

## MULTNOMAH COUNTY, OREGON ADMINISTRATIVE PROCEDURE PUR-8

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**SUBJECT:** Sustainable Purchasing

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**PURPOSE:** To incorporate sustainability considerations into purchases of goods and services.

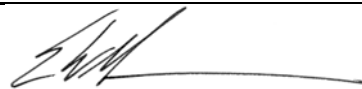
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**ORGANIZATION RESPONSIBLE:** Department of County Management,  
Central Procurement and Contract Administration

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**DATE:** February 26, 2010

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**ORGANIZATIONS AFFECTED:** All Departments/Offices

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**LEGAL CITATION/ REFERENCE:** ORS 279A, PCRB Rules

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### I. POLICY STATEMENT

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 to improving the environment and the quality of life of its citizens.

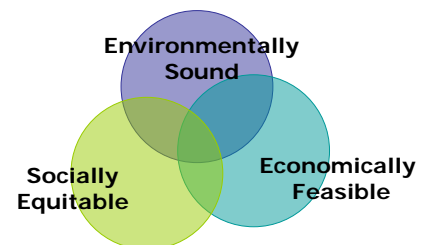
The County seeks to reduce the environmental impacts of its operations and to promote fiscal responsibility, social equity, and community and environmental stewardship by integrating sustainability considerations into the procurement process.

## II. OBJECTIVES

- To support the sustainability goals of the County, creating economic, social and environmental benefits for this and future generations, and to support a healthier working environment for employees and for citizens in general through the purchase of environmentally, socially and economically sustainable goods and services;
- To benefit the community by contributing to environmental and social objectives, such as:
  - Reducing greenhouse gas emissions and air contaminants;
  - Improving energy and water efficiency;
  - Reducing the use of hazardous chemicals and substances;
  - Reducing waste and supporting reuse and recycling;
  - Reducing the environmental impacts associated with food production, consumption and disposal; and
  - Protecting and encouraging the local food and sustainable agriculture sectors, which are central to our region's economy.
  - Promoting contracting opportunities for State certified MWESB firms.
- To leverage the purchasing power of the County to:
  - Reduce the cost of government;
  - Strengthen sustainable markets and industries;
  - Stimulate innovation and demand for sustainable goods and services.

## III. GUIDING PRINCIPLES-

- For sustainability to be successfully integrated into Multnomah County purchasing, commitment to action is required at all levels. By making thoughtful decisions and taking necessary precautions at the local level, Multnomah County also supports the future of our regional, national and global community.
- Recognizing that upfront cost remains a factor for Multnomah County in the selection process, sustainable procurement is set within the context of achieving best overall value for money, which requires the consideration of



environmental, social and economic sustainability criteria into the procurement process.

- The triple bottom line refers to capturing an expanded spectrum of values and criteria for measuring success: economic, environmental, and social. These are interconnected and action in one of these areas impacts all other areas. The triple bottom line is integral to making sustainable purchasing decisions.

#### **IV. SUSTAINABLE PROCUREMENT APPROACH**

**A. Best Practices Manual and Checklist:** CPCA and Sustainability shall prepare and periodically update a Sustainable Purchasing Best Practices Manual (“Best Practices Manual”) and Sustainable Purchasing Checklists which reflect the County’s sustainability goals and which shall be used to guide purchasing decisions in accordance with the provisions of this administrative procedure.

**B. Planning Phase:** At the planning phase, there is the greatest opportunity to consider sustainability criteria.

- 1) Once it has been determined there is an organizational requirement which needs to be met the following steps toward determining the supplier source and integrating sustainability criteria into good purchasing practice should be taken:
  - Check if a Qualified Rehabilitation Facility ([QRF](#)) can provide the product or service. (PCRB 55-0010)
  - Check if an existing product or service within the County that could meet the need. Check [Surplus Listing on MINT](#) and with other departments.
  - Check SAP and consult with CPCA to determine if an existing contract or a contract from another jurisdiction for a product or service that would meet the need. If there is no existing contract, check if other departments would be interested in a joint procurement.
  - Check if the product can be purchased through Central Stores.
  - Determine if an alternative can be considered, such as a renting or leasing rather than purchasing an item.

- Consulting the Best Practices Manual for more information.
- 2) If the good or service is to be competitively procured, select an appropriate procurement method according to CPCA guidelines. For intermediate and formal procurements, consider which procurement method will be the most appropriate to solicit best value including sustainability criteria. CPCA can advise you on the most appropriate tool to satisfy your requirement.
  - 3) Complete the appropriate Sustainable Purchasing Checklist to determine potential sustainability considerations. There are several checklists that have been developed appropriate for the procurement tool being used (e.g. RFP, bid). These may be found at the CPCA MINT site.
  - 4) Consult the Best Practices Manual when developing bid specifications and RFP requirements. The CPCA MINT site provides additional resources and tools to assist with research. This includes sustainable purchasing listservs, purchasing guides and attribute calculators.
  - 5) For Formal Purchases, attach a completed copy of the appropriate Sustainable Purchasing Checklist to your procurement request. For Intermediate Purchases, attach a completed copy of the appropriate Sustainable Purchasing Checklist to your quote tab requesting a procurement number. For Small Purchases, a small purchasing checklist may be completed, but is not required.
  - 6) For competitive procurements, CPCA will ensure that the Sustainability Checklist has been completed before issuing a procurement tracking number.

**C. Acquisition Phase:** (competitive procurements) *this phase includes the actual purchase as well as the preparation of solicitation documents, evaluations of proposals, and contract award.*

#### Bids / Competitive Proposal Quotes (CPQ) for goods

Within Multnomah County, goods are typically purchased using a bid for formal procurements and CPQs for intermediate procurements. The selection of vendors is based solely on price, therefore sustainability considerations must be incorporated into

the specifications. Items 1-3 below will apply to all bids and CPQs; items 4-7 may be applicable depending upon the goods being purchased and the circumstances.

- 1) Create clear product specifications including sustainability requirements such as efficiency, recycled content and third party certification (e.g. Ecologo, Energy Star, EPEAT).
- 2) Include packaging and delivery requirements that are less damaging to the environment to the extent practicable.
- 3) Consider Total Cost of Ownership in preparing product specifications including:
  - Delivery, shipping and transportation costs;
  - Costs to switch from a current product or brand to another;
  - Unit operating and support costs (e.g., manpower, energy, parts requirements, scheduled maintenance, and training);
  - Disposal costs;
  - Salvage or residual value; and
  - Other relevant information including test and operational data.
- 4) Give preference to goods manufactured with recycled content if the cost does not exceed by more than five percent the cost of a similar product with no recycled content or if the product is paper, if the cost of the recycled paper does not exceed the cost of non-recycled paper by more than 15%. Please consult PCRB rule 46-0320 for more information.
- 5) Give preference to goods produced in Oregon whenever offers are received that are identical in price, fitness, availability and quality. Please see the PCRB rule [46-0300](#) for more information.
- 6) Choose agricultural goods produced and transported entirely within the state of Oregon if the cost does not exceed more than 10 per cent of agricultural goods not produced and transported entirely within Oregon. Use of a higher percentage requires that the Board of County Commissioners acting as a PCRB make a written determination supporting the higher percentage. See upcoming PCRB rule for more information.

- 7) If the purchase is a chemical, follow the New Chemical Review Process, described in [RSK-21](#).

#### Requests for Proposal (RFP) / Requests for Intermediate Procurement (RIP)

An RFP or RIP is typically used to purchase services. Sustainability considerations may be included in the evaluation criteria for these types of solicitations.

- 1) If an RFP selection process is used, Departments shall reserve at least 10 percent of the evaluation points for sustainability criteria. The CPCA Manager has the discretion to exempt procurements from this requirement when deemed appropriate. Consult the model RFP sustainability criteria found in the Best Practices Manual for additional guidance. Where practical, include the sustainable practices of prospective proposer's in the evaluation criteria. Consider whether sustainability criteria will have the effect of limiting participation of MWESB contractors in the solicitation process.
- 2) If using third party certification standards, in order to allow smaller businesses and MWESB vendors to remain competitive, include language allowing proposers to provide demonstrable proof of meeting certification standards in lieu of certification.
- 3) Include a requirement for annual vendor reporting of appropriate sustainability measures during the contract term to the CPCA Sustainability Coordinator.

#### **V. ROLES AND RESPONSIBILITIES**

Central Procurement and Contract Administration shall be responsible for appointing a CPCA representative who will act as the CPCA Sustainable Purchasing Coordinator.

Department Directors shall be responsible for:

- Designating at least one employee as a Sustainable Purchasing Representative who will coordinate with the CPCA Sustainable Purchasing Coordinator and attend at least one training session per year.
- Encouraging employee attendance at internal and external trainings related to sustainable purchasing.

- Encouraging the use of environmentally preferable/sustainable products and services through information dissemination, development of internal procedures, and leading by example.

Materiel Manager shall be responsible for:

- Integrating this policy into all Central Stores purchasing practices to the greatest extent practicable.
- Developing and implementing the tracking and reporting of sustainable purchasing for Central Stores.
- Promoting and educating County customers about this procedure.

Sustainability Program shall be responsible for:

- Providing guidance with respect to County sustainability policies and initiatives and coordinating with CPCA and the Materiel Manager to ensure that purchasing practices reflect those policies and initiatives.
- Maintaining regular communication with the Materiel Manager and the Sustainable Purchasing Coordinator in order to support this procedure.
- Serving as a countywide internal consulting resource.

The CPCA Sustainable Purchasing Coordinator shall be responsible for:

- Coordinating with the Department Sustainable Purchasing Representatives for training.
- Updating purchasing documents, templates, sustainable purchasing web pages, and other internal procedures so they reference this procedure and incorporate best practices for specifying products and services that meet the intent of this procedure.
- Developing and integrated sustainable purchasing boilerplate language into solicitation document templates.
- Identifying future specifications and contracts for review, examining areas in which to expand the use of sustainable products and services and ensuring that all generic solicitation language, purchasing regulations, and procedures do not conflict with the goals of this sustainable purchasing procedure.

- Updating the best practices, resources and checklists to reflect the needs and feedback of the Sustainable Purchasing Representatives.
- Developing and implementing a tracking and reporting mechanism.
- Coordinating the development of sustainable purchasing resources including, but not limited to, best practices, standards, specifications, case studies, and other purchasing tools as needed.
- Coordinating buyer-specific trainings on sustainable purchasing best practices that meet the intent of this procedure.
- Coordinating the collection of information for the purposes of tracking, reporting, and evaluating the County's sustainable purchasing activities.
- Serving as a countywide internal consulting resource.

The Sustainable Purchasing Representatives shall be responsible for

- Promoting and educating County colleagues and customers about this procedure.
- Attending at least one training per year.
- Coordinating with the CPCA Sustainable Purchasing Coordinator.

## **VI. PROCEDURE REVIEW**

The CPCA Sustainable Purchasing Coordinator shall be responsible for periodically bringing together internal stakeholders to review this procedure for updates or to otherwise determine whether this procedure is in alignment with other County policies. The procedure shall be reviewed one year after adoption and then at least every three years, but may be done on a more frequent basis as needed.

## **VII. REPORTING**

The CPCA Sustainable Purchasing Coordinator will provide project updates through the CPCA annual report.