

## UCSC Green Office Profile

### Procurement Services (with a little about Financial Affairs Green Team) Sustainable Business Practices Case Study

#### About the Office

- 15 staff, located at 2300 Delaware (off-campus)
- 1 staff member is ½ time sustainable procurement manager (written into her job description); sustainability written into every Procurement job descriptions in 2009

#### Summary Statement

In 2007 sustainability was just becoming recognized entity at UCSC and in 2008 a campus sustainability assessment was completed which detailed accomplishments and areas for improvement with regards to sustainable business practices and operations at UCSC. Working groups were established that set goals and objectives for major areas relating to sustainability, and **Procurement** was identified as one working group, so the unit was a **part of campus sustainability goal setting from the beginning.**

Management staff in Procurement recognized importance of assigning sustainability work to an individual and paying them for it. That's when their **Sustainable Procurement Manager position was created.**

One of the first things that the Sustainability Procurement Manager did was to identify ways that the Procurement unit could better incorporate sustainability into their business practices and operations. She hired a student who helped **develop a comprehensive (internal) education program for the unit on waste.** This included: 1) completing a **waste assessment** where they weighed and categorized their waste streams at beginning of the program, weekly and then at the end of the 6 month period to measure how their waste changed over the time that educational programs were offered; 2) held a **brainstorming** session with staff before final assessment of 6 month period **to identify strategies for waste reduction** (it was critical that staff be a part of identifying solutions themselves. Some things they identified: skip sticky notes, file electronically, change margins, review doc in print mode before print to make sure it will print properly, turning things off when not in use); 3) brought in **lecturers** to talk about waste (life cycle costs, procurement relationship to waste) and held a lecture on behavior change to help staff identify triggers/ways they could encourage positive behaviors; and 4) **developed an educational brochure** to share at Campus Earth Summit event to encourage others to replicate their in-house sustainability education approach.

The other significant development that helped to further incorporate sustainability into business practices at Procurement was the development of a working group (called **Green Purchasing Working Group** or GPWG) to identify sustainability goals and objectives for Procurement.

In 2011 they completed the **Green Office Certification Program.** Initially they received a Sapling rating; to receive the highest (Tree rating) they needed to improve their energy use.

They agreed as an office that unless someone had a medical reason to use electric office supplies (i.e. stapler, pencil sharpener), they would eliminate them from the office (donated them); they started using energy savings settings and power strips on their computers and got rid of (donated to Gray Bears) a small refrigerator with limited use. A few month's later they got re-certified as a Tree level office.

## Major Sustainability Accomplishments

### Reducing Paper Use

During the 6 month assessment period (when the office was measuring waste and participating in educational programs on waste) staff **brainstormed strategies for waste reduction**. They identified opportunities to reduce paper waste by developing and using electronic procurement processes. One staff member says, "I was a printer—I just used to print and make markups. I learned more about the E-procurement system and how I could use it electronically and shared that with others in department by showing them ways to utilize electronic systems." In addition to moving to an electronic requisition system where procurement records are kept electronically (in Cruzbuy) they **identified simple strategies** like marking up documents electronically rather than printing; changing margins on documents and previewing them before printing (if printing was essential).

Staff also **challenged their current business practice of maintaining hard copies of records** for 5-7 years. "We had entire rooms of filing cabinets of procurement records. We committed to no longer creating those files—and instead made everything accessible in Cruzbuy. We then went through purge process to get rid of files we didn't need, for ones that we needed to keep we marked cabinet with recycle date (determined by talking to records management to identify what our legal requirement was and went through files and labeled them for when they could be recycled). We found we had lots of files we were holding onto that we didn't need to. It took several weeks with several people going through it all (during fiscal close)."

The majority of Procurement staff are now paperless. Sometimes vendors will print and send documents to them. "If they do that, we scan and turn into a PDF and attach to record and then shred or recycle the paper. There are some in our unit that prefer to print to do markups and that's their own process. We're not 100% paperless. But all of the records need to get attached to Cruzbuy requisition, which is our electronic repository. We've been able to use **electronic invoicing technology** in Cruzbuy to have suppliers electronically invoice us against orders; a large number of high invoice transactions are all electronically invoiced."

"We also have a lot of **vendor meetings where they give quarterly business reviews** and there's a lot of printed collateral that comes in those meetings. We **hand it back and ask for electronic-** they hear it so much from us that they don't bring printed copies anymore; we also ask them to not give out catalogs when they visit campus clients (only when asked for). We tell them they need to hand to us electronically."

"In addition, we **file our emails electronically**, which are our main source of records. We have suppliers to send electronically rather than print or fax. There are tools that allow you to receive large files electronically. Offices that deal with a lot of paper could invest in those tools and encourage their vendors or contractors to use it instead of print, as much as

possible. For some suppliers sometimes you just have to print—so you accommodate those as needed.

Another paper reduction strategy we implemented was **developing an electronic bidding process for competitive bid events (called CruzBid)**. This allows buyers to issue bid specifications and receive responses from vendors all electronically. Electronic systems like CruzBid promise greater accuracy and efficiency. Costs are also reduced for paper, filing and handling, postage, and data storage. In many cases, we found that leveraging existing technologies allowed us to implement paper reduction strategies like electronic filing more immediately and proficiently. To do this, we identified a software module within our existing e-procurement tool that would allow us to record each step of the bid process electronically. Since we have an average of 10 bids a year, a lot of paper use has been reduced. Here's an example of three separate bid events and the paper associated with each, to give you a sense of the volume of paper we've been able to reduce:



## Composting

One of our partners in a neighboring unit (Financial Admin Services and Transactions or FAST) created a compost bin and got permission from facilities manager to put it outside our building. As part of our (Procurement's) Green Office Certification we received a \$100 worm composting bin which functioned a lot better and was cleaner. So we partnered with FAST and began composting together.

We have a coffee can with lid under our kitchen sink and staff take out and add to worm bin when filled. Other kitchen started composting as well. Some individuals keep small containers at their desk with lid which they take to the bin once a week. We have signs up that show what can go in and can't (guides). As part of the Financial Affairs Green Team Year In Waste 2014 we held a training on composting through Dave Shaw from Kresge College & Stevenson garden present on how to care for compost. "There has been more adoption over time; as people see that it's working they're more willing to use it. When people see that there are things that could go to compost being put in the trash it changes behavior over time."

### **Involving neighboring departments/units**

The AVC of Financial Affairs has an annual leadership meeting (anyone in management position in his org) and he asked the Sustainable Procurement Manager to present on procurement sustainability activities. The Manager shared the sustainability efforts and accomplishments in the unit and at end of presentation the AVC appointed the Sustainable Procurement Manager to start a department-level Financial Affairs Green Team. The Sustainability Manager led the team and the other unit managers nominated one representative from their unit. Fin Affairs Green Team takes charge from Fin Affairs (GPWG takes charge from CSS). Green Team suggested all Fin Affairs units get Green Office Certification and, to date, 8/8 units have received their certification. The Division holds workshops on sustainability topics to educate staff. For Chancellor's Challenge they did a Department-level waste assessment and had Physical Plant staff help them assess their waste for a 4 week period, and then launched year in waste program similar to what had been done for Procurement. They created project plan for each initiative and submit to management for review and approval before jumping out- keep them focused, helped develop plan with clear measurable objectives and has management buy in. Did that for year in waste- held workshops throughout the year, went to the dump at Dimeo Lane, made an educational video on waste, share it online and developed new web site with educational information. "Our biggest success will be when we weigh at the end of the fiscal year. Dimeo Lane trip was a fun field trip for staff."

It was instrumental to have management level support for staff participation in sustainability activities, so staff felt it was legitimate part of their job and not something they had to sneak in during breaks or after hours. "Staff participated in hour long meetings every two weeks, work on action items in between (writing article, planning event taking anywhere from 5 minutes to a couple of hours depending on the tasks). To be on the Financial Affairs Green Team, staff make a 3 year minimum commitment; There are 8 members representing each of the eight departments within Financial Affairs."

### **Challenges, lessons learned, next steps**

- Convincing members of green team that this isn't grassroots movement anymore—we're adherent to UC policy. People think they need to do it on lunch hour, don't think their management will give them leave to go. Management will give leave to go but employees have a hard time getting away. Making it a part of a job description (attend 1 workshop a year).

- To keep energy around sustainability look outside your department. Once you have tree status engage others, bring others to the party. Stepping out of Business Admin Services and bring in ITS. We're one building, which is an incredible pilot opportunity. Policy is number one way to bring in, number two is management engagement and identifying those ways to bring in. Thinking about how policies and plans impact you. Why are we only bronze level Electronic Product Environmental Assessment Tool policy from UCOP.
- Identify areas in the UCOP Sustainable Practices Policy that relate to your office's mission. Identify ways your unit or department could contribute.

## Resources

Can o'worms compost bin used by Procurement and FAST:

[http://www.woodlanddirect.com/Outdoor/Worm-Composting/Can-O-Worms-Composter?gdftrk=gdfV23673 a 7c1677 a 7c8224 a 7c3120001&gclid=Clmu-7\\_Mhr4CFYxufgodcKcAzw](http://www.woodlanddirect.com/Outdoor/Worm-Composting/Can-O-Worms-Composter?gdftrk=gdfV23673 a 7c1677 a 7c8224 a 7c3120001&gclid=Clmu-7_Mhr4CFYxufgodcKcAzw)

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