

DRAFT

Change Agent Group Goals-Procurement

Mission Statement: To enable the acquisition of resources in a manner that supports the UC education, research, and public service mission through innovation, support of the invention and transition towards environmentally preferable processes, social responsibility, and the utilization of green technologies that enhance the positive transformation of markets towards full sustainability.

List of Current Sustainable Practices:

- 1. Electronic Processing:** UCSB currently uses several electronic systems to administer campus business processes. Campus procurement is largely decentralized and all low-value buying is administered by the departments. Although UCSB does not have an integrated e-commerce system in place, it operates with a patchwork of various systems that have come online in recent years. Programs impacting procurement include:
 - a. FlexCard: campus Visa card for low value buying
 - b. Rex (Requisition Express), POTs (Purchase Order Tracking system), PORs (high-value or restricted-item purchase orders)
 - c. CATS: Capital Assets Tracking System (Equipment Management)
 - d. WebTV: electronic travel voucher system
 - e. Direct deposit (reimbursements, payroll, travel)
 - f. Ebill presentment (online student statements—going live 7/06)
 - g. Online General Ledger (Invoice links)
 - h. Data Warehouse (campus financials and historical data)
 - i. GUS (departmental administrative/financial shadow system)

- 2. Commodities:** Environmentally Preferable Products are increasingly being purchased on campus. Both large and small departments, including Housing & Residential Services and Facilities Management, have made considerable efforts to purchase commodities with greater energy efficiency, green chemicals, high recycled content, low VOC content, low mercury/cadmium/lead content, and responsible end of life management programs that include reuse and recycling.
 - a. FM, H&RS Custodial staff(s) using Green Seal certified chemicals, 100% recycled content paper (% needed)
 - b. FM phasing-in energy efficient lighting on campus
 - c. Office Supplies contract offers products with recycled content
 - d. Campus procurement of recycled content paper (% needed)
 - e. Energy Star features mandatory with all new contracts for appliances, printers, copiers, facsimile, PCs
 - f. FM, HR&S using environmentally preferable carpet tiles

- Bio-based processing systems and non-toxic machines
 - reusable,
 - compostable,
 - continually remanufactured,
 - reprocessed

- 3. Sustainable Economy:** Positive transformation of both the University of California and its supporting industries and markets towards a triple bottom line that is prosperous, cost effective, and responsible while meeting the goals of:
 - Cradle to cradle—Accountable, responsible, and environmentally preferable supply chain management from material extraction, production, marketing, sale, use, disposal, collection, reuse, and so forth continually as a web of closed loop cycles and processes.
 - Exponential increase in resource productivity—efficiency levels
 - “Biomimicry”—Janine Benyus,
 - Nature as a model
 - Nature as a measure
 - Nature as a mentor
 - Zero emissions generated through travel/transport of goods
 - Zero-waste (all inputs are either recycled, composted, or reused/reprocessed/remanufactured locally—a closed loop system)
 - Commodity matrix to clearly assess the impact of products/services on human health and social conditions and a clear commitment to purchase within goals

- 4. Purchasing supports UC research, innovation, and invention of environmentally preferable systems and processes**
 - Investment strategy incorporates sustainable design
 - Incentives for programs that meet or exceed the goals being established for environmentally preferable processes
 - Sustainable new technologies that drive market forces are rapidly integrated within UC
 - Standardized criteria for sustainable commodities/services across industries and markets

Goals (measurable or numerical data)

Short term (0-1 years)

1. Electronic commerce:
 - a) Catalogs (elimination of decentralized hard copies)

UCSB Campus Sustainability Plan Template

- Purchase new electronic catalog system—estimated cost = \$100K
 - Route 50% of buying through new electronic catalog system
 - Reduce hard copy catalogs on campus
 - Inventory of hard copy catalogs (Mail Services)
 - Inventory of campus catalogs processes
 - Create vendor website for catalog posting
 - Inform all UCSB vendors of intent to solely utilize electronic catalogs
 - Provide access to a vendor website for posting
 - Set transition date for Mail Services to reduce hard copy flow.
- b) FlexCard
- Increase utilization to 75% of departments
 - Cross reference and compile spend reports
 - FlexCard vs. LVO (POs vs. US Bank data)
 - Spend volume through Flex-card
- c) GUS
- Integrate strategic sourcing/green vendors as priority purchasing within the GUS system:
 - Create spend tracking system with commodity/vendor coding and work with the GUS coding team to have this integrated into their program
 - Track Low Value buying on quarterly basis
- d) Process payments:
- Move to Electronic Data Interface (EDI) with vendors (UCSB/IS&C—vendor relationship)
 - Locate & allocate programmer to implement EDI
 - Track implementation and utilization
- e) Travel:
- Work with Kerr Hall to increase video conferencing in order to decrease actual travel
 - Create business/feasibility case = cost savings
 - Establish pilot program for intersystem group(s)
 - Increase video conferencing access by 15%
 - Begin implementation of e-signatures
 - Establish program scope, cost, and timeline
- f) Website:
- Improve Strategic Sourcing website—data, resources – in order to increase use by UC departmental purchasing staff/end-users

UCSB Campus Sustainability Plan Template

- Enhance online interface between campus purchasing and system-wide strategic sourcing
 - Ease of use
 - Marketing
 - Google like search engines
- Formalize [LabRATS](#)—Laboratory research and technical staff (currently a list-serve for Lab staff created by Allen Doyle and managed through Yahoo)
 - UCSB equipment and supplies sharing system
 - *Establish project scope*
- Create web links: Business Services, Purchasing, Sustainability
- Strengthen resource base for Sustainability site
 - Post commodity criteria
 - Post training materials

2. Commodities:

a) Office supplies

- 100% campus wide phase in of minimum 30% PCW recycled content paper
 - Get spend reporting from Office Max & Central Stores
 - Create cost effective pricing strategy
- Green tag all items with recycled content, energy star, “certified” green, enable LEED credits
 - Create commodity tree coding
 - Compile quarterly spend reports (Office Max)
 - Work with Storehouse to compile inventory
 - Work with Storehouse to enhance green option
- Increase availability/awareness of environmentally preferable products—marketing
- Discourage use of virgin products/non-recyclable products—education and outreach

b) Janitorial Supplies

- Create baseline inventory of UCSB Green Cleaning utilization (spreadsheet format--end of calendar year)
 - FM, H&RS, Central Stores, Strategic Sourcing data
 - Identify applications where use is absent
 - Identify new end-users (food services, depts.)
 - Research possibility of enhanced standards, products, availability, and pricing

c) Appliances, PCs, Copiers, Faxes, Misc. Electronics:

- Establish clear E-waste standards
 - Inventory available E-waste receptacles
 - Improve & Increase availability of receptacles

UCSB Campus Sustainability Plan Template

- o Manufacturing take-back written into contracts
 - Energy Star
 - o Establish Energy Star partnership for UC
 - o Establish Sustainability-IT working group
 - o Target high-energy use buildings/departments
 - o Monitor and meter energy usage
 - o Enable all energy saving features on all machines
 - o Track results, repeat campus wide
 - d) Carpet (Initiative currently underway)
 - e) Furniture (Initiative currently underway)
 - f) Operations and Maintenance (Initiative currently underway)
 - g) Travel (Initiative currently underway)
 - h) Food Services Initiative currently underway)
- 3. Policy/Education & Outreach:
 - a) Energy efficiency
 - Departmental-building metering
 - o Work with Energy Manager, Green Campus
 - 75% campus wide enablement of energy star features
 - Measure energy savings
 - o Meter data (before and after energy star)
 - o Analyze, report cost savings/CO2 emissions
 - b) Manufacturing Take-back and Recycling programs
 - Design “universal” take-back program
 - o Ease of use and at no additional cost to UC
 - o Program to include existing equipment
 - o Vendor reporting for all reclaimed equipment
 - Work with new and existing vendors to initiate pilot recycle programs:
 - o Copiers
 - o Carpets
 - o PCs
 - o Furniture
 - o Bottled water
 - c) Develop packaging specifications for all UC vendors and build into Strategic Sourcing terms and conditions:
 - recyclable
 - rapidly renewable
 - bio-based
 - practical & effective
 - o Research and analyze cost incentives, develop business plan
 - o Engage vendors with outreach (memo, letter to all vendors, including those not on Strategic

UCSB Campus Sustainability Plan Template

Sourcing contracts, notifying them of the UC guideline/goal)

- d) Products Content
 - Continually incorporate language for Environmentally Preferable product standards
 - Work with State of California EPP task force
 - Designate UC representative to taskforce
 - Collaborate on joint EPP standards for state of California
 - Work with municipalities active in EPP
 - Establish web links, interface efforts (Goleta, Santa Barbara, Santa Monica, San Francisco, Alameda County)
- e) Standards and Criteria
 - Continually monitor and enhance commodity matrix with specifications for more sustainable procurement (emphasis on vendor selection/qualification, LEED certification)
 - Compile data into working spreadsheet, and create criteria archive (post to website)
- f) Begin establishment of target goals for strategic initiatives:
 - System wide Vice President of Financial Management
 - Campus Material Managers
 - Strengthen Departmental understanding
 - Clarity and standardization of requirements and processes
- g) Green Marketing
 - Signage and visual schematics (Sustainability logo)
 - Create Environmentally Preferable logo (reference Energy Star logo)
 - Implement use on campus
 - Allow and encourage for contract vendors as appropriate
 - Integrate efforts across campus with logo
 - Monthly press release/outreach event on campus
 - Sustainability efforts publicized throughout
 - UCSB
 - Santa Barbara and tri-counties
 - UC system
 - State of California

Intermediate (1-5 years)

- 1. Electronic Commerce
 - a) Catalogs (full elimination of decentralized hard copies)

UCSB Campus Sustainability Plan Template

- Expand catalog base to cover 100% of Strategic Sourcing vendors
 - Improve vendor website for non-strategic sourcing vendors and increase utilization
 - 100% phase out of hard copy catalogs
 - b) Pilot e-commerce system(s) for campus
 - Fully implement EDI
 - Integrate existing processes into new system
 - Roll out training and new system to campus
 - c) FlexCard
 - 100% of departments utilize FlexCard
 - 75% of Low value purchasing done with FlexCard
 - 100% Strategically sourced commodities purchased through FlexCard
 - d) E-signatures for all forms
 - e) Campus-specific e-bay/reuse of surplus (sharing system)
 - Develop web option for campus sharing (excess equipment, unused supplies)
 - f) Website
 - Continually review and increase the integration of websites between campus, Business Services, Purchasing, Sustainability, UCOP and vendors
2. Staffing and Resources
- a) Secure core funding for 1.0 FTE Sustainability Business Specialist
 - b) Add Strategic Sourcing Manager 1.0 FTE to Business Services/Purchasing staff
 - c) Add additional support staff as needed (web programming)
3. Commodities
- a) Benchmark and expand upon short term objectives
 - b) Continual development and utilization of Sustainability criteria for all commodity categories
 - Work within Strategic Sourcing Master Plan to identify priority commodity categories
 - Identify strategic categories based upon ecological, social, and economic impacts
 - Create working database of Sustainability criteria for web posting for RFP, contractual utilization
 - UC system wide working committee to ensure implementation of Sustainability goals for business processes
 - c) Reporting and benchmarking

UCSB Campus Sustainability Plan Template

- For new and existing agreements, collect spend data quarterly for EP commodities
 - Measure spend volume vs. energy usage, waste disposal, etc. to gauge campus operational savings
 - Create energy usage vs. space utilization matrix
 - Increase utilization of EP options
4. Policy/Education & Outreach
- a) Continuous improvement and utilization of matrix, criteria, and guidelines for more sustainable procurement
 - emphasis on vendor selection/qualification
 - Increase quality points weighting for Sustainability (min. 15%)
 - b) Firm alignment of goals for strategic initiatives and engagement of Sustainability goals at all levels in firmly established in **UC policy**
 - System wide Vice President of Financial Management
 - Campus Material Managers
 - Strengthen Departmental understanding of sustainability goals
 - Clarity and standardization of requirements and processes
 - c) Green Marketing
 - Signage and visual schematics (Sustainability logo)
 - 100% interface of logo with Sustainability projects
 - Integrate Environmentally Preferable (EP) purchasing programs with logo across UC system
 - Monthly press release/outreach event on campus Sustainability efforts
 - UCSB
 - Santa Barbara
 - UC system
 - d) Manufacturing Take-back and Recycling programs
 - Implement “universal” take-back program
 - Ease of use and at no additional cost to UC
 - Program to include existing equipment
 - Vendor reporting for all reclaimed equipment
 - e) Travel
 - Increase video conferencing by 75%
 - Increase ride-sharing/vanpooling for intercampus travel
 -

← - - - - Formatted: Indent: Left: 162 pt

Long Term (5-10 and 10-20+)

1. Electronic Commerce
 - a. Fully integrated and implemented electronic commerce system between departments, campus, UC systemwide, and vendors
2. Commodities:
 - a. International Standards for Environmentally Preferable (EP) purchasing
 - i. Tier rating system (LEED model)
 - ii. Scientifically based, neutral oversight of standards development
 - iii. Internationally recognized logo
 - iv. Effective controls for validity of environmental criteria
 - b. All product inputs into the University of California are compliant with EP standards
 - i. Rapidly renewable
 - ii. Recycled content
 - iii. recyclable
 - iv. reusable
 - v. biodegradable
 - vi. can be refurbished
 - vii. effective end of life programs
 - c. Zero waste output from University locations
 - d. UC wide e-bay/reuse of surplus sharing process
3. Policy/Education & Outreach:
 - a. 100% UC wide implementation of Sustainability practices in UC business and investment strategies

Barriers:

1. Funding
2. Buy-in across (decentralized) campus/UC system
3. Duplication of efforts: *reinventing the wheel*
4. Communication
5. Time
6. Apathy/education and awareness
7. Lack of incentives
8. Risk-adverse environment
9. New learned behavioral changes: *resistance to change*

10. Conflicting messages: *inconsistency of understanding surrounding Sustainability*

Short-term Action Items:

- Standardized language, criteria, certification standards
- Summer student orientations: *presentation of sustainable purchasing at new student orientation*
- Educational seminars/workshops (campus & system wide)
- Vendor catalog system
- Website (UCOP Strategic Sourcing Sustainability section, sustainability.ucsb.edu) resource links, integration
- OACIS (HR): *require that sustainability is addressed (templates included) in all job descriptions*
- Modify employee performance review to incorporate Sustainability goals within the matrix of job performance
- Purchasing criteria and guidelines (policy matrix, LEED standards)
- Modify travel system to utilize e-signage and receipts

Other

- Modify web systems to allow easy/quick access by end-users providing links to sustainability/vendor information
- Purchasing system: *modify to include vendor catalog and information regarding vendor matrix with sustainability focus (flexcard)*
- Performance review form modified to include sustainability section
- Addition of sustainability information in General catalog (move this to on-line or increase cost to make hard-copy less desirable)