Model Responsible Purchasing Report Template

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# Overview

**How to Use this Template Document**

This Template Document serves as an ideal model for users to create their own responsible purchasing reports. Use the accompanying Guidance Document to help fill in the [bracketed] areas and add a cover page to form your own report. The recommended language can be modified if users do not feel it meets the needs of their specific reporting circumstances.

Much of the data that goes into a responsible purchasing report comes as a result of an effective system to track purchases. For more guidance on how to track purchases, please refer to **How to Track Purchases** in the Guidance document.

**Style Guidance**

Reports should be useful for internal staff as well as community members and stakeholders. Each section contains suggested formatting techniques to clearly outline information for readers.

Add **pictures** of purchased products or ongoing projects that demonstrate your responsible purchasing efforts. In captions, include specific details about the pictured product.

Add **charts or graphs** to illustrate changes over time or relationships. Be sure to add titles to each illustration so each exhibit can be referenced in the text.

**Highlight** important phrases or statistics. This can be done by bolding text, offsetting these points in the margins, and creating a summary box to emphasize your point.

This Model Responsible Purchasing Report provides recommendations for communicating your work concerning responsible purchasing. We offer the following as a resource to create reports that engender support for responsible purchasing programs and recognition for their value in saving money and resources, and improving the environment.

# Executive Summary

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| **[ORGANIZATION NAME]**’s responsible purchasing program was initiated in [**YEAR**] and reflects our commitment to sustainability, as mandated by **[MANDATE, e.g. climate commitment, zero waste policy, etc.]. [ORGANIZATION NAME]** defines **[responsible, environmental, or sustainable, depending on what term is used]** as promoting **[DEFINITION, e.g. environmental stewardship, protecting human health, and supporting local and global sustainability].**  In **[YEAR], [ORGANIZATION NAME]** spent a total of $**[AMOUNT]** on socially and environmentally responsible products. This represents **[PERCENT]** % of **[ORGANIZATION NAME]**’s annual procurement expense budget. Compared to conventional alternatives, these purchases saved $**[AMOUNT]**.  Our responsible purchases resulted in the following benefits:  **[NUMBER]** poundsCO2e emissions avoided  **[NUMBER]** gallons of water saved  **[NUMBER]** trees saved  **[NUMBER]** tons of waste reduced or diverted  **[OTHER BENEFITS]**  **[OTHER BENEFITS]**  In the past year, we piloted several new products, including:  **[NUMBER] [PRODUCT]**s were purchased and tested by **[DEPT].** The results included**:**  **[BENEFIT]**  **[CHALLENGE]**  As a result of the test, **[ORGANIZATION NAME]** intends to **[ACTIVITY]**.  **[NUMBER] PRODUCT]**s were purchased and tested by **[DEPT]**. The results included:  **[BENEFIT]**  **[CHALLENGE]**  As a result of the test, **[ORGANIZATION NAME]** intends to **[ACTIVITY].**  This year we established an important partnership with **[PARTNER]** designed to **[GOAL].** In the coming year, we plan to **[PLANNED ACTIVITIES]**.  Our other goals in the upcoming year include:  **[GOAL 1]**  **[GOAL 2]**  **[GOAL 3]** |

# Responsible Purchasing Policies

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| **[INSTITUTION]**’s Responsible Procurement Policies include the following **[LAWS/ORDINANCES/POLICIES]**:  **[Policy #1- Name, Date of policy adoption, description, and deliverables, URL]**  **[Policy #2- Name, Date of policy adoption, description, and deliverables, URL]**  **[Policy #3- Name, Date of policy adoption, description, and deliverables, URL]**  **[Policy #4- Name, Date of policy adoption, description, and deliverables, URL]**  **[Policy #5- Name, Date of policy adoption, description, and deliverables, URL]** |

# Purchase Summary

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| During **[TIME PERIOD]**, the **[INSTITUTION]** purchased $**[AMOUNT]** on socially and environmentally responsible products. The **[INSTITUTION]** saved$**[AMOUNT]** as a result of its responsible purchasing efforts.  This year’s responsible purchasing spending represents a **[PERCENTAGE]** % **[INCREASE/DECREASE]** over the previous year, when the **[INSTITUTION]** spent$**[AMOUNT]** on socially and environmentally responsible products and saved $**[AMOUNT]**. The **[INCREASE/DECREASE]** is partially due to **[REASON]**.  The savings realized by the responsible purchasing program equal **[NUMBER]** times as much as it costs to run the responsible purchasing program. Future efforts to increase cost savings include **[ACTION].**  Calculations for responsible purchasing spending are made by **[METHOD].** We are undertaking efforts to improve the accuracy and timeliness of our results, including **[ACTION].**  The social and environmental benefits achieved by the Responsible Purchasing Program include:  **[BENEFIT 1] – [DESCRIPTION]**  **[BENEFIT 2] – [DESCRIPTION]**  See the chart below for spending figures, by product category.   |  |  |  | | --- | --- | --- | | **[YEAR]** Responsible Purchasing Spending | | | | **Product Category** | **Certifications / Attributes** | **Amount** | | Agricultural Products |  | $**[NUMBER]** | | Cleaning Supplies |  | $**[NUMBER]** | | Construction Materials |  | $**[NUMBER]** | | Energy Using Products |  | $**[NUMBER]** | | Food Services |  | $**[NUMBER]** | | Green Power |  | $**[NUMBER]** | | Office Products |  | $**[NUMBER]** | | Vehicles and Maintenance |  | $**[NUMBER]** | | Miscellaneous Products |  | $**[NUMBER]** | | TOTAL RESPONSIBLE PURCHASES IN **[YEAR]** |  | $**[NUMBER]** | |

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| |  |  | | --- | --- | | **[YEAR]** Savings Due to Responsible Purchasing Program Purchases | | | **Item** | **Amount** | | Alternative Fuel Vehicles | $**[NUMBER]** | | Energy-Efficient Lighting | $**[NUMBER]** | | Energy-Efficient Electronics | $**[NUMBER]** | | Green Cleaning Products | $**[NUMBER]** | | Remanufactured Toner Cartridges | $**[NUMBER]** | | Renewable Energy | $**[NUMBER]** | | Reclaimed Water and Water-Efficient Fixtures | $**[NUMBER]** | | Retread Tires | $**[NUMBER]** | | Recycled Vehicle Maintenance Fluids | $**[NUMBER]** | | TOTAL SAVINGS DUE TO RESPONSIBLE PURCHASING PROGRAM PURCHASES | $**[NUMBER]** | |
| |  |  | | --- | --- | | ***[INSERT GRAPH OF RESPONSIBLE PURCHASING SPENDING IN PREVIOUS 1-5 YEARS]*** | ***[INSERT GRAPH OF SAVINGS DUE TO RESPONSIBLE PURCHASING PROGRAM PURCHASES IN PREVIOUS 1-5 YEARS]*** | |

# Purchase Details

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| Note: The Model Language below should be replicated for each of the product categories.  **[PRODUCT CATEGORY 1]**  A total of $**[AMOUNT]** was spent on **[PRODUCT CATEGORY]** in **[YEAR].** Social and environmental issues concerning **[PRODUCT CATEGORY]** products include **[ISSUES]**. **[RESPONSIBLE PRODUCT]** can address some of these issues by **[EXPLANATION]**.  Historically, **[INSTITUTION]** has purchased **[OBSOLETE PRODUCT]**, but has recently begun testing **[PRODUCT/SERVICE]**. The **[TEST PROGRAM]** held this year tested **[PRODUCT/SERVICE]** with **[RESULTS]**. This is the first time **[PRODUCT/SERVICE]** was deployed widely, and **[INSTITUTION]** will **[CONTINUE/DISCONTINUE/FURTHER EVALUATE]** its use.  The **[INSTITUTION]** continues to establish contracts that allow agencies to procure a wide variety of responsibly purchased **[PRODUCT CATEGORY]** which meet certain environmental standards. The following is a list of eco-labels and standards used to identify environmentally or socially preferable alternatives for **[PRODUCT CATEGORY].**  **[PRODUCT1] - [ECO-LABEL], [STANDARD]**  **[PRODUCT2] - [ECO-LABEL], [STANDARD]**   |  |  | | --- | --- | | ***(ADD PICTURES OF PRODUCT/SERVICE)*** | ***(ADD PICTURES OF PRODUCT/SERVICE)*** |  |  | | --- | | ***(ADD GRAPH COMPARING THIS YEAR’S [PRODUCT CATEGORY] SPENDING TO PREVIOUS YEARS’)*** | |

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| |  |  |  | | --- | --- | --- | | **[YEAR] [PRODUCT CATEGORY 1] Purchases** | | | | **Product** | **Description**  *(Why is it green? List relevant eco-label/standard)*  *(If it saves money, how much?)*  *(What conventional product does it replace?)* | **Amount Spent** | | **[PRODUCT]** | **[DESCRIPTION]** | **$[NUMBER]** | | **[PRODUCT]** | **[DESCRIPTION]** | **$[NUMBER]** | | **[PRODUCT]** | **[DESCRIPTION]** | **$[NUMBER]** | | **[PRODUCT]** | **[DESCRIPTION]** | **$[NUMBER]** | | **[PRODUCT]** | **[DESCRIPTION]** | **$[NUMBER]** | | **TOTAL AMOUNT SPENT ON [PRODUCT CATEGORY]** | | **$[NUMBER]** | |
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# End-of-Life Management

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| Since **[YEAR]**, **[DEPARTMENT]** has been responsible for organizational recycling efforts, according to **[LAW/ORDINANCE/POLICY]. [INSTITUTION]** spent a total of $**[AMOUNT]** on recycling efforts in **[YEAR]**.  The traditionally recycled items accepted for recycling by our facility are: **[ITEM 1]**, **[ITEM 2]**, **[ITEM 3]**.At present, the recycling rate is **[PERCENTAGE]** % of the overall waste stream.  The following items are not widely recycled by similar institutions, but **[INSTITUTION]** has arranged for the recovery of materials from these items.  **[ITEM 4]**  **[INSTITUTION]** has been recycling **[ITEM 4]** since **[YEAR].** The environmental effects of improper disposal of **[ITEM 4]** include **[EFFECTS]**. The potential for human health hazard also exists, due to the presence of **[CHEMICAL]** in **[ITEM 4]**.  **[INSTITUTION]** manages the recycling of **[ITEM 4]** through a partnership with **[PARTNER]**. In the past year, **[NUMBER/UNITS]** of **[ITEM 4]** were recycled, saving **[NUMBER/UNITS]** of **[MATERIAL]** from entering landfills. **[INSTITUTION}** saved$**[NUMBER]** through the recovery of **[ITEM 4]** by avoiding landfill disposal.  **[ITEM 5]**  **[INSTITUTION]** has been recycling **[ITEM 5]** since **[YEAR]**. The environmental effects of improper disposal of **[ITEM 5]** include **[EFFECTS]**. The potential for human health hazard is also present, due to the presence of **[CHEMICAL]** in **[ITEM 5]**.  **[INSTITUTION]** manages the recycling of **[ITEM 5]** through a partnership with **[PARTNER]**. In the past year, **[NUMBER/UNITS]** of **[ITEM 5]** were recycled, saving **[NUMBER/UNITS]** of **[MATERIAL]** from entering landfills. **[INSTITUTION}** saved$**[NUMBER]** through the recovery of **[ITEM 5]** by avoiding landfill disposal.  Future Efforts  Over the next year, **[INSTITUTION]** will pilot recycling program for **[ITEM 6]**. The environmental effects of improper disposal of **[ITEM 6]** include **[EFFECTS]**. The potential for human health hazard also exists, due to the presence of **[CHEMICAL]** in **[ITEM 6]**.  **[INSTITUTION]**’s recycling rate could increase if **[NEW PROGRAM]** were implemented. This program would involve **[STAKEHOLDERS]** undertaking **[ACTIONS]**. The anticipated benefit is $**[NUMBER]** and **[NUMBER/UNITS] [MATERIAL]** diverted from landfills.   |  |  | | --- | --- | | ***(ADD GRAPH OF TOTAL WASTE COLLECTED OVER TIME)*** | ***(ADD GRAPH OF TOTAL RECYCLED MATERIALS COLLECTED OVER TIME)*** | | ***(ADD GRAPH OF RECYCLING SPENDING OVER TIME)*** | ***(ADD GRAPH OF RECYCLING RATE OVER TIME)*** | |

# Recognition and Awards

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| **[INSTITUTION]** has received significant recognition for its responsible purchasing efforts over the past year. **[INSTITUTION]** was the proud recipient of the **[YEAR] [AWARD]** for its **[PROJECT]**.  Previous awards earned by **[INSTITUTION]** include:  **[YEAR] – [AWARD], [AWARDING ORGANIZATION]**  **[YEAR] – [AWARD], [AWARDING ORGANIZATION]**  **[YEAR] – [AWARD], [AWARDING ORGANIZATION]**  **[INSTITUTION]** was mentioned in **[MEDIA]** on **[DATE]** for its **[PROJECT]**. It was also listed in **[MEDIA]** on **[DATE]**, **[MEDIA]** on **[DATE]**, and **[MEDIA]** on **[DATE]**.  **[INSTITUTION]**’s Responsible Purchasing Program supports other environmental initiatives within the organization, and purchasing was used to earn points toward **[CERTIFICATION]**. The responsible purchasing program **[COORDINATOR/MANAGER/DIRECTOR]** submitted purchase data to partners in **[DEPARTMENT]** who managed the process to earn **[CERTIFICATION]**. |

# Challenges and Opportunities

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| In **[YEAR]**, **[INSTITUTION]** encountered the following challenges to the responsible purchasing program:  **[CHALLENGE 1] – [EXPLANATION]**  **[CHALLENGE 2] – [EXPLANATION]**  **[CHALLENGE 3] – [EXPLANATION]**  **[CHALLENGE 4] – [EXPLANATION]**  **[CHALLENGE 5] – [EXPLANATION]**  **[INSTITUTION]** is addressing these challenges and advancing its work by:  **[OPPORTUNITY 1] – [EXPLANATION]**  **[OPPORTUNITY 2] – [EXPLANATION]**  **[OPPORTUNITY 3] – [EXPLANATION]**  **[OPPORTUNITY 4] – [EXPLANATION]**  **[OPPORTUNITY 5] – [EXPLANATION]** |

# Next Steps and Recommendations

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| **[INSTITUTION]** plans on implementing the following recommendation and next steps over the course of **[YEAR].**  **[RECOMMENDATION 1]** [Description of recommendation]  **[RECOMMENDATION 2]** [Description of recommendation]  **[RECOMMENDATION 3]** [Description of recommendation]  **[INSTITUTION]** has set the following goals for **[YEAR]**:  **[GOAL 1]** [Description of goal]  **[GOAL 2]** [Description of goal]  **[GOAL 3]** [Description of goal] |

# Acknowledgements and Additional Resources

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| **[INSTITUTION]** would like to thank the following individuals for their contributions to this Responsible Purchasing Report: **[NAME]**, **[NAME]**, **[NAME]**.  **[INSTITUTION]** maintains relationships with the following organizations:  **[ORGANIZATION 1]**  **[ORGANIZATION 1]** assists **[INSTITUTION]** with **[ACTIVITY]**. **[FURTHER DESCRIPTION OF RELATIONSHIP].**  **[ORGANIZATION 2]**  **[ORGANIZATION 2]** assists **[INSTITUTION]** with **[ACTIVITY]**. **[FURTHER DESCRIPTION OF RELATIONSHIP].**  Glossary  **[TERM 1] – [DEFINITION]**  **[TERM 2] – [DEFINITION]**  List of Acronyms and Terms Used in the Report  **[ACRONYM 1] – [FULL PHRASE]**  **[ACRONYM 2] – [FULL PHRASE]**  Calculators Used to Determine Cost and Environmental Benefits  **[CALCULATOR 1] – [SOURCE], [LINK]**  **[CALCULATOR 2] – [SOURCE], [LINK]**  **[ADDITIONAL RESOURCES]**  **[DESCRIPTION OF RESOURCES]**  Contact  **[NAME]**  **[TITLE**  **[INSTITUTION]**  **[PHONE NUMBER]**  **[EMAIL ADDRESS]** |