Table of Contents

Executive Summary ......................................................................................................................................................... 2

Survey Results: General Questions ................................................................................................................................. 4
Questions 1 - 14

Survey Results: Institutional Challenges and Priorities ...................................................................................................... 11
Questions 15 - 17

Survey Results: Procurement Processes .......................................................................................................................... 13
Questions 18 - 26

Survey Results: Campus Sustainability ............................................................................................................................ 18
Questions 27 - 35

Conclusion ........................................................................................................................................................................... 22

Throughout the survey, the NAEP definition of Green Procurement (below) is utilized:

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 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."
Introduction

NAEP's annual Green Procurement Survey Report offers a benchmark, specifically for higher education. Responses were given by procurement professionals from colleges and universities nationwide and demonstrate how they use spending to create and maintain a green campus community.

This year's report is the eighth such report issued, starting from 2009. The survey was emailed to 827 individuals employed at NAEP Member institutions. A total of 62 individuals responded, which is a response rate that is so low that the validity of the report this year could be called suspect. We are working to make some changes, which will hopefully encourage more members and partners to respond. We ask your indulgence and remain committed to tackling the task of recording the journey that American colleges and universities are engaged in to become more responsible and sustainable institutions in their respective communities.

Despite the small sample, many of the trends observed continue on the track which was set by year three of the survey and this certainly demonstrates the growth and importance of green procurement on campus. There were a couple of minor swaps in rank order positions, but beyond that there was not any earth shattering changes.

This year’s first time responder rate was 43.6 percent, which is in the middle of the historical range of 35.6 to 59 percent. Thank each of you who participated in 2016 and a special thank you to the first time responders. Your time and effort is greatly appreciated.

In the spirit of transparency we have created a spot on the NAEP website, titled Surveys (under the Resources tab) where you can visit and see the comprehensive data, dating back to 2009 when this survey began. We will make this available for as long as we conduct the survey.

Your responses are important not just to us but to others as well! The University of New Hampshire System, in partnership with Sightlines, inquired about our data and asked us to share our perspective on green procurement and sustainability on campus.

The result is State of Sustainability in Higher Education, which can be viewed at:


Now on with the survey!
Executive Summary

For the 2016 survey, two new questions were added, listed here.

These two new questions provide a good measure of support for what we are observing. The sense that higher education continues to grow its commitment for green procurement is confirmed in Q36 responses, assuming the plurality winner here “Don’t Know” is not heavily weighted to the waning side of the experience once those folks find out what is or has happened on their campus. Nonetheless, by almost a 4 to 1 margin those who responded do know that it is real, and it is getting more real. In other words, if it was a fad it is not going away anytime soon and certainly not just yet. We look forward to seeing future responses and analyzing this data going forward.

Question 37 asks respondents to place sustainability and green procurement into the context of their institution’s priorities. We ask this in part because far too often procurement professionals think that their life’s work is not in the ‘top 5’ of the institution’s priorities. We have felt for a very long time that sustainability and green procurement is a pathway for procurement professionals to earn a seat at the ‘big table’. Obviously we also are very interested in what the broader perception by respondents is to where sustainability and green procurement sit as a priority. Interestingly enough, 66% of respondents say sustainability and green procurement is in the top 5 for list of priorities for their institutions! This is fantastic news. It is further confirmation that the time, money, the effort and struggles by those of you on the front lines of sustainability and green procurement have garnered a place at the “big table”. This is a golden opportunity to make your value proposition and produce the kind of results we know that educational procurement professionals can and do produce, and are given the opportunity to contribute in a meaningful way.
There is more good news in the data we will explore a little more. There was a slight reduction in the level of affirmative responses in the core sections of the survey: questions 4-16 (pages 5-12). Likewise, there was strong evidence of the uptake and endorsement of green procurement and therefore, sustainability, which is dramatic and is evidenced by member adoption of formal green procurement policies (Q6), AASHE membership (Q9, page 8), STARS participation (Q10, pages 8-9), and the number of Sustainability Plans on campus (Q12). These are signals that we are truly in the implementation stage.

As we look at issues that need to be addressed, two have consistently appeared throughout eight years of data gathering, 1) The lack of a formal measurement system and 2) Formal green procurement training.

In 2016, 64.5 percent of respondents indicated they had no formal measurement system – that shows a very minimal improvement over the starting point of 77 percent in 2009. There is a strong statement in management literature, which is very simple: “You can’t manage it if you don’t measure it.” We need to dramatically improve this metric if we are to keep the newfound trust we have worked so hard to get from those at the big table.

The lack of green procurement training remains a significant issue with long and short-term consequences.

Encouraging movement continues in the certification of green products as was evidenced in the data found in Q20 & Q21 (page 14-15). It is apparent there are clear dominant certification bodies emerging. This settling out of the marketplace is good news for procurement professionals, faculty, and staff because it will lessen the confusion.
Survey Results: General Questions

The General Questions section consists of our core fourteen questions. These questions remain the heart and soul of the survey and will be used as such for many years. They help us to understand the size, nature, and fundamental condition of the institution and its green procurement history. The questions are intended to provide both a background and a foreground to the institutional activities in the broader national higher education sustainability effort.

Q1. Participation

In trying to identify who is responding, we collected data from Members about their prior participation. In 2016, more than 51.6 percent of the 62 respondents participated in the 2015 survey. This is of a very small sample. It has become apparent that we attract a significant number of new respondents each year. The challenge becomes then how to secure participation from a group of seasoned professionals, some of who have responded since 2009 (8 percent). The good news is that with an eight-year trend line, this continual infusion of new respondents has not had any negative material affect.

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

Our FTE demographic has shifted somewhat over the eight years but it is a very small shift: less than 4 percent. Our dominant responder is from a small institution and it has been that way since the start.
Q3. Is your institution _____?

Likewise our eight-year trend on the nature of our institutional demographic remains surprisingly consistent with only a 2.3 percent shift. Our dominant responder is from a public institution. Public institutions accounted for 62 percent of the 2009 respondents and 59.7 percent of 2016. In 2011 we created a categorization for private-for-profit institutions that has stabilized at less than 10 percent and was 9.6 percent in 2016.

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

Here we are trying to discern the level of green procurement’s relationship to the institution’s overall sustainability initiative. The data has clearly reflected a very high rate of uptake by institutions in the last five years. It reached the apex at 65 percent in 2013. There was a fall off this year to 45.2 percent. What we think is important is the “we are considering” response of 37.1 percent, our second highest anticipation of action data since the beginning. We understand that becoming an official component is cyclical in nature as new institutions begin their journey to becoming more “green” and sustainable.

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

Originally produced in 2008 to assist members in developing their institutional policy, the framework still creates value today. During the eight-year period, the highest rate of readership was this year at 41.9 percent. The Green Procurement Policy Roadmap has been a benefit for many members.
Q6. Do you have a formal Green Procurement Policy?

This question remains the heart of the survey. The eight-year trend indicates that the number of institutions that do have a policy in place had basically doubled; 24 percent in 2009 to 47.1 percent in 2013, and dropping down to 40.3 percent this year. We have used this question to forecast the growth of policy implementations by looking at the “Not Yet’s” and the data again indicates that there are more institutions in the higher education community that are in the process of implementation (34.4 percent in 2015 and 25.8 percent in 2016). Historically this steady stream of new adopters often times turns into some of our most active practitioners and responders for a number of years.

To try and better understand what is taking place, we use Q7 responses to help us to understand the timeframe of possible transformation of our institutions and profession in the spread of green procurement.

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

Respondents were asked to identify when they think they will have a program in place. More than a third (35.5 percent) have a program today. 14.5 percent believe they will have a program in place in one year or less. This is a downward trend from the early years where we had many as 46 percent in 2009 and 53 percent in 2010 thinking they would have a program in place in a year. The sum of the “already have,” “next quarter,” “six months” and “year” is 50 percent interestingly, balancing the “Don’t Knows” and the “Not Planning’s.” The penetration that we forecasted coming out of those years could 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 program in place and that the notion of sustainability and green procurement would become mainstream may actually be taking place.
The “Not Applicable” and/or “Not planning” number across the eight years it is not a material number although 11.3 percent in 2016 is not unimportant either as it barely exceeds the 2009 response. The bigger concern has always been the “Don’t Knows” which across eight years has essentially remained flat at basically 40 percent of the respondents.

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Don't Know</th>
<th>Not Applicable/Not Planning a Green Procurement Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>39%</td>
<td>11%</td>
</tr>
<tr>
<td>2014</td>
<td>40%</td>
<td>7%</td>
</tr>
<tr>
<td>2012</td>
<td>36%</td>
<td>4%</td>
</tr>
<tr>
<td>2010</td>
<td>37%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

These questions try to identify the degree of inclusion for the major components of the green procurement policy at institutions. We ask specifically about environmental, economic, and social justice components. From the onset 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 (54.8 percent) and social justice the lowest at (40.0) percent. The eight-year trend indications are that this will continue to be the case and that economic considerations have waned some as the knowledge and education of green materials and services has proliferated.

Environmental Considerations

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes</th>
<th>No</th>
<th>Not Yet</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>55%</td>
<td>12%</td>
<td>27%</td>
<td>11%</td>
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<tr>
<td>2014</td>
<td>51%</td>
<td>15%</td>
<td>35%</td>
<td>15%</td>
</tr>
<tr>
<td>2012</td>
<td>59%</td>
<td>18%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>2010</td>
<td>65%</td>
<td>25%</td>
<td>21%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Economic Considerations

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes</th>
<th>No</th>
<th>Not Yet</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>48%</td>
<td>13%</td>
<td>31%</td>
<td>14%</td>
</tr>
<tr>
<td>2014</td>
<td>46%</td>
<td>15%</td>
<td>35%</td>
<td>18%</td>
</tr>
<tr>
<td>2012</td>
<td>50%</td>
<td>18%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>2010</td>
<td>59%</td>
<td>19%</td>
<td>22%</td>
<td>16%</td>
</tr>
</tbody>
</table>
Most intriguing are the social justice numbers. This is the most difficult of the classical three angles of the sustainability triangle to make its way into policy. That remains the case, although, the last two of the eight years show that progress is being made. From a starting point of being a component at a rate that was nearly half of what was taking place with environmental and economic considerations, social justice still stands in last place but has made up ground. The conjecture is that the basic nature of the landscape hasn’t changed that much across the eight years.

Q9. Is your institution a member of AASHE? (Association for the Advancement of Sustainability in Higher Education)

Membership in AASHE, the leading organization in the higher education sector focused on sustainability, is highly correlated to green procurement. There is a strong affinity between membership and action in this space. Over the eight years membership by respondents has increased from 33 percent to 51.6 percent; more than a 50 percent increase. In 2016 another 3.2 percent of respondents are considering joining. This may be the single clearest trend in our data. AASHE is continuing to grow. NAEP has been a strategic partner with AASHE since its founding and have been members on the technical advisory board for the evaluation of the STARS tool and specifically the procurement section of the tool.

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

AASHE created (STARS), which is a tool its members may choose to utilize. The tool is a performance standard based sustainability tracking assessment and rating system, which has a public disclosure and reporting requirement. It is data driven as opposed to the ubiquitous subjective sustainability rating systems created by the higher education sector's content experts and public relations partners.
We wanted to determine if our shared members were using the tool. This was the sixth time we have asked this question. A clear trend has emerged. The rate of increase in utilization was greater than 50 percent from 32 percent in 2011 to a high of 52.5 percent in 2014 and dropped to 43.6 percent in 2016. And another 3.2 percent of respondents are considering using STARS in the future.

Q10. Is your institution participating in AASHE’s STARS (Sustainability, Tracking, Assessment & rating System) Program?

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

We are also very interested in how our members are embracing the ACUPCC’s efforts in the climate change arena. Respondents indicated they are signatories at the 29 percent level and another 8 percent indicate they are considering becoming a signatory.

Q12. Does your campus have a Sustainability Plan?

We are very interested in whether members have an institutional sustainability plan. This question is linked to Q4 in the context that the Green Procurement Policy if given a broader context in which to exist becomes a part of a whole in lieu of being a freestanding procurement policy. Thus, we believe it becomes a predictor of longer-term success.

The eight-year trend indicates institutional acceptance of the creation of sustainability plans on campus with more than 74.2 percent of 2016 respondents affirming the existence of a plan; this is the big winner because it continues to create the environment for Green Procurement Policies to flourish. The starting data point for this question was 62 percent in 2009. Again there is good news as there are another 6.4 percent who have a plan under development as indicated by the respondents in 2016.
Q13. Does your campus have a Climate Action Plan (CAP)?

Another critical element of a robust sustainability plan is a Climate Action Plan (CAP). We have been surveying this question for eight years. Indications were that there was a near doubling of institutions that had a Climate Action Plan in that span of time. 24 percent did in 2009, growing to 47.9 percent in 2013 and now falling to 29.1 percent in 2016. Maybe there is just a lag because another 8 percent indicate they have a Climate Action Plan under development. We have concluded that institutions build their green procurement policy first. Then they fit it to the development of a sustainability plan. When the sustainability plan is accepted they develop a CAP to accomplish the goals of the institution. We cannot help but wonder that with the passage of the Climate Accord in Paris, and the Clean Power Plan that has yet to be litigated, we should see a significant increase in this area in coming years.

Q14. Who in your organization is responsible for your institution’s sustainability initiatives?

Since the initiation of this survey, we have been very interested in understanding who on campus is responsible for the sustainability initiative. The trended data indicates that institutions have largely made the director level the home for their sustainability initiatives. The second highest response is the vice presidential level. Interestingly enough, there also is a trend that the “no single individual” is responsible and or that accountability lays at the “institutional level.” These are equally dangerous paths. We believe that to have no one at the helm is questionable.
Why is that? If nobody is responsible, “nobody” is accountable. Sustainability and therefore, green procurement is hard work in changing the minds and actions of a campus.

The fact that the Director level (43.6 percent) in 2016 responses remains the dominant model followed by the Vice President level (25.6 percent) is consistent with the eight year trended data.

Survey Results: Institutional Challenges and Priorities

In this major section of the survey we are trying to examine the institutional issues that are a part of the ongoing sustainability processes related to green procurement on campus. It is important to understand things like drivers, emphasis areas, broad market initiatives, and technical challenges. This section intentionally provides context and linkages to other components of the survey that appear later.

Q15. What are the main drivers for your institution’s sustainability initiatives?

We work to understand what is driving institutional sustainability initiatives each year. We ask respondents to share all factors they consider to be sustainability drivers. Over the length of the survey, eight years, our top five drivers have remained the same; “do the right thing”, reduce carbon footprint, reduce material consumption, improve institutional image, and reduce costs. We remain confident that this is highly unlikely to change in the near future.

In 2016 we created new driver responses based upon respondent’s feedback: “harvesting the co-benefits of green procurement.” Obviously this was a solid addition as it moved into the sixth spot in its first year in the survey. Regardless, the top five drivers are very solid and members have consistently identified them. Respondents do have other answer choices but they are invoked less frequently. In 2015, two interesting things were observed; the incorporation of a “social justice component”, and “reduce liability drivers,” made impressive advancements. We wondered if the trend sustained itself could that mean a broadening of the dialogue on campus about what green procurement is and does. Unfortunately both fell off their 2015 highs but did not disappear so we will watch with interest what transpires in 2017.

1. “Do the right thing”
2. Reduce carbon footprint
3. Reduce costs
4. Reduce material Consumption
5. Improve Institutional image
Q16. 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 (1 being easiest and 5 being most challenging).

We ask respondents to share their experience in implementing a green procurement policy by ranking the degree of importance on seven discreet tasks. We feel these tasks are clearly included in the process of implementing a green procurement policy. The range of choices insures the ability to discern the challenging tasks from the less difficult tasks.

**Easiest**

1. Securing executive support for green programs
2. Effectively promoting certified products and suppliers to end-users
3. Justifying “cost” for green purchasing
4. Getting suppliers to provide accurate and updated product information
5. Measuring progress with green procurement
6. Validating supplier’s green claims
7. Changing user behavior to focus on sustainability

We have asked this question for all eight years. The top three tasks identified as the most challenging tasks were; “changing user behavior to focus on sustainability”, “Validating suppliers green claims” and “measuring progress with green procurement.” These two tasks have remained the leaders from year one sometimes flip flopping as they did this year, but the new arrival “validating suppliers green claims” rose up from the fourth position. This is the third time it has been a top three placeholder. This may portend either a lot of green washing is going on or maybe a lot of younger buyers in the workforce.

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” are also consistently seen as not being difficult for procurement officials to have the information needed to implement their programs.

These three statements across the eight years have remained the bottom feeders so to say. Our respondents have these issues under control.

There had been a de-emphasis in the changing user behavior data but it came back with a fury in 2016. The second ranked statement “validating supplier’s green claims” moved up two positions. The fact that validations are seen as this important most likely means there is an increase in selling green products and services to end-users and this bodes well. We have solid data on what the non-issues are; it is not difficult to get executive support, respondents don’t have difficulty getting the information they need from suppliers and apparently when respondents have information, they feel they can promote green certified products such as EPEAT electronics to end users.

Likewise it remains difficult for respondents to influence users to think more sustainably about their purchases. There is an opportunity to explain total cost of ownership as opposed to “first cost” which is really price. And apparently there still no widely known and utilized software tool to assess just what green procurement has accomplished.

Q17. Rate on a scale of 1-5 how important are the following issues to your green procurement program (1 being least important and 5 being most important).

We try to measure on a simple ordinal scale what members perceive as the important components of their formal policy. Over the eight years of the survey the most important component has been Energy Star product purchasing.

It is obvious that ensuring that paper products purchases include both recycled content and when specified post-consumer waste is a part of the paper product and lastly increasing spend with diversity suppliers.
Of some concern possibly is the continued decline in the measurement of green procurement compliance importance in the opinion of respondents. One would like to believe that as this continues to fall it is caused by the fact that acceptance of green products and services purchasing has become more mainstream. Thus reducing the need for procurement professionals not having to “hard sell.” The data does confirm the fact that ecolabel procurement is not of major significance on campus. More to come on that in Questions 22 and 23 later. And finally, increasing spend with local suppliers is something that has been a topic for 50+ years in procurement but it never seems to rise to a prominent position and languishes in the middle of priorities.

Most Important

#1 Purchasing Products that attain ENERGY STAR certification
#2 Ensuring that all paper products purchased contain recycled content
#3 (tie) Increasing the total post-consumer recycled content in purchased products
#3 (tie) Increasing spend with diversity suppliers
#3 (tie) Increasing spend with local suppliers
#4 (tie) Measurement of green procurement compliance
#4 (tie) Reducing total shipments of delivered goods
#4 (tie) Increasing suppliers with eco-labels (i.e., Green Seal, GREEN GUARD)

Least Important

Survey Results: Procurement Processes

In this section the questions take a deeper dive into the procurement process. They are focused on systems, commodities, services, green procurement tools, and measurement and reporting. These questions continue to allow for the ‘sharpening of the saw’ insights and identifications of trends in the procurement profession.

Q18. 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. This may be the one question that evidences the institution’s commitment to successful implementation of its green procurement policy by providing a system, which facilitates better support for the end users. There is a trend of greater support and sophistication but there remains a lack of systems, which can identify and promote green products and services, and track ‘spend’ on green products and services.
It was clear that the 2016 respondents possess decidedly more robust systems, which allow them to better promote, identify, track and filter green products and their related activities and influence campus spending, but there is plenty of opportunity for improvement. More than forty-five percent of respondents could clearly identify green suppliers in their product search and 64.5 percent had systems that promoted green service providers and services. These are important improvements to systems. Equally important is the fact that only 29 percent could track total spend on green products and services. Great progress has been made but there remains a hurdle in the capturing of data on the spend side and a huge need to be able to filter results and improve general search capability both for departmental users as well as procurement staff.

Q19. In which of the following commodity categories does your green procurement primarily focus?

<table>
<thead>
<tr>
<th>Commodity Category</th>
<th>2016 Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper products</td>
<td>77%</td>
</tr>
<tr>
<td>General office supplies</td>
<td>60%</td>
</tr>
<tr>
<td>Janitorial supplies</td>
<td>52%</td>
</tr>
<tr>
<td>Computers</td>
<td>47%</td>
</tr>
<tr>
<td>Appliances</td>
<td>47%</td>
</tr>
<tr>
<td>Local Food</td>
<td>45%</td>
</tr>
<tr>
<td>Vehicles</td>
<td>42%</td>
</tr>
<tr>
<td>Construction Materials</td>
<td>36%</td>
</tr>
<tr>
<td>Renewable Energy</td>
<td>36%</td>
</tr>
<tr>
<td>Organic Food</td>
<td>29%</td>
</tr>
<tr>
<td>Office furnishings</td>
<td>29%</td>
</tr>
<tr>
<td>Renewable Energy Credits</td>
<td>18%</td>
</tr>
</tbody>
</table>

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 all eight years. We made some big additions to the selections in 2013 and the responses confirm that those were good choices for inclusion. Our top five leading commodities are; paper products (77.4 percent), office supplies and equipment (59.7 percent), janitorial supplies (51.6 percent), computers (46.8 percent) and appliances (46.8 percent). The new additions very did well for a fourth year; examples are construction materials (35.5 percent), renewable energy (35.5 percent), and local food (45.2 percent).

These categories help us to better understand the ever-expanding focus of the commodities in green procurement. To reinforce a point that from a waste volume, prospective paper, paper products and packaging are most likely the largest waste streams on campus, followed closely by organic sources, and the most sensitive is likely electronics dominated by computers. Focusing on these items as green commodities will lead to both cost and environmental improvements when the dialogue moves to packaging minimization and end of use discussions on land fill diversion.

Q20. Are green product certifications used in your procurement system?

We have been tracking green product certifications and their use in respondent’s automated systems for five years. We are trying to find out how prevalent their use is. We are also quite interested in what certifications are being used. The jury remains out on whether there is going to be a clear winner or winners in this arena. We indicated three years ago that the data shows a horse race. The fact that there are a huge number of product and service certifications out there complicates this issue. Procurement professionals have to pick their way through more than 400 certifications, which can and do cause confusion and fragmentation, leading to the creation of this question.
This year’s responses did not make an overly strong case for widespread adoption of product certifications, with basically one third using certifications, and one third not using, and one-eighth not using them yet. It appears that this data splits out that about 34-39 percent are using certifications and 12 percent are considering using them. Forty percent aren’t considering using and won’t use them. It remains too early to say we have a trend. We need to allow little more time.

Q21. What green product certifications are used in your procurement system?

We want to know which certifications members are using. We have been collecting this data for eight years. Energy Star has led the way and has grown from 55 percent in 2009 to 80.7 percent in 2013 and 71 percent in 2016; Green Seal has held the second position and continues to grow from 25 percent in 2009 to 43.6 percent in 2016. EPEAT assumed the third position this year at 37.1 up from 26.4 the previous year, and The Forest Stewardship Council (FSC) is in fourth position with 29 percent.

We added four certifications in 2013: EPEAT, FSC, Eco Logo and GRA. Three of the four had continued solid utilization in 2016. An indication of the crowded certification field is the fact that the “Other” category attracted a respondent’s response rate of 30.7 percent. Members shared some of their certifications and we will be examining them. Time and 2017 results will help us to clarify the staying power of all as this field continues to expand and grow. We feel like the marketplace is beginning to shake out a bit and we are cheering for our members.

Q22. In which of the following services categories does your green procurement primarily focus?

In the services arena our eight-year leaders “Recycling/Waste Handling” (72.6 percent) and “Housekeeping/Cleaning” (60 percent) have remained as the top two service areas of application. “Food Services” (48.4 percent) is third this year and the 2013 addition “New Construction” the fourth slot with (43.6 percent), while “Landscaping” at 36.5 percent rounded out our respondents top five.

There were two new service additions to the survey in 2016, catering services and architectural services. Each fared well with 19.4 and 17.7 percent respectively. The services arena is dominated by the Facilities and Auxiliary Services departments; two large powerful and influential partners on campus. Green procurement can be a great opportunity to bring value into the organization and the students will help that to happen. This question is linked to two questions later in the survey related to the USGBC’s LEED certifications.
Q23. What percent of total procurement spending is on green products and services?

We remain very interested in the outcomes of the application of the green procurement policy implementations and its marriage to technology. Here we are trying to measure this relationship as a percentage of total spend. 16.1 percent report a green spend of more than 10 percent of total spend this year is on green products and services. The range on the question is from 16.1 percent to 28.4 percent in 2012. And additionally 21 percent report they spend 10 percent or less on green goods and services. The range for this response runs from 8.6 percent to 21.6 percent also in 2012. Thus, 2016 was a very representative response when placed in the context of eight years of responses.

We think this means the marketplace is being signaled to develop more robust databases with reporting capabilities. Whether it is strong enough to drive the improvements in both systems and supply is anyone’s guess at this juncture. Obviously there is some shift occurring. The question is, is it material? Does it change the game? Without data systems to capture, record, and report the green procurement spend we will have to continue to rely on “doing the right thing” until we have the data to prove otherwise.

Q24. How do you measure the success of green procurement?

Here we want to know how members are measuring the success of their green procurement efforts. This is another eight year trended question. The results show that very minimal change has occurred over the years. This year’s respondents said that 64.5 percent of them had no formal measurement system – that is no meaningful improvement over the starting point of 77 percent. To begin to see an improvement, higher education needs to invest in data systems improvements.
The 20% of respondents who do measure success use the percentage of spend on green products by a factor of greater than 100 percent over other alternatives. That number (27.4 percent) is only an increase of 12.4 percent from the 2009 start. There is a small sliver of institutions that use a cost savings methodology (11.3 percent) and an even smaller group who use the percentage of unit volume method (9.7 percent).

We see this as a significant hurdle to be overcome! Devoid of data and with such a huge “no formal measurement” response, this issue is going to come to senior institutional leadership sooner or later.

Q25. How often do you report on your green procurement performance?

Transparency in green procurement is important: specifically 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 both internal and external stakeholders. 2016 was important both internally and externally. In 2016 fewer respondents reported that they “Never Report Internally” than in all of the prior years but one, and those who do report internally were in equilibrium with those who don’t. The results: “Never Reporting internally” (50 percent) and “Combined Internal Reporting” (48.4 percent).

The positive news is there is a slight downward trend that has moved overall external “never reporting” from 64 percent in 2009 to 54.8 percent in 2015. The result is that external reporting for 2016 are 30.7 percent, up from 2015’s 26.4 percent reporting for all external reporting options. The eight-year trend remains on a slight upswing in both the internal and external reporting by respondents. The results for 2016 indicate a greater movement in the area of external reporting. This may be a result of stakeholder pressures, or AASHE and STARS requirements or changes in regulations. Nonetheless, it is happening just ever so slightly. We hope that the rapid growth of STARS should improve these scores in the future. More and more institutions are under pressure to increase transparency, and green spend is assuredly a part of that broader trend in higher education.
Q26. What benefits do you see from your green procurement initiatives?

In higher education, outcomes are important so we asked respondents to share what benefits they derive from their green procurement initiatives. This is a six-year trend question. We did include two additional options in 2013. Those additions were "Improving STARS rating", and "Increasing student recruitment" both of which scored well 35.5 percent and 21 percent respectively in 2016. These were the 6th and 7th ranked benefits.

The top three benefits which respondents identified have not changed since the survey was launched; “Doing the right thing”, 83.3 percent in 2016 versus 2015’s 84 percent; “Improving institutional image” at 74.2 percent in 2016 versus 2015’s 74.2 percent; and “Stakeholder satisfaction” at 72.6 percent in 2016 versus 70.6 percent in 2015. These remain the dominant benefits our members identify from institutional effort. On some campuses these are probably considered to be akin to marketing slogans. We strongly believe that when coupled with improving the STARS rating and increasing student recruitment, a much clearer picture emerges about our profession sees benefit in green procurement initiatives.

### 2016 responses

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing the right thing</td>
<td>82%</td>
</tr>
<tr>
<td>Improving institutional image</td>
<td>74%</td>
</tr>
<tr>
<td>Stakeholder satisfaction</td>
<td>73%</td>
</tr>
<tr>
<td>Promoting the institution’s procurement initiatives</td>
<td>44%</td>
</tr>
<tr>
<td>Cost reduction and reduced liability</td>
<td>44%</td>
</tr>
<tr>
<td>Improving STARS rating</td>
<td>36%</td>
</tr>
<tr>
<td>Increasing student recruitment</td>
<td>21%</td>
</tr>
<tr>
<td>Meeting ACUPCC commitment</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>

Survey Results: Campus Sustainability

Respondents were asked to self-assess their green procurement programs; their training; their relationship and assessment of the campus sustainability champion; the increase in adoption of the USGBC’s programs; and the nascent endowment fossil fuel divestment initiative.

Q27. How would you rate the success of your green procurement initiatives?

This question is intended to allow respondents to self-assess the success of their green procurement initiatives using a graded A-F scale. We believe that it is important to have the members share their assessment as an indicator of the progress they feel is being made. The eight-year trend is a gradual movement from the C’s (52-35.5 percent) 2009 to 2016 to the D’s (19-25.8 percent). This likely reflects a larger downward shift from the C’s to the D’s and from the D’s to the F’s. There has been little to no movement in the A’s (4-4.8 percent) and B’s (21-22.6 percent) although that is a positive growth for each. The concern is the F’s (5-11.3 percent), which have more than doubled. This is not an encouraging trend. The general shift is toward an increasingly lower overall assessment.
The fact remains that so few have assessment tools. This leaves us with no data to support these perceptions beyond that of the respondents. We would like to believe that old axiom that perception is reality, is false. The trend data cannot be argued; there is a steady downward trend. We should not discount this trend but neither should we try and take it to the bank. We will be considering surveying faculty and staff randomly at member institutions to assist us in evaluating the success of green procurement on campuses where the initiative exists.

Q28. Please rate the green procurement training received at your institution.

We first became interested in the availability and the quality of green procurement training in late 2009. The first survey to collect data was 2010. We knew that there were questions about green procurement training from the members.

We began asking and using an eight point ordinal scale “poor” to “outstanding”. We decided to change that in the 2016 survey to a five-point scale plus a “none available” choice. We eliminated “fair” and “reasonable”. The ongoing surprise is that respondents continue to tell us (43.6 percent) in 2016 to (33 percent) in 2010 that there is no training available to them. Obviously that means in seven years there has been no perceptible expansion of opportunity for training and in fact it probably got worse. One has to wonder how senior institutional leadership believes that it can have a quality green procurement initiative. It cannot be a reasonable assumption if there is no investment in the most valuable resource the procurement employee.

Further, there is a very loud and clear indictment in the data. 12.9 percent of respondents in 2016 consider what training they do receive to be poor. On the other end of the spectrum, those identifying the training received as outstanding is a mere 6.5 percent in 2016 compared with 0 percent in 2010, tell another story. It is possible that those institutions that are large enough or wealthy enough are performing their training activities and are doing a great job.

What about those institutions in the middle or at the smaller institutions? Is there anywhere or nowhere to turn for assistance? Does it make sense for higher education to make the green procurement policy commitment but not fund the implementation and ongoing training to insure success? Is the answer to ask our larger member institutions what their key to success is? Or ask them to do training for the other members for a fee?

It should come as a surprise that the center of the scale “OK and “Good” occupy only (25.8 percent) of the responses and that the 2010 comparative number was (21 percent). It certainly is not a bell curve and all of the trend data is moving in the wrong direction! We think the facts are clear; there is a huge void. If the notion of green procurement is
to thrive and reach its potential, help is needed from outside the individual institutions to get the lofty sustainability goals many institutions have set for themselves an opportunity to come to reality.

**Q29. Is there a green procurement "champion" on campus?**

We want to find out if there is a green procurement champion on campus. We began asking the question in 2011. The “yes” responses have hovered around 53 percent until 2014. The 2016 and 2015 responses are (45.2 and 41.7 percent), respectively. We had our highest percentage of “no” responses in 2015 (40.5 percent) and 2016 is not much better (37.1 percent). The “don’t knows” responses are relatively static at (17.8 percent).

Institutional leadership for sustainability is at the Director level or above level (88.4 percent) of the time, so why don’t respondents feel there is a champion for green procurement? This may be an indication that the growth of the sustainability initiatives has altered its focus away from the critical role that green procurement plays in a sustainability plan. The presence of a green procurement champion on campus has dropped 8 percent in the last four years.

**Q30. Is this Green Procurement Champion effective when working with your team?**

Here we want to know from only those respondents who affirmed there was a champion on their campus, was the green procurement champion effective in working with the green procurement organization. We are very confident that the champions have been effective and the data loudly demonstrates this. For those institutions that have a champion on campus the relationship is very positive, as further indicated by the very low dissatisfied respondent’s perception of effectiveness data.

**Q31. Does your campus have a new construction USGBC BD&C LEED policy?**

This was a new question in 2013 intended to build upon the link between green procurement and facilities and sustainability. We wanted to know if the higher education sector had embraced the USGBC’s LEED process for new construction as a part of their overall sustainability planning. The fourth year data indicates that is the case at a rate of greater than 40 percent, which is down 18 percent from the 2014 high mark of 68.1 percent. We suspected that the number might be larger in following years based upon the 19.8 percent who did not know in 2014, which certainly has not turned out to be the case. It is
possible that the early adopters dominated the early years and what we are seeing now is a more normative pattern. We will be seeking to understand what transpired, as these results are counter to the USGBC's national data.

Q32. Is your campus certifying existing buildings using the LEED O + M process?

We were looking for higher education’s embrace of the USGBC’s LEED for existing buildings programs. The fourth year data shows clear support at (33.9 percent). However, there has been a (15.3 percent) drop from 2014 to 2016. There are also a large number of “don’t know” responses (41.9 percent), which leads to a lot of questions.

Q33. Is your campus involved in a fossil fuel divestment campaign with its endowment holdings?

Periodically there are hot topics on campus. This is one of them. We felt this was worth testing the waters. We wanted to find out the extent of effort that higher education was taking to divest itself of investments in the fossil fuel industry from its endowment holdings. The data indicates that this activity is gaining momentum. Only more data and time will tell us the extent but with COP 21 agreement signed in December 2016 at Paris, and the impending Clean Power Plan and litigation, we expect this number to increase. The “yes” response rate was (4.8 percent), while the “no” rate was (37.1 percent). The “don’t know” responses (54.8 percent) can easily swing the data in a short timeframe. Large-scale change can cause that to occur in any direction so we will continue to watch this phenomenon.

34. How would you describe the veracity of your campus commitment to green procurement over the last three years? (See Executive Summary, page 2 for graph)

We are trying to have the respondent take a broad look at green procurement in the context of the campus over the past three years. We are interested in how the respondent’s see it taking place. Is it waxing, waning or don’t know on their campus. This is the first year for this question. We were pleased to see the good percentage of respondent saying it is waxing (40.3%) and a relatively small percentage (11.3%) that believed it is shrinking or waning.

35. On a scale of 1-5, with 1 being the highest priority, where would sustainability and green procurement fall on your institution's campus priorities? (See Executive Summary, page 2 for graph)

Here the intent of the question is to draw out from the respondent what the individual believes is the priority of sustainability and green procurement in the hierarchy of priorities on campus. This also is a first year question. Where the notions of sustainability and his or hers profession’s commitment to green procurement is important we believe.

Interestingly enough roughly a third of respondents don’t believe it is in the top five priorities on campus. But, basically two thirds of respondents, however, felt it was in the top five priorities for the campus and 8.1 percent thought it was the top priority on campus. This is encouraging. This optimistic outlook is great for the profession because if you think you are doing great things you most likely will do great things when they are recognized and appreciated. This is a question that over time will help us to understand better the integration of sustainability into all facets of campus life and institutional direction and the important role procurement professionals play.
Conclusion

First, thank you to those who have 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 procurement in the higher education sector. We also want to thank those who responded for the first time in 2016. We want to encourage you to respond again in 2017 and beyond. We encourage you to share this report with your colleagues. Again, thank you!

This is a survey of the membership, not a survey of the member institutions. What’s the difference you might ask? We do not restrict the survey to the member of record for the institution. We do restrict individuals to one response. So to be clear if there are five people on campus who are actively engaged in the procurement of goods and services, or they are the green procurement champions, we are interested in the responses from each individual.

The trending of data that we had hoped for when we devised the base survey a very long time ago has paid handsome results. We believe that this survey remains a meaningful exercise for the organization and the profession; it is value added. If upon reading the report you have suggestions for topics to be considered in the future, clarifications of questions, or conclusions please let us know by emailing membership@naepnet.org.

We strongly believe there is value to the broader higher education community as a whole and to procurement professionals everywhere on the planet and in every sector of the economy to the responses our members provide. The citation by Sightlines in the UNHS sponsored *The State of Sustainability on Campus* is evidence of the same. We will continue to adapt and improve where possible. We vow to keep our core fourteen questions so that twenty-five years from now there will be a baseline of seventeen years of data on the history of green procurement from which to glean data for evaluating future green procurement activities. This can only be sustained with the active engagement of NAEP Members.

Thank you for your time and attention,

Brian K. Yeoman
Director of Sustainable Leadership

*You Can Do Great Things!*