



PROCUREMENT BULLETIN

Dear Public Officials:

The arrival of spring marks the time for jurisdictions to begin their school department procurements for this coming fall. School business managers and purchasing agents should consider preparing competitive procurements for supplies and services – such as school bus transportation, janitorial services and supplies, and textbooks – this spring. Even though contracts cannot be signed until the new fiscal year, it is appropriate to plan for and prepare the procurement during this fiscal year. Many vendors are eager to secure contracts before the school year begins and jurisdictions can benefit from this increased competition. In addition, planning for these procurements now allows jurisdictions to identify the actual costs associated with these supplies and services, thus enabling officials to forecast budgets more accurately.

This spring also marks the arrival of a new MCPPO class entitled “Procurement Fraud: Prevention and Detection.” This class addresses the many different types of procurement fraud that every jurisdiction can face, including bid-rigging, collusion and product substitution. Participants will learn what procurement fraud is and how to identify it. Participants will also learn practical tools to protect their jurisdictions against these risks. Town officials, department heads and frontline employees are all in a position to identify and prevent fraud, and therefore all would benefit from this class. For registration information, please see pages 11–12 of this *Bulletin*.

The Office designs its classes to help jurisdictions prevent fraud, waste and abuse in the expenditure of taxpayer money. Our philosophy is that excellence in public procurement is one of the best prevention mechanisms a city or town can have. Therefore, we are committed to providing public officials with the tools they need to do their jobs, including educating them about conducting competitive procurements for supplies and services. To maximize participants’ learning experiences and time, we include additional topics related to ethics and public service, public records laws, the open meeting law and other laws applicable to the expenditure of public funds.

Finally, congratulations to the public officials who recently received MCPPO designations. A listing of the public officials’ names can be found on page 13 of this *Bulletin*. Their commitment and dedication to their jurisdictions and to serving the public are commendable.

Thank you for your time and consideration in reviewing this Office’s publications. Please do not hesitate to contact the Office with comments or questions regarding our programs and resources.

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



Voting Machine Procurements

Massachusetts law requires cities and towns to use voting machines that have been certified by the Secretary of the Commonwealth. M.G.L. c. 54, § 32. Therefore, a local jurisdiction must procure its voting machines from those vendors whose equipment the Secretary of the Commonwealth has certified. Currently, the Secretary has certified only two models of voting machines for use in Massachusetts elections. A different vendor manufactures and distributes each model. Since competition is already limited, local jurisdictions should avoid using restrictive specifications that could further limit competition.

Furthermore, jurisdictions procuring voting machines must comply with Chapter 30B. This means that a local jurisdiction must follow sound business practices, solicit price quotes, or conduct a bid or proposal process depending on the total value of the contract.

If the cost of the procurement is under \$10,000, Chapter 30B requires the use of “sound business practices.” This means ensuring the receipt of a favorable price by periodically soliciting price lists or quotes. While the law does not require a formal competitive process for contracts under \$10,000, it does require local jurisdictions to ensure that they have received the needed quality of supplies and services at a reasonable price.



If the cost of the voting machines is between \$10,000 and \$35,000, a jurisdiction must solicit quotes. Chapter 30B requires jurisdictions to seek “written or oral quotations from no fewer than three persons customarily providing such supply or service.” M.G.L. c. 30B, § 4. The certification requirement in Chapter 54 limits the vendor pool that a local jurisdiction can use. Therefore, it is important for a jurisdiction using a quote process to document this limitation in writing and maintain the documentation in the procurement file.

If the cost of procuring the voting machines is \$35,000 or more, a jurisdiction must conduct a competitive advertised process using an Invitation for Bid (IFB) or Request for Proposal (RFP) under Section 5 or Section 6 of Chapter 30B, respectively. As a best practice, and to ensure compliance with Chapter 54, a jurisdiction should include the Secretary of the Commonwealth’s voting equipment certification as a minimum quality requirement in the IFB or RFP.¹

The IFB process would allow a jurisdiction to procure voting machines that meet both the certification requirements of Chapter 54 and the procurement requirements of Chapter 30B while awarding the contract to the lowest responsive and responsible vendor based on cost alone. Consequently, when using an IFB, a jurisdiction should not include overly restrictive specifications that would automatically preclude one of the certified machines from consideration; the jurisdiction would not receive the benefit of a competitive procurement in these circumstances. For example, avoid using vendor specifications to design the IFB. If the Secretary of the Commonwealth has already certified the machine, for instance, does it matter to the jurisdiction whether it is made of plastic or metal? Is a half-inch difference in screen size an important enough specification to limit the procurement to a single vendor? Consider the impact that such requirements have on the competitive process before including such requirements in an IFB. Remember, there are only two certified voting machines available in Massachusetts, so specifications should not be written so as to automatically disqualify one of the available choices.

¹ Note that there are also federal statutory requirements on voting equipment that a jurisdiction should address in the quality requirement section of the IFB or RFP.



(Voting Machine Procurements, continued from page 2)

The other option is an RFP, which gives a local jurisdiction the ability to form evaluative criteria geared to the preferences and requirements the jurisdiction seeks in its voting machines. However, jurisdictions should avoid using evaluative criteria that favor one vendor over another. Evaluative criteria should be generic enough so as to not further limit the vendor pool from which jurisdictions legally can procure the voting machines.

For example, in the event a machine malfunctions, if response time is an important criterion, then the jurisdiction should develop evaluative criteria designed around response time that is not based on the geographic location of the vendor's headquarters or service facilities. Vendors who do not have facilities within the state or located within a certain number of miles of the jurisdiction may still be able to meet response time requirements. In other words, mileage-based requirements tied to the location of the vendor's offices are not the sole measure of response time. Vendors often have contractors that work within the geographic location, but who are not physically stationed at the company's headquarters or facility. Therefore, jurisdictions should avoid a mileage-based requirement when drafting voting machine specifications or minimum quality requirements.



In sum, while Chapter 54 limits the selection of voting machines available in Massachusetts, a local jurisdiction should still design its procurement for voting machines in a manner that results in the most competitive and open procurement possible.

Chapter 30B Update: New Court Decision on “Minor Informality”

A Massachusetts Superior Court recently ruled that a planning council (the council) violated Section 6 of Chapter 30B by failing to waive a “minor informality” in a vendor's bid submission. In SpartanERV v. Metropolitan Area Planning Council, SpartanERV (Spartan) challenged the council's decision to reject its bid for fire engines because Spartan allegedly submitted its price and technical proposals in the same box, although the proposals were in separately labeled binders. The council's request for proposals instructed vendors to submit the technical and price proposals separately.

The Court found that even if the vendor did, in fact, submit the technical and price proposals in the same box, it was “a matter of form rather than substance” that “could easily have been corrected without causing any prejudice to other offerors . . . or to MAPC or the municipalities relying on [the] procurement.” The Court explained:

Spartan's technical proposal was indeed separate from and did not contain or disclose any part of its pricing proposal. All that the MAPC had to do in order to correct the packing problem is to put the copies of Spartan's technical proposal in the pile of technical proposals to be reviewed by the Evaluation Committee, while putting Spartan's price proposal aside, storing it with the other respondents' price proposals, and making sure that no member of the Evaluation Committee saw or learned the contents of Spartan's price proposal.

Therefore, the Court ordered the council to reinstate and promptly evaluate the vendor's proposal without considering the vendor's alleged mistake in submitting the proposal. The Court's memorandum and order is available at www.socialaw.com/services/slip-opinions/slip-opinion-details/spartan-motors-usa-inc.-d-b-a-spartanerv-v.-metropolitan-area-planning-council.



BUYING ELECTRICITY FOR YOUR TOWN BUILDINGS: POWER PURCHASE AND NET-METERING AGREEMENTS

Jurisdictions traditionally contract with an electric utility company¹ or a competitive energy supplier for the electricity they use in their public buildings. Increasingly, however, jurisdictions are also entering into power purchase agreements (PPAs) and net-metering credit purchase agreements (NMAs) for some of their electricity needs. PPAs and NMAs are complex agreements that can have a long-lasting impact on a jurisdiction. Consequently, although PPAs and NMAs are subject to a limited exemption under Chapter 30B, the IGO nevertheless recommends using a competitive process before entering into such agreements.

A PPA or NMA is a long-term contract to obtain electricity that is generated by a renewable energy source, such as a solar power development or wind turbine.² A PPA or NMA generally does not take the place of a traditional utility or supplier contract, but is an additional contract that is necessarily coordinated with the utility company. In a PPA, a jurisdiction buys a certain amount of electricity at a certain rate from a renewable energy producer, thus reducing the amount of electricity the jurisdiction buys from the utility company or electricity supplier. The renewable energy system is usually on the jurisdiction's property.

With an NMA, the renewable energy producer does not supply electricity directly to the jurisdiction, but instead sends it to the wholesale power grid. In the NMA, the jurisdiction agrees to "buy" a certain amount of electricity at a set price from the renewable energy producer. In exchange, the jurisdiction's electric utility company provides credits on the jurisdiction's electric bill. The credits should be worth more than the price the jurisdiction pays the producer in the NMA, thus saving the jurisdiction money. Although the basic terms and conditions of PPAs and NMAs are slightly different, the goals are the same: to reduce the jurisdiction's energy costs and help finance renewable energy projects.

Jurisdictions may procure PPAs and NMAs using a competitive procurement process in Chapter 30B. Alternatively, jurisdictions may execute such agreements under Section 1(b)(33) of Chapter 30B, which exempts "energy contracts ... for energy or energy related services." This exemption only applies, however, if the jurisdiction submits the contract and "a report of the process used to execute the contract" to the IGO, the Department of Public Utilities (DPU) and the Department of Energy Resources (DOER) within 15 days after signing such a contract. See M.G.L. c. 30B, § 1(b)(33).

Both PPAs and NMAs are usually long-term contracts of up to 20 years. As with any long-term contract, risks and benefits must be carefully considered. The Department of Housing and Community Development has published *Public Housing Notice 2015-01* to provide guidance on entering into NMAs. The *Notice* is an excellent resource that discusses the procurement process, provides information on analyzing different factors

¹ This article uses the term "utility company" synonymously with "distribution company," which the Department of Energy Resources defines as a "the local company that delivers electricity to your home or business. Your distribution company will ... read your meter, maintain local wires and poles, and restore your power in the event of an outage." See www.mass.gov/eea/energy-utilities-clean-tech/electric-power/customer-rights-and-info/useful-definitions.html.

² See *Renewable Energy Power Purchase and Net-Metering Credit Purchase Agreement Guidelines for State Entities* (Massachusetts Department of Energy Resources, December 2013).



(Buying Electricity for Your Town Buildings: Power Purchase and Net-Metering Agreements, continued from page 4)

that may affect the contract and offers evaluation criteria. The information in the *Notice* may be useful for evaluating PPAs as well.

Finally, some jurisdictions hire a consultant or energy broker to help identify an electricity supplier, PPA or NMA. If the jurisdiction hires that consultant or broker without using Chapter 30B, Section 4, 5, or 6, the consultant's or energy broker's contract is then considered an energy-related service under Section 1(b)(33). Therefore, the jurisdiction also must file a copy of that contract, along with a report of the process used to execute the contract, with the DPU, DOER and IGO.

In sum, although PPAs and NMAs fall under a limited exemption in Chapter 30B, the IGO recommends that these complicated contracts be developed using a competitive process that considers multiple proposals. A competitive procurement allows a jurisdiction to evaluate an array of factors, including the value of the credits, the feasibility and size of the project, the capacity of the energy producer to complete the project, and references from other jurisdictions, in order to choose an energy producer that will offer the most advantageous proposal.

Additional Resources To Review:

Renewable Energy Power Purchase and Net-Metering Credit Purchase Agreement Guidelines for State Entities (Massachusetts Department of Energy Resources, December 2013), available at www.mass.gov/eea/docs/dpu/electric/net-metering/doer-ppa-and-nma-guidance.pdf.

Public Housing Administration Notices – 2015-01, Contracting for Net Metering Credits from Off-Site Solar Power Developments (Massachusetts Department of Housing and Community Development, Division of Public Housing and Rental Assistance, January 2015), available at www.mass.gov/hed/housing/ph-manage/public-housing-administration-notices.html.

Chapter 30B Hotline: (617) 722-8838



FREQUENTLY ASKED QUESTIONS RELATING TO PROCUREMENT

Q1: I am a Procurement Coordinator in my town. The town is planning to purchase office supplies under one of the Operational Services Division's (OSD) statewide contracts. A vendor has told me that his firm is on a state contract and provided me the contract number. Can I accept the vendor's statement for the purpose of ensuring that I am complying with Chapter 30B?

A1: No. You should not simply accept the vendor's statement on its face. Using a state contract only complies with Chapter 30B if the following conditions are met: (1) the vendor is listed on the contract; (2) the contract is open to all public entities; (3) the vendor is providing the specific goods and services that are identified in the contract's scope of work or description of services; and (4) the jurisdiction follows all of the terms of the contract (*i.e.*, obtaining three vendor quotes if it is required by the state contract). Unfortunately, vendors may attempt to sell goods and services that are not specifically on the state contract (for instance, selling laptop computers based on a system maintenance contract); this would not comply with Chapter 30B. You therefore must be diligent and ensure that when you purchase from a statewide contract, you are complying with Chapter 30B.

In addition, you should ensure that the vendor's invoice identifies the state contract number associated with it. Finally, you have the responsibility to determine that you are making appropriate and allowable purchases based on the requirements and conditions of the specific state contract. If you have questions about state contracts, you should research the Contract User Guide at www.commbuys.com or contact the appropriate team leader for that product through the OSD's help line at (617) 720-3197.



Q2: I am the school business manager at a regional high school. For some sports, the students are required to purchase their own uniforms, but I collect the money, deposit it into a school account and order the uniforms. Do I need to follow Chapter 30B when I buy the uniforms?

A2: Yes. Chapter 30B would apply to this procurement. The school is making the purchase even though the funds originated from the students. Therefore, Chapter 30B is applicable. If the students were buying the uniforms directly from the vendor with their own funds (even if they were using the school's product specifications), then Chapter 30B customarily would not apply to that procurement. But if the school decides to choose the uniform vendor that the students will be required to use, then the school must follow Chapter 30B and conduct an open and competitive procurement process regardless of who makes the payment for the uniforms.



However, we caution you to avoid a potential conflict of interest that could violate Chapter 268A, the state's ethics statute. For example, steering students to buy from a business that you have a financial interest in, or with whom you have a business or personal relationship, would likely violate the ethics law. You should review the "Summaries of the Conflict of Interest Laws" or seek an informal written opinion through the State Ethics Commission's website (www.mass.gov/ethics). In the alternative, you may call their office directly at (617) 727-9500 to speak to the Attorney for the Day.



(Frequently Asked Questions Relating to Procurement, continued from page 6)

Q3: I am a newly appointed Chief Procurement Officer for my town. I am somewhat confused by the differences between cooperative and collective agreements. Are they intended to mean the same thing? Can you explain the differences between these types of agreements?

A3: Cooperative and collective agreements are not the same. In Massachusetts, cooperative and collective contracts are different procurement mechanisms, but both are available under Massachusetts law for certain purchases.

Section 22 of Chapter 30B allows local jurisdictions to purchase supplies using a contract already procured by in-state or out-of-state “public procurement units” if the contract terms state that the contract is open to Massachusetts governmental bodies. In addition, the contract must be the result of an open and fair competition. A “public procurement unit” could consist of the federal government, another state, or a political subdivision (a city, town, district, regional school district, county, or agency, board, commission, authority, department or instrumentality thereof) of the Commonwealth or any other state. It is also important to note that this section limits the use of cooperatives to the procurement of *supplies* only. A local jurisdiction cannot use a cooperative agreement to procure services. In any event, before using a cooperative agreement, the Office urges cities and towns to perform due diligence and background research to ensure it was procured through a fair and open competitive process.

Section 1(c) of Chapter 30B authorizes “collective” procurements (also commonly known as “collaborative” procurements). This section authorizes two or more local jurisdictions to solicit bids for supplies or services as a group. In a collective procurement, one local jurisdiction serves as the “lead jurisdiction” and acts on behalf of the other local jurisdictions to solicit and award a contract for the benefit of that designated group. The lead jurisdiction undertakes the bid process in full compliance with Chapter 30B and each participating local jurisdiction must accept sole responsibility for paying for any purchases that it elects to make under the contract and for complying with all of the contract terms. It is important to note that a local jurisdiction must be a member of the group before the contract solicitation. Local jurisdictions cannot “piggyback” onto a collective contract that already exists.



Section 1(c) also authorizes local jurisdictions to procure supplies from the Operational Services Division’s (OSD) contracts as long as the awarding authority and the vendor follow all of the contract terms and conditions. OSD’s website contains “Contract User Guides” and information on each state contract. Please refer to www.mass.gov/osd for further details.

For more general information on cooperative and collective agreements, see Chapter 2 of the Office’s *Chapter 30B Manual*, which is available at www.mass.gov/ig.



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 AND CORI FORM SUBMISSIONS



As a reminder, the Office has received approval to accept CORI forms by mail. If you submit the CORI form by mail, you must first notarize the form and also include a copy of your valid government-issued photo identification. You may instead choose to submit CORI forms and MCPPO designation applications in person to the Office of the Inspector General. CORI forms and designation applications can be found on our website at the following link: <http://www.mass.gov/ig/publications/forms/mcpdesig.pdf>.



PRIVATE SECTOR EMPLOYEES:

CERTIFICATION & RECERTIFICATION REQUIREMENTS

Employees who work in the **private sector** and have successfully completed the 4-day *Certification for School Project Designers and Owner's Project Managers* seminar must recertify every three years from the date they completed the seminar. In order to recertify, **private sector** employees are required to attend the 1-day *Recertification for School Project Designers and Owner's Project Managers* seminar.

Please note that private sector employees are not required to submit the MCPPO Designation Application and/or the CORI form. This application process is for public sector employees only.

If you have any questions regarding these policies, please contact Joyce McEntee Emmett, MCPPO Program Director, at (617) 722-8835 or via email at Joyce.Emmett@state.ma.us.



Story of a Building



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



(Sandra A. Trach, Principal of Estabrook Elementary School and Patrick W. Goddard, Director of Public Facilities, Lexington Public Schools)

The MCPPO Program, along with the Massachusetts School Building Authority (MSBA), recently hosted a one-day training on partnering with the MSBA on a school building project. The program took place at the Joseph Estabrook Elementary School in Lexington on February 4, 2016.

The course provided a complete framework for planning and implementing a new school building project. The morning segments focused on the preparation recommended before submitting an application to the MSBA and the importance of developing a strong educational plan that informs the architect's design work for a school building project. Group discussion provided guidance on the "do's and don'ts" of developing an educational plan. In the afternoon, the class viewed the film "Most Likely to Succeed," a documentary about curriculum reform and the educational model at High Tech High School in San Diego, California. The film generated interest and conversation about shifts in traditional teaching, various student learning styles, and related school design considerations in the twenty-first century. The lively discussion also focused on project-based learning, flexible learning spaces, relevant classroom adjacencies and related MSBA square footage allowances. In fact, the Estabrook School's design incorporates flexible spaces for project-based learning in certain parts of the school.

In addition, attendees toured the school and asked questions about the design and construction process from the public officials directly involved in the project. It was an informative and engaging training for anyone involved in preparing for a major school building project. As West Springfield Acting Assistant Superintendent Kevin McQuillan said, "The opportunity to see a brand-new elementary school about the type and complexity we might see here was very valuable. It was an extremely important and enlightening day." The Inspector General's Office extends much gratitude and appreciation to the MSBA, the Joseph Estabrook Elementary School's principal and staff and the many others who participated in this very important program.



Office of the Inspector General

Glenn A. Cunha, Inspector General

The Massachusetts Certified Public Purchasing Official (MCPPO)
Program Presents

CREATING A PROCUREMENT OFFICE

PREREQUISITE: NONE

COURSE LEVEL: BASIC

INSTRUCTIONAL METHOD: GROUP-LIVE

ADVANCED PREP: NONE

This 2-day course is designed for those new to the procurement field; attendees will gain the skills and knowledge necessary to run a successful procurement office. The course will cover procurement policies and procedures, contract administration, legal requirements and other important factors for creating a successful procurement office within local governmental entities, districts and authorities.

COURSE DATES:

June 2–3, 2016

8:30 A.M. – 4:30 P.M.

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

**12 Littleville Road, Huntington,
MA (videoconference location)**

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 in this seminar include:

- Advantages and challenges of centralized and decentralized procurement systems
- Consistent application of bidding policies across department lines
- Developing standardized documents to facilitate bidding procedures
- Professional collaborations with other procurement officials and jurisdictions
- Sources of education and advice on legal requirements and best practices
- Working with state administrative and investigatory agencies
- Contracting terms and conditions for better results
- Developing a succession plan for procurement offices
- Dealing with challenging vendors
- Incorporating recent developments and changes in the Commonwealth's procurement laws into bidding processes and contracting practices
- Making responsibility and responsiveness determinations
- Managing procurement files and contract records in the electronic age

This course qualifies for 14 continuing professional education (CPE) credits, 14 professional development points (PDP) and 14 MCPPO credits towards recertification. 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
MA-IGO-Training@state.ma.us Tel: (617) 727-9140

MASSACHUSETTS CERTIFIED PUBLIC PURCHASING OFFICIAL PROGRAM

REGISTRATION FORM January–June 2016

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, 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 relating to 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.

Winter/Spring 2016 SCHEDULE

PUBLIC CONTRACTING OVERVIEW

January 26, 27, 28 ☐ BOS
March 2, 3, 4 ☐ BOS ☐ HUNT*
March 30, 31, April 1 ☐ BOS ☐ UML*
May 4, 5, 6 ☐ BOS
June 7, 8, 9 ☐ BOS

SUPPLIES & SERVICES CONTRACTING

February 24, 25, 26 ☐ BOS
March 15, 16, 17 ☐ BOS
April 13, 14, 15 ☐ BOS ☐ UML*
May 23, 24, 25 ☐ BOS ☐ HUNT*
June 21, 22, 23 ☐ BOS

DESIGN & CONSTRUCTION CONTRACTING

February 9, 10, 11 ☐ BOS
March 8, 9, 10 ☐ BOS ☐ COMM*
April 5, 6, 7 ☐ BOS ☐ HUNT*
May 11, 12, 13 ☐ BOS ☐ UML*
June 14, 15, 16 ☐ BOS

STORY OF A BUILDING

February 4 ☐ LEX*

CONTRACT ADMINISTRATION

March 22 ☐ BOS ☐ HUNT* **NEW**
May 25 ☐ SPD*

BOARDS & COMMISSIONS

March 24 ☐ BOS ☐ HUNT* **NEW**

CONSTRUCTION MANAGEMENT AT RISK

April 12 ☐ BOS

REAL PROPERTY

April 26 ☐ BOS ☐ HUNT*

ADVANCED TOPICS UPDATE

May 2, 3 ☐ BOS ☐ UML*

PROCUREMENT FRAUD

May 10 ☐ BOS **NEW**

CREATING A PROCUREMENT OFFICE

June 2, 3 ☐ BOS ☐ HUNT*

DRAFTING A MODEL IFB

AT YOUR DESK

☐ Self-paced

PRIVATE SECTOR TRAINING

CERTIFICATION for School Project Designers & OPMs

February 22, 23, 29 & March 1 ☐ BOS
May 19, 20 & 26, 27 ☐ BOS

RECERTIFICATION for School Project Designers & OPMs

March 18 ☐ BOS
June 1 ☐ BOS

*Videoconference/on-site locations:

COMM: COMM Fire District, Centerville, MA
HUNT: Gateway Regional School District, Huntington, MA
LEX: Joseph Estabrook Elementary School, Lexington, MA
UML: UMass Lowell, Lowell, MA
SPD: Stoughton Police Department

Additional Seminar Information



PUBLIC CONTRACTING OVERVIEW

No Prerequisite

~~January 26, 27, 28~~

☐ BOSTON

~~March 2, 3, 4~~

☐ BOSTON

☐ HUNTINGTON*

~~March 30, 31, April 1~~

☐ BOSTON

☐ UMASS LOWELL*

Tuition: \$495 for government/non-profit employees
\$650 for all others

May 4, 5, 6

☐ BOSTON

June 7, 8, 9

☐ BOSTON

3-day seminar

SUPPLIES & SERVICES CONTRACTING

Prerequisite: Public Contracting Overview or Charter School Procurement

~~February 24, 25, 26~~

☐ BOSTON

May 23, 24, 25

☐ BOSTON

☐ HUNTINGTON*

~~March 15, 16, 17~~

☐ BOSTON

June 21, 22, 23

☐ BOSTON

~~April 13, 14, 15~~

☐ BOSTON

☐ UMASS LOWELL*

3-day seminar

DESIGN & CONSTRUCTION CONTRACTING

Prerequisite: Public Contracting Overview or Charter School Procurement

~~February 9, 10, 11~~

☐ BOSTON

May 11, 12, 13

☐ BOSTON

☐ UMASS LOWELL*

~~March 8, 9, 10~~

☐ BOSTON

☐ COMM FIRE DISTRICT*

June 14, 15, 16

☐ BOSTON

~~April 5, 6, 7~~

☐ BOSTON

☐ HUNTINGTON*

3-day seminar

STORY OF A BUILDING

No Prerequisite

~~February 4~~

☐ LEXINGTON**

Tuition: \$150 each participant

1-day seminar

CONTRACT ADMINISTRATION

No Prerequisite

~~March 22~~

☐ BOSTON

☐ HUNTINGTON*

May 25

☐ SPD*

Tuition: \$150 each participant

1-day seminar

BOARDS & COMMISSIONS

No Prerequisite

~~March 24~~

☐ BOSTON

☐ HUNTINGTON*

Tuition: \$150 each participant

1-day seminar

CONSTRUCTION MANAGEMENT-AT-RISK

UNDER M.G.L. c. 149A: Legal Requirements & Practical Issues

No Prerequisite: Introductory course geared to procurement officials who are not construction experts

~~April 12~~

☐ BOSTON

Tuition: \$150 for government/non-profit employees

1-day seminar

REAL PROPERTY

No Prerequisite

~~April 26~~

☐ BOSTON

☐ HUNTINGTON*

Tuition: \$150 each participant

1-day seminar

ADVANCED TOPICS UPDATE

Prerequisite: Supplies & Services Contracting or Design & Construction Contracting

~~May 2, 3~~

☐ BOSTON

☐ UMASS LOWELL

Tuition: \$345 for government/non-profit employees
\$500 for all others

2-day seminar

PROCUREMENT FRAUD

NEW CLASS

No Prerequisite

~~May 10~~

☐ BOSTON

Tuition: \$150 each participant

1-day seminar

CREATING A PROCUREMENT OFFICE

No Prerequisite

~~June 2, 3~~

☐ BOSTON

☐ HUNTINGTON*

Tuition: \$295 for government/non-profit employees
\$500 for all others

2-day seminar

DRAFTING A MODEL IFB

☐ AT YOUR DESK

No Prerequisite

Requires Microsoft Word 7.0 or higher

Tuition: \$75 each participant

Self-paced

PRIVATE SECTOR TRAINING

CERTIFICATION for School Project Designers & Owner's Project Managers

~~February 22, 23, 29 & March 1~~

☐ BOSTON

~~May 19, 20, & 26, 27~~

☐ BOSTON

Tuition: \$1250 each participant

4-day seminar

RECERTIFICATION for School Project Designers & Owner's Project Managers

Prerequisite: Certification for School Project Designers & Owner's Project Managers

~~March 18~~

☐ BOSTON

☐ June 1

☐ BOSTON

Tuition: \$495 each participant

1-day seminar

*Videoconference/**on-site addresses:

COMM FIRE DISTRICT: 1875 Falmouth Road, Centerville, MA 02632

UMASS LOWELL: UMass Lowell, 1 University Avenue, Lowell, MA 01854

STOUGHTON POLICE DEPARTMENT: 26 Rose Street, Stoughton MA 02072

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

LEXINGTON: Joseph Estabrook Elementary School, 117 Grove Street, Lexington, MA 02420



CONGRATULATIONS TO OUR NEW DESIGNEES!

The following is a list of the MCPPO Program's new Designees based on applications reviewed (not received) between January 1, 2016 and March 31, 2016:

MCPPO

*Therese Altieri, Town of Needham
Richard Carnevale, Town of North Reading
William Cleary, Nashoba Regional School District
Anthony Crespo, Somerville Housing Authority
Andrea Downey, Norton Housing Authority
Charles Gibson, Town of Nantucket
David Gingerella, Northern Essex Community College
Roberta Jones, Hampshire Regional School District
Joseph Kilgarrieff, Massachusetts Water Resources Authority
Kevin Mizikar, Town of Leicester
Margaret Nartowicz, Town of Rutland
Nina Nazarian, Town of Princeton
James Nowack, Nauset Public Schools
Andrew O'Leary, New Bedford Public Schools
Michael Pfifferling, Wakefield Public Schools
Erika Snyder, Adams-Cheshire Regional School District
Phyllis Tirrell, Town of East Bridgewater
Patricia Velie, Medford Public Schools
Frank White, Wakefield Municipal Gas & Light Department*

MCPPO for Design & Construction

None

MCPPO for Supplies & Services

*Beverly Tefft, Central Mass. Special Education Collaborative
Suzanne Thomas, Town of Wellfleet*

Associate MCPPO

*Tamara, D'Entremont, Whittier Regional Voc. Tech. High School
Karen Desjeans, Holyoke Community College
Candace Gaumond, Town of Wilbraham
Brenda Haas, Mass. Bay Transportation Authority
Varnie Jules, City of Boston
Vincent Leone, Hamilton-Wenham Regional School District
Lincoln Lynch IV, Norton Public Schools
Brian Melia, City of Boston
Pamela Piersiak, Needham Public Schools
Rhonda Pinnell, City of Fall River
Damian Ruggieri, Hudson Public Schools
Mary Schumann, Town of Nahant
Marie Sobalvarro, Town of Harvard
Robin Stein, City of Methuen
Carol Thurlow, UMass Amherst
Jason Trepanier, Town of East Bridgewater
Kelly Winston, City of Boston*

Associate MCPPO for Design & Construction

Kenzie Rhodes, Dept. of Public Health, Western Mass. Hospital

Associate MCPPO for Supplies & Services

*Rose Chung-Dell, City of Boston
Joan Damore, Dennis-Yarmouth Regional School District
Tina Kirby, Pittsfield Public Schools
Rosa LoCoco, City of Woburn*





SUBSCRIPTION INFORMATION

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