q2: 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. Given the recent spate of snow storms in Massachusetts this winter, my jurisdiction needs to haul away and dispose of snow. Is snow hauling exempt from Chapter 30B like snow plowing is?

A2: No. Section 1(b)(17) 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 determine whether to procure hauling services under the emergency procurement provisions of Section 8 of Chapter 30B. Please refer to Chapter 6 of this Office’s *Chapter 30B Manual: Procuring Supplies, Services and Real Property* for a detailed explanation of your obligations with emergency-related procurements.





NEWS FROM THE COMMONWEALTH'S OPERATIONAL SERVICES DIVISION:

Attention Public Purchasers – Join the Operational Services Division (OSD) at the *MASSBuys* EXPO on April 30, 2015 at the DCU Center in Worcester to learn about best practices in public procurement and cost-saving products and services available on statewide contracts. *MASSBuys* is the largest Business to Government (B2G) event in the Commonwealth designed exclusively for public purchasing and procurement officials and OSD statewide contractors. Visit the Government Resource Center, a collaborative effort between state agencies and public employee associations intended to bring together government and association experts to provide attendees with useful information and resources from across the Commonwealth. Attend FREE professional development workshops, including workshops hosted by the Office of the Inspector General. Enjoy a day of celebration of procurement and purchasing officials at the *MASSBuys* EXPO! Attendance, round-trip transportation from Boston, complementary breakfast and lunch, as well as parking at designated lots, are all free for all government and not-for-profit organizations. Pre-registration is required. To register, please visit: www.mass.gov/osd/massbuys.



Trustees of Massachusetts Public Higher Education Attend Trainings on Fraud, Ethics and Fiduciary Duties

In March, the Office of the Inspector General (Office) joined forces with the Massachusetts Board of Higher Education, the Non-Profit Organizations/Public Charities Division of the Office of the Attorney General, and the State Ethics Commission to provide training to the trustees of institutions of higher learning and their related foundations. The collaborative seminars focused on issues that were highlighted in the Office's report on improper spending practices by the former president of Westfield State University, Evan Dobbelle. The trainings took place in March at Massasoit Community College and Holyoke Community College.

Attendees, including board members, college and university presidents and executive staff, gathered to hear presentations on fraud, conflict of interest, fiduciary duties and the fundamentals of trusteeship. A multi-agency panel addressed several hypothetical scenarios relevant to public higher education board members, including trustees' decision-making in the context of their fiduciary duties to the institutions they serve, as well as ethics and conflict-of-interest issues. Many attendees took advantage of the opportunity to raise questions important to their roles and institutions. The Office looks forward to offering additional trainings in the future.



Presentation at Holyoke Community College



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

The Massachusetts Certified Public
Purchasing Official (MCPPO) program



Spotlight on Schools: Procurement Issues, Challenges & Trends

*"Very useful
information...Great in-
depth discussion of
current issues!"*

*April 15, 2014
Participant*

Course Date:
April 14, 2015
Boston, MA
8:30 a.m. – 3:30 p.m.

The Commonwealth of 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 CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Prerequisite: None

Instructional Method: Group-Live

Course Level: Basic

Advanced Prep: None

Attend this six-hour seminar and learn more about the specialized issues and challenges confronting school business officials and staff members. Participants will apply the principles of public procurement, under M.G.L. c. 30B, to traditional and emerging areas of school buying.

Topics covered include:

- Revenue-producing arrangements such as vending machine agreements
- Considerations for technology purchases
- Sole-source issues and proprietary specifications in the context of school-related procurements
- Fostering competition for school transportation services
- Special education contracting issues
- Contractual and other procurement problems associated with the use of vendor-supplied specifications

Participants will also have the opportunity to ask questions, exchange ideas, network, and explore strategies for obtaining the best value for their school systems.

This course provides 6 continuing professional education (CPE) points and 6 professional development points (PDP).

To register, please visit our website at www.mass.gov/ig.

If you need additional information, please contact Joyce McEntee Emmett, 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

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

PREREQUISITE: NONE

INSTRUCTIONAL METHOD: GROUP-LIVE

COURSE LEVEL: BASIC

ADVANCED PREP: NONE

Construction Management at Risk Under M.G.L. c. 149A is designed to reach procurement officials who are not construction experts. This one-day course will provide an overview of the legal requirements of Chapter 149A, explain the roles of major participants in the process, identify sources of risk, and discuss best practices for controlling risk in CM-at-risk projects. Completion of the *Design and Construction Contracting* seminar is recommended, but not required. There is no written examination.

"This presentation is one of the best I've attended on any subject. Extremely knowledgeable and clear discussion of this complicated area."

– CMR Participant

COURSE DATE:

April 16, 2015
8:30 a.m. – 3:30 p.m.
Boston, MA

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 addressed to the National Registry of CPE Sponsors through its website: www.learningmarket.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 CM-at-risk contract

This course 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.

For additional information, 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



Massachusetts School Building Authority
Funding Affordable, Sustainable, and Efficient Schools in Partnership with Local Communities

STORY OF A BUILDING

Course date:

May 28, 2015
8:30 a.m. – 4:00 p.m.

Sherwood Middle School

28 Sherwood Avenue
Shrewsbury, MA 01545

This course qualifies for 6 professional
development points (PDP) and 6 MCPPO
recertification credits.



Prerequisite: No Prerequisite
Instructional Method: Group-Live

Course Level: Basic
Advanced Prep: None

Co-sponsored with the Massachusetts School Building Authority, this new on-site class immerses attendees in the story of a public building construction project from the beginning of the planning stages to the final stages, resulting in a building “coming to life.” You will gain insight from project management teams, owner’s project managers, architects, contractors, building committee members and others.

Topics covered include:

- Key ingredients for a successful project
- Lessons learned
- Post-construction experiences
- A tour of the subject building with a question & answer period

Lunch will be provided in the new school cafeteria

To register, please visit our website at www.mass.gov/ig.
If you need additional information, please contact Joyce McEntee Emmett, 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 2015**

Please complete below and indicate seminar selection on the right:

NAME: _____ TITLE: _____

PHONE: _____ EXT.#: _____ FAX: _____

EMAIL: _____

ORGANIZATION/JURISDICTION: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

Do you require any reasonable accommodations? _____

ATTENTION: As of January 1, 2015, all registration forms must be mailed in and accompanied by payment.

HOW TO REGISTER:

Please mail a completed registration form along with a check or money order made payable to:

Office of the Inspector General
 One Ashburton Place, Rm. 1311
 Boston, MA 02108 ATTN: MCPPO 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 for MCPPO programs may be addressed to Joyce McEntee Emmett, Director of 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.learningmarket.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 MCPPO Designation include a completed Criminal Offender Record Information (CORI) Request 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 MCPPO Program, at MA-IGO-Training@state.ma.us or go to our website at www.mass.gov/ig.

PUBLIC CONTRACTING OVERVIEW

- ~~January 27, 28, 29, 2015~~ BOS
- ~~January 27, 28, 29, 2015~~ UMD*
- ~~March 10, 11, 12, 2015~~ BOS
- ~~March 10, 11, 12, 2015~~ HUNT*
- ~~April 7, 8, 9, 2015~~ BOS
- ~~April 7, 8, 9, 2015~~ UML*
- ~~June 9, 10, 11, 2015~~ BOS
- ~~June 9, 10, 11, 2015~~ UMD*

SUPPLIES & SERVICES CONTRACTING

- ~~February 3, 4, 5, 2015~~ BOS
- ~~March 17, 18, 19, 2015~~ BOS
- ~~March 17, 18, 19, 2015~~ UMD*
- ~~June 16, 17, 18, 2015~~ BOS
- ~~June 16, 17, 18, 2015~~ HUNT*

DESIGN & CONSTRUCTION CONTRACTING

- ~~February 10, 11, 12, 2015~~ BOS
- ~~February 10, 11, 12, 2015~~ UMD*
- ~~March 31, April 1, 2, 2015~~ BOS
- ~~March 31, April 1, 2, 2015~~ HUNT*
- ~~April 28, 29, 30, 2015~~ BOS
- ~~April 28, 29, 30, 2015~~ COMM*
- ~~June 23, 24, 25, 2015~~ BOS
- ~~June 23, 24, 25, 2015~~ UML*

SPOTLIGHT ON SCHOOLS

- ~~April 14, 2015~~ BOS

CONSTRUCTION MANAGEMENT AT RISK

- ~~April 16, 2015~~ BOS

ADVANCED TOPICS UPDATE

- ~~May 6, 7, 2015~~ BOS

REAL PROPERTY

- ~~May 12, 2015~~ BOS

STORY OF A BUILDING

- ~~May 28, 2015~~ SHREWSBURY

CREATING A PROCUREMENT OFFICE

- ~~June 3, 4, 2015~~ BOS

DRAFTING A MODEL IFB

- ~~Self-paced~~ AT YOUR DESK

PRIVATE SECTOR TRAINING

CERTIFICATION for School Project Designers & OPMs

- ~~February 26, 27 & March 4, 5, 2015~~ BOS
- ~~May 13, 14 & 20, 21, 2015~~ BOS

RECERTIFICATION for School Project Designers & OPMs

- ~~March 24, 2015~~ BOS
- ~~June 2, 2015~~ BOS

***2015 videoconference locations:**

- COMM:** COMM Fire District
Centerville, MA
- HUNT:** Gateway Regional School District
Huntington, MA
- UMD:** UMASS Dartmouth
- UML:** UMASS Lowell





For detailed course information, visit our website at www.mass.gov/ig.

PUBLIC CONTRACTING OVERVIEW		Tuition: \$495 for government/non-profit employees \$650 for all others
<i>No Prerequisite</i>		
<input type="checkbox"/> January 27, 28, 29, 2015	BOSTON	<input type="checkbox"/> April 7, 8, 9, 2015
<input type="checkbox"/> January 27, 28, 29, 2015	UMASS DARTMOUTH*	<input type="checkbox"/> April 7, 8, 9, 2015
<input type="checkbox"/> March 10, 11, 12, 2015	BOSTON	<input type="checkbox"/> June 9, 10, 11, 2015
<input type="checkbox"/> March 10, 11, 12, 2015	HUNTINGTON*	<input type="checkbox"/> June 9, 10, 11, 2015
		3-day seminar
SUPPLIES & SERVICES CONTRACTING		Tuition: \$495 for government/non-profit employees \$650 for all others
<i>Prerequisite: Public Contracting Overview</i>		
<input type="checkbox"/> February 3, 4, 5, 2015	BOSTON	<input type="checkbox"/> June 16, 17, 18, 2015
<input type="checkbox"/> March 17, 18, 19, 2015	BOSTON	<input type="checkbox"/> June 16, 17, 18, 2015
<input type="checkbox"/> March 17, 18, 19, 2015	UMASS DARTMOUTH*	
		3-day seminar
DESIGN & CONSTRUCTION CONTRACTING		Tuition: \$695 for government/non-profit employees \$850 for all others
<i>Prerequisite: Public Contracting Overview</i>		
<input type="checkbox"/> February 10, 11, 12, 2015	BOSTON	<input type="checkbox"/> April 28, 29, 30, 2015
<input type="checkbox"/> February 10, 11, 12, 2015	UMASS DARTMOUTH*	<input type="checkbox"/> April 28, 29, 30, 2015
<input type="checkbox"/> March 31, April 1, 2, 2015	BOSTON	<input type="checkbox"/> June 23, 24, 25, 2015
<input type="checkbox"/> March 31, April 1, 2, 2015	HUNTINGTON*	<input type="checkbox"/> June 23, 24, 25, 2015
		3-day seminar
SPOTLIGHT ON SCHOOLS		Tuition: \$150 each participant
<i>No Prerequisite</i>		
<input type="checkbox"/> April 14, 2015	BOSTON	
		1-day seminar
CONSTRUCTION MANAGEMENT AT RISK UNDER M.G.L. c. 149A: Legal Requirements & Practical Issues		Tuition: \$250 for government/non-profit employees \$450 for all others
<i>No Prerequisite: Introductory course geared to procurement officials who are not construction experts</i>		
<input type="checkbox"/> April 16, 2015	BOSTON	
		1-day seminar
ADVANCED TOPICS UPDATE		Tuition: \$345 for government/non-profit employees \$500 for all others
<i>Prerequisite: Supplies & Services Contracting or Design & Construction Contracting</i>		
<input type="checkbox"/> May 6, 7, 2015	BOSTON	
		2-day seminar
REAL PROPERTY		Tuition: \$150 each participant
<i>No Prerequisite</i>		
<input type="checkbox"/> May 12, 2015	BOSTON	
		1-day seminar
STORY OF A BUILDING		Tuition: \$150 each participant
<i>No Prerequisite</i>		
<input type="checkbox"/> May 28, 2015	SHREWSBURY—Sherwood Middle School	
		1-day seminar
CREATING A PROCUREMENT OFFICE		Tuition: \$295 for government/non-profit employees \$500 for all others
<i>No Prerequisite</i>		
<input type="checkbox"/> June 3, 4, 2015	BOSTON	
		2-day seminar
DRAFTING A MODEL IFB		Tuition: \$75 each participant
<i>requires Microsoft Word 7.0 or higher</i>		
	AT YOUR DESK	
		Self-paced
PRIVATE SECTOR TRAINING		
CERTIFICATION for School Project Designers & Owner's Project Managers		Tuition: \$1250
<i>No Prerequisite</i>		
<input type="checkbox"/> February 26, 27 & March 4, 5, 2015	BOSTON	
<input type="checkbox"/> May 13, 14 & 20, 21, 2015	BOSTON	
		4-day seminar
RECERTIFICATION for School Project Designers & Owner's Project Managers		Tuition: \$495
<input type="checkbox"/> March 24, 2015	BOSTON	
<input type="checkbox"/> June 2, 2015	BOSTON	
		1-day seminar

***Videoconference locations/ addresses:**

COMM Fire District: 1875 Falmouth Road, Centerville, MA 02632

HUNTINGTON: Gateway Regional School District, 12 Littleville Road, Huntington, MA 01050

UMD: UMASS Dartmouth, 285 Old Westport Road, North Dartmouth, MA 02747

UML: UMASS Lowell, 1 University Avenue, Lowell, MA 01854



CONGRATULATIONS TO OUR NEW DESIGNEES!

The following is a list of the MCPPO Program's new Designees based on applications reviewed (not received) between November 1, 2014 and January 31, 2015:

MCPPO

Paul Airozo, Mass. Maritime Academy
Laurie Allen, MWRA
Charles Aspinwall, Town of Millis
Gregory Beatrice, Chelsea Housing Authority
Alan Benson, Town of Boxford
Joan Bernstein, Franklin Cty. Housing & Redev. Auth.
Enrico Cappucci, Mass. Military Division
Joe Cook, City of Northampton
Elizabeth Doucette, Town of Wayland
Adam Gautie, Fall River Housing Authority
Erik Gitschier, Lowell Regional Water Utility
Nancy Holt, Town of Scituate
Evan Katz, Ayer Shirley Reg. Sch. Dist.
Robert King, Town of Framingham
Mary Lauria, Mass. Military Division
Heather Lemieux, Town of Barre
Joseph Lobao, Town of Wilmington
Anne Mahan, Assabet Valley Collaborative
Kevin Mahoney, Minuteman Reg. Sch..Dist.
Amanda Majewski-Winn, N. Sagamore Water Dist.
John Mangiaratti, Town of Westford
Sheri-Lynne Matthews, Tewksbury Public Schools
Mark Morris, Southeastern Reg. Sch. Dist.
Stephen Nadeau, Town of Needham
Ann O'Regan, Framingham Public Schools
Orlando Pacheco, City of Haverhill
Amy Putney, Town of Framingham
Christopher Raymond, Westfield State University
Thomas Rose, Attleboro Public Schools
Peter Royer, UMass Amherst
Lisa Schlegel, Quinsigamond Community College
Stacey Tata, Quinsigamond Community College
Gregg Tivnan, Town of Nantucket
Debra Tucker, Salem Housing Authority
Michelle Vaillancourt, Town of Needham
Brian Wing, Gateway Reg. Sch. Dist.
Laura Wood, City of North Adams

MCPPO for Design & Construction

Henry Haff, Town of Needham
Brian Kearnan, Mass. Dept. of Correction

Associate MCPPO

Denise Barter, Town of Framingham
Heidi Bauer, Town of Nantucket
Daniel Campbell, Holyoke Community College
Melina Fontanez-Limardo, MWRA
Kristin Gorski, Metro. Area Planning Council
John Grande, Town of Tisbury
Stephanie Luz, Town of Natick
Melissa Maniscalco, Tewksbury Housing Authority
William Reichelt, Town of West Springfield
Andrea Ristine, Town of Acton
Sharon Rogers, Barnstable Cty. Sheriff's Office
Laurie Sandler, Town of Framingham
Kristin Shaver, CREST Collaborative
Mitchell Vieira, Town of Rockport
John Woods, Town of Carver

Associate MCPPO for Supplies & Services

Christopher Parker, Gateway Reg. School Dist.
Katherine Pye, City of Cambridge
Mary Sancinito, Town of Scituate
Joanne Sharpe, Springfield Public Schools
Ellen Talbot, Town of Scituate
Christine Tougas, Westfield Gas & Electric Dept.

Associate MCPPO for Design & Construction

John Bianchi, Mass. State Police
Annmarie Rodrigues, Mass. Dept. of Correction



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