

# Unlocking Procurement Excellence: The Road to the AEP Award Starts Here!

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The logo features a stylized black and white graphic of a pen nib on the left. To its right, the text "Achievement of" is in a bold, dark blue sans-serif font. Below this, the word "Excellence" is written in a large, red, cursive script. Underneath "Excellence", the words "In Procurement" are in a bold, dark blue sans-serif font, followed by a registered trademark symbol (®).

# Achievement of Excellence In Procurement®

Founded in 1995, the *Achievement of Excellence in Procurement Award* is the premiere international award dedicated to recognizing organizational excellence in public procurement.

**Innovation, Professionalism, Productivity, E-Procurement and Leadership**



# Sponsor Organizations



# The CPPC Link

## **Proud Canadian Sponsor of the AEP Award**

CPPC is a proud sponsor of the AEP program, actively promoting the award to Canadian public procurement organizations and championing excellence in the profession across Canada.

## **CPPC Executive Director and Members on the Review Committee**

CPPC's Executive Director, François Emond, serves on the AEP review committee, ensuring Canadian perspectives and bilingual representation are part of the evaluation process. CPPC Members participating in submission review activities include: Mitsy Jones-Bailey, Steve Kennedy, Pooja Nagra and Cheryl Comeau

## **Help Evaluating if Your Organization Should Participate**

CPPC can assist Canadian organizations in evaluating whether they are ready to pursue the AEP award, providing guidance on criteria alignment and readiness assessment.



# The CPPC Link

## Application Available in French

Through our MOU with NPI, CPPC is supporting the translation of AEP materials into French and NPI is funding a French language interface for the application platform – making the award more accessible to francophone organizations.



### 2026 - Prix d'Excellence en Approvisionnement Guide de Mise en Candidature

**Date limite de dépôt des candidatures : vendredi 15 mai 2026 à 17 h 00, heure normale du Centre**

#### Partie I: Instructions générales

SEULES LES CANDIDATURES DÉPOSÉES PAR VOIE ÉLECTRONIQUE SONT ACCEPTÉES. LES DOSSIERS DE CANDIDATURE DOIVENT ÊTRE SOUMIS AU MOYEN DU PORTAIL PEA À PARTIR DU 1<sup>ER</sup> JANVIER ET AU PLUS TARD LE 15 MAI 2026 À 17H, HEURE NORMALE DU CENTRE. LE PRÉSENT DOCUMENT SE VEUT ÊTRE UN GUIDE POUR LES MISES EN CANDIDATURE ET EST COMPLÉMENTAIRE AU PROCESSUS DE MISE EN CANDIDATURE EN LIGNE. EN CAS DE DIVERGENCE ENTRE CE DOCUMENT ET LA CANDIDATURE EN LIGNE, CETTE DERNIÈRE PRÉVAUT.

nce en Approvisionnement est responsable de l'évaluation des ayant complété la mise en candidature pour son organisme sera 026 et aura accès à sa fiche de résultats officielle. Nous vous e équipe d'approvisionnement afin d'identifier les opportunités ures. La décision de l'équipe d'évaluation du Prix d'Excellence

s accordez au gestionnaire du programme, soit le *National* on d'utiliser les documents déposés aux fins de promotion du al.

ne PEA, consultez [www.npi-aep.org](http://www.npi-aep.org). Les questions concernant ient doivent être adressées à : Carrie Mathes, MPA, FNIGP, )PPB, APP, FCCM, responsable du Prix d'Excellence en on.org.



# Receiving the Award Has Its Benefits

- Demonstration of meeting (or exceeding) a North American standard for procurement excellence
- Continuous Improvement
- Enhanced stakeholder confidence
- Team morale and pride
- Competitive advantage
- CPPC support for Canadian applicants



# Membership Has Its Benefits

## Award Application Fee Schedule\*

\$495 for NPI members

\$695 for non-members

**These fees are in USD – 2026 applicants will be compensated for the exchange rate.**

Payment of the non-refundable application fee must be made electronically when the application is submitted.



## SELF-SCORING WORKSHEET

Part III – Criteria	POINTS	SELF-SCORE
1. Procurement Ethics Standards	5	
2. Electronic Procurement Manual	5	
3. Professional Development Program	10	
4a. Internal Department Customer Service Survey	5	
4b. External Vendor Customer Service Survey	5	
4c. Internal Customer Department Training	5	
4d. Formal Vendor Training	5	
4e. Performance Measures	10	
5. Centralized Procurement Authority	10	
6. Organizational Structure	5	
7a. Internal Procurement Automation	10	
7b. Electronic Sourcing	10	
7c. Electronic Evaluations and Automated Scorecard	10	
8a. P-Card System / Electronic P-Card Manual	5	
8b. Comprehensive P-Card Program Audit or Certification	5	
9. Use of Term/Requirements Contracts	5	
10a. Certification/Chief Procurement Official	10	
10b. Certification/Professional Staff	10	
11a. Education/Chief Procurement Official	5	
11b. Education/Professional Staff	5	
12. Association Leadership Position	10	
13. Presenter/Panel Member/Author	10	
14. Adoption of Best Value Procurement Method	10	
15a. Sustainable Procurement Policy/Program	5	
15b. Sustainable Procurement Best Practices	5	
16. Cooperative Procurement Strategy	5	
17. Contract Award Authority	5	
18. Continued Pursuit of Excellence	10	
<b>TOTAL POINTS</b>	<b>200</b>	

# Complete the Self-Scoring Worksheet

**Total eligible points:**

**200**

**Points required to obtain  
the award:**

**100**





## 2026 Achievement of Excellence in Procurement® Award Application

**Application Deadline: Friday, May 15, 2026 by 5:00pm CST**

### Part I: Application Instructions

ONLY ONLINE APPLICATIONS ARE ACCEPTED. APPLICATIONS MUST BE ENTERED THROUGH THE AEP APPLICATION PORTAL ON OR AFTER JANUARY 1 AND NO LATER THAN 5:00PM CST ON MAY 15, 2026. THE INFORMATION CONTAINED IN THIS APPLICATION IS INTENDED TO SUPPLEMENT THE ONLINE APPLICATION PROCESS. IF THERE ARE ANY DISCREPANCIES BETWEEN THIS DOCUMENT AND THE ONLINE APPLICATION, THE ONLINE APPLICATION WILL PREVAIL.

The Achievement of Excellence in Procurement® Evaluation Team is responsible for the evaluation of the applications. The applicant will be advised of the results by mid-August 2026 and will be provided access to the official scorecard. Please share the scorecard with your procurement team to identify areas for improvement in future applications. The decision of the Achievement of Excellence in Procurement® Officer is final. By applying, you are giving permission for NPI to use the submitted documents to promote the program and the public procurement profession.

Additional information about the AEP program is available at [www.npi-aep.org](http://www.npi-aep.org). Questions concerning the Achievement of Excellence in Procurement® Program should be addressed to:

Carrie Mathes, MPA, FNIGP, CFCM, NIGP-CPP, CPPO, C.P.M., CPPB, APP, FCCM, Achievement of Excellence in Procurement Officer, at [aep@npiconnection.org](mailto:aep@npiconnection.org).

## Review the 2026 Award Application

<https://www.npi-aep.org/application-submission-portal>

- Application Instructions
- Submittal Instructions
- Award Criteria





## 2026 AEP Application Summary of Changes

There are multiple changes to the 2026 AEP Application please review carefully and read the application requirements in their entirety.

Application deadline is Friday, May 15, 2026 by 5:00pm CST.

Multiple criteria have date requirements. Please verify as dates are updated annually.

Multiple criteria have changes that serve to clarify and further define the submittal requirements. Changes are identified in *italics* and are summarized herein.

### Criteria Updates

1. General Instruction: Clarified how documentation should be supported by effective dates or proof of adoption. Clarified that screen shot(s) should be dated to for validation purposes.
2. Criteria No. 3: Clarified the full period *of time for* training received.
3. Criteria No. 4a: Removed reference to transactional based survey. Clarified that a link in an email signature does not satisfy the criteria.
4. Criteria No. 6: Added instruction to highlight positions of Accounting or Budget Director.
5. Criteria No. 7a: Added instruction to include link to webpage.
6. Criteria No. 7c: Clarified demonstration supports the active use of the system. Regarding screenshot of evaluation page, clarified timeframe of solicitation posting.
7. Criteria No. 9: Clarified total procurement spend must include all contract spend and non-contract spend.
8. Criteria No. 10a: Clarified that only the specific certifications listed satisfy the criteria.
9. Criteria No. 10b: Clarified that only the specific certifications listed satisfy the criteria.
10. Criteria 12: Clarified that service as an AEP Evaluator for the prior year's application evaluation cycle satisfies the criteria. Clarified what documents will successfully demonstrate service as an AEP Evaluator.
11. Criteria No. 14: Clarified submittal should not include the entire solicitation, identified specific pages to submit for solicitation documents and evaluation matrix or scoring summary.
12. Criteria No. 15: Removed reference to "moving towards implementing" a program.

Submit any questions regarding any changes to:

Carrie Mathes, MPA, FNIGP, CFCM, NIGP-CPP, CPPO, C.P.M., CPPB, APP, FCCM,  
AEP Officer at [aep@npiconnection.org](mailto:aep@npiconnection.org).

## Review the 2027 Summary of Changes

<https://www.npi-aep.org/application-submission-portal>

- Summary of annual changes
- Provides clarification of criteria changes



**Application window is from January to mid May...**  
**Award portal opens around January 1, 2027**

**Applications due by May 15, 2027 at 5:00 CST**  
**Results released by Mid-August**

**Recognition of Award recipients begins in the fall**

**CPPC recognizes Canadian recipients at its annual Forum**



**Don't delay....start today!**

**Make it a team project**

**Request a mentor: [aep@npiconnection.org](mailto:aep@npiconnection.org)**



**Access the Educational Series**

<https://www.npi-aep.org/educational-series>

**CPPC is there to support you as well!**

Learning  
**TIME**





## Achievement of Excellence in Procurement® (AEP) Educational Series

No charge for any of the sessions!  
Format: 30–60-minute Zoom meetings

Join the Achievement of Excellence in Procurement® evaluation team for a series of “AEP Educational Sessions” where we will review this year’s application and discuss a few of the more challenging criteria. These sessions will be interactive and allow participants to ask questions of the panel.

Questions? Email [aep@npiconnection.org](mailto:aep@npiconnection.org)

### Criterion 10 – Certification of CPO and Staff

Session Objectives:

Discuss importance of certifications in public procurement and how they serve to demonstrate a high level of professionalism and expertise; review certifications currently accepted for this criterion; discuss definition of “eligible professional staff”; review model submittals from prior year.

### Criterion 15 - Sustainable Procurement Policy/Program and Sustainable Procurement Best Practices

Session objectives:

Discuss importance of sustainable procurement; what is considered demonstration of implementing or moving towards implementing a strategic sustainable procurement program; discuss sustainable procurement best practices; review model submittals from prior year.

Watch the recording [here](#).

### Criterion 16 – Cooperative Procurement Strategy

Session Objectives:

Discuss the importance of implementing a comprehensive cooperative procurement strategy; the value for agencies; appropriate use of cooperatives; review components of a successful approach; review model submittals from prior year.

Watch the recording [here](#).

The screenshot shows the website for the National Procurement Institute (NPI). The header includes the NPI logo with the tagline "Leading Excellence in Public Procurement" and a "Member Login" button. The navigation menu contains: Home, About, Membership, AEP Award, Annual Conference, Awards, Board Room, Calendar, and Members Only. A dropdown menu is open under "AEP Award", listing: Application Portal & Historical Data, Award Recipients, Evaluation Team, Committees, Sponsors & Supporters, Educational Series, Testimonials, AEP by the Numbers, Media Library, eProcurement Platform Certification Program, and AEP Certified eProcurement Providers. The "Educational Series" item is highlighted with a blue arrow. In the "Quick Links" section, there are four red buttons: "AEP Award", "Annual Conference", "NPI Apparel", and "Get Involved". A dashed blue arrow points from the "Educational Series" menu item to the "Get Involved" button.





## Self-assessment Exercise

Criteria Most Likely Already Reflected in Your  
Practices





## AEP Award Application



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

Procurement Ethics policy must be issued by the Chief Procurement Official at a minimum, and specifically address procurement ethics. A procurement ethics policy embedded in a procurement manual **is** acceptable but the policy or the manual must be posted publicly online to receive points.

There must be evidence that this policy was adopted by the Chief Procurement Official of the agency at a minimum, not just posted, to receive points for this criteria. Inclusion of the policy in the agency’s official procurement manual satisfies this requirement.

Membership in a procurement association, which has an ethics policy, **is not** in and of itself an acceptable documentation of an ethics policy, unless the agency adopts said policy as its own.

- **Submit:** Narrative statement explaining where the policy is published or can be found. The policy must be publicly available online to satisfy this criteria. Provide a link to or a screenshot of the online posting; and
- **Submit:** A copy of or link to the procurement ethics policy and evidence of its establishment as official procurement policy by your agency.



## 7. Utilization of eProcurement and Automated Technology to Improve Efficiencies

### a. Internal Procurement Automation (10 pts)

Internal procurement automation refers to an automated requisitioning system designed to facilitate the procurement process within your organization. The system must provide for electronic entry of requisitions, routing, and status inquiries. Once approved, the system must also generate a digital PO which is automatically emailed to the vendor or is routed to the vendor through Electronic Data Interchange (EDI). Points will not be awarded if manual emailing of the digital PO occurs.

### b. Electronic Sourcing (10 pts)

To streamline the application process for criteria 7b and 7c, we have vetted and approved several eProcurement solutions as AEP® Certified. Applicants that utilize the following AEP® Certified systems are only required to submit one screenshot *and a link to their web page* for each criteria showing the system they use and a statement certifying that they meet the requirements of the criteria. Access a listing of the AEP® Certified e-procurement solutions at <https://www.npi-aep.org/aep-certified-eprocurement-providers>

To meet the requirements for this criteria, the entity must show evidence of electronic sourcing, which includes online vendor registration, automatic vendor notification, posting of the solicitation, and posting of the resulting solicitation tabulations and award documentation.

### c. Electronic Evaluations and Automated Scorecard (10 points)

To streamline the application process for criteria 7b and 7c, we have vetted and approved several eProcurement solutions as AEP® Certified. Applicants that utilize the following AEP® Certified systems are only required to submit one screenshot *and a link to their web page* for each criteria showing the system they use and a statement certifying that they meet the requirements of the criteria. Access a listing of the AEP® Certified e-procurement solutions at <https://www.npi-aep.org/aep-certified-eprocurement-providers>

To meet the requirements of this criteria, agencies must demonstrate *the active use of* an online, centralized system that provides for:

1. Review and scoring of proposals
2. Notice of required evaluations and deadlines
3. Digital scorecards that automatically calculate individual scores, provide comments and notes, and provide a means to qualify and/or rank respondents.



## 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)**

The intent of this criteria is to identify procurement card programs that are comprehensive (i.e., include policies, procedures, training, and monitoring of transactions) with systems in place that provide proper financial controls. This program should be a supplemental tool used for efficiency and in addition to good procurement practices. P-Cards limited to travel expenses do not qualify. Having a credit card available for purchases, without having proper controls, policies and procedures in place would not qualify.

A P-Card manual must be electronically posted (e.g., on a shared drive, the intranet or the internet site) for internal use. Please do not submit the entire manual.

b. **Formal Procurement Card Program Audit/Review OR a staff member with a current CPCP (Certified Purchasing Card Professional) certification from the Institute of Commercial Payments (IOCP) (5 pts)**

**While there are two options for earning points under this criteria, a maximum of five points will be awarded.**

A successful P-Card program includes a combination of best practices: dedicated resources, multi-faceted program management, training and retraining, continuous monitoring, and timely interfaces with the financial accounting system. For many agencies, Procurement is responsible for issuing cards and managing the overall program, while Finance is responsible for processing payments (receiving the receipts and monthly statements from the cardholders). Auditing this program and making improvements and corrections is a good practice. This should be done by a source outside of the card program administration (e.g., Finance or external auditors) and the review should include the whole program, from the initial card request, to training, and to viewing actual expenditures.



## 11. Education

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

- **Submit:** Narrative or organization chart clearly stating the name and title of the Chief Procurement Official. Explain any differences in names on diplomas (e.g., maiden name, married name); and
  - **Submit:** Name of the university or college, degree, and graduation date. Include a **legible** copy of the highest earned diploma or evidence from the conferring institution that a degree was received. If providing a copy of a transcript, the name of the Chief Procurement Official, the degree earned, and the date must be highlighted.
- OR**, an official, signed letter from the agency's Human Resources Director (or top employment official) certifying the individual holds the stated degree is acceptable.

## 14. Adoption of statute, ordinance or policy that allows for Best Value procurements for your agency (10 pts)

"Best Value" means a technique in a competitive solicitation process which emphasizes value over price and permits the evaluation of criteria such as qualifications, experience, and performance data to determine the best overall value to the agency.

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. Best Value solicitations for construction (Construction Manager at Risk, Job Order Contracting, and Design Build) could also qualify for this criteria.



## 15. Sustainable Procurement

The objective of this criterion is to demonstrate that the agency has implemented or is moving towards implementing a strategic sustainable procurement program. Strategic sustainable procurement programs integrate within an agency's existing strategic procurement processes, addressing prioritized environmental, social and/or economic impacts and opportunities of that agency's purchased goods and services. Sustainable procurement programs have been shown to provide value to agencies in areas such as reduced cost of goods and services, reduced administrative costs, reduced supply chain risk, and increased supply chain resiliency. Programs limited to single areas such as recycled materials, green cleaning products or energy conservation do not qualify. Program or policy must be broad and address multiple environmental, social and/or economic impacts and opportunities.

NOTE: Agencies can receive points by meeting either criteria a) and/or criteria b).

### a. Formal sustainable procurement policy OR formal sustainable procurement program (5 pts)

The policy or program must secure executive-level commitment; identify a program lead; and allocate the resources needed for implementation.

- **Submit:** A copy of the formal sustainable procurement policy or program.
- **Submit:** A copy of the document, website, policy, etc. that established the formal policy or program and/or that defines the program structure and plan.
- **Submit:** Evidence of executive-level commitment (ex. policy release history, signed letter, etc.), program lead and resource allocation

### b. Implementation of best practices (5 pts)

Submission must include at least one best practice from the following:

- Set relevant environmental, social, and economic priorities
- Goals & Metrics
- Staff Engagement & Accountability
- Goods/Services Evaluation & Transparency
- Supplier Engagement, Transparency, & Accountability
- Supplier Development & Innovation
- Communications & Sustainable Purchasing Transparency



## 18. Continued Pursuit of Excellence (10 pts)

Demonstrate a performance improvement **over and above any criterion** listed in this application. What new program / procedure / innovation / process improvement did you enact? Did it solve a problem? How did it improve the performance or efficiency of your agency? Did it save you money or find ways to utilize new resources? How were the results measured?

- **Submit:** Narrative explaining the project, action plan or innovation which must be procurement related. Narrative must clearly identify the problem and explain the solution, action plan or innovation. Only submit one project. Project must have been completed or action plan implemented on or after *January 1, 2024*.
- **Submit:** Provide **clear and measurable performance results** of the project, action plan or innovation and demonstrate how this improved the performance of your agency.





## Self-assessment Exercise

Valuable criteria that may not yet be  
integrated into current practices



### 3. **Established a procurement staff “professional development” program (10 pts)**

The intent of this criteria is to recognize agencies that have a planned and deliberate approach to continuing education. There must be an established, clearly defined continuous, formal professional development program in place to receive points.

Training shall be on procurement issues. Participation in professional association sponsored seminars and webinars, internal and external procurement related training are all acceptable. Client/customer (i.e., user) training programs do not satisfy the criteria. The program must include all full-time professional procurement staff. Professional staff are defined as those staff involved in the traditional procurement/contracting functions, e.g., buyer, contract officer, procurement agent, specifications writer, contract administrator, purchasing manager, etc.

Dedicated funding for professional development is considered optimal; however, webinars and other free or low-cost training are encouraged to meet this criteria for agencies with limited budgets. Attending an occasional webinar, conference or class does not on its own constitute a formal program.



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

a. **Formal survey of procurement performance, completed by internal (department) customers (5 pts)**

The intent of this criteria is to solicit feedback on the operations of the procurement function. Survey results should be used to develop processes or procedural improvements in procurement. The survey may cover a specific time period and shall be completed by internal customers on multiple procurement topics. *A generic “how are we doing” link in an email signature does not satisfy the criteria.*

A survey of a presentation made to customer departments is not acceptable. A general agency survey does not qualify unless there is a specific section designated to procurement that covers multiple procurement issues.

**A link to a generic survey sent out after a completed procurement is not acceptable. The survey needs to be a specific, formal survey directly related to procurement operations.**

b. **Formal survey of procurement customer service, completed by external customers (vendors/contractors) (5 pts)**

Survey of external customers (vendors/contractors) needs to be on multiple procurement issues. Some examples of topics are efficient bid procedures, customer service, equity, website, etc.

A link to a generic survey sent out after a completed procurement is not acceptable. The survey needs to be a specific, formal survey directly related to procurement operations.

To demonstrate this survey is comprehensive, the agency must demonstrate that the survey was distributed to at least 25 current vendors/contractors.

- **Submit:** A narrative explanation (e.g., email) and when (date) the survey was distributed and the number of responses to the survey is required. If your agency can quantify the number of vendors/contractors that received the survey, please include this information. The agency must demonstrate that at least 25 vendors/contractors were sent the survey;
- **Submit:** A summary tabulation of the results that substantiates the survey was conducted on or after *January 1, 2024*; and
- **Submit:** A list of suggested process improvements related to the survey results. For example, what changes will be implemented considering the survey results? Be specific in your response.

d. **Formal vendor training within past year with scheduled and agenda 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 agency.

A “vendor fair” limited to a “table” only, is not acceptable. There must be an agenda specifically listing your agency as a presenter of training on “how to do business” on a comprehensive basis. Joint vendor training should clearly identify your agency as a presenter on the agenda. Web-based training is acceptable as long as the training meets all the other requirements of this criteria.



**9. Use of requirements contracts (annual or term also known as blanket orders) for at least 30% of total dollar commodity and services purchases (5 pts)**

The purpose of this criteria is to demonstrate that your agency has leveraged spend through establishing and/or utilizing requirement (term, annual, blanket, IDIQ) contracts for at least 30% of the total procurement spend. Requirements contracts improve efficiency and provide an opportunity to save through negotiated pricing contracts. Provide the basis of your analysis, including where the spend totals came from. The requirements contracts amount should be the actual expenditure on the contract, which may not be the same amount the term contract was issued for. Documentation should indicate that at least 30% (percentage should be rounded up to the nearest whole percentage (i.e., 29.5 = 30%; 29.4 = 29%)) of total procurement spend is based on requirements contracts. *Total procurement spend must include all contract spend and non-contract spend.*



## 10. Professional Certification

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

*Please note that only the specific certifications listed above satisfy this criteria.*

- **Submit:** Narrative or organization chart clearly stating the name and title of the Chief Procurement Official. Explain any differences in names on certifications (e.g., maiden name, married name); and
- **Submit:** A legible copy of one current certification. In lieu of a copy of the certification, you may attach a copy of the issuing organization's web page or an official letter from the organization that validates certification.

- b. Current Certified Professional in Supply Management (CPSM), Certified Purchasing Manager (C.P.M.), Accredited Purchasing Practitioner (A.P.P.), Certified Public Purchasing Officer (CPPO), Certified Professional Public Buyer (CPPB), Certified Professional Contracts Manager (CPCM), *Certified Contract Management Associate (CCMA)*, Supply Chain Management Professional (SCMP) or NIGP Certified Procurement Professional (NIGP-CPP) designation earned by at least 75% of eligible professional staff (10 pts)

*Please note that only the specific certifications listed above satisfy this criteria.*



**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 (10 pts)**

The intent of this criteria is to encourage continued research and presentation (either oral or written) to our professional peers on a procurement related topic. To receive points for this criteria it must be clearly demonstrated that the staff member prepared and presented on a specific procurement topic. Facilitating or moderating a session does not qualify. “How To Do Business with the Agency” presentations for vendors do not qualify (covered under 4.d)





**Achievement of**  
**Excellence**  
**In Procurement®**

# Tips and Tricks



## 14. Adoption of statute, ordinance or policy that allows for Best Value procurements for your agency (10 pts)

“Best Value” means a technique in a competitive solicitation process which emphasizes value over price and permits the evaluation of criteria such as qualifications, experience, and performance data to determine the best overall value to the agency.

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. Best Value solicitations for construction (Construction Manager at Risk, Job Order Contracting, and Design Build) could also qualify for this criteria.

- **Submit:** A narrative explaining how your agency meets this criteria.
  - Narrative should detail the statute, ordinance or policy authorizing your agency to do best value procurements.
- **Submit:** The law, ordinance or policy establishing best value procurement authority; and
- **Submit:** Solicitation documents published/posted after *January 1, 2025*.
  - Solicitation cover page with the publication or issue date of the solicitation or the schedule from the solicitation demonstrating when it was issued to the public (not the solicitation due date). Evaluation criteria page(s) from the solicitation detailing the assigned points or weights demonstrating that points and weights were visible to the vendors during the solicitation process prior to the due date. No points will be awarded for ordinal evaluation methodology. *Do not include the entire solicitation document, only the pertinent pages that show the solicitation publication/issue date and the evaluation criteria.*
  - Evaluation matrix or scoring summary comprised of the criteria, weights and evaluators' scores demonstrating the use of best value evaluation. A blank evaluation matrix or sample is not sufficient to provide documentation of use. *Do not include the entire evaluation report, only the pertinent pages that show the criteria, weights, and evaluators' scores.*



## 15. Sustainable Procurement

The objective of this criteria is to demonstrate that the agency has implemented a strategic sustainable procurement program. Strategic sustainable procurement programs integrate within an agency's existing strategic procurement processes, addressing prioritized environmental, social and/or economic impacts and opportunities of that agency's purchased goods and services. Sustainable procurement programs have been shown to provide value to agencies in areas such as reduced cost of goods and services, reduced administrative costs, reduced supply chain risk, and increased supply chain resiliency. Programs limited to single areas such as recycled materials, green cleaning products or energy conservation do not qualify. Program or policy must be broad and address multiple environmental, social and/or economic impacts and opportunities.

NOTE: Agencies can receive points by meeting either criteria a) and/or criteria b).

**a. Formal sustainable procurement policy OR formal sustainable procurement program (5 pts)**

The policy or program must secure executive-level commitment; identify a program lead; and allocate the resources needed for implementation.

- **Submit:** A copy of the formal sustainable procurement policy or program;
- **Submit:** A copy of the document, website, policy, etc. that established the formal policy or program and/or that defines the program structure and plan; and
- **Submit:** Evidence of executive-level commitment (ex. policy release history, signed letter, etc.), program lead and resource allocation

**b. Implementation of best practices (5 pts)**

Submission must include at least one best practice from the following:

- Set relevant environmental, social, and economic priorities
- Goals & Metrics
- Staff Engagement & Accountability
- Goods/Services Evaluation & Transparency
- Supplier Engagement, Transparency, & Accountability
- Supplier Development & Innovation
- Communications & Sustainable Purchasing Transparency

For the submitted best practice(s) to qualify, agencies must demonstrate implementation of at least 50% of the relevant requirements described in the [Sustainable Purchasing Leadership Council's Maturity Model Inventory Checklist](#)

- **Submit:** A narrative describing your implementation of each best practice.
- **Submit:** Documentation supporting your claims (e.g., a website displaying your sustainable procurement goals & metrics; copies of sustainable goods/service requirements or preferences included in solicitations)
- **Submit:** The SPLC Checklist completed indicating what practices were implemented



**Use Clear Headings and Subheadings:** Organize your content with descriptive titles and subtitles to help evaluators quickly navigate and understand the structure of your submittal.

**Prioritize Key Information:** Highlight critical points early in each section, using concise sentences and avoiding unnecessary jargon to ensure clarity.

**Incorporate Visual Aids:** Use charts, graphs, or tables to summarize data and key metrics, making it easier for evaluators to grasp complex information at a glance.

**Provide Relevant Examples:** Use specific, real-world examples to demonstrate your compliance or achievements, ensuring they directly address the award criteria.

**Ensure Consistent Formatting:** Maintain a uniform font, size, and spacing throughout your document, and use bullet points or numbered lists to break up dense text for readability.



**Fresh Perspective:** A reviewer who wasn't involved in preparing the application can provide an unbiased evaluation, ensuring clarity and completeness.

**Catch Errors:** A second set of eyes can identify typos, inconsistencies, or omissions that the preparer might have overlooked.

**Evaluate Against Criteria:** An independent reviewer can confirm whether the application directly addresses each award criterion and meets all requirements.

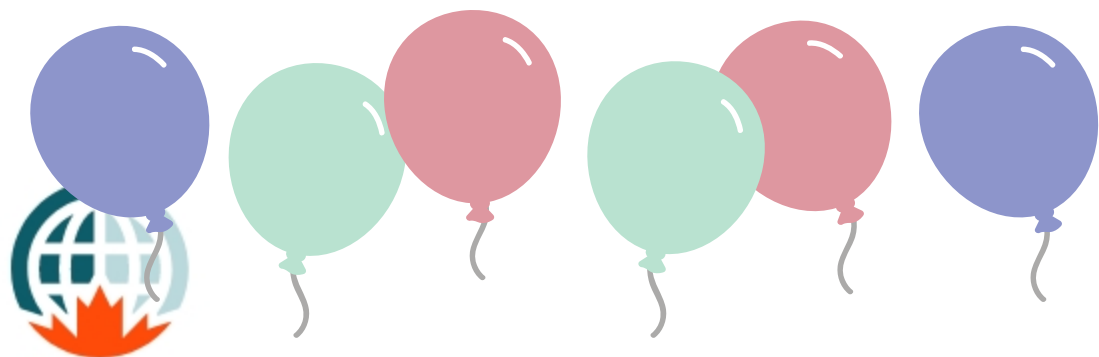
**Improve Readability:** A reviewer can assess whether the content is well-organized, succinct, and easy for evaluators to follow.

**Validate Supporting Evidence:** A third party can ensure that all examples, documents, and attachments effectively support the application and align with the narrative.





Let's Celebrate



# NOVA SCOTIA



# QUESTIONS

