

# 2015 SUSTAINED PROFESSIONAL PURCHASING AWARD Application

## Part I Instructions for Applying

To apply for the 2015 Sustained Professional Purchasing Award, e-mail the application to Genetta Carothers at [gcarothers@charlottenc.gov](mailto:gcarothers@charlottenc.gov).

### Deadline December 18, 2015

**Submit 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. Checks can be mailed to the City of Charlotte, Attn: Genetta Carothers, 600 E. 4<sup>th</sup> Street, #931, Charlotte, NC 28202. Payment can also be made with a credit card on the CAGP web site at: <http://www.cagponline.org>.

The complete application and all enclosures must be submitted in a searchable .pdf format via email to [gcarothers@charlottenc.gov](mailto:gcarothers@charlottenc.gov). 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 2015 Sustained Professional Purchasing Award program should be addressed to Genetta Carothers. This award covers the period from December 1, 2014 through November 30, 2015. (130 Points Required) Participants should provide complete, detailed documentation to support each section.

Name of Entity and Procurement Organization:

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(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>
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To receive the Sustained Professional Purchasing Award, the applicant must obtain a total of at least 130 points. Submit **four (4)** complete sets of the application and all requested enclosures.

**ENCLOSURES MUST BE IN THE FOLLOWING SEQUENCE.**

<b>Has the applicant organization achieved the following:</b>	<b><u>Yes</u></b>	<b><u>No</u></b>
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 a copy of the booklet/guide)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2. Published in either hard copy or on-line format an “Ethics” policy statement within the past five (5) years? (5 pts.) (Enclose a copy of the ethics policy statement)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3. Published or revised a procurement policy and procedure manual for internal use within the past five (5) years? (5 pts.) (Enclose: 1) copy of the cover page with date adopted or revised, and 2) index or Table of Contents)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4. Established a formal buyer training or certification program? (5 pts.) (Your agency’s requirements for continued education or certification; enclose a copy of the program or schedule)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5. Maintained a “continuous improvement” program		
a. At least two (2) meetings of procurement formal focus group (i.e. representation from multiple departments with the primary focus of procurement related issues) within current fiscal year (5 pts.) (Enclose a copy of the agenda and roster of group membership for a focus group meeting within your organization)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Formal internal (i.e. end-user) procurement customer survey within past three (3) years (5 pts.) (Enclose a copy of the survey results for your organization)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. Formal user agency training within past two (2) years (5 pts.) (Enclose a copy of the agenda for training held within your organization by purchasing staff for key employees or departments within your organization)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
d. Formal vendor training within past two (2) years with schedule and agenda for workshop (5 pts.) (Enclose a copy of the agenda from where you organization hosted vendor training)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
e. Ability to provide user training materials available to internal departments via an intranet site (5 pts.) (Enclose a screenshot of the intranet site)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6. Centralized procurement authority based in law (Statute, ordinance, or charter, if applicable)? (10 pts.) (Enclose a copy of the law establishing central authority)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

7. Internal Procurement Automation? (Enclose a copy of the print screens for each category where applicable)

- a. Electronic purchase orders (5 pts.) (Enclose a copy of the purchase order format)  Yes  No
- b. Maintenance of a bidders list (5 pts.) (Enclose a copy of the index or other evidence of list created to distribute bid notices – this is not the same as bid notices – this not the same as your financial vendor system unless you have a method to do a bidders list by commodity)  Yes  No
- c. User access (directly enter requisitions, make on-line inquiries, etc., by the using agency) (5 pts.) (Enclose a copy of the user manual index)  Yes  No

**Has the applicant organization achieved the following:**

**Yes** **No**

8. Utilization of E-Commerce (electronic transmission of data with the business community – enclose a copy of the print screens where applicable for each category)?

- a. Internet home page with link to purchasing activities (must be your organization's home page) (5 pts.) (Enclose a copy of the home page)  Yes  No
- b. On-line vendor registration (5 pts.) (State E-Procurement or IPS System qualifies, but must show documentation that your unit utilizes) (Enclose a copy of the vendor instructional information)  Yes  No
- c. Posting of solicitations (5 pts.) (State E-Procurement System or IPS qualifies, but must show documentation for your organization's bid) (Enclose a copy of a sample page)  Yes  No
- d. E-mail notification of **formal** solicitation by statute to prospective bidders (5 pts.) (Enclose a copy of instructional information, State E-Procurement or IPS System qualifies, but must show documentation for your unit's bid)  Yes  No
- 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 a copy of instructional information)  Yes  No
- 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 a copy of web pages)  Yes  No
- 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 a copy of instructional information)  Yes  No

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|----|---|------------------------------|-----------------------------|
| 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 a copy of sample page) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| i. | Ability to electronically transmit purchase orders through a financial system directly to the vendor (5 pts.) (Enclose a copy of documentation from the financial software system)    | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| j. | Formal Inventory/warehouse system maintained by the purchasing organization? (5 pts.) (Enclose a copy of the listing or index of commodities)   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| k. | Use of Reverse Auction for procurement within the past three (3) years (5 pts.) (Enclose a copy of instruction information for your unit)   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| l. | Disposal of surplus property via electronic auction (5 pts.) (Enclose a copy of sample page for your unit)  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

**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 Professional in Supply Management (CPSM), Certified Public Purchasing Officer (CPPO) designation earned by Chief Procurement Official? (10 pts.) (Enclose a copy of the latest certificate)  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| b. | Current Certified Local Government Purchasing Officer, (CLGPO), Certified Purchasing Manager (C.P.M.), Certified Professional in Supply Management (CPSM), 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 a copy of the listing of total number of purchasing staff; and name, title, issue date, and expiration date of certified staff and a copy of each certificate) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

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 a copy of name of the Chief Procurement Official, university or college, type of degree and graduation date) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| b. | <b><u>OR</u></b> a degree from a four year university or college earned by the Chief Procurement Official? (5 pts.) (Enclose a copy of the Chief Procurement Official's University or college and graduation date)                                  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

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 a copy 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)  Yes  No

11. Purchasing staff member on a position with a national or regional purchasing association during the past calendar year? (5 pts.) (Enclose a copy of the individual's name, organization, and position)  Yes  No

12. Participation at a national or regional conference as a chairperson, presenter or panel member during past calendar year? (5 pts.) (Enclose a copy of the conference program)  Yes  No

13. Environmental Purchasing?

a. Formal environmental purchasing policy including reuse, reduce and recycle provisions (5 pts.) (Enclose a copy of the policy)  Yes  No

b. Publication within past three (3) years of performance report on environmental purchasing (5 pts.) (Enclose copies of the report)  Yes  No

**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.) (Enclose a copy of the policy)  Yes  No

b. Does the organization have a system in place that can track and report minority utilization statistics? (5 pts.) (Enclose a copy of the system description)  Yes  No

**TOTAL POINTS ACHIEVED:** \_\_\_\_\_

**Part III**  
**Submission of Application**

Application must be submitted by **December 18, 2015** to Genetta Carothers via e-mail at [gcarothers@charlottenc.gov](mailto:gcarothers@charlottenc.gov) .

Submit the completed application and all requested attachments in a searchable .pdf format via e-mail to [gcarothers@charlottenc.gov](mailto:gcarothers@charlottenc.gov) . 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