

City of Middleton

Sustainable Purchasing Policy

A Proposal from WECC

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Background of Proposal

In 2010, the City of Middleton Common Council adopted a comprehensive Sustainable City Plan. During its planning process, the city gathered feedback from residents and stakeholders regarding their views on the city's role in promoting sustainability and then compiled these perspectives into the plan to create a common vision for a sustainable future for the City of Middleton.

The plan describes specific steps and goals to be achieved along Middleton's path to sustainability. Within the "Economy/Food/Fair Trade" category, Middleton stated a goal to, "Develop sustainability guidelines for City purchasing including office supplies, building and remodeling supplies (paint, carpet), and services to encourage local, environmentally friendly products and/or fair trade purchases." WECC's proposal is intended to support the City of Middleton in addressing this goal.

Middleton has made admirable progress in taking concrete actions to make its city more sustainable, including the creation of a leading-edge recycling center; construction of green transportation infrastructure; and implementation of an effective medication drop-off program. Adopting a sustainable purchasing policy would represent a next step in Middleton's sustainability efforts, as it would recognize the ways in which its purchases create environmental impacts that extend beyond the city's boundaries.

Middleton faces two primary challenges in creating and implementing a sustainable purchasing policy; 1) Middleton city staff has extremely limited time allocated to municipal sustainability projects. Therefore, city employees have minimal time available to research, develop, write, and implement a sustainable purchasing policy, and 2) Middleton uses a decentralized purchasing process, which limits the availability of existing purchasing data and complicates implementation of a new purchasing policy.

Introduction to WECC

WECC is an accomplished mission-based nonprofit organization, headquartered in Madison, Wisconsin. WECC's solutions reach clients in fifteen states, including Wisconsin, New York, New Jersey, California, Hawaii, Ohio, Illinois, Michigan, Minnesota, Iowa, South Dakota, Colorado, Texas, Maryland and New Mexico.

For more than 35 years, WECC's mission has been to champion and deliver innovative energy initiatives, which produce enduring economic and environmental benefits for all. WECC's history of success is built upon implementing energy efficiency and financing programs for utilities and government agencies. From this foundation, WECC has broadened its product offerings to incorporate environmental sustainability services, such as sustainable procurement programs, sustainability planning, and greenhouse gas inventory quantifications (aka carbon footprint).

Project Description

WECC will complete a multi-phase project for the City of Middleton. In phase one, WECC will create a Sustainable Purchasing Policy for the City of Middleton that will minimize the city's environmental impacts associated with purchased products and provide training on the policy to relevant city staff. Phase one of the project will be implemented in a manner that overcomes the two challenges stated above and will be completed in 2016.

Phase one will provide two deliverables to the City of Middleton:

1. WECC will present a Sustainable Purchasing Policy to the city's Sustainability Committee, which the Sustainability Committee will then present to the Common Council for adoption. This proposal includes incorporation of one set of revisions to the proposed policy based on feedback from the Sustainability Committee and one set of revisions to the proposed policy based on feedback from the Common Council.

The Policy will be designed to minimize adverse environmental impacts resulting from Middleton's purchases and will also promote purchasing from local and socially responsible providers. While seeking to promote sustainable purchasing, the Policy will account for the reality of limited purchasing budgets and constrained staff time available to comply with the Policy. It will also provide guidance to city staff on balancing considerations of product cost, quality, and sustainability when making purchasing decisions.

The Policy will provide sustainability standards for product categories that are determined to be high-frequency purchases and/or high-environmental impact product types, including capital purchases. The standards will account for industry trends and best practices; availability of complying products; and budgetary constraints. The Policy will account for any purchasing categories, such as consumables, durable goods, and capital expenditures, which may currently direct Middleton's purchasing practices.

In addition to sustainability standards, the Policy will identify targets for levels of compliance with the stated standards.

2. Upon adoption of the Policy, WECC will provide two on-site training sessions regarding the Policy to key City of Middleton employees. The training will introduce staff who are involved in purchasing to the Policy; explain standards included in the Policy; and provide resources for finding and purchasing complying products.

Assuming successful completion by WECC of Phase 1 and approval by the Middleton Sustainability Committee and the Middleton Common Council, phase two of the project would be completed in 2017 and would include one or more of the following services to be provided by WECC.

1. WECC will assist the City of Middleton in implementing a software solution that will support staff in complying with Middleton's Sustainable Purchasing Policy. The specific solution will be based on the details and requirements of the policy adopted by Middleton's Common Council. Functionality may include a dynamic means of identifying and updating products that comply with the Policy, as well as the ability to track product purchases. Implementing a software solution with these capabilities would support Middleton in determining compliance with the Policy and tracking progress toward compliance with any goals that may be defined in the Policy. Creating an ongoing interface between staff and the city's sustainability work would additionally provide a mechanism for ongoing employee engagement around sustainability.
2. One year after approval of Middleton's Sustainable Purchasing Policy, WECC will conduct a follow-up study to assess the impact of the policy. The study will repeat the research done during the baselining analysis and will determine the level of compliance with the policy. This research will document the city's progress towards attainment of any goals that are defined in the Policy.

In addition to documenting Middleton's progress, the study will quantify the impact of the environmental benefits that the city has caused as a result of sustainability improvements in its purchasing standards.

3. WECC will calculate the City of Middleton's greenhouse gas (GHG) inventory (aka carbon footprint) associated with all buildings and vehicles owned by the city. WECC's certified Greenhouse Gas Inventory Quantification staff will complete the inventory in compliance with the industry-leading Greenhouse Gas Protocol Standard. The inventory will include Scope 1 and 2 emissions, which

represent direct emissions, as well as indirect emissions associated with purchased electricity, steam, heating, and cooling. The inventory will not include Scope 3 emissions, which are indirect emissions associated with purchased goods and services, third-party transportation, etc.

After completing its analysis, WECC will provide a report to the city that documents Middleton's current level of emissions. The report will include segmentation of emissions by activity, which will support the city's future efforts to reduce its emissions.

4. An alternative project, as mutually agreed upon by Middleton and WECC, focused on assessing and/or enhancing the City of Middleton's environmental sustainability performance.

Proposed Phase 1 Process

To complete the deliverables described for phase one, WECC proposes the process described below:

Step	Components
1. Develop baseline	• Use online survey tool to gather general purchasing information for the past 12 months from relevant City of Middleton staff. • Visit four city facilities, as prioritized by city staff, to gather information on purchased products and capital expenditures, while taking care to minimize time required of staff. • Review existing City of Middleton purchasing policies and classifications. • Analyze data to define product categories; identify high-frequency purchases; and high-impact products.
2. Research policy elements	• Review sustainable purchasing policies adopted by other municipalities. • Research sustainable product alternatives, including sustainability attributes and cost range. • Investigate opportunities and viability for local sourcing of products.
3. Write and present draft policy	• Define sustainability standards. • Identify compliance targets. • Articulate cost-effectiveness requirements. • Prepare proposed policy in City of Middleton policy format. • Present draft policy to Sustainability Committee. • Incorporate feedback from Sustainability Committee into draft policy. • Incorporate feedback from Common Council into revised policy.
4. Train staff	• Develop Sustainable Purchasing Policy reference and training materials for staff. • Conduct two staff training sessions.
5. Present approved policy	• Collaborate with city staff to present the approved policy at the March, 2017 Green Tier meeting.

Proposed Phase 2 Process

Assuming successful completion by WECC of Phase 1 and approval by the Middleton Sustainability Committee and the Middleton Common Council, Middleton would select one or more of the phase two projects to be completed in 2017. WECC and Middleton would then review and further define the scope of the selected project(s) and enter into a contract for services.

Timeline

WECC will begin work on phase one of the project within two weeks of execution of an agreement for services with the city.

WECC will complete baseline development, policy research, and policy drafting within 60 days of the project start date. The timeline for presentation and implementation of the policy is dependent upon meeting schedules for the Sustainability Committee and the Common Council. WECC will complete staff training within 30 days of the date that the Common Council adopts the Policy, or as otherwise dictated by the implementation schedule selected by the Common Council. WECC and City of Middleton staff will jointly present the approved policy at the March, 2017 Green Tier meeting.

Following adoption of the Sustainable Purchasing Policy, Middleton and WECC will define the scope of phase two of the project and determine a timeline for completion of one or more phase two projects in 2017.

Project Cost

WECC proposes to complete both phase one deliverables for the project on a fixed-cost basis. The total cost for phase one of the project will be \$5,000. This cost includes the steps described above, and needed to determine an effective purchasing baseline, conduct necessary research, write the policy, and participate in presenting the policy to the City of Middleton's Sustainability Committee.

WECC anticipates participating in a collaborative working relationship with City of Middleton to create the proposed policy and train staff. While WECC understands the importance of minimizing the time burden of this project on city employees, WECC will require certain information from the city in order to complete the project. WECC will rely on the city for timely responses in order to ensure the project remains on time and within the agreed upon budget.

The phase one project cost of \$5,000 is expected to be less than WECC's expenses in delivering the services described in this proposal. In recognition of the reduced cost offered by WECC for phase one, Middleton will collaborate with WECC in presenting the approved policy to other Green Tier member communities. Assuming successful completion by WECC of Phase 1 and approval by the Middleton Sustainability Committee and the Middleton Common Council, Middleton would also commit to hire WECC to complete at least one phase two project in 2017.

Path Forward

If the City of Middleton accepts this proposal for services, WECC is prepared to move forward quickly with the project. Please contact Dan Streit, WECC's Program Manager for Environmental Sustainability Services, at dans@weccusa.org or 608.729.6954 to discuss next steps in executing an agreement for services or with any questions that you may have.

This proposal is valid for 90 days from the date of submission.