

Sustainable Purchasing Policies: A Tale of Two Cities

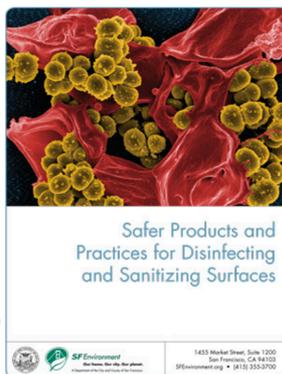
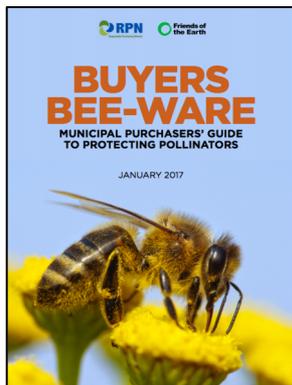


RPN Webinar
Dec 4, 2018

Today's Audience: 235+ Registrants

- **35% - Local Governments**
- **18% - Businesses** (buyers, sellers, consultants)
- **15% - State Agencies**
- **11% - Nonprofits**
- **9% - Higher Education**
- **8% - Federal Agencies** (EPA, USDA, DOE)
- **4% - Schools** (K-12)

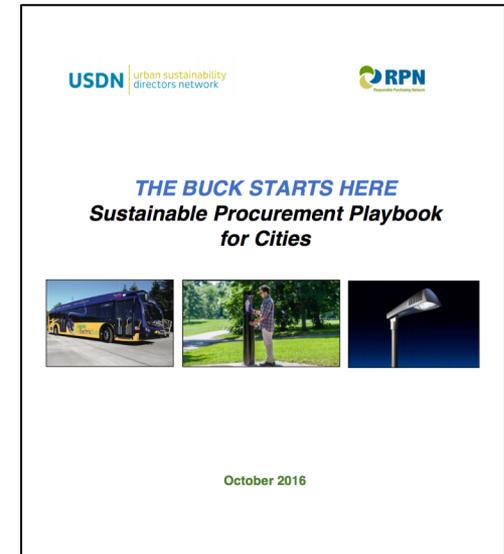
Responsible Purchasing Network



RPN is a nonprofit network that develops cutting-edge tools to help government agencies, public institutions, and businesses purchase sustainable products and services.

RPN Resources

- ~20 Responsible Purchasing Guides
- Webinars
- RPN newsletter
- Technical assistance
- Model specifications
- Sample purchasing policies



Presenters



Alicia Culver

Executive Director, RPN

Sustainable Purchasing Policy Development Best Practices



Stacey Foreman

**Sustainable Procurement Coordinator,
City of Portland, Oregon**

City of Portland Sustainable Procurement Policy



Karl Bruskotter

**Sustainable Procurement Advisor,
City of Santa Monica, CA**

Sustainable Procurement and Easy Guides

Audio and Recordings

- Participants are muted.
- This presentation will be recorded.
- The slides and recording will be posted on RPN's website.
- Please fill out the survey following the webinar.



Questions?

Submit questions for presenters or the moderator at any time by typing them into the GoToWebinar **QUESTION BOX.**



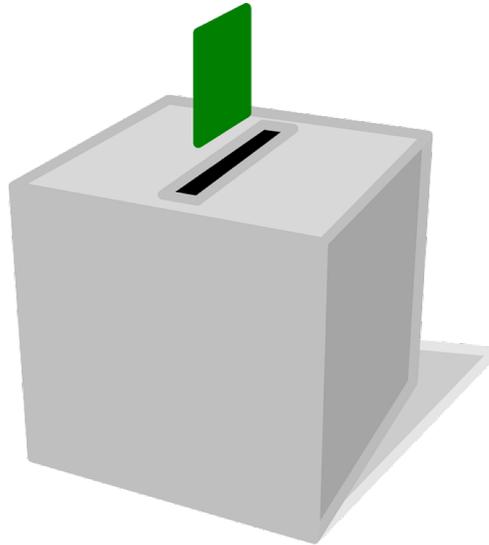
We will compile and answer the questions...

- **After each presenter and**
- **At the end of the webinar**

Polling Question #1

Does your jurisdiction or organization have a sustainable purchasing policy?

VOTE NOW



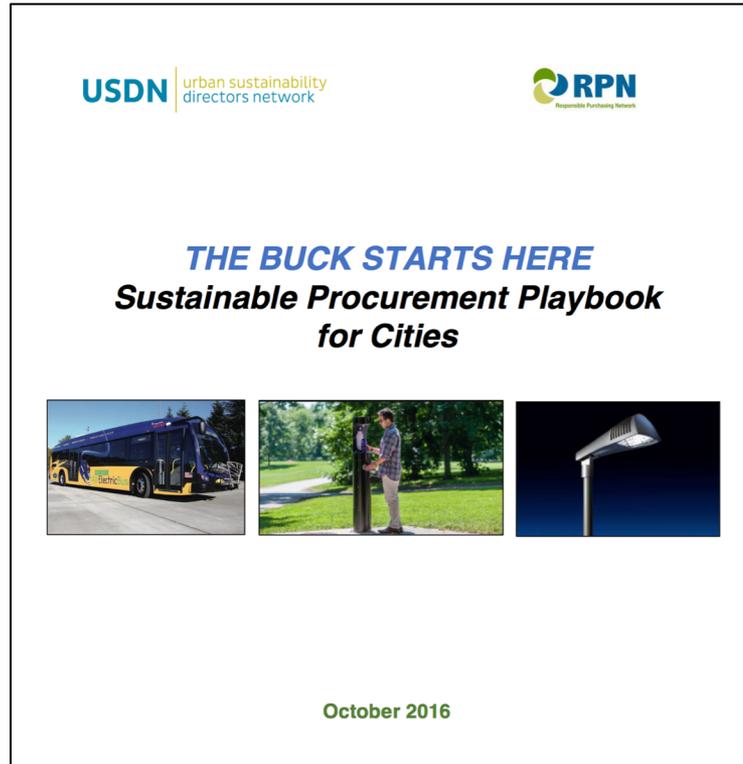
Sustainable Purchasing Policy Development Best Practices



Alicia Culver, RPN

RPN Webinar

December 4, 2018



http://responsiblepurchasing.org/purchasing_guides/playbook_for_cities/index.php



Chapter 3: Developing a Sustainable Procurement Policy

This chapter showcases sustainable procurement policies adopted by USDN members, explains why a sustainable procurement policy is an essential element of an effective sustainable procurement program, and recommends eight best practices for cities and counties to follow when formulating a sustainable procurement policy. It also summarizes the various types of policy vehicles such as laws and executive orders, discusses category- and product-specific sustainable procurement policies, and presents a model sustainable procurement policy that local governments can adopt as-is or tailor to meet their needs.

Chapter 3 Draft Overview

- Why should cities and counties adopt a sustainable procurement policy?
- Overview of Various Types of Sustainable Procurement Policy Vehicles
- Best Practices for Creating a Sustainable Procurement Policy
- Key Elements of an Effective Sustainable Procurement Policy
- Product- and Outcome-Specific Sustainable Procurement Policies

Making a Difference with Sustainable Purchasing

We're committed to reducing our impact on the environment and improving our community through social programs, environmental initiatives and sustainable purchasing.

Our sustainable purchasing policy promotes the purchase of products which are environmentally responsible, ethically sourced and come with minimal packaging.

The policy also includes a supplier code of conduct – this ensures that our suppliers are also committed to reducing their impact on the environment and supporting the community.

The policy, code of conduct and tendering process are ways we encourage businesses to integrate environmental and social programs into their business practices. As part of the tender process, you may have the opportunity to highlight and be scored on your environmental and social programs.



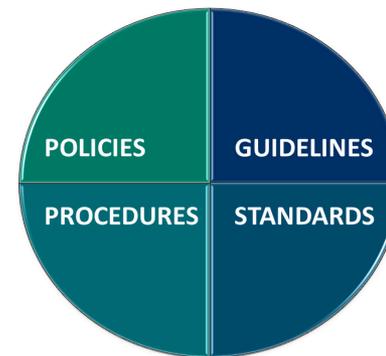
Why Adopt a Sustainable Purchasing Policy?



- Demonstrates your commitment to “Lead by Example”
- Stimulates discussions among staff about policy goals
- Facilitates creation of program infrastructure
- Supports champions who are already doing the right thing
- Clarifies sustainable procurement procedures for purchasing agents and vendors (e.g., planning, development of standards, and reporting requirements)
- May enable your organization qualify for sustainability awards and environmental grants

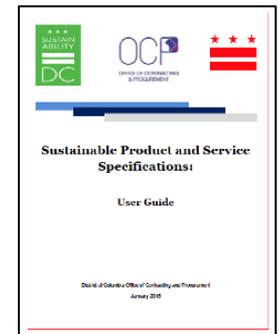
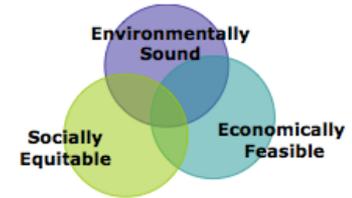
Types of Sustainable Purchasing Policy Vehicles

- Executive Orders
- Laws, Ordinances and Resolutions
- Administrative Directives & Guidance
- Other Opportunities to Insert Sustainable Purchasing Language
 - Sustainability Plans
 - Climate Action Plans
 - Zero Waste Plans
 - Procurement Procedures Manuals



Sustainable Procurement Policy Best Practices

1. Addresses the three pillars of **sustainability**: environmental, social and economic
2. Clearly delineates the **roles and responsibilities** of jurisdiction's various departments
3. Directs jurisdiction to develop sustainable procurement **tools** (e.g., standards)
4. Directs jurisdiction to make sustainable procurement the **default** action for all major purchasing



Sustainable Procurement Policy

Best Practices (continued)

5. Directs jurisdiction to set and meet sustainable procurement **goals**
6. Encourages employees to use life-cycle costing, total cost of ownership or other **best value** assessments, when making purchasing decisions
7. Includes **tracking and reporting** requirements
8. Directs jurisdiction to periodically review/**update** its sustainable procurement policy and procedures



Sustainable Purchasing Policy Template

**CITY OF _____ SUSTAINABLE PURCHASING POLICY
TEMPLATE**

*Drafted by Responsible Purchasing Network for the Urban Sustainability Directors Network
(June 2018)*

Key Elements of a Sustainable Purchasing Policy

- Purpose
- Policy Statement
- Promotion of Sustainability Benefits
 - Use of Credible Eco-Labels
- Implementation and Staff Responsibilities
 - Support for Related Policies
 - Definitions





Purpose

1. Purpose

In accordance with the City of _____'s [Sustainability Policy/Plan¹], the City recognizes its responsibility to minimize negative impacts on human health and the environment while supporting a diverse, equitable, and vibrant community and economy. The City also understands that the types of products and services it buys have inherent social, human health, environmental and economic impacts, and that it should make procurement decisions that embody the City's commitment to sustainability.

This Sustainable Purchasing Policy is intended to:

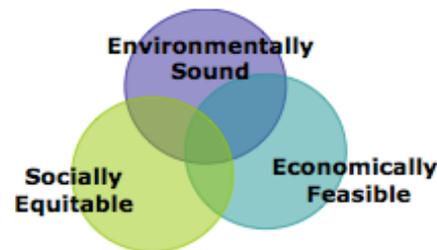
- Communicate the City's commitment to sustainable purchasing to its employees, vendors, and community;
- Complement and support implementation of the City's sustainability goals and policies;
- Provide implementation guidance; and
- Empower employees to be innovative and demonstrate leadership by considering sustainability benefits when making purchasing decisions.

Policy Statement

2. Policy

2.1 General Policy Statement

All City employees will purchase products or services in a manner that protects human health and the environment, is fiscally responsible and, and promotes social equity, disadvantaged business opportunities and other economic benefits to the community. This policy applies to all City departments and employees, vendors, contractors and grantees for all products and services provided to the City.





Sustainability Benefits



2.2. Sustainability Benefits

City employees will encourage sustainability benefits to the maximum extent feasible when writing specifications, evaluating bids, and making other purchasing decisions.

- **Environmental Benefits**

- Minimizing air/water pollution, GHG emissions, and waste; protecting health, biodiversity, forests/ and oceans; conserving energy/water; promoting transparency

- **Social Equity Benefits**

- Promoting local firms, DBEs, B Corps, certified green business

- **Fiscal Benefits**

- Lowering consumption/financial risks, reducing maintenance costs, promoting “Best Value”/quality, aggregating demand/cooperative purchasing

Use of Credible Eco-Labels

2.3 Use of Social and Environmental Product or Service Labels

City employees are encouraged to use independent, third-party social and/or environmental product or service labels (sustainability labels) when setting standards, writing specifications for, or procuring products or services as long as such labels:

- Were developed and awarded by an impartial third-party;
- Were developed in a public, transparent, and broad stakeholder process; and
- Represent specific and meaningful leadership criteria for that product or service category.

In addition, whenever possible, sustainability labels used in product or service specifications should be based on a standard that addresses multiple attributes and life-cycle considerations with claims verified by an independent entity. Examples of credible sustainability labels include, but are not limited to, ENERGY STAR, Green Seal, UL EcoLogo, Cradle to Cradle, Safer Choice, Forest Stewardship Council, and the Electronic Products Environmental Assessment Tool (EPEAT).



Implementation and Staff Responsibilities

3. Implementation and Responsibilities

The City will provide sufficient staffing, funding and material resources necessary to ensure that its Sustainable Purchasing Program goals and priorities are met and results are reported. The City will support employee engagement and training, professional services, product and service pilot tests, and the development and utilizations of standards, checklists, guidance on best practices, educational materials, and tracking tools.

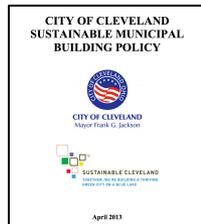
- **Establish a Sustainable Purchasing Committee**
- **Create a Sustainable Purchasing Program**
- **Undertake Action Planning**
- **Develop standards, Best Practices Manual, tools**
- **Create contracts**
- **Conduct outreach and training**
- **Collect data and report results**



Supporting Other Related Policies

4. *Supporting Other Related Local, State and Federal Policies*

It is the intent of this policy to support and complement all relevant City laws, regulations, resolutions and plans as well as applicable state and federal laws and regulations. [See examples of the types of policies that can be referenced in a City's sustainable purchasing policy.]



- **City Policies (Ordinances, Regulations and Executive Orders)**
 - Green building, Energy management, Recycling, Polystyrene ban, Supplier diversity, Health and Wellness
- **Sustainability Plans**
 - Climate Action Plans, Zero Waste Plans, Food Policy Council Plans, etc.
- **Federal and State Laws**
 - Clean Air and Clean Water Acts,
 - State recycling and minimum wage laws

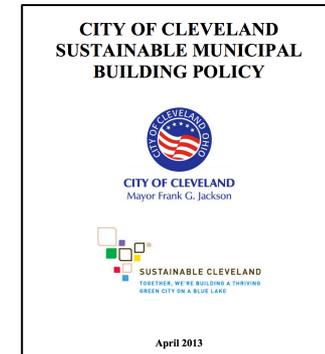
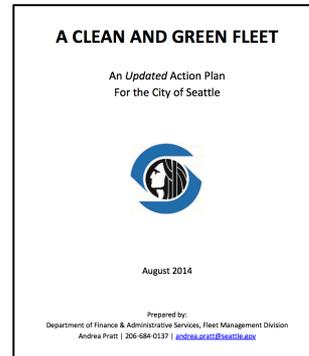
Purchasing Policies Based on Specific Sustainability Outcomes

- “Buy Local”
- Energy-Efficient/ENERGY STAR Purchasing
- Ethical/Fair Trade/Sweat-free Purchasing
- Sustainable Infrastructure
- Toxics Reduction

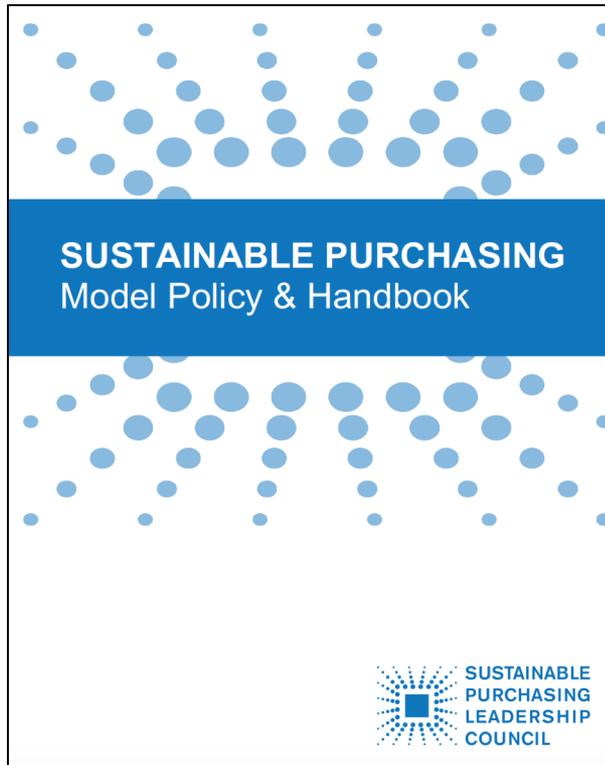


Product-Specific Sustainable Purchasing Policies

- Bottled Water
- Green Cleaning
- Green Fleet
- Green IT
- Integrated Pest Management (IPM)
- Paper Reduction & Purchasing
- Renewable Energy
- Sustainable Food



SPLC Model Policy and Handbook



Appendix 1: Model Policy Template

Policy to Establish a Leadership Sustainable Purchasing Program

It is the policy of (organization) to be a leader in sustainability.

With this policy, we are establishing a sustainable purchasing program at (organization). This will strengthen our commitment to (reference relevant sustainability/corporate social responsibility policies or goals for the organization, such as commitment to the UN Sustainable Development Goals, other corporate social responsibility (CSR) and/or environmental goals).

Our sustainable purchasing program will address the environmental, social, and economic impacts associated with the (organization's) purchase of an estimated annual (insert \$ dollar amount) in goods and services.

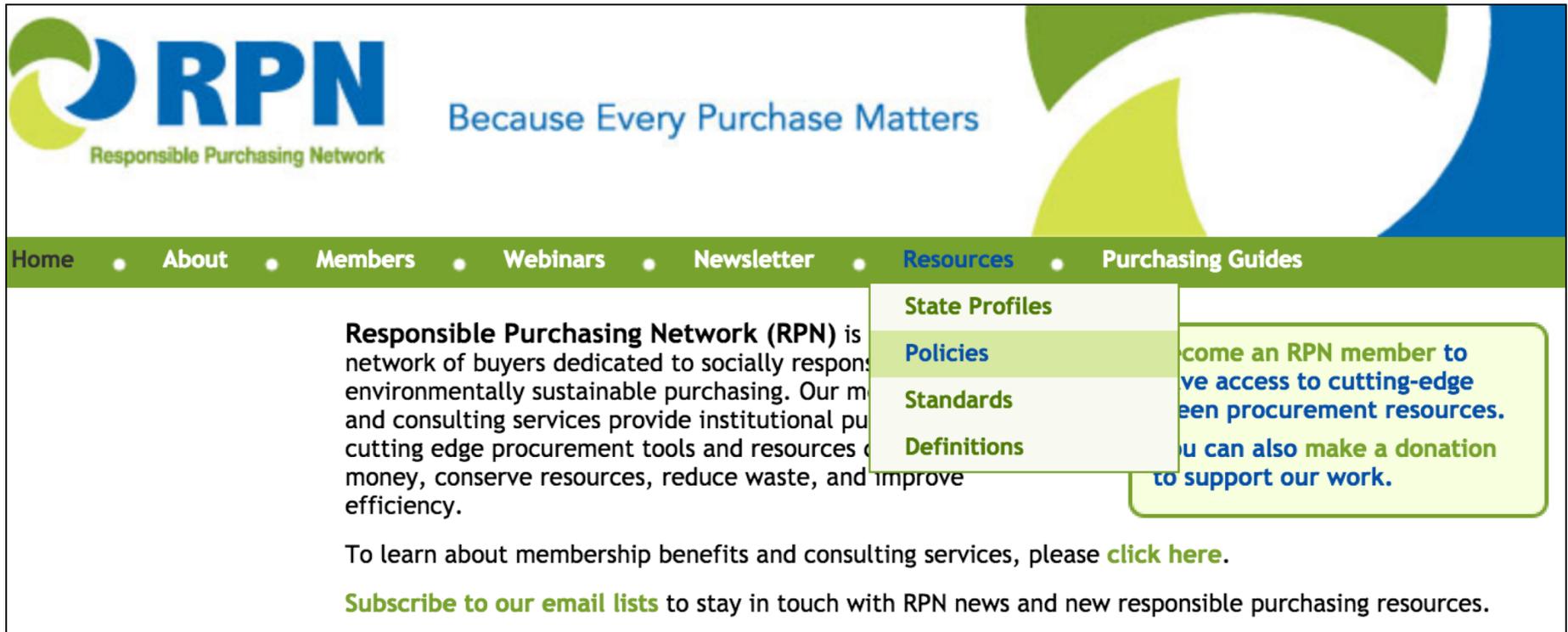
Sustainable purchasing means making sure that our suppliers – and the products and services they supply – deliver value for money and generate benefits not only for (organization), but also for the environment, society, and the economy.

We commit to the following actions:

- 1. Resources.** Allocating sufficient staff and financial resources to the sustainable purchasing program to ensure program goals are met, outcomes are achieved, and results are reported.
- 2. Leader.** Appointing a leader within the (purchasing/contract management department) (hereafter "the program leader") who has the authority to design and implement the sustainable purchasing program.
- 3. Engagement.** The program leader will establish and lead an (inter-departmental/cross-agency/cross-functional advisory committee) to establish, support, promote, coordinate, integrate and maintain the sustainable purchasing program. This advisory committee will meet at least (once every quarter).
- 4. Analyze Spend.** To inform program design and strategic planning, the program leader will create a shared understanding of current and future spending patterns and purchasing needs at (organization) and identify the largest and most material sustainability-related impacts and opportunities generated from by our purchasing. This will be done by conducting a sustainability spend analysis or identifying existing comparable studies.
- 5. Plan.** The program leader, in consultation with the advisory committee and other stakeholders, such as key budget holders and suppliers, will create a Sustainable Purchasing Action Plan (hereafter "Action Plan"). The Action Plan will:
 - a. Prioritize categories of spending for sustainable purchasing based on the results of the sustainability spend analysis;
 - b. Establish quantitative goals for each category;
 - c. Identify the specific implementation strategies to achieve goals; and
 - d. Describe coordination, communications, measurement, and reporting responsibilities.
- 6. Implementation.** The program leader will engage appropriate internal and external stakeholders to implement the Action Plan. Implementation strategies may be taken at any step in the purchasing cycle, and may include:
 - a. Undertaking a needs analysis to potentially reduce spending in a given category;
 - b. Conducting market assessments and engage suppliers to determine the availability of viable and innovative procurement options;

<https://www.sustainablepurchasing.org/request-policy/>

Sustainable Purchasing Policy Resources on RPN Website



RPN
Responsible Purchasing Network

Because Every Purchase Matters

Home • About • Members • Webinars • Newsletter • **Resources** • Purchasing Guides

- State Profiles
- Policies**
- Standards
- Definitions

Responsible Purchasing Network (RPN) is a network of buyers dedicated to socially responsible and environmentally sustainable purchasing. Our membership and consulting services provide institutional purchasers with cutting edge procurement tools and resources to save money, conserve resources, reduce waste, and improve efficiency.

To learn about membership benefits and consulting services, please [click here](#).

Subscribe to our email lists to stay in touch with RPN news and new responsible purchasing resources.

Join an RPN member to have access to cutting-edge procurement resources. You can also make a donation to support our work.

Questions? Comments?



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City of Portland Sustainable Procurement Policy

Responsible Purchasing Network
Webinar

December 4, 2018

Stacey Foreman, Sustainable Procurement Coordinator
City of Portland, Oregon

Sustainable Procurement Program Overview

- 1 FTE dedicated to managing sustainable procurement program
 - Housed in central procurement office
 - Responsibilities:
 - Research products, standards, and best practices
 - Craft specifications, templates, and policies
 - Facilitate procurement process integration
 - Provide hands-on project implementation assistance
 - Conduct education and outreach
 - Build relationships and facilitate engagement
- Small program budget for miscellaneous expenses and occasional consultant work

The CITY OF PORTLAND Oregon

Sustainable Procurement

Sustainable Procurement Resources for Employees
Best practices, example criteria, metrics, and related sustainable procurement resources for employees

Buying Green Case Studies
Buying green experiences from City of Portland Bureaus

- ▶ [Asphalt Release Agent - Soy-Based](#)
- ▶ [Custodial Supplies Management](#)
- ▶ [Diesel Coolant Heaters](#)
- ▶ [Electric Vehicles](#)
- ▶ [Electricity Generation, On-Site - Biogas](#)

[+ View 8 more links](#)

Buying Green Example Specifications
Example green specifications used in City solicitation documents

- ▶ [Corporate Responsibility Evaluative Questions](#)
- ▶ [Data Center Colocation Services](#)
- ▶ [Furniture - Office - 2018](#)
- ▶ [Graffiti Removal Services - 2014](#)
- ▶ [Hosted IT Services - Data Center Questions](#)

[+ View 5 more links](#)

Sustainable Procurement Publications
Reports and publications related to the City's Sustainable Procurement Program

- ▶ [Sustainable Procurement Program Strategic Plan](#)
- ▶ [Green Spend Snapshot FY15-16](#)
- ▶ [Green Spend Snapshot FY14-15](#)
- ▶ [Sustainable Supply Chain Analysis - Executive Summary](#)
- ▶ [Green Spend Snapshot FY13-14](#)
- ▶ [Green Spend Snapshot - December 2013](#)

Sweatshop Free Procurement Policy and Compliance
Information on the City's effort to buy uniforms made in factories with fair labor practices

Sustainable Procurement Policies
City Sustainable Procurement Policy and related policies

How We Got To Today

- **WHY Sustainable Procurement at the City?**
 - Aligns with Existing Values
 - External Stakeholder Pressure
 - Walk Our Talk
 - Huge Opportunity

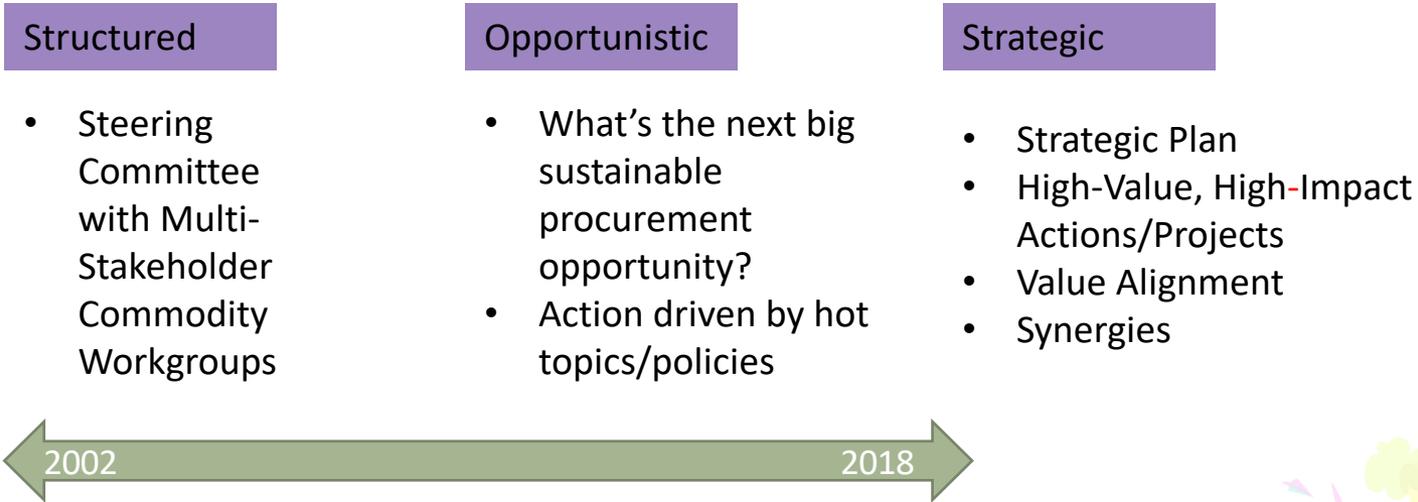
Sustainability Values

Stewardship
Diversity
Excellent Customer Service
Responsive
Healthy, Productive Employees
Best Value Contracting
GHG Reduction
Healthy Community
Cost Optimization
Leadership
Due Diligence
Risk Management



How We Got To Today

Program Evolution



Sustainable Procurement Policy Background

- 2002 Sustainable Procurement Strategy
 - Plus City Procurement Code with “Buy Recycled” and related mandates
- 2008 Sustainable Procurement Policy (very minor update in 2010)
 - Plus a long list of single-issue policies and other sustainability policies that have procurement-related mandates
- 2018 Sustainable Procurement Policy (major update)
 - Passed by City Council 8/22/18
 - Posted on City’s Sustainable Purchasing Program website at <https://www.portlandoregon.gov/brrfs/article/695574>



Sustainable Procurement Policy Background

■ 2018 Policy Update Goals

- Consolidate sustainable procurement-related policies
- Expand metrics/reporting
- Provide better decision-making direction for employees
- Set foundation to be more strategic, both in activities and communications



Sustainable Procurement Policy Details

■ Policy Sections

- Purpose
- Applicability
- Policy Statement
- Guiding Principles
- Prioritization
- Best Practices
 - Baseline and Emerging
- Roles and Responsibilities
- Policy Compliance
- Metrics and Reporting
- Policy Update and Continuous

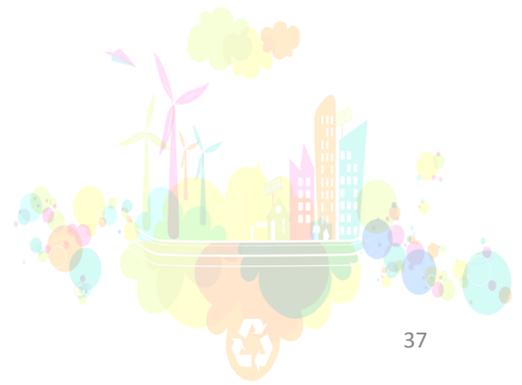
- Maintenance Process
- Definitions
- Related Sustainability Policies & Resolutions
- Attachment 1: Code of Conduct for Apparel Manufacturers
- Attachment 2: Environmentally Responsible Paper Standard



Sustainable Procurement Policy Details

- Section 1: Purpose
 - Establishes WHY this is important and of value to the City
- Section 2: Applicability
 - Confirms this is an internal policy that applies to all City employees
- Section 3: Policy Statement
 - In broad terms, what is this about?

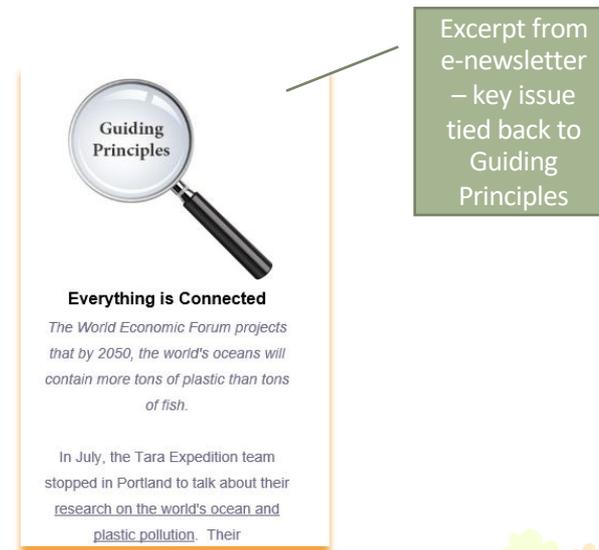
3. Policy Statement
All City employees shall utilize the City's [sustainable procurement guiding principles](#) and follow [sustainable procurement best practices](#) when planning and designing projects, developing project and operations budgets, developing asset management plans, writing product and service specifications or standards, selecting materials, making purchasing or supplier decisions, and developing and managing City contracts and price agreements as applicable to their [roles and responsibilities](#) and/or to a specific project. In doing so, City employees shall strive to be leaders in sustainable procurement and reduce adverse social, human health, and environmental impacts associated with City purchases while maintaining fiscal health, both in the short and long-term.



Sustainable Procurement Policy Details

■ Section 4: Guiding Principles

- Provide high-level, values-based direction
 - Decision-making guidance in absence of specifics
- Will be used for consistent themes/threads in program communications/messaging



Guiding Principles

Everything is Connected

The World Economic Forum projects that by 2050, the world's oceans will contain more tons of plastic than tons of fish.

In July, the Tara Expedition team stopped in Portland to talk about their [research on the world's ocean and plastic pollution](#). Their

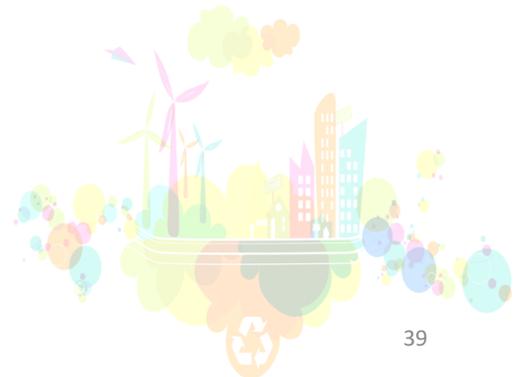
Excerpt from e-newsletter – key issue tied back to Guiding Principles



Sustainable Procurement Policy Details

■ Section 5: Prioritization

- Based on City commitments, 2016 Supply Chain Analysis, and external pressures
- Issue-Based (e.g. GHGs, toxics, etc.)
- Target issues will be used to focus program efforts
- Directs development of a prioritization toolkit for employees
 - How to identify “High-value, High-impact” actions address trade-offs



Sustainable Procurement Policy Details

■ Section 6: Best Practices - Baseline

- “How we do business” action items
 - Grouped by Prioritization Issue Area (e.g. GHGs, Toxics, etc.)
- Developed largely from historical mandates (*policy consolidation*)
- Helps with “where does it say I have to do that?” stakeholders
- Will be used in “how” resources – like checklists, example specifications, etc.

Greenhouse Gases (GHG) Emissions Reduction

1. Invest in energy efficient products, services and technologies that result in simple paybacks of ten years or less.
2. Specify and buy recycled content products with as high post-consumer waste content as possible while meeting responsible performance specifications; including packaging and shipping materials. Key materials to target for recycled content include paper, plastics, metals, asphalt, and concrete.
3. Specify and buy paper products that meet the City’s [Environmentally Responsible Paper Standard](#).

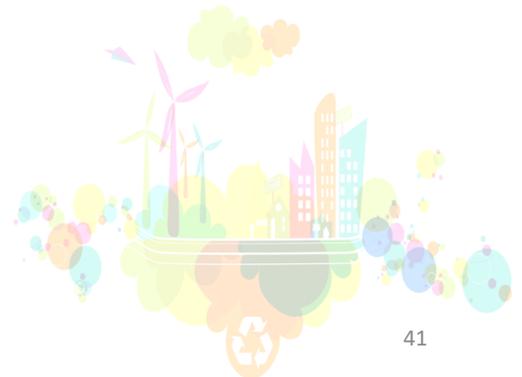


Sustainable Procurement Policy Details

- Section 6: Best Practices - Emerging
 - Intended for action items that are desirable, but are not ready for widespread implementation yet

Supplier Diversity and Fair and Safe Supply Chains

1. Request [conflict minerals](#) reporting from applicable electronics manufacturers detailing their due diligence activities to source conflict-free 3TG following the Organisation for Economic Co-operation and Development (OECD) Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas. Utilize due diligence information to support the development and purchase of conflict-free products.
2. Evaluate and engage contractors on their company and supply chain sustainability practices and performance based on international conventions/declarations and industry best practices, including labor, governance and ethics. Seek continuous improvement.



Sustainable Procurement Policy Details

- Section 7: Roles & Responsibilities
 - Detailed for Each Audience Type
 - By type of job, not by department
 - Will guide the creation of online employee resources by audience
 - Resources by audience was a common stakeholder request during program strategic planning

Procurement Services and Bureau Procurement Staff

- Review solicitations and procurements for [sustainable procurement best practices](#).
- Initiate conversations and work with Bureau staff to incorporate [sustainable procurement best practices](#) and related City sustainability mandates into solicitations, contracts, and price agreements.
- Collaborate with Sustainable Procurement Program staff, including coordinating education of bureau contacts and contractors on sustainable procurement practices and assisting with data collection, compliance and monitoring.
- Reference and utilize Sustainable Procurement Program tools and resources.
- Seek opportunities for sustainable procurement training.
- Support the sustainable procurement community of practice through professional associations and networking.

City Planners, Policy, Program and Operations Managers

Within your scope of work:

- Utilize the [sustainable procurement guiding principles](#) and [best practices](#) during planning, policy, standards, and process development.



For City Project Managers and Design Professionals

Add Slideshow

Edit Description

YOUR SUSTAINABLE PROCUREMENT ROLE

Within your scope of work:

- Utilize the Sustainable Procurement Guiding Principles and Baseline and Emerging Best Practices during project planning and development
- When analyzing the need for specific goods or services, consider what alternative options might exist to deliver the same outcome in a better way, utilizing the Sustainable Procurement Guiding Principles
- Incorporate Sustainable Procurement Best Practices and Prioritization Strategies into project design, contractor and material/product specifications and selection
- Reference and utilize SP Program tools and resources
- Plan and advocate for project budgets that support City Sustainable Procurement Best Practices and related sustainability mandates
- Engage project contractors, consultants, suppliers, volunteers, or other City staff on Sustainable Procurement Guiding Principles and Best Practices
- Contribute to Sustainable Procurement targeted data collection and reporting



Building Sustainable Procurement Specifications

How to integrate Sustainable Procurement into product and service specifications

Money Matters: Costs and Benefits of Sustainable Procurement

How to budget and other cost evaluation for sustainable procurement

Designing to Solve the Problem

TED talk on how thoughtful design can help solve environmental and social problems on a life-cycle level

Vendor Sustainability

What makes a company or vendor "green"?
Which vendor will contribute to City Sustainable Procurement?

Talking Our Walk

How to talk about Sustainable Procurement with colleagues

Sustainable Procurement Policy Details

■ Section 8: Policy Compliance

- Yes, all City employees are responsible for complying with the policy
- Metrics shall be bureau-specific, if possible, to facilitate compliance and accountability via feedback loops
 - Need for feedback loops was another key stakeholder request during program strategic planning
- Seek incentives
 - Seek internal compliance via carrots, not always sticks

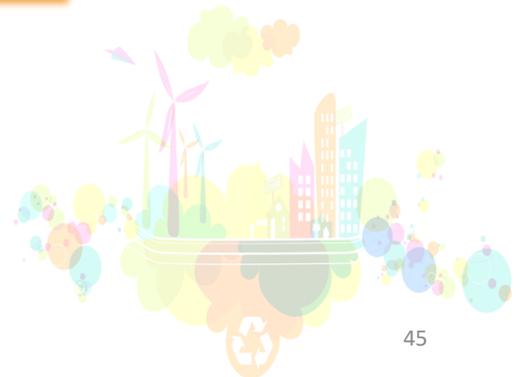


Sustainable Procurement Policy Details

- Section 9: Metrics and Reporting
 - Fosters accountability, compliance, and transparency
 - Metrics/reporting must address prioritized issue areas

10. Sustainable Procurement Metrics and Reporting

The following metrics and reporting requirements shall encourage continuous improvement and may be updated in between policy revisions per the [continuous maintenance process](#). For each of the [targeted impact areas](#), the Sustainable Procurement Program shall develop at least one [Key Performance Indicator](#) (KPI). As sustainable procurement data capabilities and sustainable procurement resources advance, the Sustainable Procurement Program shall develop additional KPIs.

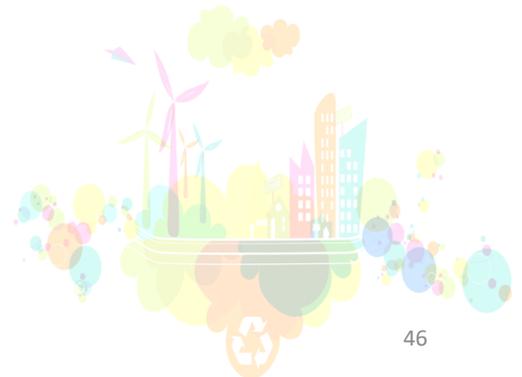


Sustainable Procurement Policy Details

- Section 10: Update and Continuous Maintenance Process
 - Continuous maintenance allows for a more flexible, streamlined update process as best practices develop

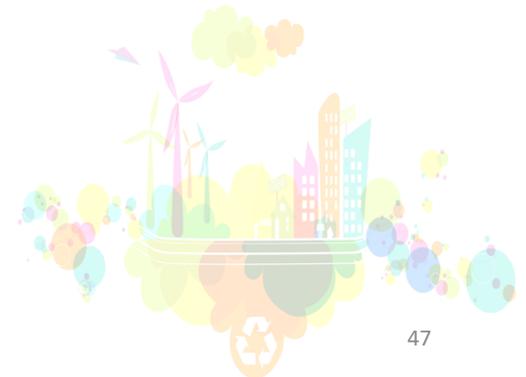
Continuous Maintenance Process

Sections of this policy subject to continuous maintenance may be revised in between policy update cycles in order to incorporate new applicable initiatives, best practices, tools, capabilities and processes, and remove outdated references. Updates made to this policy through continuous maintenance will be posted on the Sustainable Procurement Program website and reference the month and year the update was made. The continuous maintenance process shall be initiated by the Sustainable Procurement Program Manager. Proposed updates shall be reviewed by applicable stakeholders for input and refinement. Proposed updates shall be approved by an internal multi-bureau stakeholder group, such as the Procurement Services Bureau Liaison Group or equivalent. Continuous maintenance updates shall occur no more frequently than once a year.



Sustainable Procurement Policy Details

- Section 11: Definitions
 - Hyperlinked throughout document
- Section 12: Related Sustainability Policies & Resolutions
 - Key Citywide sustainability policies that are beyond procurement, but have procurement-related mandates
- Attachments
 - Code of Conduct for Apparel Manufacturers
 - From previous Sweatshop Free Procurement Policy
 - Environmentally Responsible Paper Standard
 - Updated from previous Sustainable Paper Use Policy
 - Can be used in all kinds of paper product specifications



What's Next?

- Making some additional edits to the policy per City Council request
- Implementation!
 - Updating employee online resources
 - Updating internal processes/templates
 - Rolling out program communication plan
 - Initiating pilot projects per the Emerging Best Practices section





Questions?

Stacey Foreman

Sustainable Procurement Coordinator

City of Portland, Oregon

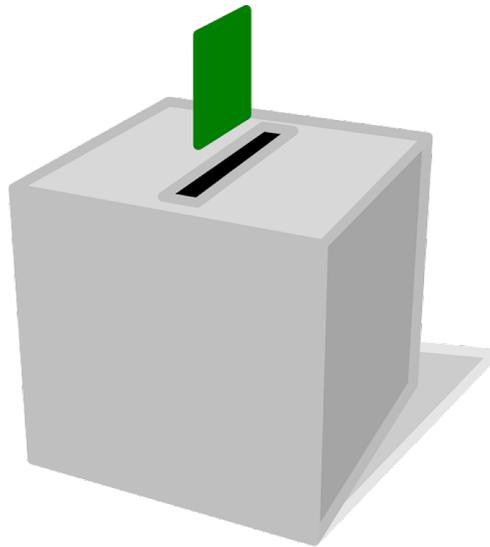
Stacey.Foreman@portlandoregon.gov

www.portlandoregon.gov/buygreen

Polling Question #2

What type of technical assistance would help you the MOST in implementing your sustainable purchasing policy?

VOTE NOW



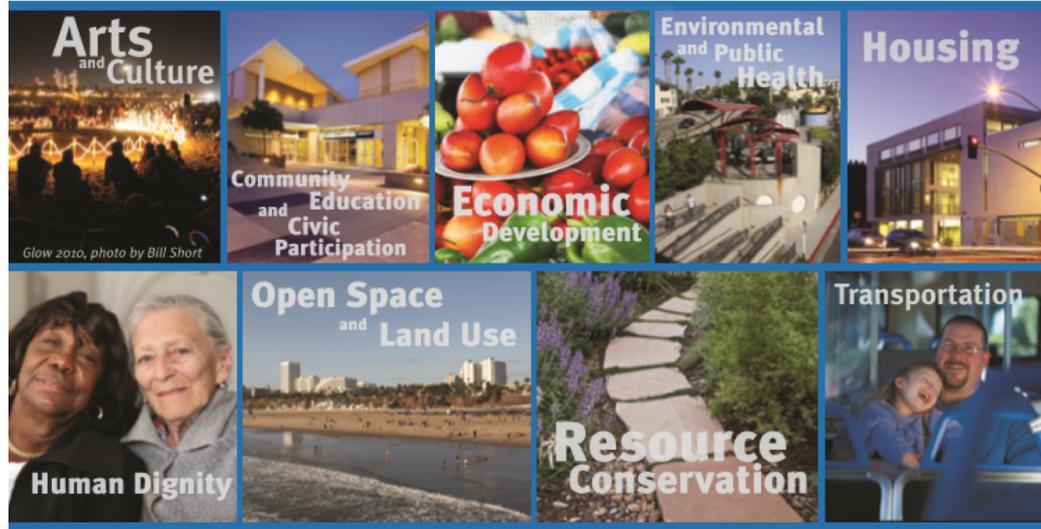
Sustainable Procurement and Easy Guides

Presented by
Karl Bruskotter, City of Santa Monica
December 4, 2018



Sustainable City Plan

City of Santa Monica



Using the power of community to enhance our resources, prevent harm to the natural environment and human health, and benefit the social and economic well-being of the community for the sake of current and future generations.

Adopted September 20, 1994
Updated February 11, 2003
Revised October 24, 2006
Updated January 14, 2014

20
1994-2014
YEARS
OF PROGRESS



SCP Guiding Principles

#8 The City is Committed to Procurement Decisions which Minimize Negative Environmental and Social Impacts

The procurement of products and services by the City and Santa Monica results in environmental, social and economic impacts both in this country and in other areas of the world. The City will develop and abide by an environmentally and socially responsible procurement policy that emphasizes long-term values and will become a model for other public agencies.

Sustainable Procurement Policies

Tropical rainforest wood purchasing ordinance
Ozone depleting chemical purchasing ordinance

Recycled products procurement policy

Toxics-use reduction program

Integrated pest management AI

Sustainable Fleet AI

City policy pertaining to office paper AI

Energy efficient office equipment AI

Work environment modifications and improvements AI

Sustainable Building AI

Hazard Communication Plan for Safe Handling of Hazardous Substances in the Workplace

Procurement AI

Living Wage ordinance

Bottled water memo from City Manager

Cool Foods Pledge

Disposable food service container bans



ADMINISTRATIVE INSTRUCTION

SUBJECT: Procurement

NUMBER: IV-4-1

EFFECTIVE DATE: June 29, 2018 (R)

PAGE: 1 of 27

Rectangular Snip

I. **Purpose**

The purpose of this Administrative Instruction is to establish policies and guidelines that define authority and responsibilities within the City's centralized purchasing system, including treatment of purchasing for certain public works projects and procurement involving State and/or Federal funds.

II. **Scope**

This Administrative Instruction describes how City Departments acquire goods and/or services consistent with applicable Santa Monica Charter and Municipal Code provisions and other laws, rules, and regulations.

It applies to:

- 1) All City procurement of goods and services.
- 2) All maintenance and repair projects subject to California state prevailing wage requirements.
- 3) All public works projects, funded in whole or part with federal or state funds.

This policy makes explicit and formally details the requirement to comply with applicable federal law and Uniform Guidance provisions (CFR Title 2: Grants and Agreements, Subtitle A, Chapter II, §200) when federal grant funds are involved

Procurement staff may also determine that this Administrative Instruction applies to public works projects below the threshold for California state prevailing wages.

Procurement in Santa Monica

We are a best bidder City, not a low-bid City



ADMINISTRATIVE INSTRUCTION

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D. Encumbering Funds

Departments are required to encumber, or set aside, budgeted funds necessary to complete a purchase of goods or services. For operating multiyear contracts with recurring, annual costs, it is the City's policy to encumber the annual amount each year. For non-operating (i.e. capital) contracts spanning multiple years, staff must encumber the entire amount of the contract unless an exception to break down a contract by year or phase is made within the contract itself.

E. Necessary Purchases

Departments must avoid unnecessary or duplicative purchases, and are encouraged to consider the most efficient and effective approach to purchases, e.g., consolidating procurements, lease versus purchase, cooperative agreements for use of common or shared goods and services, use of federal excess and surplus property as opposed to purchasing new equipment.

F. Sustainable Procurement

Departments shall purchase goods and services that minimize negative impacts to the environment and human health, both locally and globally. Departments shall make every reasonable effort to comply with the City's sustainable procurement policies to support Council direction and Council-adopted sustainability policies. The process and resources to enable staff to meet these goals and policies are covered in Section IV.E.



Purchasing Decisions Made Easy

Welcome! Here you will find custom tailored guides that enable employees to make decisions that bring the greatest value while reducing the negative impacts to our environment, human health and the community - designed with you in mind.



Office Supplies and Equipment



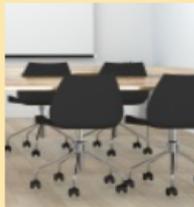
Computers
Food and Beverage
Containers
Letterhead, Business
Cards, and Envelopes
Multipurpose and Copy
Paper
Printing and Imaging
Equipment

Custodial and Chemical Supplies



Cleaning Products
Cleaning Equipment
Carpet Cleaning
Janitorial Paper Supplies
Graffiti Removal
Hand Soap
Hand Sanitizers and
Wipes
Metal Cleaners and
Polishers

Furnishings



Carpet Guide

Appliances and Fixtures



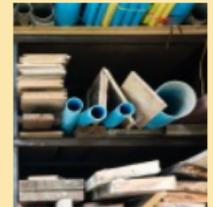
Appliances
Toilets and Urinals

Facilities Maintenance and Services



HVAC Systems
Pest Control

Construction and Renovation Materials



Adhesives and Sealants
LED Lighting
Paint

Printing and Imaging Equipment

Introduction

Printing and imaging equipment generally covers copiers, printers, scanners, and multi-function devices that perform all these tasks. The Information Systems Department (ISD) can assist in determining what equipment will best serve your functional and technological needs and help coordinate the purchase or lease of such equipment. The intent is to purchase or lease high performing, cost effective equipment that uses energy efficiently, has duplex copying capability, produces less emissions indoors, and are properly managed at the end of their life.



Purchasing office electronics?

First things first – it is becoming common to network computers to a single multi-function device that can perform numerous tasks, including printing, scanning, faxing and more.

The days of having your own printer are so last decade. The cost and hassle of replacing toner cartridges alone makes this unappealing. Besides, doesn't Risk Management advise us to get up from our work stations once in a while to relieve stress?

Procuring printing and imaging devices is the sole responsibility of ISD. Prior to purchasing any office equipment, contact ISD at 458-8381 or visit ISD's homepage via E-desk – go to "Help Desk and Training" and then "Purchasing Technology" and then "Ordering Supplies and Equipment" to view a list of recommended printing and imaging equipment and other office electronics.

City of Santa Monica

EASY GUIDE



City Specifications

Minimum Requirements

- Equipment must be Energy Star qualified. www.energystar.gov
- Equipment must have duplex copying capability available and enabled.
- Equipment must be able to accept recycled content papers.

Compliance with "The Energy Efficient Office Equipment Administrative Instruction" (1999) requires that all City employees who purchase or lease office equipment to purchase energy-efficient office equipment and identify ways to use the equipment in the most energy-efficient manner possible.

Exceeds Minimum Requirements

Equipment that is registered at the EPEAT bronze level or higher. A list of EPEAT registered equipment can be found at www.epeat.net.

Look for these eco-labels!



Important notes and tips

The Electronics Products Environmental Assessment Tool (EPEAT) Registry maintains a list of copiers, printers, and multi-function devices that have multiple environmental attributes. For example, all EPEAT registered imaging equipment is:

- ENERGY STAR-certified;
- Designed to work reliably with recycled content paper and remanufactured toner cartridges;
- Low-emitting, which protects indoor air quality; and
- Manufactured without lead solder, cadmium and other hazardous materials.

Office equipment should be placed in well ventilated areas, wherever possible.

Benefits to our environment, personal health, and community

- Uses energy efficiently
- Lower emissions of dust, ozone and volatile organic compounds to minimize indoor air pollution
- End of life management considered
- Made with recycled or recovered material
- Minimal packaging
- Low noise
- Cost effective

What do I do when I'm done with this equipment?

Leased equipment is returned to the supplier. For unwanted printers and imaging devices, contact ISD at 458-8381 or enter an online ticket. Equipment should never be discarded in trash.

LEED for Existing Buildings: Operations and Maintenance credits available

Listed as durable goods, office equipment must be Energy Star qualified and a plan in place to donate unused, unwanted office equipment at the end of their lives or dispose through a statewide electronics recycling program, in order to attain MR Credits 2 and 8.

Page 2 | EASY GUIDE | Printing and Imaging Equipment | 2018

Surprising facts

There are over 170 million imaging equipment products in use in U.S. buildings today, consuming \$30 billion worth of electricity annually.

If all imaging equipment in the U.S. was ENERGY STAR-certified, we could save more than \$1 billion in electricity costs and prevent 17 billion pounds of greenhouse gas emissions every year – equal to the emissions from more than 1.6 million vehicles.

Source: US EPA, Energy Star Program





ADMINISTRATIVE INSTRUCTION

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E. Sustainable Procurement

Departments should use the Office of Sustainability and the Environment (OSE) Easy Guides, available on the City's intranet under Employee Resources/ Sustainability, to assist with sustainable purchasing. The Easy Guides include an introduction to the good or service; how to get it in accordance with sustainability guidelines; required and preferred environmental performance specifications; relevant eco-labels; important notes; benefits; and more. When purchasing goods or services, Departments shall reference and comply with the requirements listed in the Easy Guides if one has been developed for the good or service. OSE staff will develop and revise Easy Guides alone or in conjunction with other Departments. For example, the Information Systems Department (ISD) could assist OSE staff with an Easy Guide for computers purchases. OSE staff provide training on the Easy Guides and any website tools. If an Easy Guide has not been developed, the Sustainable Procurement Advisor and Purchasing Services Manager will provide direction on the best sustainable procurement practices.

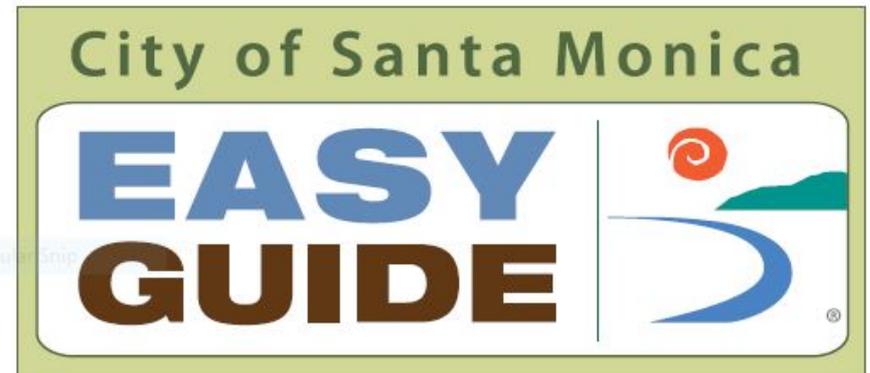
Drivers for Sustainable Procurement

- Climate change and energy
- Protect water quality (Santa Monica Bay and groundwater)
- Safeguard human health and the environment from toxic and hazardous chemicals
- Conserve water and use efficiently
- Protect air quality
- Avoid and reduce waste generation
- Minimize depletion of natural resources and loss of biodiversity
- Social equity
- Community development

Multi-purpose/Copy Paper

Introduction

Santa Monica employees purchase a significant amount of multi-purpose and copy paper to conduct the City's operations. Most of this paper is used in copiers, printers, and multi-function imaging equipment. The City aims to buy high-quality, environmentally sustainable paper that contains a high percentage of recycled content, comes from sustainably managed forests, and is manufactured without harmful chlorine bleaching compounds. The City's Total Workplace initiative should help further reduce citywide office paper use.



City Specifications

Minimum Requirements

- 100% post-consumer recycled content
- Processed chlorine free

Exceeds Minimum Requirements

- Made with Green-E certified renewable energy
- Certified by the Forest Stewardship Council (FSC)



Why?

- Improve internal communication
- Increase transparency
- Clear direction for staff
- Avoid greenwashing
- Compliance with City policies, AIs, programs, and ordinances
- Compliance with federal, state, and local regulations
- Rebates

To Avoid Greenwashing



Cleaning Products

General Purpose, Restroom, Floor, and Glass Cleaners

Introduction

In addition to cleaning for hygiene, appearance, and cleanliness, the city is committed to cleaning to protect the environment and public health, preserve building surfaces and increase productivity of building occupants and visitors. General purpose, restroom, floor and glass cleaners are used routinely and, therefore, present the highest exposure for custodial workers and building occupants and visitors. For this reason, the City only selects the safest and highest performing cleaning products for these applications.

Purchasing cleaning products

Concentrated cleaning products – City departments/divisions that perform a significant amount of cleaning, such as the Custodial Services Division and the Big Blue Bus, will go through a formal or informal competitive-bidding process to procure concentrated cleaning chemicals and automatic dispensing units. Note: to use these systems, a facility typically must be equipped with a custodial closet that has a water supply and drain for wastewater.

Cleaning product and dispensing unit Issues?
Contact the Custodial Services Division at (310) 458-2277.

Ready-to-use cleaning products for non-custodial staff – Select pre-approved products such as Seventh Generation, Sustainable Earth and Clorox Green Works brand products, which can be ordered from Staples. Products meeting the City's specifications can be purchased from local retailers.

Restorative, monthly-use and specialty cleaning products must be evaluated and approved by the Office of Sustainability and the Environment at (310) 458-2213 and Risk Management.



City Specifications

Minimum Requirement

Cleaning products must have one of the following low-toxicity certifications:

- Green Seal
- UL EcoLogo
- Cradle to Cradle (Silver or Gold)
- Safer Choice (US Environmental Protection Agency)

Look for these eco-labels!



Any product not meeting the above required specifications must be approved by the Office of Sustainability and the Environment and Risk Management.

City employees are prohibited from bringing in their personal cleaning products.



Who we've worked with

Architecture Services

Facilities Maintenance

Information Systems

Procurement

Administrative staff

Custodial Services

Resource, Recovery and Recycling

Office of Sustainability and the Environment

Public Landscape

Appliances

Introduction

Appliances include refrigerators, dishwashers, ice makers, washers/dryers, and other items that might be purchased for use at City facilities. It is the responsibility of City employees who procure these items to select ones that meet the City's specifications.

City of Santa Monica

**EASY
GUIDE**



City Specifications

Purchasing appliances

- **First things first** - If your existing appliance is broken, contact Facilities Maintenance at 458-8501 to see if it can be fixed. Appliances have an average life expectancy and FM can help determine if your appliance is worth replacing.
- If you are looking for an appliance, utilize the "Up for Grabs" system to find out if another division has the appliance you need. Employees are not encouraged to source older, energy and water wasting appliances.
- The City does not have one "go-to" vendor for appliances. It is up to the discretion of city employees to purchase necessary appliances. For appliances, such as dishwashers, that require installation, you will need to contact Facilities Maintenance or submit a work order request online.



Minimum Requirements

Appliances must be ENERGY STAR certified. To find an ENERGY STAR-certified appliance, visit www.energystar.gov or simply look for the ENERGY STAR label/logo on the product or packaging when shopping.

Exceeds Minimum Requirements

- Some of the most energy efficient appliances available have been recognized as ENERGY STAR Most Efficient.
- Purchase from a local retailer or manufacturer.
- Purchase from manufacturers/retailers that have "take-back" programs for appliances at the end-of-life for recycling or refurbishment.



Look for this eco-label!



Important notes and tips

- Gaskets on refrigerators should be checked annually for cracks and tears.
- Take advantage of rebates from the manufacturer and from Southern California Edison for appliances that use energy and water efficiently.
- Size appliances appropriately. For instance, if you only have a few employees using a refrigerator, it would likely be unnecessary to purchase a full size refrigerator. This would save money on the initial purchase and on energy over the long term.

Benefits to our environment, personal health, and community

- Uses energy efficiently
- Uses water efficiently
- Responsibly managed at the end of life
- Reduced green house gas emissions
- Saves money



What should I do when I no longer need an appliance?

- 1) First you need to decide if the appliance is an asset worth keeping. Contact Facilities Maintenance at 458-8501 to have the appliance evaluated.
- 2) If the item is worth keeping, contact the Purchasing Section to put the item on Up for Grabs.
- 3) If the item is not worth keeping, contact Resource Recovery and Recycling at 458-2223 for proper disposal and recycling. The item must be moved to a location where Resource Recovery and Recycling staff can pick it up. A fee will be charged for the removal of the item.

LEED for Existing Buildings: Operations and Maintenance credits available

City employees that purchase Energy Star-certified appliances can help the City earn "green" building credits by optimizing its energy performance (Energy and Atmosphere credit) and/or reducing its water use (Water Efficiency credit).

Surprising fact

A refrigerator uses the most electricity of all kitchen appliances, approximately 8 percent of a home's total energy usage. A typical refrigerator costs about \$1,140 to operate over its lifetime



Easy Guides in development

- Disinfectants
- Office Supplies
- Hand Dryers
- Coffee and Tea Service
- Flooring
- Uniforms
- Business travel
- Deodorizers
- Professional Services
- Print Services
- Drinking Water Dispensers
- Furniture
- Give-aways/promotional items

Quick Impressions / Feedback



Q&A

Submit questions at any time by typing them into the GoToWebinar **QUESTION BOX.**

