

2010

Achievement of
Excellence
In Procurement®

FIFTEENTH ANNUAL

APPLICATION

Part I
Instructions for Applying

Due date is May 31, 2010.

We are pleased to announce the 2010 Achievement of Excellence in Procurement application is available online. You may access the on-line application with full instructions at www.npicconnection.org. Any applicant needing assistance or guidance utilizing the online system may contact any of the evaluation committee members.

The Achievement of Excellence in Procurement Committee is responsible for the evaluation. The official submitting the application will be advised of the decision and will, upon completion of the review process, be provided with an evaluation report. It is expected that you will receive an email notification of your success by the end of June 2010. The decision of the Achievement of Excellence in Procurement Committee is final. By submitting an application, you're giving permission for NPI to utilize the submitted documents to further promote the program and the public purchasing profession.

Additional information about the AEP program is available at www.npicconnection.org. Questions or comments concerning the Achievement of Excellence in Procurement program should be addressed to Beth Fleming, C.P.M., CPPO, Director of Purchasing, County of Denton, TX, and Chair, Achievement of Excellence in Procurement Committee, 940-349-3130, or beth.fleming@dentoncounty.com.

All applications must be submitted by May 31, 2010

Note: For 2010, entities that are unable to submit an application online and would like to respond by submitting a hard copy application may do so by contacting Beth Fleming, AEP Chairperson at (940) 349-3130 or beth.fleming@dentoncounty.com

The following information will be requested as part of the online application. Please have this information available when entering your application online.

Name of Entity/Organization: _____
(as it will appear on the trophy (e.g., Procurement Department, City of Pleasantville))

To whom (mayor, board chairman, city manager, etc.) would you prefer that the formal announcement of the successful Achievement of Excellence in Procurement Award be mailed? Most agencies have the announcement sent to their supervisor or the chief executive.

Direct recognition from an outside organization is more meaningful to your boss and beneficial to you! This does not need to be limited to one person. If you would prefer notice to more than one person, please indicate the additional information.

Organization official to receive formal announcement of the results:

Name	
Title	
Organization Name	
Address	
City/State/Zip	

Procurement Official to also receive notification of the results and evaluation scorecard (this should be the entity's top procurement official):

Name & Credentials	
Title	
Organization Name	
Department Name	
Address	
City/State/Zip	
Phone	
E-mail	
Website*	

**The requested website is for your entity. If the link to procurement is not intuitive, please also provide that address.*

The 14th Annual Achievement of Excellence in Procurement awards will be presented at the following sponsors' conferences:

If you are successful, would you prefer to have the trophy presented and/or recognized at:

- The National Purchasing Institute's Annual Conference**
- The National Institute of Governmental Purchasing's Annual Forum (recognition only)**
- The National Association of State Procurement Officials' Annual Conference**
- The Florida Association of Public Purchasing Officers' Spring Workshop**
- The California Association of Public Purchasing Officers' Annual Conference**
- The National Association of Educational Procurement**
- The Texas Public Purchasing Associations' Conference**
- None of the above; please mail the trophy directly to my agency.**

If you plan on attending more than one conference, you should indicate that above and receive the award at multiple conferences. Your trophy will actually be presented at the first scheduled conference, but you will be recognized at all checked. **NOTE:** Even if you attend one or more of these conferences, you may not be recognized if not indicated above.

Part II Instructions for Online Submittal

Application must be submitted by **May 31, 2010**. Late applications will not be considered. Don't wait for the last day to complete the application. **Start today.**

To assist with the online application, you may access the online application with full instructions at www.npicconnection.org. Any applicant needing assistance or guidance utilizing the online system may contact any of the evaluation committee members. By submitting online, you will not send an application binder. When submitting on-line, payment of the \$400 application fee must be made electronically by credit card or procurement card.

Registering: Each entity will register with an email address and unique password. It is important to note that only one "registration" will be able to input data for each agency. Therefore, if you have multiple individuals who work on the application throughout the year, you may want to consider registering with a user name and generic password that can be shared internally with those working on the application.

Log-in: You can log-in as often as you like and or review uploaded information up until the time you make your final submission.

Tabs: The tabs at the top will navigate you through the program. However, once you make your final submission under the Payment tab, the application is locked and cannot be accessed.

Application Information: The Application Information tab allows you to enter demographic information about your agency and notification information for successful applicants. All fields must be completed and click CONTINUE when complete to move to Criteria tab.

Criteria: The Criteria tab allows you to navigate through individual criterion.

- Start with any of the criterion in any order. You can easily maneuver to any criterion
- There is a legend that identifies the status of each item (Need info - gray, Active – red, Complete – green)
- Each criterion has the value listed and there is a running total for points submitted
- Select Yes or No for each criterion. All must be answered for final submittal.
- Select single or multiple files for each criterion to upload and click UPLOAD FILE. Avoid multiple small files whenever possible. It is best to combine multiple pages into one file when possible.
- Locate the first file by clicking the BROWSE button. Next, press the UPLOAD FILE to submit the file. Repeat this process until all files have been submitted. Uploading files may take a few minutes. Don't navigate away from the page while uploading. The files uploaded are listed for reference. File size is limited to 11 MB. Instructions for uploading larger files is listed below:

- Zip File – multiple files (i.e. PDF's, Word Documents, Excel Spreadsheets, etc.) compressed into one file folder. This conveniently reduces the size and allows you to work with one document instead of several. This will help to make sure the files you upload are not above the 11 MB (11264kb) limit.
 - To create a zip file, locate the files in question on your computer. If all the files are not already grouped together, move them into one area on your computer, i.e. the desktop or some folder.
 - Click on a file to highlight it and use CTRL + Click to highlight additional files.
 - When all of the applicable files are highlighted, right click on one of them and select: Send to a Compressed (Zipped) folder.
 - The name of the zip file will typically be the name of the first file highlighted. You can rename the zip file if you would like. You can now upload this one zip file for your application instead of the multiple files you started with. This process will also minimize size for single files.
- Do not upload .html files as they are not able to be viewed by the evaluation committee
 - To save data for each criterion, click CONTINUE & SAVE. Up until final submission, you will be able to make changes and add or delete files
 - For final submittal, make sure you have answered Yes or No for all criterion and have uploaded required files for all yes responses
 - It is highly recommended that you proof all criterions for accuracy before final submission.
 - It is recommended that you save a copy of uploaded files for your records

Payment Information: This section requires two actions. First you will indicate where you would like your trophy presented or which conference(s) you would like to be recognized at. Second, Payment information will then be required before the application is accepted. Once completed, click SUBMIT. **The application will be submitted when you Click SUBMIT. Be sure you are ready to submit before doing so as you will not be able to edit at that point.**

Confirmation: A confirmation page will be displayed and the application will be submitted to the AEP Evaluation Committee. All decisions by the Evaluation Committee are final and results will be released by the end of June. By submitting an application, you're giving permission for NPI to utilize the submitted documents to further promote the program and the public purchasing profession.

Part III Criteria

To successfully receive the “Achievement of Excellence in Procurement” award, the applicant must obtain a total of at least 100 points. It is critical to check the submittal requirements as they have changed. Date parameters have been updated and all documentation requiring dates must fall within the established parameters.

The point value of each criterion is always 5 or 10. All criteria are pass/fail. That is, you receive all the points allocated per criteria (i.e., 5 or 10) or none. If the evaluation committee determines that the total points add up to at least 100, the application is successful. Therefore, you should be able to determine your success before you submit the application. The evaluation committee strongly suggests that you do not request points for criteria that cannot be verified or established and that you verify all required submittal documents have been included.

Has the applicant organization achieved the following?

1. Publishes an electronic “How to do Business” document on the entity’s website. (5 pts)

- Information needs to address multiple aspects of the purchasing function and be designed to assist the general business community/vendor in doing business with your organization. A single purpose (e.g., MWBE, Living Wage, or environmental issues) document is not acceptable.
- **Submit:** Current screen shots of the link and page which directs suppliers to information on how to do business with your entity and documentation from the guide demonstrating it addresses multiple areas of procurement.

2. Establishment of a “Procurement Ethics” policy statement (5 pts)

- Procurement Ethics policy must be formally issued or adopted by, at a minimum, the chief procurement official and specifically address procurement issues.
- A procurement ethics statement embedded in a purchasing manual is acceptable. Membership in a purchasing association, which has an ethics policy, is not acceptable documentation. Ethics statement must be specific for the procurement function.
- **Submit:** A copy of the procurement ethics policy statement and evidence of its establishment as official procurement policy.

3. Publishes an electronic procurement manual for internal use (5 pts)

- Manual must be comprehensive, addressing multiple procurement activities and not limited to specific issues (e.g., pCard or MWBE program).
- Manual must be electronically posted (e.g. on a shared drive, the intranet or the internet site)

- **Submit:** Current screen shots of the link, webpages or shared drive information that electronically posts your procurement manual for use by internal customers.
- **Submit:** The cover page and index of the procurement manual or screen shots of the electronic contents. Please do not submit the entire manual; but only those pages that substantiate the contents

4. Maintained a “continuous improvement” program comprised of the following:

a. Formal procurement customer survey of internal customers (5 pts)

- Survey of internal customers of multiple purchasing issues. Survey may be based on a schedule or be transactional based.
- A survey of a presentation made to customers is not acceptable.
- General agency survey does not qualify unless there is a specific section designated to purchasing that covers purchasing issues.
- **Submit:** The customer survey and a summary tabulation of the results indicating date that substantiates the survey was conducted on or after January 1, 2007.

b. Formal procurement customer survey of external customers (5 pts)

- Survey of external customers (suppliers) and shall be of multiple purchasing issues.
- Survey may be based on efficient bid procedures, customer service, equity, website, etc.
Submit: The customer survey and a summary of tabulation of the results indicating the date that substantiates the survey was conducted on or after January 1, 2007.

c. Formal internal customer training within past year with a minimum of two scheduled and agendaed workshops (5 pts)

- Training needs to be comprehensive and not limited to a specific topic (procurement cards, internal automation, etc.) unless schedule is attached to demonstrate multiple topics are scheduled and presented on a rotating basis for end users throughout the previous year. Training should be multi-departmental.
- **Submit:** The training agenda with date that substantiates the training was conducted on or after January 1, 2009. Do not include the PowerPoint slides.
- **Submit:** Dated roster or dated sign-in sheet of attendees.

d. Formal vendor training within past year with scheduled and agendaed workshop (5 pts)

- Training needs to be comprehensive and not limited to a few specific contracts or pre-bid meetings.
- Training specifically needs to address “how to do business” with your organization.
- A “vendor fair” limited to a “table” only, is not acceptable. There must be an agenda specifically listing your organization as a presenter of training on “how to do business” on a comprehensive basis. Joint vendor training should clearly identify your entity as a presenter on the agenda.
- **Submit:** The training agenda with date that substantiates the training was conducted on or after January 1, 2009.

e. Performance measures specific to procurement function (5 pts)

- The performance measures should be on multiple purchasing areas. .
- **Submit:** A copy of performance measures and the results for the most recently completed fiscal or calendar year and comparison to past statistics.
- **Submit:** A statement for each measurement on (1) the purpose for measuring, and (2) an analysis of how the data is used to improve efficiencies and effectiveness within your agency.

5. Centralized procurement authority based in law (Statute, ordinance, or charter, if applicable) (10 pts)

- **Submit:** The law establishing central procurement authority. Section of the law specific to centralized procurement authority must be highlighted to receive points and the source of the statute/ordinance/charter must be evident (e.g. resolution adopted by governing board, section of code identified). Do not submit entire ordinance/law.
- **Submit:** If governing law does not specifically state that procurement is “centralized,” please include explanatory narrative that demonstrates how the written law satisfies this requirement.

6. Procurement Organizational Structure (5 pts)

- Placement of the procurement function at a high level in the organizational structure to ensure sufficient authority and independence to foster the goals and objectives of the procurement function. Procurement function reporting to finance department is not acceptable. Procurement must be at least on the same organizational level as Finance.
- **Submit:** An organization chart of the agency delineating the highest administrative position, the placement of Procurement, the placement of Finance, and any intermediate organizational levels. Clearly identify the procurement reporting structure by either highlighting and/or including a cover sheet explaining the relationships between procurement and upper management.

7. Internal Procurement Automation (5 pts)

- An internal online procurement automation system designed to facilitate the purchasing process within your organization. At a minimum, the system must provide for online entering requisitions by the user, routing approvals of the requisition, and online status inquiries. System must be an enhanced user-friendly system utilizing a “graphical user interface” or Windows based appearance instead of a text based system (green screen).
- **Submit:** Current screen shots which demonstrate, at a minimum, that the system is utilized by the agency for online entering of requisitions by the user, routing approvals of the requisition, and online status inquiries. Do not include a manual.

8. Utilization of Electronic Commerce (electronic transmission of data with the business community)

For criteria b-i in Section 8, submit current screen shots showing the required function within the specified time frame must be included to demonstrate each criterion. You must have screen shots that show each step of the process with highlights.

a. Internet home page with link to purchasing activities (5 pts)

- **Submit:** Current screen shots for each link, including at a minimum, the internet home page for your entity and link(s) to purchasing home page. The application evaluation committee will review your web site. Please ensure that documentation provides for a web address to reach purchasing activities from your entity's home page. Highlight the link that is used to go from one web page to the next web page.

b. On-line electronic vendor registration and screen shots of registration process (5 pts)

- On-line vendor registration requires an interactive web site. That is, a vendor can contact your web site; register for purchasing activity by categories of commodities and services directly on-line and the information automatically updates the vendor database. The ability for a vendor to download an application, complete the application, and then mail a hard copy or email the application to you for input into a system, is not acceptable. A "list serve" system of general notification and without a commodity code database is not acceptable.
- **Submit:** Current screen shots of registration process that demonstrate automation with the use of commodity codes. In addition to the current screen shots, if you utilize a third party service provider, a direct link from your website to the vendor registration is required.

c. Posting and Distribution of solicitations (Invitations for Bid & Request for Proposals) (5 pts)

- Vendors must be able to search and review posted solicitations and must be able to download solicitations from the web site. Attaching a notice to an email on an individual basis is not acceptable.
- **Submit:** A sample screen shot of the posting. If you utilize a third party service provider, a direct link from your website to the vendor site is required.
- **Submit:** Current screen shots that demonstrate required functionality. In addition to the current screen shots, if you utilize a third party provider, a direct link from your website to your agency's solicitations is required.

d. System email notification of formal solicitation to prospective registered bidders (5 pts)

- Email notification of formal solicitation to prospective registered bidders must be on a system basis from a vendor database. Attaching a notice to an email on an individual basis, emailing the solicitation manually, or "list serve" general notification without commodity codes database are not acceptable.
- **Submit:** Current screen shots that demonstrate required functionality.
- **Submit:** A copy of an automated broadcast list.

e. Acceptance of On-line interactive Request for Quotation (RFQ) process (5 pts)

- The RFQ process is for “small” purchases (i.e., below the formal bid threshold amount). An on-line interactive RFQ process includes automatic notification to vendors registered in the vendor database, posting on the agency web site, vendor on-line response, and automatic tabulation/abstracting of quotations received. This system is for distributing request for quotations and receiving responses for purchases under the formal bid threshold amount. If you utilize a third party service provider, a direct link from your website to the vendor is required.
- **Submit:** Current screen shots that demonstrate required functionality as described above and validate usage of the RFQ system; i.e., web page(s), instructions to prospective vendors, receipt of an on-line response or tabulation. Submittal receipt date must be on or after January 1, 2009.

f. Acceptance of formal bids & proposals via the internet (5 pts)

- **Submit:** Current screen shots that demonstrate required functionality and validate usage, including an actual online submittal or other related documentation. Receipt of formal bids as an email with attachments is not considered qualifying. Submittal receipt date must be on or after January 1, 2009.

g. Posting of IFB tabulations and award documentation on web-site (5 pts)

- **Submit:** For the tabulation, provide current screen shots which lead to a current bid tabulation as posted on your website. The tabulation is documentation of prices and other information read at bid opening.
- **Submit:** For the award documentation, provide current screen shots which lead to current award documentation as posted on your website. An award document indicates who was awarded the contract. Both a tabulation and award notice are required. In addition, if you utilize a third party service provider, a direct link from your website to your agency's tabulations is required. A copy of a notice of intent to award or a recommendation for a governing body's action is not considered qualifying.

h. Electronic purchase order to vendor (5 pts)

- Electronic purchase order to the vendor must be a comprehensive system available electronically to all suppliers with internet access. Purchase Order must be transmitted to the vendor electronically by the system with e-mail, e-fax, CXML, or EDI options. An electronic purchase order system provided by a vendor to sell that vendor's product does not achieve this criterion.
- **Submit:** Copies of documentation (e.g., instructions, screen shots of actual purchase orders, screen shots of transactions logged on the system, etc.) to support functionality of system.

i. Internet auction system to dispose of surplus materials (5 pts)

- **Submit:** Current screen shots of your agency's auction site. In addition, if you utilize a third party auction service, screen shots demonstrating a direct link from your website to the auction site is required. Third party auction sites must include a site specific page for your agency; that is, the site must list your agency and your auction on the page(s). The

auctions conducted must be comprehensive, that is, not limited to one area (e.g., police vehicles). Documentation must be submitted to demonstrate utilization of multiple on-line auctions by your jurisdiction on or after January 1, 2009; that is, a listing of your jurisdiction as a participant is not in and of itself sufficient. Documentation must support that buyers can bid on-line and that the transaction is interactive.

9. Procurement Card System

a. Utilizes a Comprehensive Procurement Card (pCard) System and publishes an electronic pCard manual for internal use (5 pts)

- Procurement card program must be comprehensive and supplemental to good purchasing practices. That is, a P-card limited to travel expenses and limited internet ordering does not qualify. A P-card system that does not control maverick buying that occurs at the expense of requirements contracting also does not qualify.
- A pCard manual must be electronically posted (e.g. on a shared drive, the intranet or the internet site) for internal use
- **Submit:** Current screen shots of the link, webpages or shared drive information that demonstrates that you electronically post your pCard manual for use by internal customers.
- **Submit:** The cover page and index of the pCard manual or screen shots of the electronic contents. Please do not submit the entire manual; but only those pages that substantiate the contents and demonstrates the comprehensive nature of the program

b. Formal Procurement Card Program Audit or Review (5 pts)

- **Submit:** A copy of a management audit of the program or a summary report reviewing the program policies and procedures from a source outside of the pCard program (e.g., finance department, if they are not involved in the administration of the program, internal audit or outside auditor are acceptable). The audit or review should include findings and recommendations, if applicable. The audit or review must be of the program and not be limited to individual transactions. That is, an analysis or audit limited to transactions or an organization wide audit with a limited general reference to the P-card program is not acceptable. The audit or review must have been completed on or after January 1, 2007.

10. Use of term (annual or requirements) contracts for at least 25% of total dollar commodity and services purchases (10 pts)

- Total annual expenditures **do not include construction or construction related professional services or purchases with “non-profits.”** However, traditional one-time purchases are included in the total annual expenditures. Documentation should indicate that at least 25% of dollar value of purchases is based on annual or requirements contracts. Cooperative purchases qualify as term contracts.
- **Submit:** A list of annual term contracts including the value of annual purchases from requirements contracts. The data should be from the most recently completed fiscal year. If you have a long report, please do not submit the entire document. Instead, copy a few pages to provide the evaluation committee a concept of the data.

- **Submit:** A summary or cover page in spreadsheet or table form that shows (1) total annual expenditures, (2) total term contract purchases, and (3) the percentage of term contract purchases of the total annual expenditures.

11. Professional Certification

a. Current Certified Purchasing Manager (C.P.M.), Certified Professional Contracts Manager (CPCM), Certified Public Purchasing Officer (CPPO), or Certified Professional in Supply Management (CPSM) designation earned by Chief Procurement Official (10 pts)

- **Submit:** Name of Chief Procurement Official and a copy of the current certification. Instead of a copy of the certification, you may attach a copy of the ISM or UPPCC web page that validates certifications or a letter from UPPCC with the requested information.

b. Current Certified Purchasing Manager (C.P.M.), Certified Professional Contracts Manager (CPCM), Certified Public Purchasing Officer (CPPO), Accredited Purchasing Practitioner (A.P.P.), Certified Public Purchasing Buyer (CPPB), Certified Professional Purchaser (CPP), or Certified Professional in Supply Management (CPSM) designation earned by at least 65% of professional staff (10 pts)

- **Submit:** A copy of the listing of total number of professional staff, and name, title, issue date, and expiration date of certified staff.
- **Submit:** A copy of current certifications. Instead of a copy of the certification, you may attach a copy of the ISM or UPPCC web page that validates certifications or a letter from UPPCC with the requested information.
- **Submit:** Organization chart of Professional staff is defined as those staff involved in the traditional purchasing/contracting functions (e.g., buyer, contract officer, purchasing agent, specifications writer, contract administrator, etc.). Professional staff must be clearly highlighted on the organizational chart. The total number of professional staff includes the Chief Procurement Official. The organizational chart required for 11 b. must be the same as submitted for 12 b.

12. Education

a. A degree from an accredited four-year university or college earned by the Chief Procurement Official (5 pts)

- **Submit:** Name of the Chief Procurement Official, university or college, degree and graduation date. Include a copy of the diploma(s) or evidence from the conferring institution that a degree was received.

b. A degree from an accredited four-year university or college earned by at least 65% of the professional staff (5 pts)

- **Submit:** A listing of the total number of professional staff and the name and title of the staff, the university or college, degree, and graduation date.

- **Submit:** A copy of the diploma(s) for each listed individual or evidence from the conferring institution that a degree was received.
- **Submit:** An organization chart. Professional staff is defined as those staff involved in the traditional purchasing/contracting functions (e.g., buyer, contract officer, purchasing agent, specifications writer, contract administrator, etc.). Professional staff must be clearly highlighted on the organizational chart. The total number of professional staff includes the Chief Procurement Official. The organizational chart required for 12 b. must be the same as submitted for 11 b.

13. Established a procurement staff “professional development” program (5 pts)

- The requirement is the establishment of a continuous formal buyer or professional development program for procurement staff. Training shall be on procurement issues. This is not a customer (i.e. user) training program. Enclose the list of training provided and the **future** schedule or program. Participation in webinars, internal procurement related training and external procurement related training are all acceptable.
- **Submit:** A list delineating the training received by such staff since January 1, 2009. List should include the names and positions of the staff, a description of training, and the dates.
- **Submit:** A program or schedule for such training for next year. List should include the names and positions of the staff, a description of training, and the anticipated dates.

14. Professional staff member with a leadership position in a purchasing association (5 pts)

- Professional staff member with a leadership position of officer, board member, director or committee chairperson in a national, regional or state purchasing association; or position of Officer or Board of Directors of a chapter of a national, state, or regional purchasing association. Regional purchasing association must be at least statewide. Committee assignment must be as a chairperson. Cooperative organizations are not acceptable.
- **Submit:** Name, organization, and position through independent documentation (e.g., association brochure, program or web site screen shot) supporting association positions. The positions must have been actively serving on or after January 1, 2009.

15. Participation at a national, state or regional conference or a seminar as a presenter or panel member on a public procurement topic OR author of a published article on public procurement topic (5 pts)

- **Submit:** A copy of conference or seminar program or other independent documentation. Regional conference must be at least statewide. A Webinar or V.I.P.S. seminar with a potential national participation is acceptable. Or enclose a copy of the published article with documentation on the source, date and clearly identified author. The article must be on a public procurement topic and the source needs to be a journal or magazine and not a newsletter. The presentations or article must have occurred on or after January 1, 2009.

16. Adoption of statute or ordinance that allows for Best Value procurements for your agency (10 pts)

- A procurement method that emphasizes value over price and an assessment of the return which can be achieved based on the total life cycle cost of the item. Agency must demonstrate authority to solicit through a best value procurement method for a broad range of purchases of services and commodities (not limited to professional services or technology) as it deems to be in the best interest of the agency.
- **Submit:** The law or ordinance establishing best value procurement authority. Section of the law specific to best value procurement authority must be highlighted to receive points and the source of the statute or ordinance must be evident (e.g. resolution adopted by governing board, section of code identified). Do not submit entire ordinance/law.
- **Submit:** Copy of a solicitation cover page and associated evaluation criteria page that demonstrates the use of best value evaluation. Highlight relevant sections, but do not submit complete specifications.

17. Environmental Purchasing

a. Formal environmental purchasing policy including reuse, reduce and recycle provisions (5 pts)

- **Submit:** A copy of the environmental purchasing policy. Public works projects (e.g. air, water, etc.) and hazardous material policy (e.g. hazardous spills, ground pollution policies, etc.) do not qualify. Requirement is for “procurement” policies (e.g. buying recycled).

b. Publication of performance report on environmental purchasing (5 pts)

- **Submit:** A copy of a published environmental performance report. This report should include information about the environmental purchasing activities and results of the program and must have been published on or after January 1, 2006.

18. Lead Agency in a Cooperative Purchasing Contract (5 pts)

- Cooperative Purchasing must qualify as a consortium purchase (not a piggyback contract) whereby two or more agencies aggregate their requirements to take advantage of volume purchases. Participation limited as a user of a cooperative contract does not qualify or lead on a piggyback contract does not qualify. The solicitation must be originally issued as a cooperative; that is, the solicitation must state that it is the intent to create a cooperative contract by aggregating quantities and that the resulting contract may be used by other identified jurisdictions.
- **Submit:** A copy of the solicitation cover page that establishes your agency as the lead and language in the specifications that identifies aggregated quantities by participating agencies. Highlight relevant sections, but do not submit complete specifications.
- **Submit:** A copy of the contract award notice.
- **Submit:** Documentation supporting that other participating jurisdictions did use the contract. Contract award/renewal must be on or after January 1, 2006 and the contract must still be active.

19. Authority of the Chief Procurement Official to Solicit and Award Contracts (5 pts)

- The agency has enacted a procurement code, directive or policy to allow the chief procurement official to solicit and award competitively bid contracts for goods and non-professional (non A/E) services in an unlimited dollar amount, without agency governing body (e.g. Mayor and Council, Board of Supervisors, School Board, etc.) approval for specific contract award (source selection). This criterion covers those procurements that have competitive specifications, multiple sources and formal bidding processes.
- **Submit:** A copy of statute, ordinance or adopted policy establishing authority of Chief Procurement Official to award contracts without a dollar threshold for goods and non-professional services.

SELF SCORING WORKSHEET

_____ Organization Name

Part II – Criteria	POINTS	SELF-SCORE
1. “How to do Business” webpage	5	
2. Procurement Ethics Standards	5	
3. Electronic Procurement Manual	5	
4.a. Internal Customer Survey	5	
4.b. External Customer Survey	5	
4.c. Internal Customer Training	5	
4.d. Formal Vendor Training	5	
4.e. Performance Measures	5	
5. Centralized Procurement Authority	10	
6. Organizational Structure	5	
7. Internal Procurement Automation	5	
8.a. Internet Home Page	5	
8.b. On-line Electronic Vendor Registration	5	
8.c. Posting & Distribution of Solicitations	5	
8.d. Email Notification of Solicitations	5	
8.e. On-line Request for Quotations	5	
8.f. Acceptance of Formal Bids via Internet	5	
8.g. Posting of Tabulations	5	
8.h. Electronic Purchase Orders	5	
8.i. Internet Surplus Auction System	5	
9.a. Procurement Card System	5	
9.b. Procurement Card Audit	5	
10. Requirements Contracting	10	
11.a. Certification/Chief Procurement Official	10	
11.b. Certification/Professional Staff	10	
12.a. Education/Chief Procurement Official	5	
12.b. Education/Professional Staff	5	
13. Professional Development Program	5	
14. Association Leadership Position	5	
15. Presenter/Panel Member/Author	5	
16. Best Value Procurement Method	10	
17.a. Environmental Purchasing Policy	5	
17.b. Environmental Performance Report	5	
18. Lead Agency/Cooperative Purchasing	5	
19. Contract Award Authority	5	
TOTAL POINTS ACHIEVED	200	

**The Achievement of Excellence in Procurement is sponsored
by the following professional purchasing organizations:**

- ◆ **National Purchasing Institute**
- ◆ **Institute for Supply Management**
- ◆ **California Association of Public Purchasing Officers**
- ◆ **Florida Association of Public Purchasing Officers**
- ◆ **National Institute of Governmental Purchasing**
- ◆ **National Association of State Procurement Officials**
- ◆ **National Association of Educational Procurement**
- ◆ **Texas Public Purchasing Association**
- ◆ **National IPA**
- ◆ **U.S. Communities**
- ◆ **Airport Purchasing Group**
- ◆ **Universal Public Purchasing Certification Council**