Guidance for Leadership in Sustainable Purchasing v1.0
Pilot Program Overview

November 21, 2014
Agenda

1. SPLC Context
2. Guidance v1.0
3. Pilot Program
4. Membership
5. Question & Answers
Agenda

1. SPLC Context
2. Guidance v1.0
3. Pilot Program
4. Membership
5. Question & Answers
Context

1. Opportunity
2. Challenges
3. Solution
Opportunity for strategic leadership

Spending by Institutional Purchasers

$10 Trillion

Analysis by TRUTHstudio based on US Bureau of Economic Analysis 2011 Summary Use Annual I-O Table
Opportunity: Institutional purchasing shape markets.
Opportunity: Institutional purchasing shape markets.
Context

1. Opportunity
2. Challenges
3. Solution
Challenge: Lack of coordination.
The lack of standardization in how sustainable purchasing is defined, guided, measured, and rewarded.
1. Opportunity
2. Challenges
3. Solution
SPLC collaborates to launch a shared program for guiding, measuring, and recognizing leadership in sustainable purchasing?
A big tent.
SPLC Approach & Programs

SPLC Rating System

SPLC Guidance, Training, Community of Practice

Get Started

A. **ENLIST**
   - support from key internal and external stakeholders.

B. **SCOPE**
   - activities, goals, roles, and responsibilities.

C. **STRUCTURE**
   - internal and external stakeholder engagement process.

Run the Process

1. **ANALYZE**
   - Identify impacts within spending.
   - Prioritize categories for action.

2. **MEASURE**
   - Track and benchmark performance.
   - Evaluate for continuous improvement.

3. **IMPLEMENT**
   - Set goals, timelines and policies.
   - Train staff and engage suppliers.

4. **ACTION PLAN**
   - Identify and select proven strategies for mitigating impacts while delivering value.

Get Recognition

5. **EARN**
   - Leadership recognition.

SUSTAINABLE PURCHASING LEADERSHIP COUNCIL
Analogy: USGBC / LEED

<table>
<thead>
<tr>
<th>BEFORE (early 1990’s)</th>
<th>AFTER (early 2010’s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market fragmented by inconsistent guidelines</td>
<td>LEED provides buyers and suppliers with common language</td>
</tr>
<tr>
<td>No shared training program for green building</td>
<td>LEED AP makes training accessible to everyone</td>
</tr>
<tr>
<td>Can’t differentiate credible from greenwash</td>
<td>LEED identifies credible standards and eco-labels</td>
</tr>
<tr>
<td>Leadership recognition based on marketing</td>
<td>Leadership recognition based on performance</td>
</tr>
<tr>
<td>Shared challenges solved project by project</td>
<td>Shared challenges addressed through LEED versioning</td>
</tr>
<tr>
<td>Documentation is expensive and rare</td>
<td>Documentation costs steadily decrease</td>
</tr>
<tr>
<td>Creativity consumed reinventing the wheel</td>
<td>Creativity focused on innovation</td>
</tr>
<tr>
<td>ROI demonstrated on case by case basis</td>
<td>ROI of LEED approach consistently documented</td>
</tr>
<tr>
<td>Green building is expensive</td>
<td>Building LEED-certified adds negligible cost</td>
</tr>
</tbody>
</table>

“A common standard is impossible.” ➔ A common standard is widely embraced and used.

“Green building will always be niche.” ➔ Green building is becoming the norm.*

* Green building is estimated at 44% of non-residential new construction in 2012.
Timeline

Launch Event / American University / Jul 2013

Panel Conversation

- Joel Makower, GreenBiz Group (moderator)
- Alison Kinn Bennett, US Environmental Protection Agency
- Chris O’Brien, American University
- Jason Pearson, Sustainable Purchasing Leadership Council
- Yalmaz Siddiqui, Office Depot

Chat (Conversational):
Julia: UL has over 1400 standards which are developed through open consensus-based processes
Dave Barber: How do we get the recorded version of the presentation?
Julia (david):
Marcia Kinter: Yes, I have heard of the Sustainability Consortium – they are based at the University of Arkansas
nathan conness: This sounds a lot like
nathan conness: http://www.sustainabilityconsortium.org/
Beth Holst: That's it.
David Hyatt: I am at University of Arkansas – have written academic case studies on WWF and the sustainability consortium
Julia: That would be a good question to ask.
Joshua Martin: Yes, I asked about TSC and the Consumer Goods Forum – how is SPLC positioned in relation to those.

Q&A *Submit questions here please*

Information

All audio for today’s event will be served through your computer speakers. Please submit all questions into the Q&A Pod to the left. Slides for today’s event are available for

Download Slides Here

- SPLC_Webcam: 10 MB
- SPLC_Webcam: 1 MB
Strategic Partners engaged

- American National Standards Institute (ANSI)
- American Sustainable Business Council
- aashe
- BIFMA
- ICLEI
- ISM
- Iseal Alliance
- NASPO
- PRACTICE Greenhealth
- Product Stewardship Institute
- Responsible Purchasing Network (RPN)
- Sustainable Food Laboratory
- BSR
- Sustainability Standards Partnership

Sustainable Purchasing Leadership Council
Welcome.
We are a community of professionals dedicated to using the power of sustainable procurement to advance local and global quality of life.

Join us.

We convene a COMMUNITY of leaders.
The Council brings together visionary professionals from institutions, suppliers, government, standards bodies and NGOs to simplify, optimize and standardize the practice of sustainable procurement. Together, we can leverage the trillions of dollars spent by organizations to drive social, environmental, and economic sustainability.

We will offer GUIDANCE for implementation.
The Council’s membership collaborate with each other and with other partners to supply purchasers with the best available hot spot and product-specific guidance in a manner that prioritizes high-impact areas of spending and that supports procurement processes commonly found in the public and private sector.

We propose a LEADERSHIP recognition program.
Just as the USGBC’s LEED program provides a shared platform for guiding, measuring, and recognizing leadership in green building, the Council proposes a shared platform for guiding, measuring, and recognizing leadership in sustainable procurement.
Membership opens / Oct 2013

A big tent.
<table>
<thead>
<tr>
<th>Year</th>
<th>Members</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>Coalition of Immokalee Workers&lt;br&gt;Aflac&lt;br&gt;Alameda County, CA&lt;br&gt;American Chemistry Council&lt;br&gt;American Clean Skies Foundation&lt;br&gt;American Coatings Association&lt;br&gt;American University&lt;br&gt;Apex Clean Energy&lt;br&gt;Aramark&lt;br&gt;Arizona State University&lt;br&gt;ASSA-ABLOY&lt;br&gt;Bloomberg&lt;br&gt;BSR&lt;br&gt;BuildingWise, LLC&lt;br&gt;Business &amp; Institutional Furniture Manufacturers Association&lt;br&gt;Caesars Entertainment&lt;br&gt;California Department of General Services&lt;br&gt;CalRecycle&lt;br&gt;CEGESTI&lt;br&gt;Center for Resource Solutions&lt;br&gt;CIPS Sustainability Index&lt;br&gt;Citi&lt;br&gt;City &amp; County of Denver&lt;br&gt;City of Cleveland&lt;br&gt;City of Portland, OR&lt;br&gt;City of San Francisco, CA&lt;br&gt;City of Santa Monica&lt;br&gt;City of Seattle, WA</td>
<td>125&lt;br&gt;$200b</td>
</tr>
<tr>
<td>2013</td>
<td>ISEAL Alliance&lt;br&gt;JCPenney&lt;br&gt;King County, WA&lt;br&gt;Kohler Company&lt;br&gt;Kuhn Associates Sustainability Advisors&lt;br&gt;Leonardo Academy&lt;br&gt;LittleFootprint Lighting&lt;br&gt;Lockheed Martin&lt;br&gt;Massachusetts Operational Services Division&lt;br&gt;Massachusetts Water Resources Authority&lt;br&gt;Michigan Department of Environmental Quality&lt;br&gt;Michigan Department of Technology, Management &amp; Budget&lt;br&gt;Michigan State University&lt;br&gt;Minnesota Materials Management Division&lt;br&gt;Minnesota Pollution Control Agency&lt;br&gt;Multnomah County, OR&lt;br&gt;Municipal Collaboration for Sustainable Procurement&lt;br&gt;Municipal Collaboration for Sustainable Procurement&lt;br&gt;North Shore LIJ Health System&lt;br&gt;Northbound Ventures, LLC&lt;br&gt;Northeast Recycling Council, Inc&lt;br&gt;Office Depot&lt;br&gt;Pacific Gas &amp; Electric&lt;br&gt;PE International&lt;br&gt;Perlmutter Associates&lt;br&gt;Portland Community College&lt;br&gt;Portland State University&lt;br&gt;Practice GreenHealth&lt;br&gt;PROSOCO&lt;br&gt;Province of Nova Scotia&lt;br&gt;re:sustain&lt;br&gt;RepRisk AG&lt;br&gt;Resource Recycling Systems&lt;br&gt;Responsible Purchasing Network&lt;br&gt;REUSA-WRAPS Reusable Logistics Solutions, LLC&lt;br&gt;Rivanna Natural Designs&lt;br&gt;Roundtable on Sustainable Biomaterials&lt;br&gt;SciQuest&lt;br&gt;SCS Global Services&lt;br&gt;Social Hotspots Database Project&lt;br&gt;Sound Transit&lt;br&gt;Southern Connecticut State University&lt;br&gt;Sphere E&lt;br&gt;Stratford Companies&lt;br&gt;Sustainable Flows&lt;br&gt;Sustainable Forestry Initiative, Inc.&lt;br&gt;Sustainable Methods Institute&lt;br&gt;Sustrana&lt;br&gt;TODAY: 125 members, &gt;$200b spend</td>
<td>125&lt;br&gt;$200b</td>
</tr>
<tr>
<td>2014</td>
<td>TD Bank Group&lt;br&gt;The CarbonNeutral Company&lt;br&gt;The District of Columbia&lt;br&gt;The George Washington University&lt;br&gt;TreeZero Paper&lt;br&gt;Trucost&lt;br&gt;UL Environment&lt;br&gt;United Soybean Board&lt;br&gt;University of Pennsylvania&lt;br&gt;University of Texas, Austin&lt;br&gt;UPS&lt;br&gt;US Department of Agriculture&lt;br&gt;US Department of Energy&lt;br&gt;US Environmental Protection Agency&lt;br&gt;US General Services Administration&lt;br&gt;US Green Building Council&lt;br&gt;Venable LLP&lt;br&gt;Waste Management&lt;br&gt;World Resources Institute&lt;br&gt;World Wildlife Fund, Inc.</td>
<td>125&lt;br&gt;$200b</td>
</tr>
</tbody>
</table>
Principles for Leadership in Sustainable Purchasing

Version 1.0
Adopted April 2014

© 2014 Sustainable Purchasing Leadership Council
Principles for Leadership in Sustainable Purchasing

An organization demonstrates leadership in sustainable purchasing through:¹⁰

- **Understanding.** Understanding the relevant environmental, social, and economic (ESE) impacts of its purchasing.
- **Commitment.** Taking responsibility for the relevant environmental, social, and economic (ESE) impacts of its purchasing by committing to an action plan.
- **Results.** Delivering on its commitment to improve the relevant environmental, social, and economic (ESE) impacts of its purchasing.
- **Innovation.** Actively promoting internal and external innovation that advances a positive future.
- **Transparency.** Soliciting and disclosing information that supports a marketplace of innovation.

These criteria outline a framework for specific actions. The SPLC recognizes that timelines for achievement will vary across criteria and market sectors based on the availability of: tools and resources to implement representative actions; products and services that effectively improve the relevant ESE impacts of an organization’s purchasing; and practical tools and resources to measure that improvement.
Annual Summit
175 Attendees, 121 Organizations, 20 Workshops
Program Committees formed

- Technical Advisory Committee (TAC)
  - Ad Hoc Work. Groups
- SPLC Board
- SPLC Staff
- Purchasing Category TAG
- Purchasing Category TAG
- Purchasing Category TAG
Spend Analysis Study Begins

UNIVERSITY OF DALLAS
College of Business
Pilot Program Enrollment

SPLC Guidance, Training, Community of Practice

Get Started

A: ENLIST
Support from key internal and external stakeholders.

B: SCOPE
Activities, goals, roles, and responsibilities.

C: STRUCTURE
Internal and external stakeholder engagement process.

Run the Process

1: ANALYZE
Identify impacts within spending. Prioritize categories for action.

2: MEASURE
Track and benchmark performance. Evaluate for continuous improvement.

3: ACTION PLAN
Identify and select proven strategies for mitigating impacts while delivering value.

4: ACTION PLAN

Get Recognition

5: EARN
Leadership recognition.

PLATINUM
GOLD
SILVER
REGISTERED
SPLC Guidance, Training, Community of Practice

Get Started

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2013 2014 2015

Guidance v1.0 Release
Dec 2014
Pilot of Guidance v1.0 begins
Jan 2015

SPLC Guidance, Training, Community of Practice

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PLATINUM
GOLD
SILVER
REGISTERED

SUSTAINABLE PURCHASING LEADERSHIP COUNCIL
An Integrated Program

**SPLC Rating System**

**SPLC Guidance, Training, Community of Practice**

**Get Started**

- **A** **ENLIST** support from key internal and external stakeholders.
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**SUSTAINABLE PURCHASING LEADERSHIP COUNCIL**
Agenda

1. SPLC Context
2. Guidance v1.0
3. Pilot Program
4. Membership
5. Question & Answers
Our Approach

Get Started

A. ENLIST
   support from key internal and external stakeholders.

B. SCOPE
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Run the Process

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Sustainable Purchasing Leadership Council
SPLC Guidance, Training, Community of Practice

Get Started

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   Identify and select proven strategies for mitigating impacts while delivering value.

Get Recognition

5. EARN leadership recognition.
Future Rating System (2016)

SPLC Rating System
SPLC Guidance, Training, Community of Practice

Get Started

A. **ENLIST**
   Support from key internal and external stakeholders.

B. **SCOPE**
   Activities, goals, roles, and responsibilities.

C. **STRUCTURE**
   Internal and external stakeholder engagement process.

Run the Process

1. **ANALYZE**
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   Set goals, timelines and policies; Train staff and engage suppliers.

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Get Recognition

5. **EARN**
   Leadership recognition.

![SPLC Rating System Diagram]

SUSTAINABLE PURCHASING LEADERSHIP COUNCIL
Guidance v1.0 Chapter Outline

• Chapter 1: Preamble
• Chapter 2: Getting Started
• Chapter 3: Running the Process
• Chapter 4: Purchasing Category Guidance
• Chapter 5: Submitting for a Rating (2016)
• Appendices
Chapter 1: Preamble


Principles for Leadership in Sustainable Purchasing

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SUSTAINABLE PURCHASING LEADERSHIP COUNCIL
Chapter 2: Getting Started

Get Started

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Chapter 3: Running the Process

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SUSTAINABLE PURCHASING LEADERSHIP COUNCIL
# Chapter 3: Running the Process

Holistic range of opportunities to improve performance

<table>
<thead>
<tr>
<th>Social</th>
<th>Environmental</th>
<th>Economic</th>
</tr>
</thead>
</table>
| Social factors affect the social systems on which communities depend, now and in the future.  
+ anti-discrimination  
+ community engagement  
+ diversity/equal opportunity  
+ employee engagement  
+ equal remuneration  
+ fair trade  
+ freedom of association  
+ grievance & remedy processes  
+ human rights  
+ indigenous rights  
+ occupational health & safety  
+ right to collective bargaining  
+ sustainable compensation  
+ training and education  
+ worker rights  
- child labor  
- forced/compulsory labor  
- human trafficking  
- sourcing from conflict zones | Environmental factors affect the natural systems on which life depends, now and in the future.  
+ biodiversity preservation  
+ climate adaptation  
+ resource optimization  
+ soil health stewardship  
- acidification  
- desertification  
- eutrophication  
- freshwater pollution  
- greenhouse gas emissions  
- habitat depletion  
- human health impacts  
- land use change  
- marine pollution  
- ozone depletion  
- radiation pollution  
- resource depletion  
- smog  
- waste  
- water consumption | Economic factors affect the financial systems on which our markets depend, now and in the future.  
+ fair dealings  
+ innovation research / investment  
+ open competition  
+ transparency of information  
+ use of diverse suppliers  
+ use of HUB zones  
+ use of local suppliers  
- conflicts of interest  
- corruption (bribery, extortion...)  
- dividing territories  
- dumping  
- exclusive dealing  
- misleading market claims  
- monopoly (seller collusion)  
- monopsony (buyer collusion)  
- patent misuse  
- price fixing  
- product tying  
- refusal to deal |
Chapter 3: Running the Process

Get Started

A. ENLIST support from key internal and external stakeholders.

B. SCOPE activities, goals, roles, and responsibilities.

C. STRUCTURE internal and external stakeholder engagement process.

Run the Process

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Get Recognition

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Chapter 3: Running the Process

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Get Recognition

Purchasing category guidance utilized here.
Chapter 3: Running the Process

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Get Recognition

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# Chapter 4: Purchasing Category Guidance

<table>
<thead>
<tr>
<th>Chemically Intensive Products</th>
<th>Construction &amp; Renovation</th>
<th>Wood &amp; Agrifiber</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Maintenance</td>
<td>Furnishings</td>
<td>Paper</td>
</tr>
<tr>
<td>Landscaping Maintenance</td>
<td>Major Renovation &amp; Interior Upgrades</td>
<td>Composite Wood</td>
</tr>
<tr>
<td>Cleaning &amp; Sanitizing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boiler/Cooling Tower/HVAC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Food</th>
<th>Transportation &amp; Fuels</th>
<th>IT Hardware &amp; Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produce</td>
<td>Freight</td>
<td>Software Services</td>
</tr>
<tr>
<td>Dairy</td>
<td>Institutional Vehicle Fleets</td>
<td>Personal Computers</td>
</tr>
<tr>
<td>Poultry (and others)</td>
<td>Delivery Services</td>
<td>Mobile Phones</td>
</tr>
<tr>
<td></td>
<td>Employee Travel</td>
<td>Imaging Equipment</td>
</tr>
<tr>
<td></td>
<td>Fuels</td>
<td>Televisions</td>
</tr>
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<thead>
<tr>
<th>Electricity</th>
<th>Professional Services</th>
<th>IT End of Life Management Services</th>
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</thead>
<tbody>
<tr>
<td>Electricity</td>
<td>Professional Services</td>
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</tbody>
</table>

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**Sustainable Purchasing Leadership Council**
## Structure of Purchasing Category Chapter

<table>
<thead>
<tr>
<th>Section</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Scope</td>
<td>Phases of the lifecycle addressed for each product or service.</td>
</tr>
<tr>
<td>2. Executive Summary</td>
<td>Major impacts, strategies to address them, internal benefits for acting</td>
</tr>
<tr>
<td>3. Understanding</td>
<td>In depth review of all relevant impacts</td>
</tr>
<tr>
<td>4. Action &amp; Results</td>
<td>In depth presentation of actions that can be taken and their benefits to the organization and to social, economic and environmental systems.</td>
</tr>
<tr>
<td>5. Challenges</td>
<td>Obstacles to action and potential responses</td>
</tr>
<tr>
<td>6. Metrics</td>
<td>Recommended performance metrics for tracking progress</td>
</tr>
<tr>
<td>7. Indicators</td>
<td>Qualitative indicators to be used in the absence of quantitative metrics</td>
</tr>
<tr>
<td>8. Sample Language</td>
<td>Example RFP, contract or policy language</td>
</tr>
<tr>
<td>10. Outstanding Issues</td>
<td>Discussion of areas of the guidance needing further investigation or broader debates within an industry.</td>
</tr>
<tr>
<td>11. Resources</td>
<td>Existing resources that organizations can utilize.</td>
</tr>
</tbody>
</table>
Agenda

1. SPLC Context
2. Guidance v1.0
3. Pilot Program
4. Membership
5. Question & Answers
Guidance v1.0 Pilot Program

Why participate?

• contribute and offer improvements to program
• early access to education
• collaboration with other participants
• obtain assistance from SPLC*
• public acknowledgement*
Getting Started

Pilot Timeline:

- **Nov 2014 – Mar 2015:** Pilot opt-in period
- **Dec 18, 2014:** Participant orientation
- **Jan 9, 2015:** *Guidance v1.0* content available
- **Jan – May 2015:** Education sessions launch
- **Feb – May 2015:** Feedback sessions launch
  - Listening sessions
  - Participant surveys open
  - Collaborative participant engagement
- **May 2015:** Summit 2015 workshop & education sessions
- **June 2015:** *Lessons from Guidance v1.0 Pilot* published
Q: Are pilot participants individuals or organizations?

A: It’s entirely up to an organization.
# Guidance v1.0 Pilot

## Types of Participation (Purchasing Organizations):

<table>
<thead>
<tr>
<th>Participation</th>
<th>Level of Effort</th>
<th>Level of Service</th>
<th>Level of Recognition*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use the guidance in current work, complete participant questions</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Review guidance based on recent or upcoming work, complete participant questions</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
</tr>
<tr>
<td>Review guidance, complete participant questions</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
</tr>
<tr>
<td>Review portions of guidance, provide general feedback</td>
<td>Low-medium</td>
<td>Low</td>
<td>Low</td>
</tr>
</tbody>
</table>
Guidance v1.0 Pilot

Example (Purchasing Organizations):

High Level of Effort:
A university just received approval to conduct a spend analysis. As a result, they are going to **use** Chapter 3 to assist them in the preparation for and conduction of the spend analysis. The team members attend the education sessions, and actively provide feedback within the community group and during the listening sessions. They also submit thorough responses to the questions posed by SPLC regarding the spend analysis section.
Guidance v1.0 Pilot

Example (Purchasing Organizations):

Medium Level of Effort:
A state government recently completed the process of developing a plan for their procurement for 2015. The primary members of their team will review Chapters 2 and 3. While they neither used a cross-functional team nor were able to complete a thorough spend analysis, they intend to reflect on how the content in Chapters 2 and 3 would have helped them do their work better. They may attend some education, but will likely not be active in the community discussions or the listening sessions. They do intend to answer the specific questions posed by SPLC targeting the Chapters that they are reviewing.
Low Level of Effort:
A corporation has a large procurement of personal computers coming up in Q3 of 2015. They will review the IT Hardware & Services section of Chapter 4 and provide general feedback. They may answer the specific questions posed by SPLC targeting the Personal Computers section of Chapter 4, but don’t know if they want to commit to that.
Guidance v1.0 Pilot

Types of Participation (Suppliers and Service Providers):

Reflect on the following:
• To what extent are you able to meet the needs of purchasers identified in the Guidance?
• To what extent have the most significant impacts been identified? Are there metrics and indicators missing?

Participation Examples
• Review Guidance affecting your industry
• Answer high level questions above, targeted toward your industry
• Answer specific questions posed by SPLC targeting the Chapters relevant to your industry
• Attend education sessions
• Attend listening sessions, participation in the community forum
Guidance v1.0 Pilot

Types of Participation (Standards/Cert Developers):

Reflect on the following:
• Do the certifications/standards offered by your organization effectively measure the most significant impacts identified within a given purchasing category?
• To what extent have the most significant impacts been identified? Are there metrics and indicators missing?

**Participation Examples**
• Review Guidance affecting your industry
• Answer high level questions above, targeted toward your industry
• Answer specific questions posed by SPLC targeting the Chapters relevant to your industry
• Attend education sessions
• Attend listening sessions, participation in the community forum
Guidance v1.0 Pilot

Types of Participation (Public Interest Advocates):

Reflect on the following:
• To what extent have the most significant impacts been identified? Are there metrics and indicators missing?

Participation Examples
• Review Guidance affecting your industry
• Answer high level questions above, targeted toward your industry
• Answer specific questions posed by SPLC targeting the Chapters relevant to your industry
• Attend education sessions
• Attend listening sessions, participation in the community forum
Getting Started

Participant Proposal
only for those wanting SPLC service and/or recognition

- **Activities.** A description of the expected scope of activities for which the participant intends to pilot SPLC’s Guidance.
- **Focus.** Specification of which Guidance sections will be their primary focus.
- **Roles.** Functional roles within the participating organization (e.g., procurement, facilities, food service, finance, etc.) that may be engaged.
- **Objectives.** What does the participant want to achieve through the pilot?
- **Questions.** Questions that the organization seeks to answer through the Pilot and/or through use of SPLC Guidance.
- **Needs.** Activities for which the participant may seek SPLC staff support
- **Member Lead.** Individual(s) who will internally coordinate participation.
- **Member Contact.** Primary contact for the participating organization, if different.
Getting Started

SPLC Proposal
only for those wanting SPLC service and/or recognition

• **Level of Support.** Likely level of support that the organization can expect to receive based on the organization’s proposed Focus, and Objectives.

• **Level of Recognition.** Proposed level of recognition that SPLC will provide based on the proposed Activities, Focus, and Objectives.

• **Description.** A narrative description that is approved by the participating organization for use by SPLC in public communications about the pilot.

• **Requirements.** A clear statement of any requirements or preconditions upon which the Level of Support and Level of Recognition are contingent.

• **SPLC Contact.** SPLC staff person who will be the organization’s primary point of contact during the Pilot.
Getting Started

Network access

**Details:** All participants receive access to the Pilot Community platform, hosted by Google Groups or another similar collaboration format, for communication and collaboration among participants.

The Pilot Community platform is our primary mode of communication with and making announcements, so please become familiar with how to use it.

**Action:** A 15-minute video tutorial on how to use the Pilot Community platform will be provided.
Getting Started

Program content

**Details:** Pilot Program participants receive access to the following materials:

- Guidance for Leadership in Sustainable Purchasing v1.0
- Spend Analysis Report
- Pilot Questions
- Purchasing Category Executive Summaries
- Glossary
- Community platform
- Education sessions
- Listening sessions
Interested?

www.sustainablepurchasing.org/pilot
Join us.
Agenda

1. SPLC Context
2. Guidance v1.0
3. Pilot Program
4. Membership
5. Question & Answers
Membership

1. Why join?
2. Where would I fit in SPLC’s unique membership Roles?
3. What are the member benefits?
4. What does it cost?
5. What is the membership deadline for Pilot participation?

www.sustainablepurchasing.org/membership
Why join?

1. SHAPE THE FUTURE
   - Be at the forefront of the movement to transform the sustainability of our economy;
   - enhance efficiency of staff; reduce need for consulting; share costs of training and supplier engagement; avoid mistakes;

2. REDUCE COSTS & RISKS
   - Be at the table to help develop guidance for products or services that you sell;
   - reduce costs associated with market confusion; harmonize data requests to address “survey fatigue”;
   - find improved solutions for end users; exceed mandates cost-effectively; receive recognition for leadership;

3. INCREASE BUSINESS VALUE
   - Help raise the standards used in trillions of dollars worth of purchasing decisions;
   - reduce cost of promoting new science and best practices; lower risk that guidance and tools they advocate will be under-utilized;
   - align offerings to expressed market needs; align brand with Council’s sustainability leadership;
   - gain access to trustworthy, ready-to-use guidance; gain insight into peer efforts & market direction; develop networks of peers and reliable suppliers.

4. ACCESS PEOPLE & INFORMATION
   - gain insight into needs and expectations of leading large organizations; develop networks of peers and valued customers;
   - gain insight into procurement processes and challenges; develop relationships with potential partners.

www.sustainablepurchasing.org/why-join
Why join?

1. **SHAPE THE FUTURE**
   - **Purchasers**
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     - Enhance efficiency of staff; reduce need for consulting; share costs of training and supplier engagement; avoid mistakes
   - **Suppliers**
     - Be at the table to help develop guidance for products or services that you sell;
     - Reduce costs associated with market confusion; harmonize data requests to address “survey fatigue”
   - **Public Interest**
     - Help raise the standards used in trillions of dollars worth of purchasing decisions;

2. **REDUCE COSTS & RISKS**
   - **Purchasers**
     - Find improved solutions for end users; exceed mandates cost-effectively; receive recognition for leadership
   - **Suppliers**
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   - **Public Interest**
     - Improve outcomes by getting upstream of impacts; expand reach of existing efforts

4. **ACCESS PEOPLE & INFORMATION**
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www.sustainablepurchasing.org/why-join
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---

**Purchasers**

- Be at the table to help develop guidance for products or services that you sell;

**Suppliers**

- Reduce costs associated with market confusion;
- Harmonize data requests to address “survey fatigue”
- Align offerings to expressed market needs;
- Align brand with Council’s sustainability leadership
- Gain insight into needs and expectations of leading large organizations;
- Develop networks of peers and valued customers.

**Public Interest**

- Help raise the standards used in trillions of dollars worth of purchasing decisions;
- Reduce cost of promoting new science and best practices;
- Lower risk that guidance and tools they advocate will be under-utilized
- Improve outcomes by getting upstream of impacts;
- Expand reach of existing efforts

---

www.sustainablepurchasing.org/why-join
### Why join?

<table>
<thead>
<tr>
<th>SHAPE THE FUTURE</th>
<th><strong>Purchasers</strong></th>
<th><strong>Suppliers</strong></th>
<th><strong>Public Interest</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Be at the forefront of the movement to transform the sustainability of our economy;</td>
<td><strong>Be at the table</strong> to help develop guidance for products or services that you sell;</td>
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<td></td>
</tr>
<tr>
<td>REDUCE COSTS &amp; RISKS</td>
<td>enhance efficiency of staff; reduce need for consulting; share costs of training and supplier engagement; avoid mistakes</td>
<td><strong>reduce costs</strong> associated with market confusion; <strong>harmonize data requests</strong> to address “survey fatigue”</td>
<td><strong>reduce cost</strong> of promoting new science and best practices; <strong>lower risk</strong> that guidance and tools they advocate will be under-utilized</td>
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<td>INCREASE BUSINESS VALUE</td>
<td>find improved solutions for end users; <strong>exceed mandates</strong> cost-effectively; receive recognition for leadership</td>
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</tr>
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</tr>
</tbody>
</table>

[www.sustainablepurchasing.org/why-join](http://www.sustainablepurchasing.org/why-join)
Where would I fit in SPLC’s Roles?

www.sustainablepurchasing.org/roles
Role Definitions

Purchasers
Employees who have significant responsibility for guiding the member organization’s purchasing of goods and services, and who do not have revenue generating responsibilities.

Typical Member Organizations
Companies; governments; higher education institutions; NGOs; and member organizations representing purchasers (e.g., professional societies)

Typical Job Titles
Purchasing or procurement officers, directors, managers or staff; Directors, managers or staff of operational functions without revenue-generating responsibilities, such as facilities. Policymakers involved in developing procurement policy. Sustainability staff that do not have any responsibilities related to developing, marketing and/or selling products or services to institutions
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Role Definitions

Suppliers
Employees with revenue generating responsibilities related to the design, marketing and provision of goods or services to institutions.

Typical Member Organizations
Distributors; manufacturers; Tier 1+ suppliers; service providers (including professional services, such as consulting); certifiers; standards developers; member organizations representing suppliers (e.g., trade associations)

Typical Job Titles
Officers, directors, managers or staff involved in product development, marketing, sales, and servicing customers; Sustainability staff with any responsibilities related to developing, marketing and/or selling products or services to institutions.
Role Definitions

Suppliers
Employees with revenue generating responsibilities related to the design, marketing and provision of goods or services to institutions.

Typical Member Organizations
Distributors; manufacturers; Tier 1+ suppliers; service providers (including professional service, such as consulting); certifiers; standards developers; member organizations representing suppliers (e.g., trade associations)

Typical Job Titles
Officers, directors, managers or staff involved in product development, marketing, sales and customer service; Sustainability staff with responsibilities related to developing, marketing and/or selling products or services to institutions.
Roles Definitions

Public Interest Advocates
Employees of a public interest advocacy organization who do not have responsibilities related to promoting any products and services offered by the organization, including standards and certifications, and who have significant technical expertise in how institutional purchasing affects those aspects of the public interest for which the organization is a recognized advocate.

Typical Member Organizations
Social & environmental non-governmental organizations; government agencies responsible for advancing the public interest in ways relevant to the institutional purchasing marketplace; charitable foundations; policy think-tanks or agencies; academic institutes; professional schools

Typical Job Titles
Program directors, managers and staff; Subject matter specialists and experts; Faculty and researchers.
Member Benefits – All Roles

All Members

• **Networking** with forward-thinking purchasing professionals and other market stakeholders

• **Contribute** to the technical development of the Council’s guidance, measurement and leadership recognition programs

• **Access** member-only resources: webinars, conference calls, research reports

• **Join** expert Communities of Practice

• **Discounts** on registration for events and trainings

• **Public recognition** (member listing, member logo, press kit, etc)

• **Communication platform** (annual meeting presentations, blog articles, etc)

• **Eligibility** for awards programs

www.sustainablepurchasing.org/benefits
Member Benefits – Role Specific

Purchasers may…

• **Participate** in Purchaser Representative Seats on Board, Committees, etc
• **Purchaser-focused** programming and communities of practice
• **Product & service discounts** offered by Supplier members

Suppliers may…

• **Participate** in Supplier Representative Seats on Board and TAGs developing purchasing guidance for products and services they sell
• **Sponsor** meetings, events and publications
• **Exhibit** at meetings and events
• **Advertise** in the Product & Service Directory
• **Offer product/service discounts** to SPLC members

Public Interest Advocates may…

• **Participate** in Public Interest Representative Seats on Board, Committees, etc
What does membership cost?

It depends on the…

• Types of employees that will be participating

• Size of the organization

• Number of Roles purchased
  (Multi-Role Discount is 40% off Role with highest dues)
Three Roles

Purchaser

Supplier

Public Interest Advocate
Roles Example: World Wildlife Fund

- Purchaser
- Supplier
- Public Interest Advocate
Roles Example: FedEx

- **Purchaser**
- **Supplier**
- **Public Interest Advocate**
## Multi-Role Discount*

40% off role with highest dues, when joining in multiple roles

### Scenario 1: Join in only one Role

<table>
<thead>
<tr>
<th>Roles</th>
<th>Participating Employees</th>
<th>Standard Dues</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>Product development and marketing</td>
<td>$4,000</td>
<td>$4,000</td>
</tr>
</tbody>
</table>

**Total** | $4,000

### Scenario 2: Join in multiple Roles

<table>
<thead>
<tr>
<th>Roles</th>
<th>Eligible Employees</th>
<th>Standard Dues</th>
<th>w/ Multi-Role Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>Product development and marketing</td>
<td>$4,000</td>
<td>$2,400</td>
</tr>
<tr>
<td>Purchaser</td>
<td>Procurement team</td>
<td>$550</td>
<td>$550</td>
</tr>
</tbody>
</table>

**Total** | $2,950

* As with any discount, this discount is offered at the will of the Council and is subject to change.
## What does membership cost?

<table>
<thead>
<tr>
<th>Annual Budget/Revenue(^1)</th>
<th>Purchaser Role</th>
<th>Supplier Role</th>
<th>Public Interest Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Annual Dues</td>
<td>Annual Dues</td>
<td>Annual Dues</td>
</tr>
<tr>
<td>less than $50 thousand</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
</tr>
<tr>
<td>$50 thousand to $250 thousand</td>
<td>$150</td>
<td>$500</td>
<td>$125</td>
</tr>
<tr>
<td>$250 thousand to $1 million</td>
<td>$225</td>
<td>$1,000</td>
<td>$250</td>
</tr>
<tr>
<td>$1 million to $5 million</td>
<td>$350</td>
<td>$2,000</td>
<td>$350</td>
</tr>
<tr>
<td>$5 million to $25 million</td>
<td>$550</td>
<td>$4,000</td>
<td>$500</td>
</tr>
<tr>
<td>$25 million to $100 million</td>
<td>$850</td>
<td>$7,000</td>
<td>$750</td>
</tr>
<tr>
<td>$100 million to $500 million</td>
<td>$1,350</td>
<td>$10,000</td>
<td>$1,000</td>
</tr>
<tr>
<td>$500 million to $2 billion</td>
<td>$2,100</td>
<td>$13,000</td>
<td>$1,250</td>
</tr>
<tr>
<td>$2 billion to $10 billion</td>
<td>$3,250</td>
<td>$16,000</td>
<td>$1,500</td>
</tr>
<tr>
<td>greater than $10 billion</td>
<td>$5,000</td>
<td>$20,000</td>
<td>$1,750</td>
</tr>
</tbody>
</table>

\(^1\) For federal and state agencies, the dues level corresponds to the annual budget of the agency. For local government and non-profits, the dues level corresponds to the annual budget of the whole organization. For for-profit corporations, the dues level corresponds to the annual revenue of the company. Companies filing separate tax returns are separate for membership purposes. Subsidiaries that do not file separate tax returns may not join separately from their parent company.
What is membership deadline for Pilot?

As late as March, but…
Pilot orientations will begin in December, Communities of Practice and Education Sessions will begin in January, but can be joined later.

Non-members May Express Interest
We are accepting Pilot Expression of Interests from non-members, but participation in Education Sessions, Communities of Practice and other opportunities will depend upon our receipt of a Membership Application.

Pro-Rating
We can pro-rate your membership to match your fiscal year.

Time to Process Payment
60 day trailing payment period. (Submit application now and have sixty days to pay.)

www.sustainablepurchasing.org/membership
<table>
<thead>
<tr>
<th>Date</th>
<th>Activity Description</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 21, 2014</td>
<td>FoodCon: Incorporating Sustainability into Your Strategy</td>
<td>Presentation</td>
</tr>
<tr>
<td></td>
<td>UNC Kenan-Flagler School of Business</td>
<td></td>
</tr>
<tr>
<td>November 21, 2014</td>
<td>Special Briefing for the Public: How to Participate in SPLC’s Guidance v1.0 Pilot Program</td>
<td>Webinar</td>
</tr>
<tr>
<td>November 21, 2014</td>
<td>SUPER Early Bird Pricing for 2015 Summit Registration Ends</td>
<td>Deadline</td>
</tr>
<tr>
<td></td>
<td>Act fast and SAVE $200!</td>
<td></td>
</tr>
<tr>
<td>November 30, 2014</td>
<td>Board of Director Nomination &amp; Expression of Interest Submission Window Closes</td>
<td>Deadline</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Governance</td>
</tr>
<tr>
<td>December 5, 2014</td>
<td>Balloting opens for Board of Director elections</td>
<td>Member Activity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Governance</td>
</tr>
<tr>
<td>January 30, 2015</td>
<td>Early Bird Pricing for 2015 Summit Registration Ends</td>
<td>Deadline</td>
</tr>
<tr>
<td></td>
<td>Prices increase $150 on January 31st!</td>
<td></td>
</tr>
<tr>
<td>February 11, 2015</td>
<td>Board Meeting</td>
<td>Governance</td>
</tr>
</tbody>
</table>
# 2015 Summit: Super Early Bird Registration

www.sustainablepurchasing.org/summit

## SAVE $200!
Super Early Bird Pricing Ends Nov. 21

2015 SUMMIT
Seattle, Washington
May 27-28

Share expertise. Discover solutions. Build relationships. Shape the future.

<table>
<thead>
<tr>
<th>Registrant Type</th>
<th>Super Early Bird</th>
<th>Early Bird Rate</th>
<th>Standard Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Member</strong></td>
<td>Ends 11/21 at midnight</td>
<td>Ends 1/30 at midnight</td>
<td>Ends 5/26</td>
</tr>
<tr>
<td>$750</td>
<td>$800</td>
<td>$950 *</td>
<td></td>
</tr>
<tr>
<td><em>Includes both days of meetings, four meals, and keynote banquet with reception.</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Non-member</strong></td>
<td>$925</td>
<td>$975</td>
<td>$1,125 *</td>
</tr>
<tr>
<td><em>Includes both days of meetings, four meals, and keynote banquet with reception.</em></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Limited number of scholarships available*
10% New Member Discount between now and the New Year

Applications must be received by 12/31. Payment can follow.
Agenda

1. SPLC Context
2. Guidance v1.0
3. Pilot Program
4. Membership
5. Question & Answers

Jason Pearson
Executive Director

Christina Macken
Director of Programs

Sam Hummel
Director of Outreach & Operations