

# Sustainable Purchasing: Checklist Guide and Planning Help



This document is meant to help you when planning for a competitive procurement. As soon as you determine your need (for a good or service), sustainability requirements should be considered.

Multnomah County recognizes that the products and services it purchases have inherent social, human health, environmental and economic impacts, and that the County should make procurement decisions that embody its commitment to sustainability and social equity to improve the environment and the quality of life of its citizens.

Multnomah County's Sustainable Purchasing and Social Equity Policy (PUR-8) requires that County buyers address sustainability and social equity in the planning and acquisition phases of every competitive procurement in excess of \$10,000. There are specific requirements in Section IV C of PUR-8 which address the purchase of goods and services. Sustainability checklists are embedded into purchasing approval and reporting processes.

The Records Management (RM) in SRM is the County's system of record and will be the repository of any documentation that is required to demonstrate compliance with sustainable purchasing requirements.

With our Sustainable Purchasing and Social Equity Policy, Multnomah County is leveraging its \$300-\$400 million annual spend to ensure that goods and services are purchased in a manner that reduces environmental impacts and promotes fiscal responsibility, and social equity.

## Planning for Purchases:

There are two ways that you can address sustainability:

1. How does the vendor incorporate sustainability into their everyday business practices?
2. How will the vendor address sustainability in fulfilling your need (for a good or service)?

The first question you need to answer: Is this procurement for personal services or goods/non-personal services?

For either personal services or goods/non-personal services, you can ask the vendor about his/her everyday business practices.

## Responsible Business Practices of Vendors

The County seeks to do business with vendors that conduct their business on a day-to-day basis with responsible business practices. This section addresses the manner in which a vendor operates their business and addresses the various environmental and social impacts associated with conducting their business.

- Apart from general business practices, are there any specific business practices you want to ask the vendor about for this procurement?
- Are there specific practices that you want to include into the scope of work/statement of work for the delivery of the service or good?
- Are there key environmental impacts that are specific to this industry or line of business?
- Are there criteria related to best practices for reducing these industry impacts?

# Sustainable Purchasing: Checklist Guide and Planning Help



- Business practices criteria can be incorporated into procurements to set both minimum performance standards for all vendors and further optional criteria that vendors are encouraged to achieve.

For example, does the vendor: use certified green cleaning products, have a recycling policy, and use renewable energy such as solar or wind?

*Here are some ideas/examples:*

- Energy Conservation** (i.e. computer power management; energy efficient lighting; Energy Star electronics; use of alternative energy)
- Water Conservation** (i.e. low flow faucets; high efficiency laundry equipment; low water landscaping plans)
- Waste Management and Reduction** (i.e. e-waste recycling, composting program; paper reduction; buying in bulk)
- Alternative Fuels and Transportation Options** (i.e. commuting options; bus pass program; idling policy; route optimization plans; hybrid electric vehicles; fuel efficient vehicles)
- Sustainable Purchasing** (i.e. recycled content products; green cleaning products; local sourcing; durable vs. disposable goods)
- Fair trade and fair labor** (i.e. sweatshop free uniforms; fair trade certified goods; fair labor practices)
- Community engagement** (i.e. LEED cleaning standards; certified green cleaning products such as Green Seal or EcoLogo)
- Toxics reduction strategies** (i.e. materials management, green cleaning products, manufacturing process)

You may find that responsible business practices carry over into the delivery of a good or service. The above listed considerations apply to responsible business practices internal to an organization/firm/agency as well as in the delivery of goods and services.

## Sustainability in our Personal Services:

The County seeks to ensure that the services being provided to its citizens do not negatively impact human health or environmental quality. As you are planning for your project and/or program and developing the scope of services, consider the following:

- How will you incorporate sustainable practices into the service being procured?
- Are there impacts to the population(s) being served?
- Are there impacts from the service provider's delivery of service?

Think about the delivery of the actual service that will be provided. Consider:

- How can the vendor provide service in a sustainable manner?

# Sustainable Purchasing: Checklist Guide and Planning Help



- The facilities being used for housing services,
- The waste management plan for events or housing,
- The types of vehicles being used to transport clients, and/or
- The type of materials and supplies used.

For example: If you're procuring Residential Services, you could restrict the use of asthma triggering cleaning chemicals, implement energy conservation practices, and implement a composting program. In this example, the sustainability elements would be in the program design and scope of work. Then you would design evaluation criteria based on those specifications.

### *Sample evaluation questions:*

1. Please describe how your firm/agency/organization will provide the services identified in a sustainable manner. What measures will your firm take to minimize impacts to the environment in the delivery of services? Please provide details of efforts, practices, and/or processes.
2. Please describe your firm's/agency's/organization's sustainable business practices, which could include, but are not limited to a formal sustainability program or policy; recycling measures; energy conservation plans; or green cleaning policies. Please provide details and include copies of reports, policies or plans.
3. What sustainability innovations can your firm/agency/organization integrate into the delivery of services?

### *Here are some other ideas/examples:*

- Transportation (i.e. fuel efficient vehicles; route optimization; idling restrictions);
- Energy Conservation (i.e. energy management plan; using energy efficient appliances; purchasing energy efficient materials)
- Water conservation (i.e. water conservation practices, using water conserving products; landscaping plan)
- Waste Management and Reduction (i.e. recycling plan; composting program; buying in bulk, donating excess food);
- Indoor air quality (i.e. green cleaning products; prohibiting asthma triggering chemicals; using low VOC paints and solvents);
- Janitorial/Green Cleaning (i.e. green cleaning plan; recycled content paper products; LEED based cleaning standards);
- Recycled content (i.e. purchasing products with Post Consumer Recycled content including paper and plastic products);
- Medical supplies (i.e. PVC free; mercury free; waste management; less toxic products);
- Food (i.e. healthy options; compostable service-ware; donating excess food).

# Sustainable Purchasing: Checklist Guide and Planning Help



**If desired**, in addition to sustainability questions, you may include social equity questions to address other aspects not addressed in the social equity boilerplate language such as delivery of services in a culturally competent manner, employee retention, etc.

## Sustainability in Goods and Non-Personal Services:

Before you decide to buy anything, is what you need available:

- Through Surplus Property?
- Through Multco Market Place?
- To be leased or be rented?
- From a QRF (Qualified Rehabilitation Facility)?
- From a cooperative contract available for the good(s) and/or service(s)?

If you still need to buy the non-personal service or goods, then how can you make the goods or service green?

## Specification Development

Integrate sustainability into the product specifications themselves. Think about how the product could use less energy, be less toxic, or whether it could be reusable instead of disposable.

- Are there impacts in the production of the product?
- Are there impacts from using the product?
- Are there impacts from the disposal of the product?
- Are there impacts from the delivery of the service?
- Are there impacts from the materials and supplies being used to provide the service?

Below are some sustainability attributes to consider when you develop your specifications:

- Avoiding single use/disposal items;
- Energy efficient options;
- Low emission products;
- Toxics reduction and/or less toxic alternatives;
- Packaging reduction;
- Recyclable in local facilities and/or can be remanufactured;
- Restricting certain chemicals of concern;
- Specifying alternatives that do not require hazardous waste disposal - if available;
- Specifying items with reusable components (e.g. rechargeable batteries);
- Specifying third party certified products (such as ENERGY STAR, EcoLogo, GREENGUARD, and WaterSense);
- Total Cost of Ownership was/will be performed;
- Using LEED standards in specifications (please upload your completed LEED checklist or other documentation)
- Water conserving options;
- Waste reduction and disposal of goods.

# Sustainable Purchasing: Checklist Guide and Planning Help



## Steps for purchases:

### **For competitive procurements between \$10,000 and \$150,000 (Intermediates)**

All competitive purchases above \$10,000 are required to specify sustainability considerations in the Sustainable Purchasing checklists.

For purchases that do not include an evaluation component, sustainability attributes and considerations will need to be integrated in the development of your specifications.

For purchases that have an evaluation component, the policy requires that 25% of the total evaluation points must be allocated to sustainability, social equity, and employee healthcare and other benefits. Social equity and employee healthcare and other benefits language is boilerplate language and therefore is not to be changed, however, sustainability language is customized to best suit your purchase. Purchasing staff is available to assist you in developing this language.

- **Sustainability (10% of total points).** Questions and evaluation criteria are customized and tailored for the specific purchase. Purchasing has compiled language from previous purchases that you may find useful at: [www.multcopurch.org](http://www.multcopurch.org)

#### *Sample questions:*

1. Please describe your firm's/organization's sustainable business practices, which could include, but is not limited to a formal sustainability program or policy; recycling measures; energy conservation plans; or green cleaning policies. Please provide details and include copies of reports, policies or plans.
  2. Please describe the means and methods that will be used to reduce environmental and health impacts.
  3. What sustainability innovations can your firm/organization integrate into the delivery of goods or project?
- **Social Equity (10% of total points - MWESB, Workforce Diversity and Business Practices).** Boilerplate language.
  - **Employee Healthcare and other benefits (5% of total points).** Boilerplate language.

### **MWESB Searches for Intermediate Purchases**

All competitive purchases between \$10,000 and \$150,000 are required to solicit from at least 3 State Certified MWESBs (per PCRB rule 47-0270 (7) (a) and (b) and PUR-1 V. (A) (4), if available, as well as specify sustainability considerations in the Sustainable Purchasing checklists.

Prior to making these types of purchases, requests for MWESB vendors are directed to the search mailbox along with a completed Sustainable Purchasing Checklist to: [MWESBsearch@multco.us](mailto:MWESBsearch@multco.us).

Purchasing is the point of contact for researching and identifying potential MWESB vendors or determining if there are not sufficient MWESB vendors available for needed services or goods.

# Sustainable Purchasing: Checklist Guide and Planning Help



When making MWESB search requests, you will want to prepare your request for potential vendors with all the necessary details.

Please include the following:

- a. Describe your statement of work or scope of work. (Providing this information with your request is very helpful in determining who could be a potential vendor).
- b. Dollar value of the project.
- c. Time frame of the project.
- d. Where do you need the vendors to be located or perform their services, if relevant?
- e. Special requirements or certifications that may be needed.

If you need additional assistance with your MWESB requests, please contact Debra Lindsay at 503-988-7551 or [debra.lindsay@multco.us](mailto:debra.lindsay@multco.us).

Once you have identified your sustainability considerations, you will need to fill out the Checklist online at: (add link) and submit your Checklist along with your MWESB search request to: [MWESBsearch@multco.us](mailto:MWESBsearch@multco.us).

Upon approval of your Sustainable Purchasing Checklist, Purchasing will provide you with MWESB vendors and you can proceed with making your purchase. Purchasing will not provide MWESB vendors until your Sustainable Purchasing Checklist is approved, please plan accordingly. Traditionally, MWESB searches are processed within 3 business days, however, until your Sustainable Purchasing Checklist is approved, you will not receive MWESB vendors or search results.

As part of SRM, MWESB searches and Sustainable Purchasing Checklists will be attached to the RFx record using SRM's Records Management feature.

## **For purchases above \$150,000**

All competitive purchases above \$150,000 are required to specify sustainability considerations in the Sustainable Purchasing checklists.

For purchases that do not include an evaluation component, sustainability attributes and considerations will need to be integrated in the development of your specifications.

For purchases that have an evaluation component, the policy requires that 25% of the total evaluation points must be allocated to sustainability, social equity, and employee healthcare and other benefits. Social equity and employee healthcare and other benefits language is boilerplate language and is not to be changed, however, sustainability language is customized to best suit your purchase. Purchasing staff is available to assist you in developing this language.

- **Sustainability (10% of total points).** Questions and evaluation criteria are customized and tailored for the specific purchase. Purchasing has compiled language from previous purchases that you may find useful at: [www.multcopurch.org](http://www.multcopurch.org)

*Sample questions:*

# Sustainable Purchasing: Checklist Guide and Planning Help



1. Please describe how your firm/agency/organization will provide the services identified in a sustainable manner. What measures will your firm/agency/organization take to minimize impacts to the environment in the delivery of services? Please provide details of efforts, practices, and/or processes.
2. Please describe your firm's/agency's/organization's sustainable business practices, which could include, but is not limited to a formal sustainability program or policy; recycling measures; energy conservation plans; or green cleaning policies. Please provide details and include copies of reports, policies or plans.
3. What sustainability and social equity innovations can your firm/agency/organization integrate into the delivery of services?

**If desired**, in addition to sustainability questions, you may include social equity questions to address other aspects not addressed in the social equity boilerplate language such as delivery of services in a culturally competent manner, employee retention, etc.

For example: Demonstrate the types of training and/or culturally competent skills the staff providing these services have received and/or possess. How will staff be prepared to assist clients from diverse backgrounds and cultures in a culturally competent manner?

For example: Describe how your business practices support social equity. Social equity is defined as the pursuit to create full and equal access to opportunities for all people that enable them to reach their full potential.

For example: Please explain how you do/will apply a relational world view to your business practices. Please consider the context/environment, mental, physical and spiritual components of sustainable business practices.

For Example: How will/do you incorporate health-promoting activities into the meetings or events you facilitate or coordinate?

- **Social Equity (10% of total points - MWESB, Workforce Diversity and Business Practices)**. Boilerplate language.
- **Employee Healthcare and other benefits (5% of total points)**. Boilerplate language.

Once you have identified your sustainability considerations and you are ready to begin moving forward with your ITB, RFP, or RFPQ you will need to fill out the Sustainable Purchasing Checklist and submit to your department contact in Central Purchasing.

## **NOIs, Sole Source, and Other Exemptions**

While a Sustainable Purchasing Checklist is not required for non-competitive procurements, you are still encouraged to include sustainable considerations into your purchase. This can be addressed several ways:

# Sustainable Purchasing: Checklist Guide and Planning Help



- Include sustainability considerations into the statement of work and contract that addresses vendors' businesses practices and the delivery of service or good.
- During contract negotiations, discuss with vendor potential sustainability innovations
- Include specific third party certifications and/or means and methods for reducing environmental and health impacts.

## **Need Assistance?**

If you need additional assistance in planning for your purchase, please send an email to sustainable purchasing mailbox at: [shawn.postera@multco.us](mailto:shawn.postera@multco.us) or contact Central Purchasing staff directly. A list of staff assignments is located at: <https://multco.us/purchasing/contact-us>.