Green Procurement Trends within Higher Education – 3rd Annual Survey

2011 NAEP Green Procurement Survey Results
By Brian Yeoman & Eric Zoetmulder

Sponsored by: sciQuest, GovConnection, Airgas
Agenda

- Introduction
- Section 1: General Policy Questions
- Section 2: Institutional Challenges & Priorities
- Section 3: Procurement Processes
- Conclusions
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Goals of the Survey

Identify the current state of green procurement trends within higher education

Create a broader baseline for annual replicable surveys to measure progress

Measure progress of adoption, toolsets and activities compared to the 2009 and 2010 surveys
The NAEP 2011 Green Procurement Survey was sent to over 4000 individuals who work at 1,246 NAEP Member institutions during February 2011.

Respondents: 234 (59% First Time Respondent, 230 in 2010)

**Institution Size**
- Small: <10,000 FTE (54% (53%))
- Large: >10,000 FTE (46% (47%))

**Institution Type**
- Private: 38% (40%)
- Public: 62% (60%)

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Green procurement is an official recognized component of the institutional sustainability initiatives for 2 out of 3 schools.

4. Is Green Procurement an official, recognized component of your Institutions sustainability initiative?
General Policy Questions

The trend could not be clearer. The number of respondents with green purchasing policies is ascendant and those with no policy are dropping rapidly.

6. Do you have a formal Green Procurement Policy?
General Policy Questions

The most difficult of the three pillars of sustainability to weave into policy is the social justice component.

The data surely depicts the nearly 2:1 ratio although there has been a 8pt or 39% increase in three years.

8. Does your institutional policy on "Green Procurement" include **environmental considerations**?

8. Does your institutional policy on "Green Procurement" include **economic considerations**?

8. Does your institutional policy on "Green Procurement" include **social justice considerations**?
AASHE membership has grown significantly as they have become the dominant higher education sustainability leader.

9. Is your institution a member of AASHE?
32% of all and 66% of the AASHE members are participating in the STARS program.

10. Is your institution participating in AASHE's STARS (Sustainability, Tracking, Assessment & Rating System)?
Climate Action Plans require much more walking and a lot less talking thus their lower level of uptake, yet the trend is clear with a 17% increase in three years.

12. Does your campus have a **Climate Action Plan**?
• There are a number of instances where the campus green program lags behind what the procurement office is doing.
• There are a number of instances where the procurement department is waiting to create policy before moving.
• There where multiple comments on where do you begin to create a green procurement policy and program.
• There were negatives such as “green products are a scam and do nothing to help the environment. Luckily my institution recognizes this and does not participate in any silly programs to buy green”.
• And then there was this: “I wish we would participate in a green initiative”, or “I wish we could make a stronger green effort”.
• Finally, “I would love for NAEP to create a green procurement network where institutions can go for resources on how to get started”.

32. Would you like to share additional thoughts or ideas on your green procurement initiatives.
Our thoughts on progress made in general policy development......
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The bell curve strikes again. We are basically stuck on mediocrity.

26. How would you rate the success of your green procurement initiatives?
13. Who in your organization is responsible for your institution's sustainability initiatives?
Institutional sustainability drivers have solidified with three years of survey data.

15. What are the main drivers for your institution's sustainability initiatives?
Institutional Challenges & Priorities

Green procurement is surviving the economic climate, but the recession begins to show some impact.

27. Have any of your green procurement efforts been affected by the current economic conditions?
Larger schools are more affected in their programs than smaller schools. Private programs are less affected than Public programs.

27. Have any of your green procurement efforts been affected by the current economic conditions? By Size and By Type
Overall though, existing green procurement efforts are most often *unchanged* by the current economic climate, which shows the importance of the programs.

28. How have those efforts been affected by the current economic situation?
Institutional Challenges & Priorities

The top 5 challenges have remained the top 5. But we have had 3 different number one challenges possibly reflecting the maturity of the green purchasing movement and the effects of the economy.

<table>
<thead>
<tr>
<th>Ranked from Most Challenging to Least Challenging</th>
<th>2011 Rank</th>
<th>2010 Rank</th>
<th>2009 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justifying cost for green purchasing</td>
<td>1</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Measuring progress with green procurement</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Changing user behavior to focus on sustainability</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Effectively promoting certified products and suppliers to end users</td>
<td>4</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Validating supplier's green claims</td>
<td>5</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Getting suppliers to provide accurate and updated product information</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Securing executive support for green programs</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

16. Rate how challenging the following actions were to implement
The more time passes the more things stay the same. Very little change vs. 2010 and 2009.

### Issues for Green Procurement programs in order of importance

<table>
<thead>
<tr>
<th>Rank</th>
<th>Issue</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Purchasing products that contain ENERGY STAR certification</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Increasing total post-consumer recycled content in purchased products</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Measurement of green procurement compliance (3 in 2010)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ensuring that all paper products purchased contain recycled content</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reducing total shipments of delivered goods</td>
<td>(2)</td>
</tr>
<tr>
<td>4</td>
<td>Increasing spend with diversity suppliers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Increasing spend with local suppliers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Increasing suppliers with eco-label (Green Seal, GREENGUARD)</td>
<td></td>
</tr>
</tbody>
</table>

17. Rank how important the following issues are to your green procurement program.
The biggest surprise! The 2011 responses greatly increased the positive nature of purchasing systems to assist procurement professionals. This is a significant shift perhaps attributable to the volume of new respondents.

18. Does your purchasing system have the ability do any of the following?
Our thoughts on progress made in challenges & priorities......
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Continued strong use of green certifications while there has been a big decrease in the number of respondents who choose not to use green product certifications.

19. What green product certifications are used in your procurement system?
There were small upticks in food and office furnishings following the almost universal acceptance of paper, office supplies, energy and computers.

20. On which of the following commodity categories does your green procurement primarily focus?
Landscaping, Food service and Fleet Vehicles are approaching majority status, while pest control and transportation have large potential growth opportunities.

21. On which of the following services categories does your green procurement primarily focus? Please check all that apply.
Purchasing Systems are getting better! There was a 10% reduction in respondents who don’t know what their % of spend is reflected in growth in each of the spend categories with the exception of the over 50%.

22. What % of total procurement spending is on green products and materials?
More than 50% of respondents still do not report internally or externally.

24. How often do you report on your green procurement performance?
It does not appear that there is strong differentiation in whether respondents were large or small, public or private.

24. How often do you report on your green procurement performance? 2011 by Type and by Size
“Buy Recycled” policies are a failure.

14. Do you have 'buy recycled' products procurement policies in place?
One third does not have any training available and another third rate what they have as poor to fair!

29. Please rate the green procurement training received at your institution.
The training situation is relatively undifferentiated by the size of the institution or its funding source.

29. Please rate the green procurement training received at your institution. By Size and By Type
Champions work! 82% of respondents felt that the green purchasing champion was effective.

30. Is there a green procurement "champion" on campus?

31. Is this Green Procurement Champion effective when working with your team?
Procurement Processes Summary

Our thoughts on progress made in procurement processes.......

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Overall Conclusions

• 2011 was a year of belt tightening, but the Sustainability movement is entrenching itself in the fabric of our institutions.
• Again more schools reported to have a Green Procurement Policy than in the years before.
• AASHE is also growing in its leadership and guidance. As more and more schools participate and become members, leadership on campus becomes more practical and is reflected in the number of champions on campus who make sure progress is made and maintained.
• Probably the biggest move forward this year is that technology infrastructure is being put in place to support the movement.
• We still have a long way to go in our ability to measure and report, our available training and our actual end results, but we look forward to continued growth in 2012.
THANK YOU PARTICIPANTS OF THE 2011 NAEP GREEN PROCUREMENT SURVEY

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