NAEP
National Association *of* Educational Procurement

2013 NAEP Green Purchasing Study

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Study Overview

The NAEP 2013 Green Purchasing Survey was fielded via e-mail to 2,053 individuals who work at NAEP Member institutions throughout the United States. 139 individuals responded or 6.7% of all NAEP Members included in the distribution. Also, the Survey was distributed through the Association for the Advancement of Sustainability in Higher Education (AASHE) to its members with nine (9) responses received and included within the results.

This year's report is the fifth such report issued starting from 2009. This year we have assembled all of the data for all of the years a question was asked and have reported the results of the five year trend whenever possible.

We thank those of you who participated in 2013. Your time and effort is appreciated.

Many of the trends identified continue on track and clearly demonstrate the growth and importance of green procurement on campus. There were a couple of swaps in positions in attitudinal impressions, notably the drivers of sustainability initiatives on campus. Reducing the carbon footprint displaced doing the right thing after a four year run as the primary driver. Also, the fact that green procurement exists within the broader institutional sustainability plan and that those plans have a climate action plan component for nearly 50 % of the respondents is strong evidence of the march to mainstreaming these concepts on campus.

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Further evidence of that uptake which is dramatic is evidenced by AASHE membership, STARS participation, and the number of ACUPCC members of higher education. We are well beyond the tipping point we are in the implementation stage.

The overarching framework for the survey is as follows; General Questions 1-15, Institutional Challenges and Priorities 16-18, Procurement Processes 19-27, and Campus Sustainability processes 28-35.

There were four new questions inserted in the 2013 survey in the Campus Sustainability section which have no comparative data. We did some refinement and clarification to three questions in the Procurement Processes section after review with the Sustainability Committee.

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An overriding concern continues to be the lack of green procurement training and the way the results show up with the numerous “don’t knows” and “N/A” we experience. This issue must be addressed to definitively move forward.

This study references the NAEP definition of Green Purchasing which is as follows:

> ***Green Procurement shall be defined as the method wherein environmental and social considerations are taken with equal weight to the price, availability and performance criteria that colleges and universities use to make purchasing decisions. Green Procurement is a serious consideration of supply chain management. Green Procurement minimizes negative environmental and social effects through the use of environmentally friendly products. Green Procurement attempts to identify and reduce environmental impact and to maximize resource efficiency. Green Procurement is also sometimes known as "environmentally preferred purchasing (EPP), green procurement, affirmative procurement, eco-procurement, and environmentally responsible purchasing".***

The NAEP Green Purchasing Definition was provided on the survey itself and questions that referred to that definition were identified as such. Most questions solicited single responses. In those cases where multiple responses were accepted, that is indicated on the corresponding chart of responses.

In these instances the total number of responses will exceed the total respondent base of 139.

Following are the results of the survey.

Survey Results: General Questions

Q1. Participation.

In trying to identify who is responding we collected data from Members about their prior participation. In 2013 more than 50% of the 139 respondents participated in the 2012 survey. This is a first for NAEP; we have never had a higher prior year participation rate. Another continuing tidbit of data revolves around the number for first time responders, nearly 50% which compares with 52% in 2012 and 59% in 2011.

It is apparent that we attract new respondents and have a group of seasoned professionals who have continuously responded since 2009 (15%).

		2013	2012	2011	2010	2009
Participants		139	171	234	230	125
Participated in 2012 survey	71	50.70%				
Participated in 2011 survey	43	30.70%	45.60%			
Participated in 2010 survey	30	21.40%	26.30%	35.00%		
Participated in 2009 survey	21	15.00%	20.50%	23.00%	n/a	n/a
This is the first time	67	47.90%	52.00%	59.00%	n/a	

Q2. Please describe your institution's size. Note: FTE is defined as Full-Time Equivalent (Students).

Our FTE demographic has shifted somewhat over the five years but it is a very small shift: 2009 large 46% to 50% in 2013. This relative balance between the large and small is a very healthy situation.

		2013	2012	2011	2010	2009
Large >10,000 FTEs	70	50%	45.00%	46%	47%	46%
Small <10,000 FTEs	70	50%	55.00%	54%	53%	54%

Q3. Is your institution:

Likewise our five year trend on the nature of our institutional identification remains surprisingly consistent. Public Institutions were 62% of the 2009 respondents and 60% of 2013. In 2011 we created a categorization for private-for profit institutions which has grown from 3% to 8.6%.

		2013	2012	2011	2010	2009
Public	84	60%	52.00%	62%	60%	62%
Private - not for profit	44	31.40%	46.20%	35%	40%	38%
Private - for profit	12	8.60%	1.80%	3%	n/a	n/a

Q4. Is Green Procurement an official, recognized component of your institution's sustainability initiative?

In this question we are trying to discern the level of green procurements relationship to the institution's overall sustainability initiative. The data clearly reflects a very high rate of uptake by institutions and for the last three years that level has been higher than 60 percent reaching 65% in 2013. This demonstrates that green procurement is not a fad of the month and is here to stay.

		2013	2012	2011	2010	2009
Yes	91	65%	60.20%	60%	53%	53%
No, not in current or future plans	12	8.60%	14.60%	8%	9%	10%
Not yet, but we are in process of considering	37	26.40%	25.10%	32%	38%	37%

Q5. Have you read the NAEP Green Purchasing Policy Roadmap?

We produced a Green Purchasing Policy Road map in 2008 to assist Members in developing their institutional policy framework. We have been and continue to be disappointed with the lack of uptake by the membership. During the five years the highest rate of readership was 35% twice but in the last two years that number has fallen below 30%. We would like some feedback from the membership on the use and utility of the tool and whether or not we should invest the effort to update it or simply leave things as they are?

		2013	2012	2011	2010	2009
Yes	39	27.90%	29.20%	35%	25%	35%
No	101	72.10%	70.80%	65%	75%	65%

Q6. Do you have a formal Green Procurement Policy?

This question is the heart of the survey. Do you have a green procurement policy? The five year trend indicates that the number of institutions that do have a policy in place has basically doubled, 24% in 2009 to 47.1% in 2013. We have used this question to forecast the growth of policy implementations successfully by looking at the "Not Yet's" and the data again says that there are more institutions in the community that are in the process of implementation. Q7 responses help us to understand the timeframe.

		2013	2012	2011	2010	2009
Yes	66	47.10%	36.8	36%	32%	24%
No	44	31.40%	26.9	27%	34%	48%
Not Yet	30	21.40%	36.3	37%	27%	26%
Don't know		n/a	n/a	n/a	7%	2%

Q7. In what time frame are you planning to add a green procurement program?

The question looks to responders to identify if they have a policy in place and if not when do they think they will have a policy. Again almost 50% have a policy and another 15% think they will have one in the next year. This is a downward trend from the early years where we had numbers as high as 46% in 2009 and 53% in2010. The penetration that we forecasted coming out of those years can be seen in the doubling of those with a policy in Q6 and Q7.

It may be the case that in a few years the great dream that every institution would have a policy in place and that the notion of sustainability and green purchasing would become mainstream may actually happen.

		2013	2012	2011	2010	2009
Already have a program	69	49.30%	36.80%	36%	n/a	n/a
Next Quarter	0	0%	0.60%	3%	11%	19%
Next Six Months	7	5%	7.00%	11%	16%	19%
Next Year	15	10.70%	11.70%	12%	26%	8%
Don't Know	45	32.10%	40.90%	37%	40%	47%
Not Applicable/Not Planning a Green Procurement Program	4	2.90%	2.90%	2%	8%	7%

Q8. Does your institutional policy on "Green Procurement" include any of the following?

The question is trying to identify the major components of the green procurement policy at institutions. We asked specifically about environmental, economic, and social justice components. From the beginning it has been the case that the environmental and economic consideration inclusion in the policies has been high and remains so with the environmental considerations in the top spot (65.4%). The five year trend indications are that this will continue to be the case and that economic considerations have waned some as the fear of green materials and services levels out. The intriguing thing is the social justice numbers. I wrote an article about this being the most difficult of the classical three legs of the sustainability triangle. That remains the case although the last two of the five years clearly show that progress is being made. From a starting point of being a component at a rate that was half of what was taking place with environmental and economic considerations, social justice still stands in third place but the gap has narrowed. The 14% increase from 25% in 2009 to 40.3% in 2013 is important.

Environmental Considerations		2013	2012	2011	2010	2009
Yes	89	65.40%	59.80%	61%	55%	62%
No	3	2.20%	1.80%	2%	7%	6%
Not Yet	16	11.80%	13.00%	18%	31%	25%
N/A	28	20.60%	25.40%	19%	7%	7%
Economic Considerations		2013	2012	2011	2010	2009
Yes	79	58.50%	53.00%	57%	55%	62%
No	7	5.20%	4.80%	4%	7%	9%
Not Yet	19	14.10%	16.10%	19%	30%	24%
N/A	30	22.20%	26.20%	19%	8%	0%
Social Justice Considerations		2013	2012	2011	2010	2009
Yes	54	40.30%	32.70%	33%	29%	26%
No	14	10.40%	11.30%	14%	20%	26%
Not Yet	31	23.10%	28.00%	29%	35%	26%
N/A	35	26.10%	28.00%	24%	16%	22%

Q9. Is your institution a member of AASHE?

Membership in AASHE, the leading organization in the higher education sector focused on sustainability, is the basis of this question. There is an affinity between membership and action in this space. Over the five years membership by respondents has increased from 33% to 61.4% nearly doubling participation. Also, in 2013, 15% of respondents are considering joining. NAEP is a strategic partner with AASHE and has members on the technical advisory board for the evaluation tool.

		2013	2012	2011	2010	2009
Yes	86	61.40%	46.20%	49%	45%	33%
No	33	23.60%	21.10%	20%	19%	24%
No, but we are considering	21	15%	5.30%	2%	0%	0%
Don't Know		n/a	27.50%	29%	35%	43%

Q10. Is your institution participating in AASHE's STARS (Sustainability, Tracking, Assessment and Rating System) Program?

AASHE has a tool which its members may choose to utilize. The tool is a sustainability tracking assessment and rating system which has public disclosure and reporting requirements. It is data driven as opposed to a subjective rating system. We wanted to find out if our Members were using the tool. We have only asked this question for the last three years. The rate of increase in utilization is a 50% increase from 32% in 2011 to 48.6% in 2013. Again 12.9% are considering it.

		2013	2012	2011	2010	2009
Yes	68	48.60%	28.70%	32%	n/a	n/a
No	29	20.70%	28.10%	27%	n/a	n/a
No, but we are considering	18	12.90%	14.60%	11%	n/a	n/a
Don't Know	25	17.90%	28.70%	30%	n/a	n/a

Q11. Is your institution a signatory of the ACUPCC (American College & University President's Climate Commitment)?

We are very interested in how our Members are accepting the ACUPCC’s efforts in climate change. We have been tracking this for four years. There is a steady positive trend line and in 2013 that continued with nearly half of the respondents indicating they are signatories (49.6% and another 12.6% indicating they are considering becoming a signatory).

		2013	2012	2011	2010	2009
Yes	67	49.60%	47.60%	n/a	42.00%	n/a
No	51	37.80%	44.60%	n/a	35.00%	n/a
Not Yet/Considering	17	12.60%	7.80%	n/a	23.00%	n/a

Q12. Does your campus have a Sustainability Plan?

We are interested in whether Members have a sustainability plan. This question is linked to Q4 in the context which the Green Procurement Policy is given a broader context in which to exist. The five year trend clearly indicates continued market uptake of sustainability plans on campus with more than 75% of 2013 respondents affirming the existence of a plan. The starting point for this was 62% in 2009, and there are another 10.7% who have a plan under development.

		2013	2012	2011	2010	2009
Yes	106	75.70%	67.30%	64%	65%	62%
No	19	13.60%	16.40%	12%	6%	10%
Not Yet / Under Development	15	10.70%	16.40%	24%	24%	24%

Q13. Does your campus have a Climate Action Plan?

One critical element of robust sustainability plans is the existence of a Climate Action Plan. We have been surveying this question for five years and the data indicates that there has been a doubling of institutions that have a Climate Action Plan as a part of their sustainability plan, 24% in 2009 to 47.9% in 2013 with another 19.3% having a CAP under development.

		2013	2012	2011	2010	2009
Yes	67	47.90%	38.60%	41%	33%	24%
No	46	32.90%	40.90%	34%	19%	22%
Not Yet / Under Development	27	19.30%	20.50%	25%	22%	28%

Q14. Do you have a "buy recycled" products procurement policy?

One of the legacy issues in green procurement is the impression made early on with reduce, reuse, and recycle. Many institutions adopted or were legislated into buy recycled products policies or laws. We remain interested in this element. The five year trend is very clear, about half from the beginning until now of all institutions do not have any policies in place requiring the purchase of recycled items. Another third 32-34.7% across the five years have a policy and they are actively used while 21-15% have such a policy but they are not enforced. There is no indication that the purchase of buying recycled products has gained any traction in the universe of green procurement.

		2013	2012	2011	2010	2009
Yes, and we actively use them	48	34.30%	17.50%	26%	25%	32%
Yes, but they are not enforced	21	15%	33.90%	27%	31%	21%
No, we don’t have policies in place	71	50.70%	48.50%	47%	43%	47%

Q15. Who in your organization is responsible for your institution's sustainability initiatives?

We have been very interested in knowing who on campus is responsible for the sustainability initiative since the beginning of the survey. The data continues to indicate that institutions have largely made the director level of positions the home for their initiatives (50%). This is closely followed by the vice president level of the hierarchy. Interestingly enough there also is a continuation of the trend that no single individual is responsible and that accountability lies at the intuitional level 25% of the time.

		2013	2012	2011	2010	2009
Institutional-level	35	25%	15.80%	19%	12%	12%
Sr. VP Level / Exec VP Level / VP Level	42	30%	32.20%	33%	36%	36%
Director level	70	50%	42.10%	35%	24%	40%
Manager	29	21%	19.30%	18%	8%	11%
We do not have a institutional sustainability initiative	11	7.90%	8.80%	6%	7%	6%
There is no single individual responsible for our sustainability initiative	25	17.90%	19.30%	21%	15%	31%
Other, please specify	22	15.70%	12.30%	12%	n/a	n/a

Survey Results: Institutional Challenges and Priorities

Q16. What are the main drivers for your institution's sustainability initiatives?

We have been trying to understand what is driving institutional sustainability initiatives for five years. We allow respondents to share all factors they consider to be drivers. Over the length of the survey our top five drivers have remained the same; do the right thing, reduce carbon footprint, reduce material consumption, improve institutional image, and reduce costs. In 2013 we had a reversal of the number one position. We think that this is linked to the increase in AASHE, STARS, and ACUPCC activities. Reducing the carbon footprint displaced “do the right thing” as the leading driver. It is also possible that we simply have a better and deeper understanding in the membership and thus the cliché’ was less acceptable. Of note, in 2013 reducing material consumption (77.1%) nearly overtook doing the right thing (79.3%).

		2013	2012	2011	2010	2009
"Do the right thing"	111	79.30%	76.60%	83%	81%	86%
Reduce carbon footprint	121	86.40%	74.90%	76%	73%	74%
Reduce material consumption	108	77.10%	62.60%	71%	72%	70%
Improve institutional image	97	69.30%	59.60%	69%	73%	70%
Reduce costs	90	64.30%	57.30%	53%	65%	58%
Incorporate a social justice component	51	36.40%	31.00%	32%	n/a	n/a
Reduce liability	17	12.10%	18.10%	17%	n/a	n/a
Attract and retain employees	26	18.60%	17.00%	14%	n/a	n/a
Other, please specify	8	5.70%	7.00%	9%	n/a	n/a
None of the above	5	3.60%	5.80%	3%	n/a	n/a

Q17. If you have a FORMAL green procurement policy, rate on a scale of 1-5 how challenging the following actions were for establishing your program (5 being most challenging and 1 being easiest).

We asked respondents to share their experience in implementing a green procurement policy to try and rank the degree of importance on seven tasks we felt were clearly included in the process of implementing a green procurement policy. The range of choices insures us the ability to discern the challenging tasks from the less difficult tasks. We have asked this question for all five years. The top three tasks identified as being the most challenging tasks; changing user behavior to focus on sustainability; justifying “cost” for green purchasing, and measuring progress with green procurement have remained the leaders from the first year. The three least challenging tasks; securing executive support for green programs; getting suppliers to provide accurate and updated product information, and effectively promoting certified products and suppliers to end users have also remained constant. There has been a steady de-emphasis in the changing user behavior data and an increase in validating supplier’s green claims. The lessening of the perception of hard selling green purchasing to end users bodes well.

	Rating Average	Rank
Changing user behavior to focus on sustainability	3.56	2
Justifying “cost” for green purchasing	3.64	1
Effectively promoting certified products and suppliers to end users	3.29	3
Securing executive support for green programs	2.68	4
Getting suppliers to provide accurate and updated product information	2.94	4
Validating supplier’s green claims	3.51	3
Measuring progress with green procurement	3.58	1

Q18. Rate on a scale of 1-5 how important the following issues are to your green procurement program (5 being most important and 1 being least important).

In this question we are trying to measure on an ordinal scale what members perceive as the important components of their formal policy. It is obvious that over the five years of the survey the most important component has been Energy Star product purchasing. It is equally obvious that increasing spend with local suppliers and diversity suppliers and increasing the supplier base of eco-label are considerably less important.

Of note is the continued decline in the measurement of green procurement compliance. One would like to believe, that if this continues to fall because acceptance of green product purchasing has become more mainstream and purchasing professionals are not having to hard sell, the tipping point with the faculty and staff has to be close at hand. This is conjecture on the author's part and is not supported by any data collected herein.

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	Least Important	Somewhat Important	Important	Very Important	Most Important	N/A						
	1	2	3	4	5			2013	2012	2011	2010	2009
							Rate Avg.	Rank	Rank	Rank	Rank	Rank
Measurement of green procurement compliance	6	13	27	25	4	65						
	4%	9%	19%	18%	3%	46%	3.11%	4	4	3	3	2
Ensuring that all paper products purchased contain recycled	5	13	19	30	10	63						
	4%	9%	14%	21%	7%	45%	3.35%	2	3	2	2	3
Increasing spend with local supplie	4	19	21	29	4	63						
	3%	14%	15%	21%	3%	45%	3.13%	4	2	4	4	4
Increasing spend with diversity suppliers	7	13	16	32	8	64						
	5%	9%	11%	23%	6%	46%	3.28%	3	4	4	4	4
Increasing suppliers with eco-label (i.e. Green Seal, GREEN GUARD)	2	20	23	25	5	65						
	1%	14%	16%	18%	4%	46%	3.15%	4	3	4	4	4
Increasing the total post-consumer recycled content in purchased	2	16	22	28	9	63						
	1%	11%	16%	20%	6%	45%	3.34%	2	2	2	2	2
Purchasing products that attain ENERGY STAR certification	4	5	11	38	20	62						
	3%	4%	8%	27%	14%	44%	3.83%	1	1	1	1	1
Reducing total shipments of delivered goods	6	17	15	26	12	64						
	4%	12%	11%	19%	9%	46%	3.28%	3	2	3	3	3

Survey Results: Procurement Processes

Q19. Does your purchasing system have the ability do any of the following? Please check all that apply.

We have been interested in the role that purchasing systems play in assisting procurement departments in their efforts since the survey started. This may be the one question that evidences the institution's commitment to successful implementation of its green procurement policy. In all questions there is a clear trend of greater support and sophistication. It was very clear that the 2013 respondents possess decidedly more robust systems which allow them to promote, identify, track and filter green products and their related activities and influence campus spending.

		2013	2012	2011	2010	2009
Promote 'green' service providers (such as paper or printer cartridge recycling) in search results	52	75.40%	63.20%	57%	29%	30%
Clearly identify green suppliers in the product search area	40	58%	47.40%	42%	26%	35%
Track total spend on green products	34	49.30%	42.10%	31%	21%	14%
Clearly promote green products in search results	32	46.40%	43.40%	29%	20%	18%
Filter search resuts to only show green products	32	46.40%	28.90%	28%	13%	10%
Track total spend on green certified suppliers	28	40.60%	30.30%	28%	19%	15%

Q20. In which of the following commodity categories does your green procurement primarily focus?

Trying to understand what the green procurement policy is applied to led us to this question on products and Q23 on services. We have been tracking both for five years. We made some big additions to the selections in 2013 and the responses confirm that those were good choices for inclusion from the single year responses and we await the 2014 results. Our leading products; paper products (83.6%) , office supplies and equipment (72.9%), computers and office furnishings (36.4%) remain in the top seven group but were joined by newcomers; janitorial supplies (60%), appliances (52.1%), and renewable energy (40.7%). Other newcomers also did well; examples are construction materials (35.7%), REC's (40.7%) and local food (35%). We did observe a small shift, when presented with both local food and organic food the organic response was cut in half.

		2013	2012	2011	2010	2009
Paper products	117	83.60%	76.00%	80%	84%	86%
General office supplies and equipment	102	72.90%	65.50%	67%	71%	73%
Janitorial supplies	84	60.00%	n/a	n/a	n/a	n/a
Appliances	73	52.10%	n/a	n/a	n/a	n/a
Computers	70	50%	58.50%	53%	53%	53%
Renewable Energy	57	40.70%	n/a	57%	57%	66%
Office furnishings	51	36.40%	42.10%	37%	40%	34%
Construction Materials	50	35.70%	n/a	n/a	n/a	n/a
Local Food	49	35.00%	n/a	n/a	n/a	n/a
Logistics and transportation (including shipping and delivery)	29	20.70%	27.50%	15%	17%	17%
Organic Food	27	19.30%	40.90%	35%	36%	32%
Other, please specify	15	10.70%	19.30%	16%	11%	12%
RECs	9	40.70%	n/a	n/a	n/a	n/a

Q21. Are green product certifications used in your procurement system?

We have been tracking green product certification and their use in respondents systems. The jury remains out on whether there is going to be a sinner in this arena. The data indicates a horse race and it remains neck and neck. The fact that there are a huge number of certifications out there (more than 400) which cause confusion and fragmentation led to the creation of Q22.

		2013	2012	2011	2010	2009
Yes	58	41.70%	n/a	n/a	n/a	n/a
No	57	41.00%	23.40%	28%	38%	39%
Not yet	24	17.30%	n/a	n/a	n/a	n/a

Q22. What green product certifications are used in your procurement system?

We want to know which certifications are being used and to track the trend of acceptance by respondents over time. From the beginning EnergyStar has led the way and has grown from 55% in 2009 to 80.7% in 2013. Green Seal has held the second position and continues to grow 25% in 2009 to 37.9% in 2013. Green Products continues in the third position with a growth rate of 17% in 2009 to 25% in 2013. We added four new certifications in 2013; EPEAT (33.6%), FSC (25%), EcoLogo (15.7%) and GRA (2.1%). Three of them show great recognition and use and one not so much. Time and 2014 results will help to clarify the staying power of all as this field continues to grow.

		2013	2012	2011	2010	2009
EnergyStar	113	80.70%	69.60%	66%	57%	55%
Green Seal	53	37.90%	40.40%	32%	32%	25%
Green Products	35	25%	24.00%	27%	17%	17%
Green Guard	29	20.70%	20.50%	18%	20%	18%
Made from PCW recycled material	0	n/a	51.50%	18%	17%	18%
Other, please specify	23	16.40%	11.10%	9%	9%	8%
We don’t use green product certification in our procurement system	0	n/a	23.40%	28%	38%	39%
EPEAT	47	33.60%	n/a	n/a	n/a	n/a
FSC	35	25%	n/a	n/a	n/a	n/a
EcoLogo	22	15.70%	n/a	n/a	n/a	n/a
GRA	3	2.10%	n/a	n/a	n/a	n/a

Q23. In which of the following services categories does your green procurement primarily focus?

In the services arena our five year leaders recycling/waste handling (77.1%) and Housekeeping/Cleaning (71.4%) remained as the top areas of application. Our one service addition in 2013 was new construction which earned the third spot (60%). This question was linked to additional new questions later in the survey related to the USGBC’s LEED certification.

		2013	2012	2011	2010	2009
Recycling/Waste Handling	108	77.10%	86.00%	83%	84%	83%
Housekeeping/Cleaning	100	71.40%	69.60%	68%	72%	73%
New Construction	84	60%	n/a	n/a	n/a	n/a
Food services	60	42.90%	45.00%	40%	41%	37%
Fleet vehicles	56	40%	40.90%	35%	39%	37%
Landscaping	50	35.70%	49.70%	44%	43%	34%
Pest control	39	27.90%	31.00%	29%	33%	26%
Transportation	30	21.40%	31.00%	25%	29%	26%
Facilities services (elevator maintenance, controls, security systems and locksmith)	30	21.40%	20.90%	17%	21%	26%
Vending services	20	14.30%	19.30%	15%	19%	14%
Other, please specify	16	11.40%	10.50%	10%	9%	10%

Q24. What % of total procurement spending is on green products and materials?

We are very interested in the outcomes of the application of the green procurement policy implementations. This question is trying to measure that as a percentage of total spend. The response to this question has been a disappointment since the very beginning. Although the purchasing systems data indicates things are better, when 65% of respondents cannot tell what the percentage of spend is it means we have a long way to go. That old saying "if you don't measure it you can't manage it" comes to mind. There obviously are institutions who are doing well because 16.7% report more than 20% of total spend is on green products and services. Additionally 13.6% are greater than 10% and some 8.6% fall between 0 and 10%. This means the marketplace is being affected and that there is some shift occurring. It's just that we don't have the systems to capture, record, and report the spend.

		2013	2012	2011	2010	2009
Don't know	86	61.40%	48.00%	52%	63%	61%
Less than 10%	12	8.60%	21.60%	18%	15%	15%
10-20%	19	13.60%	14.00%	14%	13%	15%
20-30%	14	10%	8.20%	12%	6%	5%
30-50%	8	6%	6.40%	5%	3%	2%
Over 50%	1	0.70%	1.80%	0%	1%	2%

Q25. How do you measure the success of green procurement?

We want to know how Members are measuring success of their green procurement efforts. This is another five year trended question. The results are quite dismal frankly. 2013 respondents said that 65% of them had no formal measurement system – that is an improvement over the starting point of 77% but we wonder how long this can go on without any data to support the efforts by the department. The 20% who do measure use percentage of spend on products and that number is only an increase of 5% from the 2009 start. There is a small sliver of institutions that use a cost savings methodology (15%) and another who use the percentage of unit volume method (8.6%).

		2013	2012	2011	2010	2009
No formal measurement is used	91	65%	66.10%	68%	76%	77%
Percentage of spend on green products	28	20.00%	21.10%	23%	20%	15%
Cost savings	21	15%	12.90%	8%	10%	9%
Other, please specify	11	7.90%	12.90%	5%	5%	6%
Percentage of unit volume on green purchases	12	8.60%	9.90%	10%	9%	5%
Percentage of green suppliers in ERP system	7	5%	4.70%	4%	4%	3%

Q26. How often do you report on your green procurement performance?

We are also interested in how the results of the activities are reported internally and externally. We felt from the beginning that telling the story of the effort was going to be important to stakeholders both internal and external. Internally this was an important year. This year more internal report results took place than no reporting whatsoever. The never report category fell to 43.6% in 2013 from 51.5% in 2012 and trended down from a 54% starting point. Unfortunately, that is not the case for external reporting where 50% of the respondents never report externally, however, that is a downward trend that has moved from 64% in 2009. More and more institutions are under pressure to increase transparency and the green spend is a part of that broader trend in higher education. It is suspected this will tip in the next cycle.

		2013	2012	2011	2010	2009
INTERNAL Monthly			4.10%	6%	7%	14%
INTERNAL Quarterly/COMBINED 2013	18	12.90%	7.60%	13%	10%	14%
INTERNAL Semi-Annually	48	34.30%	29.20%	23%	21%	22%
INTERNAL Never	61	43.60%	51.50%	51%	56%	54%
EXTERNAL Monthly			1.20%	1%	2%	2%
EXTERNAL Quarterly/Combined 2013	5	3.60%	4.70%	6%	2%	2%
EXTERNAL Semi-Annually	37	26.40%	21.60%	17%	10%	17%
EXTERNAL Never	70	50%	55.60%	56%	68%	64%

Q27. What benefits do you see from your green procurement initiatives?

Outcomes are important so we asked respondents to share what benefits are derived from their green procurement initiatives. This also is a three year trended question but we did include two additional options in 2013. Those additions were "Improving STARS rating", and "Increasing student recruitment" both of which scored well 45% and 32.1% respectively. The leading benefits remain; Doing the right thing, stakeholder satisfaction, and improving institutional image.

		2013	2012	2011	2010	2009
Doing the right thing	118	84.30%	77.20%	81%	n/a	n/a
Stakeholder satisfaction (employees, students, community)	98	70%	59.10%	67%	n/a	n/a
Improving institutional image	103	73.60%	70.20%	78%	n/a	n/a
Promoting procurement initiatives within your organization	75	53.60%	48.50%	53%	n/a	n/a
Cost reduction and reduced liability	70	50%	43.90%	45%	n/a	n/a
Meeting ACUPCC commitment	42	30%	33.90%	26%	n/a	n/a
Improving STARS rating	63	45%	n/a	n/a	n/a	n/a
Increasing student recruitment	45	32.10%	n/a	n/a	n/a	n/a
Other, please specify	12	8.60%	9.40%	7%	n/a	n/a

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Q28. How would you rate the success of your green procurement initiatives?

This question is intended to allow respondents to grade the success of their green procurement initiatives using a normal school scale A through F. The five year trend is a gradual upgrading from the C's (52-36%) to the A's (4 -7.2%) and B's (21-28.8%) while the D's (19-18.7%) have remained relatively unchanged but the F's (5-9.4%) have almost doubled. This is an encouraging trend only in perception because if only 35% have formal assessment tools and indicated in Q24 we don't have any data to support these perceptions beyond that of the respondents. This cannot be totally discounted and needs further data to support and reinforce the perceptions.

		2013	2012	2011	2010	2009
A	10	7.20%	5.00%	4%	5%	4%
B	40	28.80%	30.40%	24%	29%	21%
C	50	36.00%	42.20%	47%	43%	52%
D	28	18.70%	11.80%	17%	16%	19%
F	13	9.40%	10.60%	8%	7%	5%
Total	139					

Q29. Have any of your green procurement efforts been affected by the current economic conditions?

The economic collapse caused us to add Q28 and Q29 in the 2010 survey due to the severity of the situation. There was a grave concern that all sustainability activities would be affected and we wanted to measure that through the eyes of the respondents. We ask has there been an affect as a result and the four year trend indicates that yes there has been an affect but the trend is down from 41% in 2010 to 38.1% in 2013 and the unchanged responses have grown from 28% to 36.7%. The "No" responses have decreased from 31% in 2010 to 25.2% in 2013. As we analyze this we conclude that green procurement has weathered the economic collapse rather well.

		2013	2012	2011	2010	2009
Yes	53	38.10%	42.90%	43%	41%	n/a
No	35	25.20%	28.60%	26%	31%	n/a
Unchanged	51	36.70%	28.60%	31%	28%	n/a

Q30. How have those efforts been affected by the current economic situation?

We wanted then to try and understand what the severity of the affects were so we used a seven point ordinal scale ("reduced materially" to "increased materially") to help us. This gives us a beautiful bell curve. The center of the scale is unchanged and it dominates the data with 60.4% in 2013 up from 54% in 2010. At either extreme point, "reduced materially" is 1.4% down and at the other end "increased materially "is 2.9% up from 0%. Notably the second largest response was in the "reduced slightly" category at 18.7% down from 21%. Our conclusion is that although affected, the normative state is that of unchanged with a small possibility that there might be some slight reduction as a result of the economic downturn.

		2013	2012	2011	2010	2009
Reduced slightly	26	18.70%	19.30%	21%	38%	n/a
Reduced moderately	9	6.50%	14.30%	13%		n/a
Reduced materially	2	1.40%	5.60%	4%		n/a
Unchanged	84	60.40%	52.80%	54%	54%	n/a
Increased slightly	7	5.00%	5.60%	5%	7%	n/a
Increased moderately	7	5.00%	1.20%	2%		n/a
Increased materially	4	2.90%	1.20%	0%		n/a

Q31. Please rate the green procurement training received at your institution?

Following 2010, our first year to survey, it was obvious that there were questions about green procurement training for the Members. Using an eight point ordinal scale "poor" to "outstanding" we have been asking respondents to rate the training available to them for green procurement. The ongoing surprise is that respondents continue to tell us 39.6% in 2013 to 33% in 2010 that there is no training available to them. One has to wonder how green procurement initiatives are going to expand and excel if this deficiency continues to exist. Further, 25.9% in 2013 consider what training they do receive to be either poor or fair that is down from 34% in 2010. On the other end of the spectrum those identifying the training received as above average or outstanding, 9.4% 2013 compared with 4% in 2010, tell another story. Is it possible that those who are self-performing are doing a great job and therein lies the answer for the larger members? It should come as no large surprise that the center of the scale "OK" and "reasonable" occupy 22.3% the responses and that the 2010 comparative numbers were 20%, We think the facts are clear, there is a clear void. If the notion of green procurement is to thrive and reach its potential help is needed from outside the institutions to get there.

		2013	2012	2011	2010	2009
Poor	19	13.70%	13.70%	21%	16%	n/a
Fair	17	12.20%	19.90%	21%	18%	n/a
Good	4	2.90%	9.30%	9%	9%	n/a
OK	14	10.10%	9.30%	5%	12%	n/a
Reasonable	17	12.20%	5.00%	8%	8%	n/a
Above average	8	5.80%	4.30%	3%	4%	n/a
Outstanding	5	3.60%	0.60%	0%	0%	n/a
No training available	12	39.60%	37.90%	32%	33%	n/a

Q32. Is there a green procurement "champion" on campus?

We wanted to find out if there was a green procurement champion on campus and began asking the question in 2011. The "yes" responses have remained constant at 53% and we had a small increase in the "no" responses in each of the last two years.

		2013	2012	2011
Yes	74	53%	54.00%	53%
No	49	35.30%	33.50%	31%
Don't know	16	11.50%	12.40%	16%

Q33. Is this Green Procurement Champion effective when working with your team? If you answered no to the previous question "Do you have a green procurement champion?", then please select N/A from the options supplied below:

We wanted to know if the green procurement champion was effective in working with the green procurement organization and asked this question in the same timeframe. The "yes" responses have remained constant at 41% and the "no" responses have done the same at 9%. The "not applicable" response rate is 50%. We conclude that the 35 + percent who don't have a champion and the 12 percent who don't know if there is a champion are the source of the "not applicable" responses. We think this means that a large number of procurement departments are doing the implementation by themselves.

		2013	2012	2011
Yes	57	41.00%	44.10%	41%
No	13	9.40%	11.80%	9%
N/A	69	49.60%	44.10%	50%

Q34. Does your campus have a buildings, New Construction LEED policy?

This was a new question in 2013 intended to expand upon earlier alterations in response alternatives. We wanted to know if the higher education sector had embraced the UASGBC's LEED for new construction. The data clearly indicates that is the case (61.9%) and we suspect that the number may be larger in following years based upon the 20.9% who did not know.

		2013
Yes	86	61.90%
No	24	17.30%
Don't Know	29	20.90%

Q35. Is your campus certifying existing buildings using the LEED EB/OM process?

We were looking for higher education's embrace of the USGBC's LEED for existing building programs. The data shows clear support (47.1%) with a large "don't know" response of 29% which is likely to increase in future years.

		2013
Yes	65	47.10%
No	33	23.90%
Don't know	40	29.00%

Q36. Is your campus involved in a fossil fuel divestment campaign with its endowment holdings?

Periodically there are hot topics on campus and we felt this was one worth testing the waters on. We wanted to find out the extent to which the effort to have higher education divest itself of investments in the fossil fuel industry from its endowment holdings was being undertaken. The data clearly indicates that this is either a nascent effort or a non-starter and only more data and time will tell us more. The "yes" response rate was 9.3%, while the "no" rate was 70.5%. The "don't knows" cannot swing the data in a short timeframe only large scale change can cause that to occur.

		2013
Yes	12	9.30%
No	91	70.50%
Don't Know	26	20.20%

Q37. Would you like to share any additional thoughts or ideas on your green procurement initiatives?

		2013
Yes	12	9.60%
No	113	90.40%

Q38. If we have questions, would you be willing to spend a few minutes discussing this survey with us?

		2013	2012	2011
Yes	53	40.50%	44.80%	51.00%
No	78	59.50%	55.20%	49.00%

Conclusion

First, thank you to those who been so willing to take the time to share your responses year in and year out because without your participation NAEP could not provide this broad market scan of green purchasing in the higher education sector. We also want to thank those who responded for the first time in 2013 and encourage you to respond again in 2014. The 2014 version of the survey will be released in early April.

The trending of data that we had hoped for when we devised the survey a very long time ago has paid handsome results. We believe that this survey remains a meaningful exercise. We believe there is value to the higher education community and purchasing professionals everywhere. We will continue to adapt and improve where possible. We vow to keep our core questions so that twenty years from now there will be a baseline of twenty five years from which to glean data for evaluating green procurement activities.

Thank you for your time and attention,

Brian K. Yeoman
Director of Sustainable Leadership