



*National Purchasing Institute
Webinar
January 14, 2010*

Presenters

Beth Fleming, C.P.M., CPPO
Denton County, TX
AEP Committee Chair, NPI

Mike Ryan, CPPO
City of Plano, TX
AEP Committee, NPI

Kathleen Bender, C.P.M.
City of Tucson, AZ
AEP Committee, NPI

Pamela Kirkland, CPPO, CPPB
City of Richardson, TX
AEP Committee, NPI



Topics to Discuss

- Sponsors/Committee
- History of the AEP Program
- How to obtain application
- Evaluation/Scoring
- New Criteria in 2010
- Submission of Application
- On-line Application



Sponsors

National Purchasing Institute



Achievement of Excellence in Procurement®



Florida Association of
Public Purchasing Officers, Inc.



California Association of Public
Purchasing Officers, Inc.





2010 AEP Committee

- **BETH FLEMING, C.P.M., CPPO**, Director of Purchasing, Denton County, TX, AEP Committee Chair
- **CHRISTINE REWISM, CPPB, FCCM**, Interim Contract Manager, Polk County, FL
- **DEBORAH CASPER, C.P.M., CPPB**, Purchasing Supervisor, City of Costa Mesa, CA
- **DREAMA HOWARD, CPPB**, Senior Buyer, City of Sunnyvale, CA
- **NANCY DAWSON, C.P.M., CPPB**, Former Purchasing Manager, City of South Lake Tahoe, CA.
- **KATHLEEN BENDER, C.P.M., CPPB**, Contract Administrator, City of Tucson, AZ
- **CHERYL TURNEY, C.P.M.**, Assistant Director of Fiscal Services, City of College Station, TX
- **CHARLES W. HUGHES, JD, C.P.M.**, Former Director of Procurement and Support Services, California State University, Long Beach, CA
- **CHERYL SHANANBURGER, CPPO**, Deputy Director of OMB, City of St. Port Lucie, FL
- **CYD GRIMES, C.P.M.**, Purchasing Agent, Travis County, TX
- **KEN PAULSEN, CPPB**, Purchasing Manager, State of Iowa
- **PAM KIRKLAND, CPPO, CPPB**, Purchasing Manager, City of Richardson, TX
- **MIKE RYAN, CPPO**, Chief Purchasing Official, City of Plano, TX
- **DON GREEN, C.P.M.**, Director of Procurement, California State University, Fullerton, CA
- **DAVID E. NASH, CPPO, CPPB**, Former Procurement Specialist, City of Fort Lauderdale, FL
- **MICHAEL VINYARD, CPPB**, Director and State Purchasing Agent, New Mexico General Services Department, NM



History of AEP Program

Why the AEP Program was created

- Program founded in February 1995 by the National Purchasing Institute
- Recognize organizational excellence in public procurement
- Encourage development of excellence
- Provide benchmarks for continued excellence
- Increase awareness of public procurement as a profession



Award Recipients

How many jurisdictions can achieve the award?

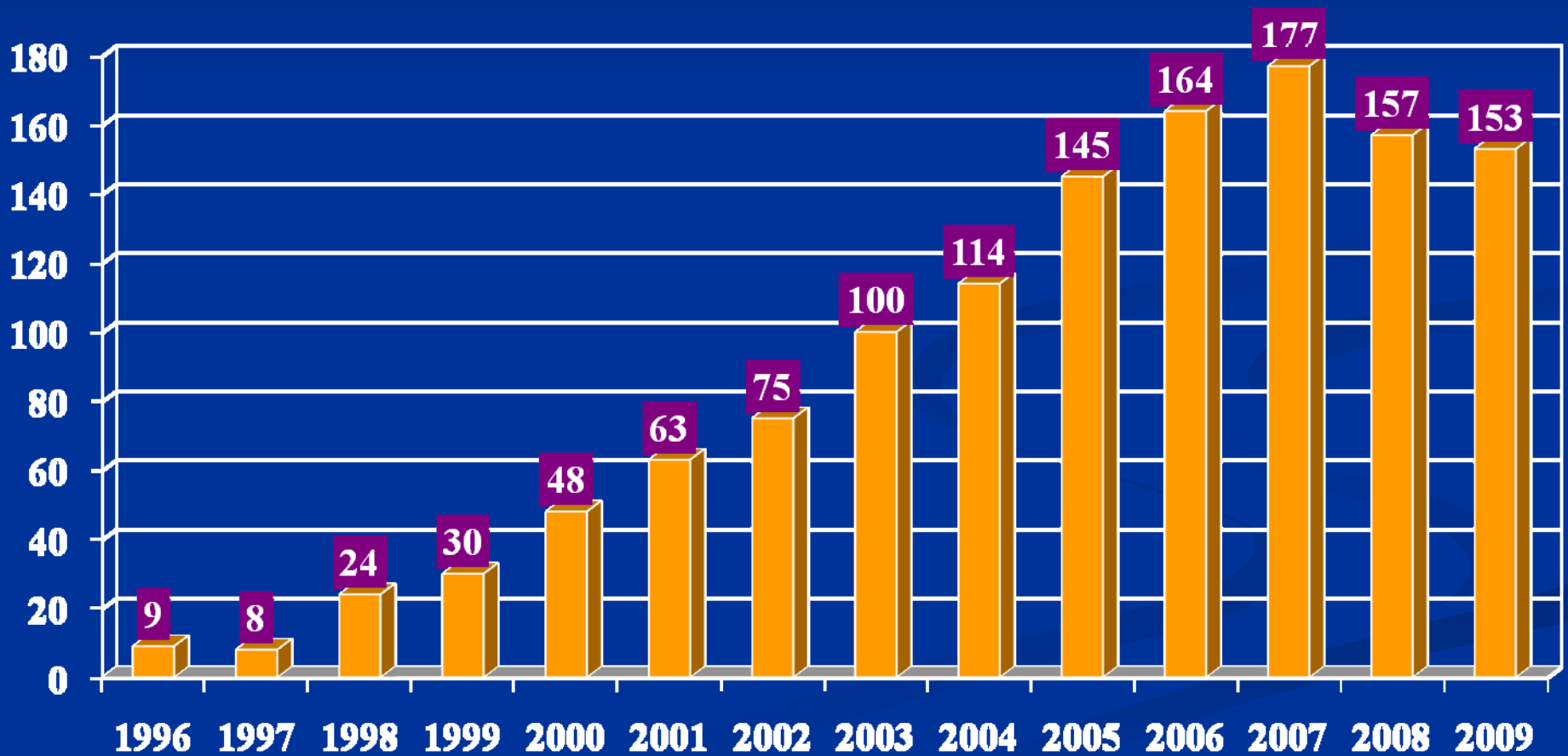
There is no predetermined number. The award is received by all that achieve a score of 100 on a rating of standardized criteria.

Do you have to be a large jurisdiction or city to be successful?

All sizes of organizations have been successful in the past. Various types of jurisdictions have won. Counties, cities, school districts, states, special districts, airport districts, and universities, both public and private, are eligible.



Award Recipients





What is excellence?

- Professionalism
- Productivity
- Innovation
- E-Procurement
- Leadership



What is excellence?

■ Professionalism

- Certification and Education of Chief Procurement Official
- Certification and Education of Staff
- Staff Training Program



What is excellence?

■ Productivity

- “How to Do Business” web page
- Procurement Ethics Policy Statement
- Procurement Manual
- Internal/External Customer Survey
- End User/Vendor Training
- Performance Measures



What is excellence?

■ Innovation

- P-Card Program
- Environmental Purchasing
- Best Value Purchasing

What is excellence?



■ E-Procurement

- On-Line Vendor Registration
- Electronic Posting and Distribution of Solicitations
- System E-mail Notification of Solicitations
- Electronic bidding
- Posting of Tabulations/Awards
- On-line Auctions
- Electronic PO's



What is excellence?

■ Leadership

- Procurement Organizational Structure
- Association Leadership
- Presenter at Regional/National Conference
- Published Author
- Lead Agency in Cooperative Bid



How to Apply

The Achievement of Excellence in Procurement (AEP) application may be reviewed and downloaded from the following web site:



www.npicconnection.org/aep



Evaluation/Scoring

- All criteria is pass/fail
- Each criteria has an possible point value of 5 or 10 points
- Applications can be self-scored before submitted
- A successful entry will have a minimum points total of 100 out of 200



Changes for 2010

- Application to be submitted on-line:
www.npicconnection.com
- Date parameters for all criteria requiring action within a specific time period updated
- Purchasing Manual to be posted electronically for users
- Added electronic p Card manual for internal use
- Expansion of allowances for staff development
- Best Value requirements expanded



Criteria

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.



Example - 1

Frederick County, MD - Official Website - Doing Business with Frederick County Page 1 of 2

News | Calendar | Contact Us | FAQs | Jobs



Departments | Government | Residents | Services | Visitors

Monday, March 24, 2008

You are here: [Home](#) > [Departments](#) > [Finance](#) > [Purchasing](#) > Doing Business with Frederick County

Vendor's Guide to Doing Business with Frederick County

[Printer friendly brochure](#)

Introduction

This guide has been prepared to familiarize you with the policies and procedures in doing business with Frederick County. The demand for goods and services within the County results in a continuous need for items of every nature and description. In an effort to stimulate competition, we want to provide all interested vendors an opportunity to offer their products and services to Frederick County. We are constantly looking for new sources of supply and encourage vendors to register with the Purchasing Department via our online application.

This guide is designed solely to provide general summary information to those wishing to do procurement business with Frederick County. As such, it is not binding in either a legal or regulatory sense. The procurement activity of Frederick County is performed in accordance with applicable laws, the Frederick County Code and other applicable rules and regulations, which govern the information in this guide.

Vendor Registration

The first step to doing business with Frederick County is becoming a Registered Vendor. Frederick County's registration process requires key pieces of information. Please make sure you have the information listed below before starting the registration process:

- General Company Address Information
- General Organization Contact Information
- Federal Employer Identification Number

Based on the commodity information you provide the Purchasing Department on the [vendor registration](#), you will receive notification, via email, of current Invitations for Bid and Requests for Proposal and may be contacted for Requests for Quotation for the goods and services you



Criteria

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

4.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.



Example – 4e

Automation of much of the purchasing function has positively impacted our ability to absorb more work.

	FY 2004	FY 2006	FY 2007
Purchase Orders Issued	2,144	4,229	11,162
Invitation to Bid Released	120	139	166

PURCHASING BENCHMARKS	Number			
	2006	2007	Incr/(Decr)	% Change
Requisitions	4,728	13,323	8,595	181.79%
Purchase Orders	4,229	11,162	6,933	163.94%
Invitations to Bid	139	166	27	19.42%
Request for Proposals	36	41	5	13.89%

PROCUREMENTS	2006	2007	Incr/(Decr)	% Change
Invitations to Bid	139	166	27	19.42%
Request for Proposals	36	41	5	13.89%
TOTAL	175	207	32	18.29%

AVERAGE REQUISITION PROCESSING TIME	2006	2007	Incr/(Decr)	% Change
Number of Days From Ready for Purchasing to Gone to PO	2.66	2.46	-0.2	-7.52%
Number of Days From In Progress to Gone to Bid	6.64	6.59	-0.05	-0.75%

The average processing time for conversion of a requisition to a purchase order or bid.

The statistics at left represent substantial increases in workload. Overtime is needed to meet rush bid and document processing demand.

In 2004 Purchasing issued 120 bids and processed approximately 2,000 purchase orders. During 2007 at half-staff Purchasing issued 166 bids and processed 11,162 purchase orders.

The following performance measures and results were submitted to management January 7, 2008. The following commentary provides the purpose, analysis and improvements resulting.

Hurricanes Katrina and Rita devastated the City of New Orleans, requiring staffing levels cut to one-half and leaving no statistics for 2005. Prior to 2006, the City had no purchasing system and all statistics were manually counted. Hence, only 2004 purchase order and bid information is available for analysis.

The substantial increase in purchase orders and bids from 2004 to 2007 combined with working at half staff shows the effectiveness of automation in creating efficiencies.

The percent change in the numbers of requisitions are compared to the percent change in the numbers of purchase orders to determine increases in workloads both to citywide departments (requisitions) and purchasing (purchase orders issued). A substantial increase in requisitions over purchase orders indicates possible contract issues, inefficiencies, and other document processing problems.



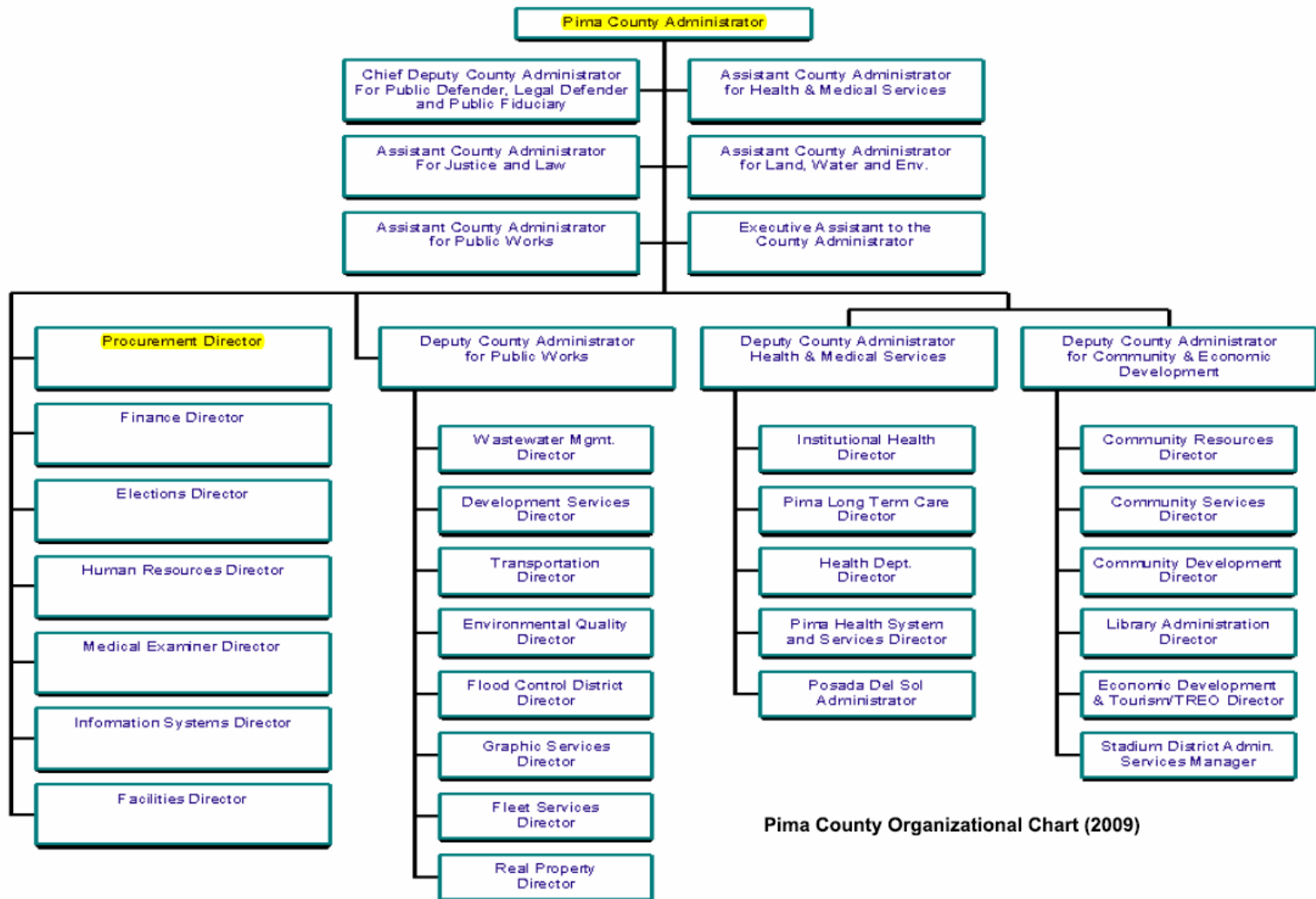
Criteria

6. Procurement Organizational Structure (5pts)

- 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.



Example - 6



Pima County Organizational Chart (2009)



Criteria

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

8.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.

Example - 8a

Placer County's home page shows two links to the Procurement Services Division:

One is found in the drop-down list of Departments

The other is a link directly to Procurement's open bids

The screenshot shows the Placer County website interface. At the top, there is a navigation bar with a search box and a 'Departments' dropdown menu. The 'Departments' menu is open, showing a list of departments including 'Procurement Services', which is highlighted. Below the navigation bar, there is a large banner image with the text 'Welcome to Placer'. Underneath the banner, there are three columns of services: 'Resident Services', 'Most Popular', and 'Business Services'. In the 'Business Services' column, there is a link for 'Procurement Bids' which is circled in red. The browser's address bar shows 'http://www.placer.ca.gov/'.



Criteria

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

8.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. 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.



Criteria

Denton County, Texas - Bid/RFP Specifications - Windows Internet Explorer

http://purchasing.dentoncounty.com/main.asp?Dept=53&Link=199

Denton County, Texas - Bid/RFP Specifications

Home | Departments | Locations & Maps | Services | Site Features | Search | Links

Tuesday April 7, 2009

DENTON COUNTY TEXAS 1846

401 W. Hickory St., Denton, TX 76201-9026 * Phone (940)349-3130 * Fax (940)349-3131

Search

Purchasing

Current

Department Links

- Purchasing Department Home
- Bid/RFP Specifications
- Current Bids
- Past Bids (November 2006 through present)
- Past Bids (Prior to November 2006)

Current bids and proposals issued by the Denton County Purchasing Department are available from BidSync. <http://purchasing.dentoncounty.com/main.asp?Parent=193&Link=504>

The County uses BidSync to distribute and receive bids and proposals. There will be NO COST to the vendor for using this internet provider for the Denton County requests. To register vendor refer to www.bidsync.com. Denton County prefers electronic responses to all requests when available.

Bid packets may also be picked up at the Denton County Purchasing office located at 401 W. Hickory, Suite 324, Denton, Texas 76201-9026. For information on current bid opportunities, Purchasing may be contacted by calling 940-349-3130 or email Purchasing.Department@dentoncounty.com or fax 940-349-3131.

IT IS THE VENDOR'S RESPONSIBILITY TO CHECK FOR ANY ADDENDUMS THAT MIGHT HAVE BEEN ISSUED BEFORE BID CLOSING DATE AND TIME.

BIDSYN

CURRENT BIDS

PAST BIDS - November 2006 through present

PAST BIDS - Prior to November 2006

BIDSYN
powered by RFP Depot

forgot your password? Secure Log In

home government purchasing B2B purchasing suppliers supplier directory agency list bid search contact

GOVERNMENT SPENDING HITS ITS HIGHEST RATE IN 30 YEARS

PUBLIC SPENDING OF GOODS AND SERVICES EXPECTED TO REACH NEARLY \$3 TRILLION

FEDERAL SPENDING WILL EQUAL NEARLY 20% OF THE NATIONAL ECONOMY

WHO IS CAPTURING YOUR SHARE OF THE MARKET?

REGISTER

If you sell to government agencies...
Stop wasting time and money searching for bids. Eliminate the hassle and let us do the work. Register now and receive immediate opportunities specific to your business. Membership grants you access to thousands of national and local bids. Synchronize with the

Thousands of bids in every industry nationwide!
Administrative and Financial
Agricultural
Architecture and Engineering

Click Map to Search Current Bids



Criteria

- **8. 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.



Example - 8.d.

BidSync

CLASSIFICATION ID

Type in what classification or NSP Number you would like to search for. Select the sub-classifications you would like to use from the results box and click "Add" to move it to the bottom box, or to more classifications as you would like. Hold the Control key to select more than one classification at a time. If you need to remove a classification from your "added" menu, click on it and then click on "Remove". Use commas for multiple codes.

NSP Code (16th Edition 5-23-2008)

Search Results

- 063-42 Rack and O-rings, Tire
- 063-43 Rack and O-rings, Tire
- 063-44 Rack and O-rings, Tire (see Class 928 If Resapping/retreading Own Tires As A Service)
- 063-45 Rack and O-rings, Tire (see Class 928 If Resapping/retreading Own Tires As A Service)
- 063-23 Tires and Tubes, Aircraft
- 063-20 Tires and Tubes, Farm Tractor and Implement
- 063-25 Tires and Tubes, Industrial
- 063-07 Tires and Tubes, Light Truck
- 063-10 Tires and Tubes, Medium Truck and Bus
- 063-30 Tires and Tubes, Misc. (Not Otherwise Listed)
- 063-06 Tires and Tubes, Motorcycle

Your item has been added to these Classifications

Suppliers 0

This bid will be: Public Private Regional, within _____ miles of zip code _____

Invite Suppliers -- Use the **Link to Quick Add** suppliers or add any suppliers to the list that you would like BidSync suppliers support to attempt to contact by phone to encourage them to place a bid. You will also receive the Email of Fax that is sent automatically when the bid is released.

Suggested Suppliers -- Lists the suppliers that have NOT been specifically invited by the Agency, but due to matching classifications, regions, and agency types, will be automatically notified. Agency User's do not have to click on the suggested suppliers link to add the suggested suppliers to the bid, the system will add them automatically. (Note: If the bid is private Suggested suppliers notified. If the bid is regional then only the suppliers who's zipcode falls within the specified region will be notified.)

Invite Suppliers Suggested Suppliers

Notify Suggested Suppliers (note: Suggested suppliers will not be notified on private bids)

Check next to each of the suppliers that you would like to remove.

Remove	Supplier	City	St
<input type="checkbox"/>	GET TIRES INC. New	Lancaster	CA
<input type="checkbox"/>	SOUTHERN TIRE MAST. New	DALLAS	TX
<input type="checkbox"/>	WINGFOOT COMMERCIAL TIRE New	HARDEN	CT

Remove Selected Remove All

BID CONTACT

BidSync allows Denton County to Invite Suppliers. Vendors will be notified of solicitations by e

BidSync Suppliers Notified

BIDSYNC
Powered by TND Group

Home Search Bids Purchasing Agenda Tools CRM Help Logout
Warwick - Denton County

Go to Bid Information

Suppliers that have been notified for Bid Bid 03-09-1960 - Tires and Tubes (Truck and Heavy Equipment)

This report cached on May 9, 2009 11:33:11 AM CDT. Click [here](#) to refresh.

Qualifications Contact Information Address Date

Agency Invited, Support Interested List, and Submitted Offer only

Failed Daily Notifications

Bidder Info: Preferred Bidder [A] Agency Invited [I] Support Interested List [O] Docs Accepted [O] Submitted Offer

Suppliers Viewed

Supplier Invitations

Suppliers Successfully Invited: 243

Support Invite Email	EMAIL	NAME	PHONE	ST	DATE	FAILED
Rico Tire Battery, Inc. [I]	ddeer@atcstire.com	Dave Deer	9042732592	TX	Apr 29, 2009 9:29:16 AM CDT	
Americas Tire Distributors [I][O]	SMizee@atdusa.com	Sherry Mizee	8175294325	TX	Apr 29, 2009 9:38:19 AM CDT	
AmeriC Tire Dist. Inc. [I]	lgoulet@amercstire.com	Kevin Goulet	2543990876	TX	Apr 29, 2009 9:38:19 AM CDT	
Blagg Tire & Service [I]	pleorant@carconceptsinc.com	Perry Leonard	9174614579	TX	Apr 29, 2009 9:29:16 AM CDT	
FOOM, Inc. [I]	brinck@ficom.com	Brian Chu	9722413218	TX	Apr 29, 2009 9:29:16 AM CDT	
Southern Tire Mart [I]	bkama@stentires.com	Bobby Kama	8175292294	TX	Apr 29, 2009 9:38:16 AM CDT	
Wingfoot Commercial Tire Systems, LLC [I]	pvargas@wingfootstc.com	Philip Vargas	9722245623	TX	Apr 29, 2009 9:29:16 AM CDT	

Bid Invite Email

Suppliers Notified.



Criteria

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.



Example - 10

Summary of the use of term (annual) contracts for at least 25% of total dollar commodity and service purchase for Alachua County Board of County Commissioners (Purchasing Division)

Total Purchases	Contract Purchases	Percentage of Annual Purchases
\$93,529,562.84	\$32,626,623.00	34.88%

Total BoCC Purchases: \$87,020,966.75
 Total Library Purchase: \$ 5,338,895.04
 Total Visa Purchases: \$ 1,169,701.05
Grand Total: \$93,529,562.84

2010 Annual Bid Log							PU	PU
ORIG BID #	PRCH AGNT	ANNUAL DESCRIPTION	DEPT REP	PO CNT	RNW EXP Date	EST \$ YEARLY	BID #	
10-1	D	Plant Mix Asphalt Concrete w/GVL	PW-ENG	PO	9/30/2013	\$45,000	1	
10-3 r	D	Mine Base Limerock & Mine Stabilizing Limerock w/GVL	PW-VW	PO	9/30/2013	\$150,000	3	
10-7	D	Asphaltic Concrete Surfacing Services w/GVL	PW-ENG	CNT	9/30/2014	\$750,000	7	
10-15	D	Purchase of Sign Material	PW-JN	PO	9/30/2013	\$83,000	15	
10-26	D	Solid Waste, Recyclable Materials and Yard Trash Collectio	PW-WM	CNT	9/30/2028	\$3,250,000	26	
10-33	D	Towing & Wrecker Services	PW-FLT	PO	9/30/2013	\$11,000	33	
10-46	D	Office Paper Recycling	PW-WM	CNT	9/30/2013	\$60,000	46	
10-56	D	Medical Supplies for Animal Services	PW-AS	PO	9/30/2009	\$90,000	56	
10-198	D	Community Agency Partnership Program -CAPP (RFA)	CSS-LR	PO	9/30/2010	\$950,000	198	
10-60	D	Removal and Purchase of Textiles - Clothing and Shoes	PW-TS	CNT	9/30/2016	\$35,000	60	
09-2	D	Ready Mix Concrete	PW-VW	PO	9/30/2011	\$30,000	2	
08-4	D	Limerock Hauling	PW-VW	PO	9/30/2010	\$250,000	4	
09-9	D	Automated Fueling Systems	PW-FLT	PO	9/30/2013	\$550,000	9	
09-10	D	Petroleum Products	PW-FLT	PO	9/30/2013	\$1,200,000	10	
06-22 R2X	D	Pant/Tree Purchase	PW-PK	PO	9/30/2011	\$50,000	22	
10-40	D	Tire Repair & Replacement	PW-FLT	PO	9/30/2014	\$60,000	40	
10-42	D	Lawn Maint Services for Sugarfoot	CSS	CNT	9/30/2011	\$26,000.00	42	
08-49	D	Liquid Asphalt Material	PW-VW	PO	9/30/2012	\$450,000	49	
08-50	D	Coarse and Fine Aggregate Materials	PW-VW	PO	9/30/2012	\$50,000	50	
10-58	D	Bahia, Centipede, St. Augustine Floratam, St. Augustine Bitt	PW - FLT	PO	9/30/2013	\$30,000	58	
09-116	D	Welding Services and Supplies	PW-FLT	PO	9/30/2013	\$60,000	116	
07-5	D	Management of the Tennis Facilities at Jonesville Park	PW-PK	CNT	9/30/2011	\$50,000	5	



Criteria

11. Professional Certification

11.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.

Examples - 11a



Universal Public Purchasing Certification Council (UPPCC) : Current

Eileen J. Gonzales CPPO, CPPB
F. Rene Gonzalez CPPO
Harold E. Good CPPO
Gerald W. Goodall CPPO, CPPB
Daris J. Goodhue CPPO
Jan D. Goodrich CPPO
Douglas Gordon CPPO
Larry R. Gordon CPPO
Stephen B. Gordon FNIGP, CPPO

Institute for Supply Management, Inc.

ISM

Be it known that

Christopher P. Steele

has successfully achieved the prescribed requirements in education, personal development, and professional responsibility as established by the Institute for Supply Management and is hereby awarded the designation of

Certified Purchasing Manager



Registration No: 40384
Issue Date: June 19, 2003
Expiration Date: June 18, 2008



L. Davis Nelson C.P.M., A.P.P.
Chair, ISM Board of Directors

Ray P. Bales, C.P.M., A.P.P.
Chair, Certification Committee



Criteria

11.b. Professional Certification

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) ,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.

Example - 11b

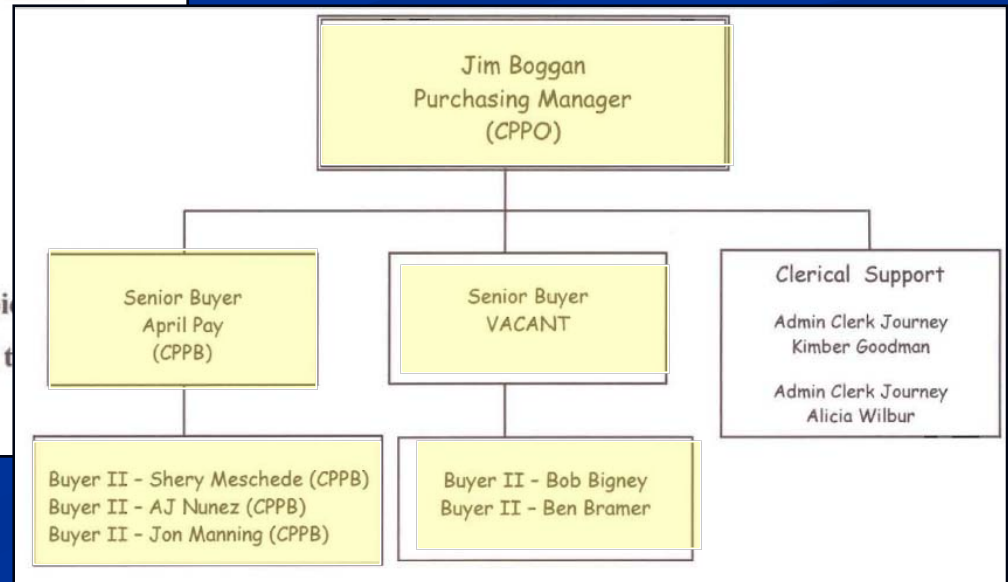
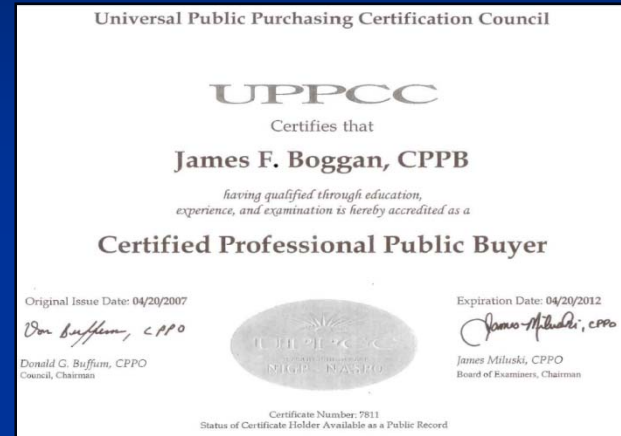


Current Certification by Professional Staff

Placer County Procurement currently employs a Purchasing Manager, 5 Buyers, and a Senior Buyer, for a total of 7 professional staff. The following staff possessed professional certification during the current reporting period:

<u>Name</u>	<u>Title</u>	<u>Certification(s)</u>
Jim Boggan	Purchasing Manager	CPPO, CPPB
April Pay	Senior Buyer	CPPB
AJ Nunez	Buyer II	CPPB
Shery Meschede	Buyer II	CPPB
Jon Manning	Buyer II	CPPB

This list represents 71% of our professional staff. Copies of certificates follow. An organizational chart is also included to show the current staffing structure.





Criteria

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.



Example - 14

NPI National Purchasing Institute
An Association of Government Purchasing Professionals

Home About NPI AEP Award Upcoming Events Membership

NPI Member Login

Email Address

Password

LOGIN [Forgot Password?](#)

NPI Board of Directors

PRESIDENT
Mark Neihart, C.P.M.
Director of Procurement
City of Tucson

NIGP

Home Members Only

Excellence in Public Procurement

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2008/2009 BOARD OF DIRECTOR

Effective July 1, 2008

OFFICERS

PRESIDENT

Kirk W. Buffington, CPPO, C.P.M., MBA
Director, Procurement Services
City of Fort Lauderdale
Room 619, 100 North Andrews



Submission

Applications must be received by May 31, 2010

The application fee is \$400.

2009 AEP – Deadline is May 31, 2010

Don't wait for the last day to complete the application.

START TODAY!



On-line Application

- NPI developed a web-based program to submit your application electronically.
 - Demographic information captured
 - Upload required documents
 - Ability to input data year round
 - Payment on-line
- Preferred submission method for 2010



Registration/Log-In

The screenshot shows a web browser window with the title "Purchase Order Application" and "login". The page features a header with the "Achievement of Excellence in Procurement" logo and the National Purchasing Institute logo. Below the header, there are two main sections: "Submit New Application" and "Continue Application".

Submit New Application

To get started click on the "Register Now" button and create a profile. Your profile will include a login and password for access to the AEP Online Application system. You do not have to finish the application process in one sitting.

[Register Now](#)

Continue Application

If you have already started an application please login below to continue where you left off.

Email:

Password:

Remember Me?

[Login](#) [Admin Login](#)

All 2010 applications must be received by May 31, 2010

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.

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<http://www.npiconnection.com>

Register with email address and password

Log-in

Application Information



Enter Organization Notification Information and identify trophy inscription information

Achievement of Excellence in Procurement
Presented by National Purchasing Institute

AEP Home | 1. Application Info | 2. Criteria | 3. Process | 4. Confirmation | Logout

1. Application Information

Name of Entity/Organization
Denton County Purchasing
(As it will appear on the trophy (e.g., procurement Department, City of Pleasantville))

Helpful Tip
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.

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.

Organization Official:
Organization Official to receive formal announcement:

First Name: Mary
Last Name: Horn
Title: County Judge
Organization Name: Denton County
Mailing Address: 110 W. Hickory
City: Denton
State: Texas
Zip Code: 76201

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

First Name: Beth
Last Name: Fleming
Credentials: C.P.M., CPPO
Title: Director of Purchasing
Organization Name: Denton County
Department Name: Purchasing
Mailing Address: 401 W. Hickory
Suite 324
City: Denton
State: Texas
Zip Code: 76201
Phone Number: 940-349-3130
E-mail Address: beth.fleming@dentoncounty.com
Website: www.dentoncounty.com

CONTINUE

Purchasing Official Information

Click Continue



Criteria

2. Criteria

1 2 3 4a 4b 4c 4d 4e 5 6 7 8a
8b 8c 8d 8e 8f 8g 8h 8l 9a 9b 10 11a
11b 12a 12b 13 14 15 16 17a 17b 18 19

Need Info
 Active
 Complete

Question Worth	Total possible points
5 points	-1/200 points

As the applicant organization achieved the following:

Publishes an electronic "How to do Business" document on the entity's website. (5 pts)

Yes
 No

- 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.

1. Locate the file on your computer:
G:\DATA\AWarzwick\AEP 200\

Please avoid the following punctuation in your file names:
, ? / \ * & ~

2. Submit your file:

***File Size Limit - 11MB

Uploaded Files
You have no uploaded files for this question.

Legend identifies status of each criterion

Select multiple files from system to upload


Click Upload File

Start with any of the criterion in any order

Criterion value and running total



Criteria



2. Criteria

Progress indicators: 1 (green check), 2 (green), 3 (grey), 4a (grey), 4b (grey), 4c (grey), 4d (grey), 4e (grey), 5 (grey), 6 (grey), 7 (grey), 8a (grey), 8b (grey), 8c (grey), 8d (grey), 8e (grey), 8f (grey), 8g (grey), 8h (grey), 8l (grey), 9a (grey), 9b (grey), 10 (grey), 11a (grey), 11b (grey), 12a (grey), 12b (grey), 13 (green check), 14 (red), 15 (grey), 16 (grey), 17a (grey), 17b (grey), 18 (grey), 19 (grey)

Legend: Need Info, Active, Complete

Question Worth	Total possible points
5 points	10/200 points

Has the applicant organization achieved the following:

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

Yes
 No

- 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.

1. Locate the file on your computer:

Please avoid the following punctuation in your file names:
, ? / \ * & ~

2. Submit your file:

***File Size Limit - 11MB

Select Yes or No for each criterion

Criteria



13

Question Worth	Total possible points
5 points	10/200 points

Has the applicant organization achieved the following:

Established a procurement staff "professional development" program (5 pts)

Yes
 No

- 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.

1. Locate the file on your computer:

Please avoid the following punctuation in your file names:
, ? / \ * & ~

2. Submit your file:

***File Size Limit - 11MB

Uploaded Files

[13 Professional Development.pdf](#) [Delete](#)

Instructions for uploading large files can be found on the AEP Instructions Tab


Uploaded files will be listed here

Click Continue & Save after completing each criterion



Criteria

Easily maneuver
to any criterion



2. Criteria

Legend:
○ Need Info
● Active
✔ Complete

Question Worth	Total possible points
10 points	40/200 points

Has the applicant organization achieved the following:

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

Yes
 No

- 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.

1. Locate the file on your computer:

Please avoid the following punctuation in your file names:
, ? / \ * & ~

2. Submit your file:

Easy to edit and
make changes
before submittal



Criteria

Can easily see
criterion submitted
and total points
requested

2. Criteria

✓	✓	✓	4a	4b	4c	4d	4e	5	6	7	8a	Need Info
8b	8c	8d	8e	8f	✓	✓	✓	✓	✓	10	11a	Active
11b	12a	12b	✓	14	✓	16	17a	17b	18	19		Complete

Question Worth	Total possible points
10 points	40/200 points

Has the applicant organization achieved the following:

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

Yes
 No

- 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 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.

1. Locate the file on your computer:

Please avoid the following punctuation in your file names:
/ ? \ * & ~

2. Submit your file:



Criteria

Click NO to all remaining criterion

This is the perfect time to proof all submittal documents against criterion requirements.

The application is complete when all has been proofed and you Click Continue & Save on the last active criterion

2. Criteria

Legend: Need Info, Active, Complete

Question Worth	Total possible points
5 points	120/200 points

Has the applicant organization achieved the following:

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

Yes

No

- 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.

1. Locate the file on your computer:

Please avoid the following punctuation in your file names:
#, ? / \ * & ~

2. Submit your file:


File Size Limit - 11MB

Uploaded Files
You have no uploaded files for this question.



Trophy Recognition

Select the conferences where your agency would like to be recognized. You can also have the trophy mailed directly to you.



3. Process Application

Application must be received by **May 31, 2010**. Late applications will not be considered. Submit one copy of the application and all requested documentation. It is recommended that you keep a copy for your records. Applications will not be returned. The application fee is \$400.

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.

The 15th 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 in
- 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 in
- 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.



Payment Information

Payment Information:

\$400

Payment Method

Credit Card Number

Expiration Date /

CVV2 *3 digit number on the back

Billing Information

First Name

Last Name

Address

City

State

Zip

Country

Phone

Email Address

Pressing "Submit" will submit your application. After submitting, you may no longer make changes to any of the information in your application.

Please double check your information before submitting by utilizing the tabs "Information" and "Criteria" above.

SUBMIT ↻

Enter
Payment
Information

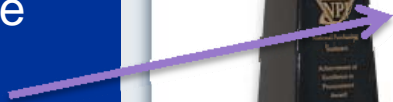
Click
Submit

Be sure you are
ready to submit
before doing so
as you will not be
able to edit at that
point



Confirmation

Application will be processed and confirmed



Achievement of Excellence in Procurement®

Presented by National Purchasing Institute

AEP Instructions	1. Application Info	2. Criteria	3. Process	4. Confirmation	Logout
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4. Confirmation

Thank you for submitting.

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



Evaluation

Evaluation Team will be able to see all documents, score each criterion and make comments

NELIXINC Nation Purchasing Institute

AEP Application Login

[Applications](#) | [Users](#) | [Logout](#) | [Switch To 2007 Form](#)

You are Scorer -1

Question	Points	Response	Uploaded Files	Criteria	Comments	Errors
1. "How to do Business" document	5	Yes	NPI Header sheet1.doc How to do Business.pdf	Criteria Met <input type="button" value="v"/> test Delete my score Delete scorer 1 Delete scorer 2	Scorer: Fleming,Beth Status: Criteria Met Comment: test	Missing Scorers
2. Ethics Standards	5	Yes	NPI Header sheet 2.doc Ethics policy.pdf	-- select -- <input type="button" value="v"/> Delete my score Delete scorer 1 Delete scorer 2		Missing Scorers
3. a. Procurement Manual	5	Yes	NPI Header sheet 3.doc Purchasing manual 2006.pdf	-- select -- <input type="button" value="v"/> Delete my score Delete scorer 1 Delete scorer 2		Missing Scorers
4. a. customer survey of internal customers	5	Yes	NPI Header sheet 4a.doc 4.Survey Results.pdf	-- select -- <input type="button" value="v"/> Delete my score Delete scorer 1 Delete scorer 2		Missing Scorers

Each criterion will be scored by 2 committee members

Discrepancies in scores will be reviewed by a separate team for a final determination



Questions?





Achievement of
Excellence
In Procurement®

BETH FLEMING, C.P.M., CPPO
Director of Purchasing, Denton County, TX
AEP Committee Chair
beth.fleming@dentoncounty.com