

2011

SUSTAINED PROFESSIONAL PURCHASING AWARD

Application

Part I

Instructions for Applying

To apply for the 2011 Sustained Professional Purchasing Award, mail to:

Attention: Genetta Carothers
City of Charlotte
BSS – Procurement Services Division
600 East Fourth Street
Charlotte, NC 28202
gcarothers@ci.charlotte.nc.us
704-336-5195

Deadline December 15, 2011

Three (3) complete sets of the application including all requested attachments and a check for the application fee in the amount of \$75.00 payable to the Carolinas Association of Governmental Purchasing. Payment can also be made with a credit card on the CAGP web site at: <http://www.cagponline.org>.

The complete sets of the application and all enclosures can be submitted on a CD (3 copies) **or** can be packaged in a 3-ring binder to provide to the CAGP Review Committee. If the submittal is on a CD, each page on the CD should be labeled with the section number. Each section should be divided with a tab. 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. Questions or comments concerning the 2011 Sustained Professional Purchasing Award program should be addressed to Genetta Carothers. This award covers the period from December 1, 2010 through November 30, 2011. (130 Points Required) Participants should provide complete, detailed documentation to support each section.

Name of Entity and Procurement Organization:

(EXACTLY AS IT WILL APPEAR ON THE PLAQUE)

To whom (mayor, board chairman, city manager, school superintendent, etc.) would you prefer that CAGP mail the formal announcement of your successful attainment of the Sustained Professional Purchasing Award?

Name: _____
Title: _____
Address: _____
City/State/Zip Code: _____
Phone Number: _____

Official submitting the application (also receives notification of results):

Name: _____
Title: _____
Address: _____
City/State/Zip Code: _____
Phone Number: _____
E-mail address: _____

<h2 style="margin: 0;">Part II Criteria</h2>
--

To receive the Sustained Professional Purchasing Award, the applicant must obtain a total of at least 130 points. Submit **three (3)** complete sets of the application and all requested enclosures.
ENCLOSURES MUST BE IN THE FOLLOWING SEQUENCE.

	<u>Yes</u>	<u>No</u>
Has the applicant organization achieved the following:		
1. Published in either hard copy or on-line format a “How to do Business” booklet/guide within the past five (5) years? (5 pts) (enclose copies of the booklet/guide)	_____	_____
2. Published in either hard copy or on-line format an “Ethics” policy statement within the past five (5) years? (5 pts) (enclose copies of the ethics policy statement)	_____	_____
3. Published or revised a procurement manual for internal use within the past five (5) years? (5 pts) (enclose copies of the cover page and index)	_____	_____
4. Established a formal buyer training program? (5 pts) (Your agency’s requirements for continued education or certification; enclose copies of the program or schedule)	_____	_____
5. Maintained a “continuous improvement” program		
a. At least two (2) meetings of procurement formal focus group within current fiscal year (5 pts) (enclose copies of the agenda and roster of group membership for a focus group meeting within your organization)	_____	_____
b. Formal procurement customer survey within past three (3) years (5 pts) (enclose copies of the survey for your organization)	_____	_____
c. Formal user agency training within past two (2) years (5 pts) (enclose copies of the agenda for training held within your organization for purchasing staff or key employees from departments within your organization)	_____	_____
d. Formal vendor training within past two (2) years with schedule and agenda for workshop (5pts) (enclose copies of the agenda from where you organization hosted vendor training)	_____	_____
6. Centralized procurement authority based in law (Statute, ordinance, or charter, if applicable)? (10 pts) (enclose copies of the law establishing central authority)	_____	_____

7. Internal Procurement Automation? (submit copies of the print screens for each category where applicable)
- a. Electronic purchase orders (5 pts) (enclose copies of the purchase order format)

	_____	_____
--	-------	-------
 - b. Local area network (5 pts) (enclose copies of documentation)

	_____	_____
--	-------	-------
 - c. Maintenance of a bidders list (5 pts) (enclose copies of the index or other evidence of list created to distribute bid notices – this is not the same as your financial vendor system unless you have a method to do a bidders list by commodity)

	_____	_____
--	-------	-------
 - d. User access (directly enter requisitions, make on-line inquiries, etc., by the using agency) (5 pts) (enclose copies of the user manual index)

	_____	_____
--	-------	-------

Has the applicant organization achieved the following:

Yes No

8. Utilization of E-Commerce (electronic transmission of data with the business community – submit copies of the print screens where applicable for each category)?
- a. Internet home page with link to purchasing (must be your organization’s home page) activities (5 pts) (enclose copies of the home page)

	_____	_____
--	-------	-------
 - b. On-line vendor registration (5 pts) (State E-Procurement or IPS System qualifies, but must show documentation that your unit utilizes) (enclose vendor instructional information)

	_____	_____
--	-------	-------
 - c. Posting of solicitations (5 pts) (State E-Procurement System or IPS qualifies, but must show documentation for your organization’s bid) (enclose copies of a sample page)

	_____	_____
--	-------	-------
 - d. E-mail notification of formal solicitation to prospective bidders (5 pts) (enclose copies of instructional information, State E-Procurement or IPS System qualifies, but must show documentation for your unit’s bid)

	_____	_____
--	-------	-------
 - e. Distribution of solicitations via the Internet (5 pts) (State E-Procurement or IPS System qualifies, but must show documentation for your unit’s bid) (enclose copies of instructional information)

	_____	_____
--	-------	-------
 - f. Use of Facebook and/or Twitter or other similar web method to promote your purchasing division’s activities or bid notice information. (5 pts) (enclose copies of web pages)

	_____	_____
--	-------	-------
 - g. Receipt of FORMAL bids & proposals via the Internet (5 pts) (Must be with an electronic bidding system, State E-Procurement or IPS System does **NOT** qualify) (enclose copies of instructional information)

	_____	_____
--	-------	-------

- h. Posting of bid opening tabulation on Internet (5 pts) (State E-Procurement or ITS qualifies but must show documentation for your organization's bid) (enclose copies of sample page)

- i. Electronic purchase order to vendor (5 pts) (State E-Procurement or IPS System qualifies, but must show documentation for your organization's bid) (enclose copies of instructional information)

- j. Formal Inventory/warehouse system maintained by the purchasing organization? (5 pts) (enclose copies of the listing or index of commodities)

- k. Use of Reverse Auction for procurement within the past three (3) years (5 pts) (enclose copies of instruction information for your unit)

- l. Disposal of surplus property via electronic auction (5 pts) (enclose copies of sample page for your unit)

Has the applicant organization achieved the following: Yes No

- 9. Certification?
 - a. Current Certified Local Government Purchasing Officer, (CLGPO), Certified Purchasing Manager (C.P.M.), Certified Public Purchasing Officer (CPPO) designation earned by Chief Procurement Official? (10 pts) (enclose copies of latest certificate)

 - b. Current Certified Local Government Purchasing Officer, (CLGPO), Certified Purchasing Manager (C.P.M.), Certified Public Purchasing Officer (CPPO), Accredited Purchasing Practitioner (A.P.P.) or Certified Public Purchasing Buyer (CPPB) designation earned by of at least 33% of purchasing staff? (10 pts) (enclose copies of the listing of total number of purchasing staff; and name, title, issue date, and expiration date of certified staff and copies of each certificate)

- 10. Education
 - a. An advanced degree (MBX, MA, etc.) from a four year university or college earned by the Chief Procurement Official? (10 pts) (enclose copies of name of the Chief Procurement Official, university or college, type of degree and graduation date)

 - b. **OR** a degree from a four year university or college earned by the Chief Procurement Official? (5 pts) (enclose copies of name of the Chief Procurement Official University or college and graduation date)

 - c. An Associate Degree (2 year program) or Degree from a four year university or college earned by at least 50% of the purchasing staff? (5 pts) (enclose copies of a listing of the total number of professional staff; and the name and title of the staff, the university or college, degree type for each member and graduation date. Purchasing staff by definition does not include secretarial, clerical, or other non-purchasing individuals)

11. Purchasing staff member on a position with a national or regional purchasing association during the past calendar year? (5 pts) (enclose copies of individual name, organization, and position)

12. Participation at a national or regional conference as a chairperson, presenter or panel member during past calendar year?
(5 pts) (enclose copies of conference program)

13. Environmental Purchasing?

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

b. Publication within past three (3) years of performance report on environmental purchasing (5 pts) (enclose copies of the report)

Has the applicant organization achieved the following:

Yes

No

14. A Minority Supplier Program?

a. Does the organization have a written policy supporting Minority business development?
(5 pts) (Include copies)

b. Does the organization have a system in place that can track and report minority utilization statistics? (5 pts) (Include copies of system description)

TOTAL POINTS ACHIEVED: _____

Part III
Submission of Application

Application must be submitted by **December 15, 2011** to:

Attention: Genetta Carothers
City of Charlotte
BSS – Procurement Services Division
600 East Fourth Street
Charlotte, NC 28202

Submit **three** (3) copies of the application and all requested attachments. A non-refundable \$75.00 application is also required. The application check should be made payable to Carolinas Association of Governmental Purchasing.

The CAGP Review Committee reserves the right to request additional documentation. The decision of the Committee is final.

With this application form, we are officially requesting a Sustained Professional Purchasing review of our purchasing organization. We agree to comply with the policies and procedures of the program.

Date

Signature of official submitting the application

Printed Name

Title