Achievement of Excellence in Procurement (AEP) Award
Proud Rio Grande Valley Award Recipients

2015 & 2014
La Joya Independent School District
Sylvia G. Zapata, RTSBA, Director of Purchasing & Warehouse Operations

McAllen Independent School District
Lorena Garcia, CPPB, Assistant Superintendent for Business, former Director of Purchasing Services
AEP Application & Instructions

• Available at NPI Website:  https://www.npiconnection.org/aep/application.asp

• Deadline to submit application to qualify for 2016 AEP Award: Tuesday, May 31, 2016. Application will only be accepted online.

• Non-refundable Application Fee: 400 for NPI members or $600 for non-members
Award Criteria

• To receive the “Achievement of Excellence in Procurement” award, the applicant must obtain a total of at least 100 points.

• 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.

• There are 18 criterions from which an Agency may obtain score.

• It is recommended that throughout the year you work on completing the criteria in phases.
Award Criteria
No. 1-3

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

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

3. Established a procurement staff “professional development” program (5 pts)
Sample of Criteria No. 2

Narrative:
McAllen ISD publishes an electronic procurement manual for internal users. Training is provided to staff at the Annual Business Operations Meeting, every Fall. Updates to the procedures manual are introduced at the annual meeting. Revisions to the manual may also occur throughout the year. The latest revision of the current manual is dated 2015-2016. The majority of the latest updates were to address changes as a result of the OMB Uniform Guidance.

Current screen shots of the link that electronically posts our procurement manual for use by internal customers are below. The manual is posted on our Purchasing webpage at http://www.mcallenisd.org/business-department/business-services/budget-preparation-manual/purchasing-manuals/

It includes sections on Purchasing Guidelines, Automated Purchase Orders System, Bid Procedures and Interlocal Agreements. We also have other manuals posted on the website addressing Warehouse, Fixed Assets and Records Management.
Award Criteria
No. 4

4. Maintains a “continuous improvement” program comprised of the following:
   a. Formal survey of procurement performance, completed by internal (department) customers (5 pts)
   b. Formal survey of procurement customer service, completed by external customers (vendors/contractors) (5 pts)
   c. Formal internal (user departments) customer training within the past year (5 pts)
   d. Formal vendor training within past year with scheduled and agendized workshop (5 pts)
Award Criteria
No. 5 & 6

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

6. Procurement Organizational Structure (5 pts)
Award Criteria
No. 7

7. Utilization of Electronic Commerce (electronic transmission of data with the business community) and Automated Technology to Improve Efficiencies

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

b. Online electronic vendor registration and screen shots of registration process (5 pts)

c. Posting and downloading of solicitations (Invitations for Bid & Requests for Proposals) (5 pts)

d. System generated electronic notification of solicitation to prospective registered bidders (5 pts)
Award Criteria continued Criteria No. 7

e. Use of an electronic, interactive Request for Quotation (RFQ) process (5 pts)

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

g. Posting of both the solicitation tabulations and the award documentation on website (5 pts)
Award Criteria continued Criteria No. 7

h. Internal Procurement Automation (Online Requisitioning) (5 pts)

i. Electronic purchase order to vendor (5 pts)

j. Internet auction system to dispose of surplus materials (5 pts)
Narrative:

McAllen ISD utilizes Sungard Bi-Tech, LLC’s Integrated Financial and Administrative Solution, or IFAS (Version 7.9.7.731), a financial and personnel management system. The system was implemented in the 2007-2008 school year. It is a Web browser-based, platform-independent system. The system supports a multi-fund budgetary accounting solution as well as integrated reporting. The Purchasing Module allows for online requisition entry, electronic routing of approvals (via workflow) and online status inquiries by end-users. The requisitions are initiated by the end-users and once approved via online Workflow, the requisition moves forward to the next approving official, which may be the department administrator or campus principal. Upon online approval by the approving official, the requisition proceeds to the Purchasing Department approval level, which is also coordinated online. Electronic approvals may be done directly via the Workflow screen in iFAS or by replying to an IFAS generated automatic email notification to the approver. At any point in the requisition/purchase order process, end users may query the system screens to inquire the status of a requisition. Reports can also be generated to provide end-users with any pending requisitions or purchase orders that are pending payment. Furthermore, at certain milestones in the requisition/purchase order process (such as when a requisition is pending approval by the person receiving the email or when it is rejected by an approving official or when a requisition becomes a purchase order) IFAS will send an automatically generated email notification advising the end user of the status. The following screen shots identify online requisitions generated by end users, online inquiry of status and workflow approval.

WORKFLOW- PR in the Process of Being Approved

- After a Purchase Requisition is entered and approved by End User, the request is released into a main stream of approvals which consist of department director/campus principal/grant approver, Purchasing Clerk, and ending review and approval of Purchasing Contract Specialist for those requests under $5K. Those Purchase Requisitions over $5K require the additional approval of the Director of Purchasing Services for the Workflow to be complete.

<table>
<thead>
<tr>
<th>Purchase Document</th>
<th>Workflow</th>
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<tbody>
<tr>
<td>User</td>
<td>When In</td>
</tr>
<tr>
<td>MSLOPEZ</td>
<td>05/06/15 10:41:54</td>
</tr>
<tr>
<td>MARCATE</td>
<td>05/10/15 00:42:50</td>
</tr>
<tr>
<td>TBA</td>
<td>Future Task Item</td>
</tr>
<tr>
<td>TBA</td>
<td>Future Task Item</td>
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</tbody>
</table>

WORKFLOW- All approvals are in place and PR is ready to be printed.
Award Criteria
No. 8

8. Procurement Card System

a. Uses a Comprehensive Procurement Card (P-Card) System and publishes an electronic P-Card manual for internal use (5 pts)

b. Formal Procurement Card Program Audit/Review OR a staff member with person with CPCP (Certified Purchasing Card Professional) certification from the National Association of Purchasing Card Professionals (NAPCP). (5 pts) While there are two options for earning points under this criterion, a maximum of five points will be awarded.
Award Criteria
No. 9 & 10

9. Use of requirements contracts (annual or term also known as blanket orders) for at least 30% of total dollar commodity and services purchases (10 pts)

10. Professional Certification

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

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 Professional Public Buyer (CPPB), Certified Professional Purchaser (C.P.P.), Supply Chain Management Professional (SCMP) or Certified Professional in Supply Management (CPSM) designation earned by at least 65% of professional staff (10 pts)
11. Education

a. A Bachelor’s or higher degree from an accredited university or college earned by the Chief Procurement Official (5 pts)

b. A Bachelor’s or higher degree from an accredited university or college earned by at least 65% of the professional staff (5 pts)
Award Criteria
No. 12 - 14

12. Professional staff member with a leadership position in a professional procurement association (5 pts)

13. Participation at a national, state, provincial, territorial or regional conference or a seminar as a presenter or co-presenter on a public procurement topic OR author of a published article on public procurement topic (5 pts)

14. Adoption of statute or ordinance that allows for Best Value procurements for your agency (10 pts)
Award Criteria
No. 15

15. Environmental Procurement

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

b. Publication of performance report on environmental procurement (5 pts)
Award Criteria No. 16

16. Lead Agency in a Cooperative Procurement Contract (5 pts)

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

18. Continued Pursuit of Excellence
Self Scoring

It is important to conduct a self-scoring NPI provides a self-scoring worksheet with application process.

### SELF SCORING WORKSHEET

- **Organization Name**

<table>
<thead>
<tr>
<th>Part III – Criteria</th>
<th>POINTS</th>
<th>SELF-SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Procurement Ethics Standards</td>
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<tr>
<td>2. Electronic Procurement Manual</td>
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<td>3. Professional Development Program</td>
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<tr>
<td>4a. Internal Department Customer Service Survey</td>
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<td>4b. External Vendor Customer Service Survey</td>
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<td>4c. Internal Customer Department Training</td>
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<td>4d. Formal Vendor Training</td>
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<td>4e. Performance Measures</td>
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<td>5. Centralized Procurement Authority</td>
<td>10</td>
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<td>6. Organizational Structure</td>
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<td>7a. Internet Home Page</td>
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<td>7b. Online Electronic Vendor Registration</td>
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<tr>
<td>7c. Posting &amp; Downloading of Solicitations</td>
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<td>7d. E-mail Notification of Solicitations</td>
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<td>7e. Acceptance of RFQ via Internet</td>
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<tr>
<td>7f. Acceptance of Formal Bids via Internet</td>
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Questions Regarding AEP Award

Brian P. Garrity, CPSM, C.P.M., CPPB, Director of Procurement

aep@npiconnection.org.
QUESTIONS?

Best Wishes On Achieving The Achievement Of Excellence In Procurement Award