



Excellence is Not a Choice: Moving Procurement Forward

Using NPI's AEP Award Criteria to Achieve Excellence

Spencer Lord, NIGP-CPP, CPPB, CPPO | NPI | 10-6-2026

Your Presenter

Spencer Lord

Assistant CPO – Quality Assurance
and Compliance at the
Georgia Department of
Transportation

NIGP-CPP, CPPO, CPPB



Session Agenda



- 1 Introduction
- 2 Pursuing Excellence Through the AEP Award
- 3 Criteria 18 - Continued Pursuit of Excellence
- 4 Wrap-Up and Q&A



Section 1 - Introduction

What does excellence mean to you?



Is excellence a choice for procurement?

Is excellence a choice for procurement?

NO!

MAJOR LONG-RUNNING U.S. DISASTERS & CRISES

2000-2026 • Natural, economic, public-health, war, technological & related crises

2000-02	Dot-com crash	ECONOMIC
2001-21	War in Afghanistan	WAR
2001-present	Post-9/11 terrorism & national-security crisis	SECURITY
2003-11+	Iraq War / later U.S. operations	WAR
2005-06	Hurricane Katrina & New Orleans recovery	NATURAL
2006-12	Housing & foreclosure crisis	ECONOMIC
2007-09	Great Recession / Global Financial Crisis	ECONOMIC
2009-10	H1N1 pandemic	PUBLIC HEALTH
2010	Deepwater Horizon disaster	INDUSTRIAL
2011-present	Western drought & water-security crises	NATURAL
2014-present	Flint water crisis & aftermath	ENVIRONMENTAL
2016-17	Zika public-health emergency	PUBLIC HEALTH
2017	Harvey-Irma-Maria hurricane catastrophe	NATURAL
2018-present	Recurring severe Western wildfire disasters	NATURAL
2020-23	COVID-19 pandemic / national emergency	PUBLIC HEALTH
2020-22	Pandemic recession & supply-chain crisis	ECONOMIC
2021-23	Inflation, energy & cost-of-living shock	ECONOMIC
2021-present	Ransomware & critical-infrastructure cyber threat	CYBER
2022-present	Russia-Ukraine war repercussions	GEOPOLITICAL
2022-23	Federal Reserve inflation / rate shock	ECONOMIC
2023	Regional banking crisis	ECONOMIC
2023-present	Middle East conflict repercussions	GEOPOLITICAL
2024-25	H5N1 avian influenza / cattle outbreak	PUBLIC HEALTH
2024-26	Multistate measles resurgence	PUBLIC HEALTH
2025-26	Tariff / trade disruption	ECONOMIC
2025-26	Federal shutdown & economic aftermath	GOVERNMENT

Scope: major multi-year or nationally consequential crises affecting the United States. "Present" indicates an ongoing issue as of October 2026.

Since January 2000...

- 26 major long-running disasters crises
- Estimated \$30 trillion in economic impact (includes destruction, lost economic output, government expenditures, financial/wealth losses, and other economic costs)
- Of the \$30 trillion, approximately \$11.5 trillion in government expenditures
- Of the \$11.5 trillion, 60-70% is during and post-COVID
- And these are just the ones I had an analysis on that were "major"

What can we do to create excellence?



Achievement of Excellence In Procurement®

Section 2 – Pursuing Excellence Through the AEP Award

About the AEP Award

Information on the Award

- Open to public agencies with Procurement functions
- 18 criteria (some have multiple parts)
- Each criteria has instructions on how to achieve points
- Criteria can change year to year
- Maximum of 200 points
- Minimum of 100 points to receive award
- Considered the Diamond Standard of procurement awards



Criteria X – Criteria Name



Criteria Explanation	Brief explanation of the criteria
Relation to Excellence	Relating the criteria to our pursuit of excellence
Spencer’s Notes	Any notes Spencer has on this specific criteria outside of excellence



Criteria 1 - Establishment of a “Procurement Ethics” Policy



Criteria Explanation	An ethics policy issued by the CPO at a minimum and specifically addresses procurement ethics. Membership in a procurement association is not enough to satisfy it.
Relation to Excellence	Ethics is the foundation of what we do – without detailing out ethical behavior, we risk people substituting their own judgement, which can have unintended consequences. Excellence requires that we have a foundation of ethical behavior or we lose the public’s trust fast.
Spencer’s Notes	Engage your legal and HR departments on this one if you have them. Their buy-in as well as your leadership is important to get it done.



Criteria 2 – Publishes an Electronic Procurement Manual or Guide for Internal Use



Criteria Explanation	A comprehensive guide published internally for the use of customers and staff. Must be comprehensive and not cover only one topic (P-Card, etc.)
Relation to Excellence	Without an internal manual to guide customers and staff, there is no road map to how each person should interact with the procurement process. Having a manual allows for there to be consistency and benchmarking for growth.
Spencer’s Notes	Guides are invaluable to new staff and those who do not engage with the procurement function often. Be sure to continually update as new information comes along.



Criteria 3 – Established a procurement staff “professional development” program



Criteria Explanation	A formal, continuous program dedicated to training procurement staff on procurement topics.
Relation to Excellence	Training pays off twice – people are more compliant the more they know and they are more engaged/productive when they are valued. Enhancing knowledge and having a deliberate plan allows staff to see growth and have more “skin in the game” as well as growing skills.
Spencer’s Notes	Training is one of the most important items we can do to make sure staff feel valued and want to contribute.



Criteria 4 a-e – Maintains a “continuous improvement” program comprised of...



Criteria Explanation	Formal surveys from internal customers, external vendors, internal customer training, external vendor training, performance metrics for procurement.
Relation to Excellence	Listening to internal and external customers on how procurement is doing helps to set a benchmark for improvement (perception is reality...). Training helps improve both customer engagement and vendor engagement to improve the efficiency and effectiveness of the procurement function. Performance metrics help give a view of how we are doing on predetermined benchmarks and set improvement goals.
Spencer’s Notes	Don’t shy away from negative feedback. It is a signal that there’s something that may need to change and can lead to better relationships going forward.



Criteria 5 – Centralized procurement authority based in law (statute, ordinance, charter or adopted policy)



Criteria Explanation	Centralized procurement functions in one Office/area of responsibility to ensure cohesive strategic direction.
Relation to Excellence	Centralized procurement authority helps procurement become a strategic partner in the organization. It also helps with consistency, compliance, and improvement.
Spencer's Notes	Centralized authority does n't mean centralized knowledge. It is important to get out there and engage with staff at all levels to get buy-in for strategic direction.



Criteria 6 – Procurement Organizational Structure



Criteria Explanation	Showing the procurement function at a high level in the organization. Accounting/Budget and Procurement should be at the same level.
Relation to Excellence	Procurement needs to have a co-equal seat at the table as other financial/operational functions. Being seen as a junior partner detracts from the procurement function and doesn't give the due weight of what we do. Recognition of that fact helps procurement set themselves up to be seen as the excellent stewards of taxpayer funds and trust that we are.
Spencer's Notes	If you do not have this set-up at your entity, begin to show yourself as a strategic partner and craft a plan to get the organizational structure altered when you can.



Criteria 7 a-c – Procurement Automation



Criteria Explanation	Using internal procurement automation to send POs directly to vendors without manual processes, using an electronic sourcing tool (including AEP® Certified e-procurement solutions), and using Electronic Evaluations and Automated Scorecard (including AEP® Certified e-Procurement solutions).
Relation to Excellence	Software and automation allow for more efficient and effective workflows, which allow staff to work on more strategic initiatives instead of manual workflows. Engaging with AEP® Certified e-procurement solutions shows a dedication to finding and using the best-in-class solutions for the profession.
Spencer’s Notes	Automation can help avoid mistakes but make sure that you do have a human checking if using AI. The benefits of automated systems are moot if we start destroying public trust with incorrect awards.



Criteria 8 a-b – Procurement Card System



Criteria Explanation	Have a comprehensive P-Card system and manual, P-Card audit or the Certified Purchasing Card Professional (CPCP) certification.
Relation to Excellence	Training and guardrails on P-Cards allow for better use of taxpayer funds and resources for small dollar purchases. Making sure that there is a system and manual allows for all staff to know the ground rules and better implement the program. Audits can show weaknesses in a program and give recommendations for improvement. The CPCP certification shows a commitment to learning and best practice analogous to the CPPB/CPPO/NIGP-CPP.
Spencer’s Notes	P-Card use is one area where procurement could get into trouble without having a well-thought out system in place. This criteria helps alleviate that concern.



Criteria 9 – Use of Requirements Contracts for at least 30% of Goods and Services



Criteria Explanation	Proving spend of at least 30% on term, annual, blanket, IDIQ contracts instead of open market or other forms of spend.
Relation to Excellence	Requirements contracts allow for more efficient use of entity resources versus bidding and negotiating every time. It shows a strategic focus on the needs of the entity and allows for better negotiation on pricing with higher volume. Staff can focus on more complex or novel procurements instead of low-dollar and/or routine purchases.
Spencer’s Notes	Requirement contracts are a major source of time savings for any entity that establishes them. I highly recommend getting as much spend on there as possible to allow for you to focus on new or growth areas.



Criteria 10 a-b – Professional Certifications



Criteria Explanation	Selected procurement certifications for the CPO and 75% of staff to achieve to meet the criteria. Includes the CPPB, CPPO, NIGP-CPP, among others.
Relation to Excellence	Commitment to knowledge and the profession is shown through obtaining a national certification. It tells others that we have mastered a Body of Knowledge (BOK) at a high level and signals that staff members know their area of expertise.
Spencer’s Notes	Obtaining my CPPO, CPPB, and NIGP-CPP broadened my knowledge of procurement in ways I never anticipated and helped me achieve what I have done. I highly recommend people go for it.



Criteria 11 a-b – Education



Criteria Explanation	Obtaining a minimum of a Bachelor’s degree for the CPO and 75% of staff.
Relation to Excellence	Obtaining higher education shows commitment to growth and gaining knowledge. It can help develop critical thinking skills that are necessary to be a strategic partner in the organization. Lack of a higher degree is not a detriment to anyone as this can be learned on the job.
Spencer’s Notes	You don’t teach what we do in colleges for the most part; however, any major brings something to the table and makes us all better procurement professionals.



Criteria 12– Staff Member in Leadership Role with Procurement Association or AEP Evaluator



Criteria Explanation	Staff member in a leadership position for a national, regional, provincial, territorial, or state recognized procurement association or serving as an AEP evaluator.
Relation to Excellence	We learn best from each other and when networking. Holding a leadership position gives a lot more surface area to find and emulate excellence in others. It also allows for give and take between procurement departments to find best practices. Serving as an AEP Evaluator also shows you the best of the best for each criteria and helps to bring those ideas back to your home entity.
Spencer’s Notes	I have learned so much from volunteering and the relationships gained are worth their weight in gold. I encourage everyone to volunteer when and where they can for this profession.



Criteria 13 – Presentation at a Conference or Author of a Published Article



Criteria Explanation	Staff member presents for a national, regional, provincial, territorial, or state recognized procurement association or publishes an article.
Relation to Excellence	Giving a presentation helps you look inward at what you do well, what you would like to present to the wider procurement community, and forces you to focus on what’s important when speaking. The same goes for publishing an article. It also gives experience for engaging leadership at your entity on the importance of the procurement function.
Spencer’s Notes	I enjoy presenting at conferences to get people’s opinions and engage with both new and seasoned veterans of our profession.



Criteria 14 – Best Value Procurement



Criteria Explanation	Statute or other enabling legislation that allows for the entity to perform best value procurements.
Relation to Excellence	Best value allows procurement staff and an entity to go beyond cost to look at how the procurement will affect the agency on multiple factors. Cost alone is not good enough in 2026 for many items, so having this tool shows that procurement departments can provide above average value to their entity through this procurement method.
Spencer's Notes	Best value procurements are the way to go whenever possible. Low bid often leads to higher problems and more costs if all factors are not considered.



Criteria 15 a-b – Sustainable Procurement



Criteria Explanation	Have a formal sustainable procurement policy or program and implementation of best practices
Relation to Excellence	An excellent entity is one who is the best steward of public funds and the land for years to come. Sustainable procurement shows a commitment to all stakeholders that the entity wants to do the best for them and by them.
Spencer’s Notes	This is one area that I wish we could focus on more. Often cost factors today mean we don’t take it into consideration but the costs tomorrow will be greater. We only get one world and need to take care of it the best we can.



Criteria 16 – Cooperative Procurement Strategy



Criteria Explanation	Have a formal strategy for the use of cooperative procurement contracts or engaging with cooperatives
Relation to Excellence	Cooperative procurement is a great solution to many of the goods and services that we purchase routinely. Using them can assist staff to focus on more strategic areas instead of routine purchases. Knowing when to use a tool and when not to shows a maturity in the program.
Spencer’s Notes	I love using cooperative procurement vehicles, but we do need to make sure that it is the most appropriate use of entity resources. The strategy will make sure that we are doing what is best for our stakeholders.



Criteria 17 – Authority of the CPO to Solicit and Award Contracts



Criteria Explanation	The CPO has the authority to solicit and award contracts for goods and non-professional services without a higher authority overturning the decision
Relation to Excellence	Entrusting the CPO to make strategic decisions allows an entity to mature the procurement function and have technical decisions lie with the SME for the function. It ensures that the best and most qualified responsive and responsible vendors are chosen with open and fair competition. This increases public trust in what we do.
Spencer’s Notes	The ability to overturn decisions by the CPO allows for potential political interference, which can erode public trust and should be avoided



Section 3 – Criteria 18 - Continued Pursuit of Excellence

Demonstrate a performance improvement over and above any criteria 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?



Discussion

1. Who here has successfully achieved criteria 18?
2. What was your story?
3. GDOT's Success
4. Ideas and encouragement
5. Tie to excellence

Section 4 – Wrap-Up and Q&A

1. Reviewed excellence and the need for it in our profession
2. Reviewed AEP Criteria and how they relate to excellence
3. Discussed AEP Criteria 18 in depth

“We are what we repeatedly do. Excellence, then, is not an act, but a habit.”

-Aristotle/Will Durant



Thank You

Questions?

Spencer Lord - slord@dot.ga.gov