



CERTIFIED LOCAL GOVERNMENT PURCHASING OFFICER (CLGPO)

POLICIES, PROCEDURES, REQUIREMENTS, &
APPLICATION PROCESS

SPONSORED BY THE
CAROLINAS ASSOCIATION OF GOVERNMENTAL PURCHASING

CERTIFIED LOCAL GOVERNMENT PURCHASING OFFICER POLICIES, PROCEDURES, REQUIREMENTS & APPLICATION PROCESS

Contents *(click on section title to go directly to that section)*

| | | |
|-------|--|----|
| I. | Introduction | 2 |
| II. | CLGPO Certification Committee | 2 |
| III. | Summary of Requirements for Certification Categories | 2 |
| A. | Exam and Certification | 2 |
| B. | Recertification | 2 |
| C. | Lifetime | 3 |
| IV. | Examination Requirements | 3 |
| A. | CAGP Membership | 3 |
| B. | CAGP Conference | 3 |
| C. | Core Courses | 3 |
| V. | Certification Requirements | 5 |
| A. | Membership | 5 |
| B. | Professional Experience | 5 |
| C. | CAGP Conference | 5 |
| D. | Core Courses | 6 |
| E. | Certification Points | 7 |
| F. | Examination | 9 |
| VI. | Recertification Requirements | 10 |
| VII. | Lifetime Certification Requirements | 11 |
| VIII. | Certification Effective and Expiration Dates | 11 |
| IX. | Expired CLGPO Certifications; Reinstatement | 12 |
| X. | Application Forms | 12 |
| XI. | Application Deadlines | 12 |
| XII. | Supporting Documentation | 13 |

CLGPO Committee Members

Chris S. Payne, CPM, CLGPO, City of Greensboro, *Chairman*

Sherri Barnhardt, CPPM, CLGPO, Cabarrus County

Karen Ewing, CLGPO, City of Charlotte

Hal Hayes, CLGPO, City of Burlington

Laura Jones, CPPM, CLGPO, Onslow County

Mary Waller, CLGPO, City of Raleigh

UNC School of Government Faculty Member

Norma Houston

CERTIFIED LOCAL GOVERNMENT PURCHASING OFFICER POLICIES, PROCEDURES, REQUIREMENTS & APPLICATION PROCESS

I. Introduction

Since 1986, the Carolinas Association of Governmental Purchasing has offered a voluntary certification program for governmental purchasing officers. Through this program, purchasing officers have the opportunity to earn and maintain designation as a Certified Local Government Purchasing Officer (CLGPO). The purposes of the CLGPO program are to:

- ✓ Provide greater service to taxpayers through more efficient purchasing.
- ✓ Recognize achievement of an established level of competency and proficiency among purchasing officials.
- ✓ Provide continuing professional development of purchasing officials and enhance their professional image.

CLGPO status is obtained by completing the certification requirements outlined in these policies. Once certified, CLGPO certification is renewed every five years assuming the certification holder has met the requirements for recertification.

II. CLGPO Certification Committee

The Certified Local Government Purchasing Officer Certification Committee (hereinafter “the Committee”) is established in Article XII, Section II of the Carolinas Association of Governmental Purchasing (CAGP). The Committee is responsible for administering the CLGPO program jointly with the UNC School of Government. The Committee is autonomous and operates independently of the general membership and Board of Directors of CAGP. The Committee is comprised of experienced purchasing professionals who have achieved and maintained CLGPO designation. The Chair of the Committee is elected from among the Committee members. Members of the Committee are appointed by the Chair in the Chair’s sole discretion. The School of Government faculty member working primarily in the field of public procurement serves as a permanent member of the Committee.

The Committee’s primary functions are to establish certification requirements and make certification award determinations. The award of certification is made in the sole discretion

of the Committee. All decisions by the Committee are final and not subject to appeal or review by any other entity, organization, or person. The Committee is authorized to promulgate any forms, guidelines, policies, or procedures it deems necessary to effectively administer the CLGPO Program.

III. Summary of Requirements for Certification Categories

A. Exam and Certification

To be eligible for CLGPO certification, an applicant must meet the following requirements:

1. Be a CAGP member in good standing.
2. Complete four core courses taught at the UNC School of Government.
3. Attend one CAGP Spring Conference.
4. Have at least three years’ experience in the governmental purchasing profession.
5. Pass all sections of the CLGPO certification examination.
6. Earn 22 certification points (APPLICANTS ARE STRONGLY ENCOURAGED TO EARN ALL 22 POINTS PRIOR TO SUBMITTING AN APPLICATION FOR CERTIFICATION).

To be eligible to take the CLGPO Certification examination, an applicant must meet requirements 1, 2, and 3.

The chart below compares the requirements for taking the CLGPO Certification examination and for CLGPO Certification:

| Requirement | Exam | Certification |
|------------------------|------|---------------|
| CAGP membership | ✓ | ✓ |
| Four SOG Core courses | ✓ | ✓ |
| CAGP Spring Conference | ✓ | ✓ |
| 3 years’ experience | | ✓ |
| Pass exam | | ✓ |
| 22 points | | ✓ |

B. Recertification

Once awarded, CLGPO certification must be renewed every five years. To be eligible for recertification of CLGPO certification, an applicant must meet the following requirements:

1. Be a CAGP member in good standing.
2. Earn 10 certification points.

C. Lifetime

Individuals who have obtained and maintained certification under the CLGPO program are eligible for lifetime certification in either of the following situations:

1. Aged 55 with 15 or more years of experience in public purchasing;
- or
2. Twenty or more years of experience in public purchasing, regardless of age.

IV. Examination Requirements

Purchasing officers pursuing CLGPO Certification are permitted to apply for and take the CLGPO examination without having completed all requirements for certification. To be eligible to take the CLGPO examination, applicants must meet the following three requirements:

A. CAGP Membership

An applicant must be a member in good standing of the Carolinas Association of Governmental Purchasing (CAGP) at the time the applicant submits his or her application.

B. CAGP Conference

An applicant must attend at least one CAGP Spring or Summer conference to be eligible to sit for the exam. If an applicant has completed the four core courses (see Section C below) but has not attended a CAGP conference, the conference at which the applicant sits for the exam may be counted toward this requirement.

The conference attended to satisfy the exam requirement DOES NOT COUNT toward the required 22 certification points that must be earned for CLGPO certification. However, if the applicant attends more than one conference prior to applying for certification, the additional conferences may count toward certification points. Applicants must provide proof of attendance at all conferences as part of their application packet. Verification of attendance at a CAGP Conference is obtained through CAGP.

C. Core Courses

Applicants must successfully complete all of the following four core courses:

1. Basic Principles of Local Government Purchasing
2. Intermediate Purchasing Seminar
3. Contracting for Construction and Design Services
4. Introduction to Local Government Finance (required as of 8/1/2010)

or

For applicants who took *both* Basic Principles of Local Government Purchasing and the Intermediate Purchasing Seminar *prior to 8/1/2010*, a six (6) hr. minimum course in Supervision or Management Training to be selected by applicant (this is not required for applicants who took *both* Basic Principles of Local Government Purchasing and the Intermediate Purchasing Seminar after 8/1/2010). If the applicant took *either* Basic Principles *or* Intermediate Purchasing prior to 8/1/2010, and took the other course *after 8/1/2010*, the applicant is required to take Introduction to Local Government Finance (see the following chart):

| Dates Basic Purchasing and Intermediate Purchasing Were Taken | Is Introduction to Local Government Finance Required? | Is Supervision or Management Training Required? |
|--|---|---|
| Both courses taken BEFORE 8/1/2010 | No | Yes |
| Both courses taken AFTER 8/1/2010 | Yes | No |
| One course taken BEFORE 8/1/2010 and the other course taken AFTER 8/1/2010 | Yes | No |

The core courses DO NOT COUNT toward the required 22 certification points that must be earned for CLGPO certification. However, if the applicant is *required* to take a Management or Supervision Training Course and *elects* to take Introduction to Local Government Finance, the applicant shall receive certification points credit for Introduction to Local Government Finance.

Each of the core courses is offered once annually at the UNC School of Government in Chapel Hill.

Applications to take the exam must be submitted by November 1st in the calendar year preceding the CAGP Spring Conference at which the examination is administered. For example, if an applicant wishes to take the exam at the 2016 CAGP Spring Conference, the application must be submitted by November 1, 2015.

An application to take the examination will be accepted even if all of the core courses have not been completed so long as the remaining required core courses will be completed before the applicant actually takes the examination.

Applicants must provide proof of attendance at the SOG core courses by submitting copies of the course completion certificates awarded at each SOG course (because an applicant's SOG transcript only confirms registration for the course but does not verify completion, an SOG transcript should not be submitted in lieu of the course completion certificates).

More information about the CLGPO Examination is provided in Section V.E below.

V. Certification Requirements

A. Membership

An applicant must be a member in good standing of the Carolinas Association of Governmental Purchasing (CAGP) at the time the applicant submits his or her application.

B. Professional Experience

An applicant must have been employed in the governmental purchasing profession a minimum of three years within the eight-year period before the date of application for certification. Credit may be awarded for employment in local, state, or federal agencies anywhere in the United States, as well as military.

For purposes of this requirement, duties of a governmental purchasing officer consist of performing technical work on behalf of a unit of federal, state, or local government in the procurement of a variety of supplies, materials, apparatus, equipment, construction and design services, and general services. Examples include: preparing specifications; analyzing purchase order requests; conferring with requisitioning personnel regarding specifications, quantity, and quality of merchandise; conducting (or assisting with) bid openings; soliciting price quotations; evaluating bids and quotations and making recommendations for award; interviewing sales representatives; examining invoices; maintaining and updating files and information on sources of supply for various commodities including catalogues and price lists; coordinating or assisting with public auctions; preparing and receiving bids for sale of surplus property.

The applicant must submit with his or her a statement from the applicant's employer(s) affirming that the applicant performed the duties of a governmental purchasing officer (regardless of job title) and verifying the dates of employment in a governmental purchasing.

C. CAGP Conference

An applicant must attend at least one CAGP Spring or Summer conference. The conference at which the applicant sits for the exam may be counted toward this requirement. The conference **DOES NOT COUNT** toward the required 22 certification points that must be earned for CLGPO certification. However, if the applicant attends more than one conference prior to applying for certification, additional conferences do count toward certification points. Applicants must provide proof of attendance at all conferences as part of their

application packet. Verification of attendance at a CAGP Conference is obtained through CAGP.

D. Core Courses

Applicants must successfully complete all of the following four core courses:

1. Basic Principles of Local Government Purchasing
2. Intermediate Purchasing Seminar
3. Contracting for Construction and Design Services
4. Introduction to Local Government Finance (as of 8/1/2010)

or

For applicants who took *both* Basic Principles of Local Government Purchasing and the Intermediate Purchasing Seminar *prior to 8/1/2010*, a six (6) hr. minimum course in Supervision or Management Training to be selected by applicant (this is not required for applicants who took *both* Basic Principles of Local Government Purchasing and the Intermediate Purchasing Seminar after 8/1/2010). If the applicant took *either* Basic Principles *or* Intermediate Purchasing prior to 8/1/2010, and took the other course *after 8/1/2010*, the applicant is required to take Introduction to Local Government Finance (see chart below):

| Dates Basic Purchasing and Intermediate Purchasing Were Taken | Is Introduction to Local Government Finance Required? | Is Supervision or Management Training Required? |
|--|---|---|
| Both courses taken BEFORE 8/1/2010 | No | Yes |
| Both courses taken AFTER 8/1/2010 | Yes | No |
| One course taken BEFORE 8/1/2010 and the other course taken AFTER 8/1/2010 | Yes | No |

The core courses DO NOT COUNT toward the required 22 certification points. However, if the applicant is *required* to take a Management or Supervision Training Course and *elects* to also take Introduction to Local Government Finance, the applicant shall receive certification points credit for Introduction to Local Government Finance.

Each of the core courses is offered once annually at the UNC School of Government.

Applicants must provide proof of attendance at the SOG core courses by submitting copies of the course completion certificates awarded at each SOG course (because an applicant's SOG transcript only confirms registration for the course but does not verify completion, an SOG transcript should not be submitted in lieu of the course completion certificates).

E. Certification Points

The applicant must earn 22 certification points to become certified. Points may be earned in three categories: (1) Professional Education, (2) Higher Education Degrees, and (3) Service to CAGP. **APPLICANTS ARE STRONGLY ENCOURAGED TO EARN ALL 22 POINTS PRIOR TO SUBMITTING AN APPLICATION FOR CERTIFICATION.**

Additional points earned beyond the required 22 points **shall not** be carried forward or credited in a subsequent recertification cycle. Applicants who have not achieved the required 22 certification points but otherwise meet all other requirements for certification may be approved for certification contingent on earning the remaining required points by or at the CAGP Spring Conference at which certification is to be presented. The Committee reserves the right to determine whether the items listed by an applicant will be credited toward an applicant's certification points requirement.

Specific categories of certification points are described below:

1. Professional Education

- a. **General.** Up to 22 points maybe awarded for professional education courses. One point is awarded for every seven hours of professional education instruction in a topic related to governmental procurement (excluding non-instruction components of a program such as breaks, lunch, receptions, and vendor shows).
- b. **Professional Purchasing Organizations.** Courses sponsored by established professional purchasing organizations (such as CAGP, ISM, NPI, NASPO, NIGP), or by a public institution or public agency (local, state or federal) dealing with a purchasing-related subject will be accepted automatically. Applicants will receive credit for only one CAGP-sponsored CLGPO exam review session during the period of time prior to certification, and will receive credit for only one CAGP-sponsored Regional Training in a calendar year.

Courses and continuing education programs relating to certification as a local government finance officer program administered by the School of Government and the North Carolina Government Finance Officers Association (www.ncgfoa.org) will be accepted automatically.

- c. **School of Government.** Finance and budget related conference and courses sponsored by the School of Government will be accepted automatically. A maximum of 3 points will be awarded for completion of the Municipal and County Administration, Fellows Program, and PELA courses sponsored by the School of Government. Points for other School of Government courses will be granted at the

discretion of the Committee depending upon the degree of relevance to the purchasing profession. Verification of attendance at any SOG-sponsored conference or program may be satisfied by either providing copies of the course completion certificates awarded at each SOG course or a copy of the applicant's School of Government transcript (SOG transcripts may be obtained by emailing the SOG Registration Office at Registration@sog.unc.edu).

- d. **State Division of Purchasing and Contracting (P&C).** Applicants may receive credit for professional education courses in purchasing-related subjects offered by the NC Department of Administration's Division of Purchasing and Contracting. Information about state purchasing courses is available on the P&C website: www.doa.state.nc.us/pandc.
- e. **Community College and University.** Applicants may receive credit for individual purchasing-related community college, college, or university courses which are not a part of an associate's, bachelor's, or graduate degree for which points are credited. Applicants must submit a copy of the official institutional transcript verifying the class or classes for which points are being claimed. Points for non-degree higher education classes will be granted at the discretion of the Committee depending upon the degree of relevance to purchasing, and will not necessarily be awarded on a one course, one point basis.
- f. **Indirect.** No more than 3 of the 22 professional education points will be awarded for courses deemed by the Committee to be indirectly relevant to public purchasing. Examples include courses in customer service, management training, fiscal management, business communications, computer training, excel program training, and risk management. Points awarded in this category will be at the discretion of the Certification Board and will not necessarily be awarded on a one course, one point basis.
- g. **Documentation.** Applicants must submit documentation verifying attendance at and completion of all profession education programs for which credit is claimed. Documentation must clearly identify the number of instructional hours taught in the program.
- h. **Expiration.** There is no specific retroactive timeframe beyond which professional education will expire for purposes of certification points; however, the Committee reserves the right to deny credit for any professional education courses deemed so old or obsolete as to no longer be relevant to the purchasing profession.

2. Higher Education Degrees

- a. **Bachelor.** Four certification points will be awarded for a bachelor's degree in any academic discipline deemed relevant to the purchasing profession. Examples include: business, accounting, supply chain management. Applicants must submit proof of degree award (either a copy of the diploma or official institutional transcript) with the application.
- b. **Associate.** Two certification points will be awarded for an associate's degree (two-year degree) in any academic discipline deemed relevant to the purchasing profession. Examples include: business, accounting, supply chain management. Credit will not be awarded for an associate's degree that is credited by a higher education institution toward a bachelor's degree if the applicant is also seeking credit for that bachelor's degree. Applicants must submit proof of degree award (either a copy of the diploma or official institutional transcript) with the application.
- c. **Graduate.** Two certification points will be awarded for a master's or other advanced degree deemed relevant to the purchasing profession. Examples include: MPA, MBA, Master's in Finance, or Master's in Accounting.
- d. **Number of points.** A maximum total of six points may be awarded in the Higher Education Degree category.

3. Service to CAGP

Points for service to CAGP will be awarded as follows:

- a. One point for CAGP board membership.
- b. One point per course for being an instructor for any SOG core course, CAGP Spring or Summer Conference, or CAGP Regional Training; *credit will not be awarded for instructing at in-service training conducted by the applicant's unit of government.*
- c. One point for chairing a CAGP committee established by the CAGP Board.
- d. One-half of one point for serving as a member of a CAGP committee established by the CAGP Board; *the applicant must provide a statement from the committee chair documenting the applicant's active service on the committee.*

No more than two points per year will be awarded for service, and no more than five points total for service will count toward the required 22 points for certification.

F. Examination

Applicants for certification must successfully complete an examination administered by the School of Government. Applicants may choose to apply for and take the examination prior to achieving the three-year purchasing experience or 22 certification points requirements (see

Section IV above). The examination consists of three sections: North Carolina purchasing law (including the Uniform Commercial Code, competitive bidding requirements, property disposal, and conflicts of interest and gifts); case problems involving application of proper purchasing law and practice; and questions regarding present and future issues facing the purchasing profession.

Three hours are allowed for completing the examination. The examination is offered once a year in conjunction with the CAGP Spring Conference. A retake examination is offered once at the School of Government at least 90 days after the date of the initial examination.

Applicants must achieve a score of at least 80% on *each* section in order to pass the entire examination. An applicant who does not achieve a passing score on any section(s) is only required to retake those sections. Upon achieving a score of at least 80% on all three sections (including retakes), the applicant is deemed to have successfully passed the full examination. The Committee may, in its discretion, direct an applicant to retake one or more core courses if that applicant repeatedly fails one or more sections of the examination.

An applicant who achieves a passing score on all three sections of the exam at the CAGP Spring Conference (or retake) and who otherwise has been approved for certification shall be awarded certification effective January 1st of the calendar year in which the entire exam is passed (i.e., applicant does not have to wait until the following calendar year to be awarded his or her certification). An applicant may elect to have his or her certification certificate formally presented at the CAGP Spring Conference the following year.

VI. Recertification Requirements

CLGPO Certification must be renewed every five years. To be recertified, the candidate must be a member in good standing of CAGP and earn a minimum of ten certification points during each five-year period. Points for recertification are earned in the same manner as for initial certification as provided for in Section V.E. Applicants who elect to retake the Contracting for Construction and Design Services course, the Intermediate Purchasing Seminar, and/or Introduction to Local Government Finance during the five-year recertification period shall receive credit for these courses (credit will be awarded only once for each course during the 5 year recertification period).

Additional points earned beyond the required ten points shall not be carried forward or credited in a subsequent recertification cycle. Any certification points awarded for professional education, higher education degrees, or service to CAGP during a previous certification or recertification cycle shall not be awarded credit in a subsequent recertification cycle.

Applicants who have not achieved the required ten recertification points but otherwise meet all other requirements for certification may be approved for recertification contingent on earning the remaining required points by or at the CAGP Spring Conference at which recertification is to be presented.

Applicants for recertification must submit their applications by November 1st of the calendar year in which certification expires. For example, if an individual's certification expires on December 31, 2016, the individual must submit a recertification application by November 1, 2016.

If an individual's certification has expired, the individual must meet the requirements set forth in Section IX in order to have his or her certification reinstated.

VII. Lifetime Certification Requirements

Individuals who have obtained and maintained certification under the CLGPO program are eligible for lifetime certification when the applicant meets *either* of the following criteria:

1. Age fifty-five with fifteen or more years of experience in governmental purchasing;
- or
2. Twenty or more years of experience in governmental purchasing, regardless of age.

Applicants for lifetime certification may submit an application by November 1st of the calendar year preceding their qualification date or in any application cycle thereafter. For example, if an applicant will achieve twenty years' experience in May 2016, the applicant may apply by November 1, 2015. The applicant also may apply in 2016 or any year thereafter.

An applicant who is eligible for lifetime certification is not required to satisfy the ten-point recertification requirement within the recertification cycle in which applicant applies for lifetime certification. An applicant whose certification has expired is not eligible for lifetime certification until the applicant's certification is reinstated as provided for in Section IX. To be eligible for lifetime certification, an applicant must have first been awarded CLGPO certification.

VIII. Certification Effective and Expiration Dates

CLGPO certification is effective for five calendar years. All certifications and recertifications are effective on January 1st in the year awarded and expire on December 31st five years later. For example, a certification awarded at the CAGP Spring Conference in 2016 is effective January 1, 2016, and expires on December 31, 2020.

IX. Expired CLGPO Certifications; Reinstatement

If an individual's certification has expired, the individual must retake the Law section of the CLGPO certification exam and be a member of CAGP in good standing. If the individual achieves a passing score of 80% or better, the individual's certification shall be reinstated. To apply for the examination, the individual must submit an application by November 1st in the calendar year immediately preceding the CAGP Spring Conference at which the examination is administered.

X. Application Forms

Applications for the CLGPO certification examination, certification, re-certification, or lifetime certification are available on the School of Government's Local Government Purchasing and Contracting website (www.ncpurchasing.unc.edu) under the "[Organizations and Certifications](#)" link.

Applications must be submitted electronically in pdf form to the CLGPO Certification Committee via email to Norma Houston, UNC School of Government, at nhouston@sog.unc.edu. Applicants must compile all application information into one pdf, with the application form appearing first, followed by all required supporting documentation. Questions about the application process may be directed to the Committee Chairman or Norma Houston (nhouston@sog.unc.edu or 919.843.8930).

XI. Application Deadlines

Applications for the CLGPO examination, certification, recertification, and lifetime certification are due by November 1st. The Committee reserves the right to reject any application that is submitted after the November 1st deadline.

Applications for recertification must be submitted by November 1st in the calendar year in which the applicant's certification expires. For example, if a purchaser's certification expires on December 31, 2016, the purchaser must submit an application for recertification by November 1, 2016.

Applications for lifetime certification may be submitted by November 1st in the calendar year preceding the applicant's eligibility for lifetime certification or in any year thereafter so long as the applicant's certification has not expired. For example, if a purchaser becomes eligible for lifetime certification in 2016, the purchaser may submit an application for lifetime certification by November 1, 2015.

XII. Supporting Documentation

Where indicated in these policies or on the application form, complete supporting documentation must be provided with the application in the form described in the “Application Form” section of these policies. All supporting documentation must be legible. Documentation of professional education must show the number of actual classroom instruction hours. The Committee reserves the right to reject any application that does not include complete and sufficient supporting documentation.