Assessing the Feasibility of Incorporating Sustainability into the Purchasing Department

ENST 390: Community-Based Study of Environmental Issues
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Executive Summary

This report assesses the feasibility of incorporating sustainability into the Purchasing Department at Colgate University. Purchasing is a growing area of focus in the implementation of sustainability into higher education. Given that sustainable purchasing is a developing field, and that colleges and universities have significant purchasing power, research on sustainable purchasing is critical to the future environmental, social, and economic impacts of higher education.

In order to address these impacts, interviews with the directors of the sustainability and purchasing offices were used to uncover the purchasing structure at Colgate, as well as any current integration of sustainability. In the same vein, structured interviews were sent to six peer institutions, on the basis of their size and environmental policies, in order to uncover sustainable purchasing practices that may be applied to Colgate.

Our results reveal that there is currently little implementation of sustainability in the Purchasing Department at Colgate. Nevertheless, several peer institutions have implemented sustainable purchasing policies, indicating that sustainable purchasing in higher education is possible. What’s more, an analysis of Colgate’s current purchasing structure reveals that RFPs (Requests for Proposals), are the most likely purchasing mechanism for integrating sustainability into purchasing at Colgate. Given that RFPs are controlled by the Purchasing Department, and typically involve very large sums of money, they should effect large-scale change.

Integration of sustainability into RFPs could take several forms. This report recommends that a policy concerning sustainability be implemented into the RFP process. This policy would require those bidding for an RFP to indicate environmental, social, and economic considerations for the project at hand. However, given that RFP projects are very diverse, a single policy may not be feasible. If this is the case, a liaison from the Office of Sustainability should be consulted with or on the committee of every RFP process, in order to ensure that environmental and social considerations are given adequate weight.
Introduction

Colgate University, a leader in the field of higher education, has recognized the growing importance of sustainability in higher education. This realization is driven by the threatened state of our global environment, and the need to take proactive steps in order to ensure that the lack of environmental, social, and economic responsibility of our current era does not threaten the quality of life of future generations. This idea of sustainability at Colgate University is furthered by the fact that two of the 13 Goals of a Colgate Education is to “recognize their individual and collective responsibilities for the stewardship of earth’s resources and the natural environment” and to “embrace their responsibilities to local, national and global communities” (Colgate University, n.d.-e). These goals are supported by the tangible representations of Colgate’s commitment to sustainability.

Sustainable initiatives on Colgate University’s campus have been created within the context of the growing need for recognition of sustainability in higher education. The creation of Colgate’s Sustainability Council has resulted in the development of a Sustainability Fund, and the Office of Sustainability in 2009 (Colgate University, n.d.-d). The drive for a more environmentally, economically and socially responsible Colgate has been supported by our agreement to the American College and University Presidents’ Climate Commitment (ACUPCC) in 2009, an agreement which ultimately committed Colgate to climate neutrality by 2019. This resulted in the creation of Colgate’s Sustainability and Climate Action Plan, and has sparked other sustainability initiatives on campus in an effort to decrease Colgate’s carbon footprint (Colgate University, 2011). Furthermore, the Office of Sustainability leads the campus in sustainable efforts, varying from academic programming to greenhouse gas inventories (Colgate University, n.d.-c). Because Colgate University is an academic leader in the field of higher education, its growing commitment to sustainability must continue to match its preeminent standing.

Colgate University is striving for institutional excellence within the global sphere of climate change, and as it has been shown, has a responsibility to include sustainability within this goal. With this context in mind, it is important to research the feasibility of incorporating sustainability into the decision-making of Colgate’s Purchasing Department since Purchasing is often a gateway for many products and services that end up at Colgate University. Our research aimed to answer the following questions: “what is the current purchasing structure at Colgate University; to what extent does sustainability play a role in our current policy, and how can the policy further support Colgate’s commitment to sustainability?” Information about Colgate’s Purchasing Department, the subject of this report, was obtained through careful and thorough research into the structure of the department and aspects of campus purchasing directly under its purview. The Purchasing Department “provides necessary services and programs to the campus community for the procurement of equipment, supplies and services” (Colgate University, n.d.-a). Colgate University has a wide range of purchasing responsibilities. Projects under the purview of the Purchasing Department range from new vehicles for Colgate’s vehicle fleet to creating contracts for new travel vendors. The department controls massive flows of money, and controls the large purchases and vendor relationships. As such, it has the responsibility to include sustainability within its actions.

This report was written for the administrators, faculty, staff and students of Colgate University, to provide clarity in the pursuit of sustainability on Colgate’s campus. Specifically, it is an assessment of the structure and dynamics of the Purchasing Department, leading to the
suggestion of potential ways to incorporate sustainability into the purchasing actions of the department. This report will first discuss some of the relevant literature to sustainable purchasing, followed by an explanation of our research methods and findings. We will then analyze and discuss the meaning of our findings, leading into recommendations based on both the relevant literature and our research findings.

**Literature Review**

*Sustainability: Definition*

Sustainability and sustainable development are used interchangeably throughout literature. However, nuances in these terms make them notably different. Sustainability can be defined as the support for the welfare of future generations through stewardship in maintaining the conditions in which humans and nature can exist in productive harmony (EPA, 2015). While the term sustainability addresses the objective of maintaining earth’s resources for intergenerational equity, the term sustainable development serves as the pathway to this end goal. The definition of sustainable development became significant through the Brundtland Commission’s published report known as *Our Common Future* in 1987. This report addressed the global impacts of humans on the environment and the need for sustainable development to moderate the human-induced changes to the ecosystem (Theis & Tomkin, 2012). The Brundtland report defined sustainable development as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (Theis & Tomkin, 2012, p. 6). Relevant to addressing the intergenerational issue presented, sustainable development puts emphasis on the interrelationships of the three main dimensions of social, environmental, and economic responsibility and the impact it has on people, resources and development (Kates, Parris & Leiserowitz, 2005; Theis & Tomkin, 2012). The three pillars used in framing the concept of sustainability serves as a social movement towards improving the quality of life for all people through social, environmental and economic considerations worldwide (Theis & Tomkin, 2012).

Procurement and consumption of goods and services plays a vital role in the agenda of sustainability and sustainable development. As our practices and decision-making in purchasing activities can contribute to environmental degradations and social inequities, our actions should be contingent upon the three pillars of sustainability. This allows us to avoid unsustainable consequences in our actions and take into consideration how our daily procurement practices can allude to more environmental, social and economic responsibility. In addressing the social dimension of sustainability, four elements are used to frame this concept: “equity, awareness, participation and social cohesion” (Bostrom, 2012, p. 5). This framework takes into consideration how society can incorporate social justice and equity through creating access to participatory decision-making (Bostrom, 2012). The environmental dimension of sustainability concerns the impact of human practices and consumption on human and ecological health of the world’s ecosystem and living systems (Theis & Tomkin, 2012). Finally, the economic dimension of sustainability focuses on the economic productivity in the use and disposal of our resources, as well as, the influential role of commerce and financial capital in the decision-making (Theis & Tomkin, 2012). The interdependence of the three pillars of sustainability aims to form the foundation of sustainability that incorporates social equity, environmental quality and economic productivity (Theis & Tomkin, 2012).
Higher Education and Sustainability

Institutions of higher education serve a vital role as leaders in advancing sustainable development and practices through its teachings, research and operations (AASHE, 2013b; McNamara, 2010; Sharp, 2009). The campus sustainability movement first emerged in the 1990s promoting sustainability initiatives to be incorporated throughout the operations of campuses in order to reduce overall environmental impact (Sharp, 2009). This first wave of the movement resulted in the rise of green products, buildings and practices on campus, while the second wave further pushed for campuses to pledge towards larger public commitments to environmental goals in sustainability (Sharp, 2009). For example, in 2007, there were 285 construction projects at higher education institutions that had been under the certification of United State’s Green Building Council’s (USGBC) Leadership in Energy and Environmental Design (LEED) program (Sharp, 2009; USGBC, 2007). Furthermore, over 620 higher education institutions in the United States endorsed the American College and University Presidents Climate Commitment (ACUPCC) between 2007 and 2009 (Sharp, 2009). Through the ACUPCC, educational institutions pledge to, “avoid additional GHG’s that may result from future growth, to reduce GHG emissions from existing operations, and to mitigate any remaining emissions by investing in carbon offsets” (Sharp, 2009, p. 2).

Though the two waves of the campus sustainability movement are major milestones for incorporating sustainability on higher education campuses, Sharp (2009) suggests a third wave in the movement. This component of the movement would address the compartmentalization and hierarchical organizations that are pervasive in many educational institutions. Decentralized organizational structure forms “the separation of different disciplines, arenas of responsibility, and tiers of management generally [preventing] people from understanding the broader context or the overall systems that operate across the institution” (Sharp, 2009, p. 3). This creates barriers towards incorporating sustainability, as sustainable development necessitates a centralized and organizational structure that encompasses the broader context of the entire institution (Sharp, 2009). When considering incorporating sustainability initiatives or environmentally preferable purchasing into the procurement processes of higher education institutions, it is significant to consider the organizational structure of the campus. This alludes to the idea of how decentralized or centralized structures of the overall institution can be beneficial or not to integrating sustainability into the purchasing system.

What is Environmentally Preferable Purchasing?

Terminologies such as sustainable purchasing policy, green purchasing and environmentally preferable purchasing (EPP) are used interchangeably when referring to procurement of products and services with less harmful environmental and human health impacts (Coggburn & Rahm, 2005). Incorporating EPP into a purchasing policy takes into consideration how consumption and purchasing of goods and services can have environmental effects, so as to alternatively, pursue environmentally benign products (Warner & Ryall, 2001). EPP includes the purchasing of goods and services that are recyclable, limited in raw materials, energy efficient, biodegradable or non-toxic (Coggburn & Rahm, 2005). For example, products that are absent of features with toxic chemicals satisfy the non-toxic criterion, as it have a small impact on health and air quality (Coggburn & Rahm, 2005). Additionally, biodegradable products use packaging materials that can be disposed of in an environmentally friendly manner are considered appropriate for EPP (Coggburn & Rahm, 2005).
Another aspect of EPP concerns what is known as the life-cycle assessment. This form of environmental endeavor towards evaluating environmental responsibility of goods and services procured encourages institution to examine how the three pillars of sustainability is integrated in their decision-making (Carter, C. & Carter, J., 1998; Carter & Dresner, 2001). Coggburn & Rahm (2005) describes life-cycle assessment as:

A process for evaluating the environmental impacts tied to a product, process, or activity that captures the entire burden placed on the environment including extracting and processing the raw materials, manufacturing, transport, use, reuse, maintenance, recycling, and final disposition (p. 25).

This process takes into consideration all the elements to production, use, maintenance and disposal of the good or service that contributes to the decision-making for making an environmentally preferable purchase (Carter, C. & Carter, J., 1998; Carter & Dresner, 2001). Specifically, this life-cycle assessment can evaluate suppliers’ commitment to waste reduction in its products, designing of recyclable or reusable products and the environmental implications of the sourced materials for production of these products (Carter & Carter, 1998; Carter & Dresner, 2001).

**Significance of Sustainable Purchasing**

Many organizations and institutions are striving towards identifying and minimizing their ecological footprint as they become more aware of the environmental degradations that their practices have on our resources (Warner & Ryall, 2001). Purchasing and consumption are often times overlooked and disregarded in terms of the ecological degradations it has on the environment. However, procurement and consumption of goods and services are profound aspects of the agenda on sustainable development (Warner & Ryall, 2001). In comparison to the development of environmental rules and regulations, the integration of sustainable initiatives into purchasing policies and programs of public and private organizations are more successful and effective in reducing overall environmental impacts and degradations (Warner & Ryall, 2001). The use of products and services that are environmentally preferable creates cleaner and healthier environments, as well as, address social and economical aspects of sustainability (Coggburn & Rahm, 2005). Social responsibility is addressed through sustainable purchasing as it reduces pollution and society’s susceptibility to illnesses and reducing dependencies on the welfare system. Economical responsibility is addressed as production and manufacturing of goods and services from vendors are assessed to ensure the longevity of the product (Warner & Ryall, 2005).

Collectively, educational institutions spend billions of dollars annually on goods and services, indicating the large purchasing power that institutions have, on influencing the policies and production of goods and services offered by vendors and suppliers (AASHE, 2013b; Coggburn & Rahm, 2005; ULSF, 1996). Purchasing through a lens of sustainability, “each purchasing decision represents an opportunity for institutions to choose environmentally, socially preferable products and services and support companies with strong commitments to sustainability” (AASHE, 2013b). Institutions of higher education are in the position to model and encourage an understanding of a sustainable economy that promotes “human and ecological health, social justice, secure livelihoods and a better world for all generations” (AASHE, 2013). Supporting the markets for environmentally preferable products would transform campuses into environments that recognize the interdependencies of the environmental, social and economical dimensions of sustainability (AASHE, 2013).
Colgate in the Context of Sustainable Procurement

Available on Colgate’s website is a document known as the “Procurement and Sustainability Policy” published by the Purchasing Department. This document is a segment of the Sustainability and Climate Action Plan created in 2011 that serves to provide sustainable procurement and purchasing guidelines. The premise of this document is based on the awareness that “each purchasing decision presents an opportunity for Colgate community members to choose environmentally preferable products and services from companies that support sustainability” (Colgate University, n.d.-b).

Included in this document are current practices and recent accomplishments in sustainable procurement at Colgate. Practices encompass the use of Green Seal certified cleaning products, institution-wide preferable purchasing of EPA Energy Star appliances and institution-wide preferable purchasing of recycled content office paper (Colgate University, n.d.-b). Accomplishments include reduced consumption of paper from 12.8 million sheets in 2009 to 8.5 millions sheets in 2010, resulting in 4.3 million sheets reduction of paper consumption in one year. Additionally, consumption of non-recycled paper decreased by 2.5 million sheets from 2009 to 2010 (Colgate University, n.d.-b).

Along with current practices and recent accomplishments, the document outlines multiple major objectives that are incorporated in the Procurement and Sustainability Policy. These include creation of an environmentally preferable purchasing policy, creation of a vendor code of conduct, and preferable purchasing of Electronic Product Environmental Assessment Tool certified computers and monitors. Additional to these objectives are a minimum of $50 for department purchases, elimination of the use of non-recycled paper, use of multi-functional machines and devices, and purchasing of products made from materials that are recyclable, post-consumer content or are environmentally benign (Colgate University, n.d.-b).

Methods

Content analysis

As previously discussed, we relied upon the literature relevant to the topic of sustainable purchasing in higher education to give context to our research. In order to find appropriate material, we used online databases such as ProQuest. Additionally, because sustainable purchasing is still an expanding field, we broadened our search to include grey literature. Grey literature, while not being formally published, is still academic material and is therefore appropriate for inclusion in this report. Grey literature was found through databases such as the Association for the Advancement of Sustainability in Higher Education (AASHE). In addition, we employed Google searches in order to find third party websites that could give us a wider range of information. This resulted in our discovery of the Responsible Purchasing Network (RPN), “an international network of buyers dedicated to socially responsible and environmentally sustainable purchasing…advised by…leading procurement stakeholders from government, industry, educational institutions, standards setting organizations, and related organizations” (Responsible Purchasing Network, n.d.). We used these resources to gain access to literature about sustainable purchasing, thus enabling us to establish a clear understanding of the issue.
Peer Institutions

To place Colgate University within the context of sustainable purchasing in higher education, we turned to our peer institutions. We first defined the parameters for defining an institution as a “peer.” Our shared characteristics were as follows: student body size, geographic location, and endowment size. These characteristics were chosen because they provided strict criteria, ensuring that other institutions were indeed our “peers.” However, they were not so strict as to limit our ability to compare Colgate, giving us the freedom to choose the institutions that fit the criteria and were most similar to Colgate. These peer institutions were Hamilton College, St. Lawrence University, Oberlin College, Bucknell University and Emory University (Table 1).

Table 1: Comparison of Colgate University and peer institutions researched by student body size, geographic location and endowment size.

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Student Body Size</th>
<th>Distance from Colgate (miles)</th>
<th>2013 Endowment (millions of dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colgate University</td>
<td>2,872</td>
<td></td>
<td>760,579</td>
</tr>
<tr>
<td>Hamilton College</td>
<td>1,850</td>
<td>17</td>
<td>710,428</td>
</tr>
<tr>
<td>St. Lawrence University</td>
<td>2,508</td>
<td>145</td>
<td>251,421</td>
</tr>
<tr>
<td>Oberlin College</td>
<td>2,900</td>
<td>350</td>
<td>727,683</td>
</tr>
<tr>
<td>Bucknell University</td>
<td>3,600</td>
<td>490</td>
<td>666,562</td>
</tr>
<tr>
<td>Emory University</td>
<td>14,769</td>
<td>785</td>
<td>5,816,046</td>
</tr>
</tbody>
</table>


From Table 1 it is clear that Emory University is much larger than Colgate in student body size, farther from Colgate than any other institution, and has a much larger endowment. Emory was chosen as a peer institution not because of their similarities, but because we found Emory’s policies concerning sustainable purchasing more comprehensive and effective than our other peers. This exception enabled us to widen our research in pursuit of best practices.

Structured Interviews. We conducted structured interviews with Hamilton College, St. Lawrence University, Oberlin College, Bucknell University and Emory University. A structured
interview was implemented for three main reasons. The first reason is that we had specific individuals we were attempting to contact. These individuals were employees of either the Sustainability or Purchasing Offices at their respective institutions (see Table 2). Because we only contacted five institutions, we expected a maximum of ten responses: a sample size too small and too targeted to necessitate sending out a randomly sampled survey. The second reason is that we had specific questions that we wanted to pursue, and the structure of a survey would not have been conducive to the type of detailed, qualitative answers we required. Implementing a structured interview allowed us to ask specific questions, but also gave the respondent the freedom to answer the question to the extent and detail that they wished. Finally, using a structured interview as opposed to an unstructured interview ensured that the questions were standardized between institutions. This gave us the ability to compare their answers evenly, and created a context with as little variable as possible into which we could place Colgate.

We chose employees of these offices by searching their offices on their respective institutional websites. This enabled us to contact them via email, and introduce ourselves, our project, and the structured interview. Respondents were given the option to respond over email, or to conduct the interview over a phone or Skype interview. Four of our five interviewees took between 10 and 20 minutes to type a response via email, and one (Bridget Flynn, Sustainability Coordinator of Oberlin College) responded via a 20 minute phone call. All interviewees gave signed informed consent, allowing their names and responses to be included in the report.

Five questions were asked, each assessing the intersection between purchasing and sustainability at the respondent’s institution. These questions were formulated by our group, and were created in order to best understand the how sustainability can fit into purchasing systems in higher education. The questions asked are included in Appendix A.

Table 2: Structured Interview Respondents Categorized by University

<table>
<thead>
<tr>
<th>Institution</th>
<th>Hamilton College</th>
<th>St. Lawrence University</th>
<th>Oberlin College</th>
<th>Bucknell University</th>
<th>Emory University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Irene Cornish</td>
<td>Ruta Ozols</td>
<td>Bridget Flynn</td>
<td>Donald Krech</td>
<td>Kelly Weisinger</td>
</tr>
<tr>
<td>Title</td>
<td>Director of Auxiliary Services, Administration and Finance</td>
<td>Purchasing and Warehouse Manager</td>
<td>Sustainability Coordinator</td>
<td>Director of Procurement services</td>
<td>Sustainability Coordinator</td>
</tr>
</tbody>
</table>

Colgate University

We researched the Colgate University Purchasing Department website in order to learn more about our own purchasing system. This was driven by the need to get an overview of the system before we began comprehensively assessing our own institution. We then examined many of the links on the page, which led us to discover a range of information, policies, and forms for Colgate employees and potential vendors. We then used the content of this website to
inform our first interview with key stakeholders: Alan Leonard, Director of Purchasing, and John Pumilio, Director of the Office of Sustainability.

**Key Stakeholders.** We assessed that Alan Leonard and John Pumilio were key stakeholders in this issue. We contacted both individuals for preliminary interviews, basing our questions on information from Colgate’s Purchasing website. We approached John in order to understand the issue from a sustainability perspective, and approached Alan in order to understand it from a purchasing perspective.

In our first interview with John, we asked basic questions about the validity of the information published online and the current status of any relationship between the Office of Sustainability and the Purchasing Department. We recorded the audio of this interview, which lasted 35 minutes, after gaining consent using our project’s unique consent form.

In our first, half-hour interview with Alan Leonard, we also asked basic questions about the validity of the information published online and the current status of any relationship between the Office of Sustainability and the Purchasing Department. For example, we asked Alan “Does the Purchasing Department currently follow the guidelines posted on Colgate’s website?” Furthermore, we asked questions about the basic structure of the Purchasing Department in order to gain a baseline understanding of what it did and its overall structure, such as “Does the Purchasing Department control contracting and vendors?” We also pursued information about the current or future inclusion of sustainability in the Purchasing Department.

This interview led us to conduct a second, more thorough 40-minute interview that delved deeper into the specific actions under the purview of the Purchasing Department, allowing us to narrow our scope of research in a more focused and effective manner. In our second interview with Alan, we asked questions directed at the exact structure of purchasing at Colgate, and more specifically RFPs, or requests for proposals. In this interview, Alan clearly outlined each purchasing mechanism at Colgate, from the largest and most impactful purchases, to the smallest.

We used both audio and video recording in both of Alan’s interviews, and gained his consent prior to the interview via our project’s unique consent form.

**Results**

*Decentralized Purchasing at Colgate*

Interviews with key stakeholders, revealed that Colgate has several decentralized purchasing mechanisms. These purchasing processes are often made by individual departments, and the Purchasing Department does not directly oversee them.

When asked about the purchasing structure at Colgate, John addressed repair and rehabilitation (R&R) purchases. R&R purchases are “projects, $30,000 dollars and less, directed towards planned maintenance” (J. Pumilio, personal communication, February 23, 2015). In an R&R purchase, “facilities select who they want to use, or typically contract with a company they’ve already been using” (A. Leonard, personal communication, February 23, 2015).

Outside of R&R, Alan summarized four other decentralized processes at Colgate. From largest to smallest, they are “department quotations, emergencies, sole source, and P Cards” (A. Leonard, personal communication, February 23, 2015). Department quotations are smaller purchases where a department will get several estimates on a smaller order, and purchasing will
select the cheapest option. Emergencies are occasions when something like a window is broken, and it needs to be replaced immediately or someone or something will be at risk. These are handled by Purchasing, using the cheapest and fastest option. A sole source purchase is where there “is a particular piece of equipment, often scientific equipment, and only one manufacturer makes it” (A. Leonard, personal communication, February 23, 2015). In this case, the department will send the order to purchasing, and purchasing will process it. Departments and individuals make small purchases, such as food, using P Cards. Purchasing is not involved in this process, but does collect the data from these purchases (A. Leonard, personal communication, April 9, 2015).

Mr. Leonard describes the structure of the purchasing program as being “decentralized to a point,” partly because it is a private institution that is not bound by laws like state schools (A. Leonard, personal communication, February 23, 2015). Therefore, some of the responsibility for purchasing falls within academic departments or offices.

Centralized Purchasing at Colgate

Interviews with Alan Leonard reveal that the largest purchases at Colgate require the most participation by the Purchasing Department. According to Alan, “If you’re looking at procurement methods as they work today...the big, massive purchases that affect huge dollars, and [that] are very complicated, are the RFP processes” (A. Leonard, personal communication, February 23, 2015). In an RFP process, typically “[Colgate] does not know exactly what [it] wants, but suppliers can come [to Colgate] and say here’s what I can offer you and here’s the price...it allows you to get the best offer” (A. Leonard, personal communication, February 23, 2015). When an RFP is sent out, a committee of key stakeholders at Colgate is formed. Typically this involves the end user, or whoever this project will affect or benefit. Generally, the Purchasing Department selects the RFP committee, “with key input from others with knowledge in regards to the current RFP” (A. Leonard, personal communication, April 9, 2015). The committee then decides what attributes it wants from the RFP, and the Purchasing department goes to work filling in “the technical details” (A. Leonard, personal communication, April 9, 2015). Once the RFP is sent out, suppliers will come to Colgate and pitch their proposal to fill the RFP. When suppliers make their pitch, the committee has the opportunity to ask questions, and choose a winning bid. Once a winning bid is selected, purchasing negotiates the specifics of the contract, and the bid, or the project is implemented (A. Leonard, personal communication, April 9, 2015).

Previously, John Pumilio has volunteered on RFP search committees, in order to ensure that a sustainable perspective is heard. As John says, “In one case, I interjected myself into the RFP committee [for a travel management firm], because this is important, how we travel is a big part of our carbon footprint” (J. Pumilio, personal communication, February 23, 2015). Consequently, “I helped to frame the RFP... so that the firms that bid [that RFP] had to address how they embrace the environment, and how they’re going to help us meet our carbon neutrality goals, and more importantly, they got the message that sustainability is important to us” (J. Pumilio, personal communication, February 23, 2015). A demonstration of how sustainability can be incorporated into the Purchasing Department’s responsibilities is through the recent RFP process with Christopherson Business Travel. Ultimately, Colgate chose Christopherson Business Travel as its new travel management contractor because they offer carbon imprint metrics with associated travel options, allowing the consumer to understand their environmental impact when choosing a travel option. John views this choice as a positive outcome of including
sustainability within an RFP process, and an example of how we could incorporate sustainability overall (J. Pumilio, personal communication, February 23, 2015).

Colgate’s Online Material

The Purchasing Department publishes several documents on Colgate’s websites. One such document is the “Procurement and Sustainability Policy” (Colgate University, n.d.). The Procurement and Sustainability Policy states, “at Colgate University, we believe you should consider the environmental impact of procurement decisions, promote the use of sustainable products when acceptable, and encourage and monitor environmental practices of contracted vendors” (Colgate University, n.d.). When John Pumilio was asked about this policy, he stated that this is a document he wrote for section 4.5 of the Sustainability and Climate Action Plan. This report was sent to the previous director of purchasing, who posted it on Colgate’s website. John does not believe that the policy is enforced (J. Pumilio, personal communication, February 23, 2015). What’s more, Alan Leonard, the current purchasing director, states that he does not believe this document is implemented in any meaningful way (A. Leonard, personal communication, February 23, 2015).

Another document, titled “minority and women owned business enterprise” (MWBE), states, “Colgate University has established a Historically Underutilized/Small Business Procurement Program to track and promote procurement with small, disadvantaged, and women-owned businesses” (Colgate University, n.d.-a). What’s more, “Colgate University Purchasing Department will continue to collect and compile vendor data related to the business classifications of vendors providing services and goods to the university” (Colgate University, n.d.-a). This indicates that Colgate has employed efforts to consider social issues in its purchasing structure. However, in an interview with Alan, he states that while he believes “minority and women contractors” are an important consideration when integrating sustainability into purchasing, that the purchasing department does not currently act to encourage participation of these groups (A. Leonard, personal communication, April 9).

Sustainability in Purchasing at Colgate

Alan Leonard believes that it is up to the Purchasing Department to set the tone for environmentally, economically and socially responsible purchasing (A. Leonard, personal communication, February 23, 2015). Currently, John Pumilio believes that there are ample cost considerations in Colgate’s purchasing decisions, but that social and environmental concerns are often ignored. Because of this, Alan would like to have an “outline or a policy of what would be a good model for this campus” (A. Leonard, personal communication, February 23, 2015). To Mr. Leonard, sustainability in the context of the Purchasing Department has various aspects: a formalized program or guidelines that support green purchasing initiatives in addition to minority and women contracts. However, there are barriers to this goal. Mr. Leonard stated “there are not enough hours in the day to get it done to make it a good program” (A. Leonard, personal communication, February 23, 2015). Furthermore, it is difficult to “get everyone to buy into the policy and…work within it, not around it” (A. Leonard, personal communication, February 23, 2015).

In regards to specific integrations of sustainability, Alan believes that RFPs are the best purchasing mechanism to do so. As he says, “If you want to take a look at one [purchasing process] I think that RFPs are the one big area that you might want to take a shot at” (A. Leonard, personal communication, February 23, 2015). Given that RFPs are created, issued, and
negotiated by the purchasing department, Alan believes that the purchasing department can make meaningful change. In the same vein, John states that “a set of sustainability guidelines specific to everyone we contract with is necessary” (J. Pumilio, personal communication, February 23, 2015). For John, these guidelines “are probably going to apply to something like an RFP, or a Vendor Code of Conduct” (J. Pumilio, personal communication, February 23, 2015). What’s more, RFPs typically involve the largest sums of money as well as long-term service contracts, and can have the most impact at Colgate. In order to incorporate sustainability into RFPs, Alan believes that there needs to be a statement, or specification in an RFP that addresses environmental and social concerns. Alan wants this specification to be “stronger than advisory,” yet he worries that one specification will not fit the diverse needs of different RFPs (A. Leonard, personal communication, April 9, 2015).

Peer Institutions

Peer Institutions with Sustainable Purchasing Policies

Table 3 shows a comparison between those institutions who have policies and those who do not. Two of the peer institutions that were sent structured interviews, Emory University and Oberlin College, currently utilize sustainable purchasing policies. Emory’s Sustainable Procurement Policy promotes environmentally preferable purchasing as defined by the National Association of Education and Procurement (Emory University, 2014). As such, environmental and social considerations are “taken with equal weight to the price, availability, and performance criteria” used to make purchasing decisions (Emory University, 2014). Emory identifies “source reduction, recycled content products, energy and water savings, toxins and pollution, and forest conservation” as “areas of focus” (Emory University, 2014). Consequently, procurement activity should assess these areas in order to determine if an impact in one or all of these areas can be reduced. Emory is also a member of the Sustainable Purchasing Leadership Council (SPLC). A founding member in 2013, Emory works with the SPLC to identify and prioritize sustainable purchasing goals, as well as benchmarking progress towards these goals.

Similar to Emory, Ms. Flynn of Oberlin described the “desired environmental attributes” of various goods, such as being biodegradable, compostable or energy-efficient (B. Flynn, personal communication, March 24, 2015). She also mentioned the importance of being mindful of the life cycle of a product. The policy “asks people to look for those attributes” (B. Flynn, personal communication, March 24, 2015).

The Green Purchasing Policy was created as a supplement to Oberlin’s environmental policy, created by the “Committee on Environmental Sustainability…a standing general faculty committee” that works on creating sustainable policies at Oberlin (B. Flynn, personal communication, March 24, 2015). In terms of barriers to sustainable purchasing, Oberlin struggles between giving autonomy and responsibility to those with the ability to purchase goods on campus. Not all purchases go through the Purchasing Office, which makes it difficult to assess the sustainability of the good. Furthermore, some purchasers believe that the environmentally responsible purchase is of a lower quality than the standard good. Finally, the difficulty of enforcing policies under a decentralized purchasing structure is a challenge (B. Flynn, personal communication, March 24, 2015). Unfortunately, Emory did not address our questions regarding the difficulties of implementing a sustainable purchasing policy.

While Ms. Flynn provided us with Oberlin’s Green Purchasing Policy, when asked if her institution currently implemented a sustainable or environmentally preferable purchasing policy, Ms. Flynn gave the following answer: “[Sic] Yes, with the caveat that it is to varying degrees”
(B. Flynn, personal communication, March 24, 2015). She further went on to describe the policy associated with Oberlin College’s university credit cards. Each individual given a credit card is also given a booklet on how to use the card. Included in that booklet is a link to both the college’s purchasing policy and the college’s green purchasing policy. However, Ms. Flynn then said (in reference to the Green Purchasing Policy) that “most people don’t know it exists and probably don’t use it” (B. Flynn, personal communication, March 24, 2015). When asked to what degree this policy is enforced, Ms. Flynn said it is not. Despite this, there is “collaboration between the purchasing office and the sustainability office for institutional purchases” (B. Flynn, personal communication, March 24, 2015). In reference to office supplies, Staples is Oberlin’s central vendor. Staples’ website has sustainable options shown first as the default, before other options for the same item (B. Flynn, personal communication, March 24, 2015).

<table>
<thead>
<tr>
<th>Institution</th>
<th>Centralized or Decentralized Purchasing</th>
<th>Sustainable Purchasing Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emory</td>
<td>NA</td>
<td>Yes</td>
</tr>
<tr>
<td>Oberlin</td>
<td>Mix</td>
<td>Yes</td>
</tr>
<tr>
<td>Bucknell</td>
<td>Mix</td>
<td>No</td>
</tr>
<tr>
<td>Hamilton</td>
<td>Decentralized</td>
<td>No</td>
</tr>
<tr>
<td>St. Lawrence</td>
<td>Decentralized</td>
<td>No</td>
</tr>
</tbody>
</table>

**Peer Institutions without Formalized Sustainable Purchasing Policies.**

**Bucknell University.** Donald Krech writes that Bucknell is “a mix of decentralized and centralized” purchasing system (D. Krech, personal communication, March 24, 2015). Generally departments make their own purchases, but if an order is greater than $5,000 it is routed through the Procurement Department. What’s more, “if an order is not specific to a department’s expertise, e.g. office furniture, it is routed through and initiated by Procurement” (D. Krech, personal communication, March 24, 2015).

In regards to sustainability, Donald states that Bucknell has a “partial policy” (D. Krech, personal communication, March 24, 2015). Paper must be FSC (Forest Stewardship Council) certified, and Energy Star must rate all appliances. What’s more, all new buildings must receive at least LEED (Leadership in Energy & Environmental Design) silver designation. Moreover, Donald is a permanent member of the Campus Greening Committee, which discusses topics that may improve sustainability at Bucknell.

Donald identifies three barriers to implementing a sustainable purchasing policy, in order of importance. First off, “cost is still the greatest barrier. If an environmentally friendly design of a product costs more than the unfriendly version, we don’t enforce the friendly purchase” (D. Krech, personal communication, March 24, 2015). Secondly, there is still a lack of environmental infrastructure. While Donald wants to switch to compressed natural gas shuttle buses, there are not filling stations nearby. Finally, “public buy-in” can be tough to overcome”
(D. Krech, personal communication, March 24, 2015). It’s difficult to get students and faculty to act sustainably.

**Hamilton College.** Irene Cornish classifies purchasing at Hamilton as decentralized.

“Physical Plant handles all of the purchasing for anything related to building and grounds,” and the individual departments “specify the items they want purchased and forward the paperwork to us” (I. Cornish, personal communication, March 10, 2015). However, the Auxiliary Services Department handles contractual arrangements with various vendors, as well as larger and miscellaneous purchasing “as needed” (I. Cornish, personal communication, March 10, 2015).

Irene notes that there is not a general environmental purchasing policy, but that Hamilton employs several sustainability programs that affect certain purchased goods. In regards to the possibility of a policy, Irene writes, “I don’t think there is any one policy that could be developed that would be applicable to every facet of purchasing. I think you have to approach individual areas where your purchasing decisions can have the most impact on sustainability” (I. Cornish, personal communication, March 10, 2015). In this manner, Hamilton does not have plans to develop a formal sustainable purchasing policy, but will approach sustainability on “a commodity basis” (I. Cornish, personal communication, March 10, 2015).

**St. Lawrence University.** St. Lawrence has a decentralized purchasing system. Departments use purchasing cards with a limit of $1500 in order to procure their own needs. If a purchase is greater than $1500 the head of the respective department must approve the order, and if the purchase is greater than $10,000, the requisite vice president must be consulted (R. Ozols, personal communication, March 10, 2015).

St. Lawrence does not have a written sustainable purchasing policy. However, St. Lawrence has made efforts to increase environmental standards for paper products, and to decrease the number of vending machines on campus. Ruta Ozols notes, “Cost is the biggest [sustainable purchasing] challenge. As a rule, unfortunately, post-consumer or Energy Star products are more expensive” (R. Ozols, personal communication, March 10, 2015). At this time, it is unknown whether St. Lawrence will develop a sustainable purchasing plan (R. Ozols, personal communication, March 10, 2015).

**Discussion and Analysis**

*Purchasing Structure and Mechanisms at Colgate University*

Colgate has a mixture of centralized, and decentralized purchasing. From interviews with John Pumilio and Alan Leonard, we have identified seven unique purchasing mechanisms. Alan identified four mechanisms where the Purchasing Department has some control, and one mechanism where the Purchasing Department has significant influence (see table 4).

It is only in the RFP process that the Purchasing Department has a significant influence over what is being purchased. Because the Purchasing Department typically selects an RFP committee, who in turn select the attributes of the product that is being purchased, the Purchasing Department may indirectly shape the final product. What’s more, the Purchasing Department creates the formal RFP based on the input of the committee, and handles the contract negotiations once a winning bid is chosen. Thus, whether it is in the committee selection process,
the formal RFP, or the contract negotiations, RFPs allow ample room for the Purchasing Department to integrate sustainability.

Table 4: Purchasing Mechanisms at Colgate University

<table>
<thead>
<tr>
<th>Purchasing Mechanism:</th>
<th>RFP</th>
<th>Bid Process</th>
<th>Department Quotations</th>
<th>Emergencies</th>
<th>R&amp;R</th>
<th>Sole Source</th>
<th>P Cards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some control from Purchasing?</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Significant control from Purchasing?</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

The Current Status of Sustainability in the Purchasing System at Colgate

On Colgate’s website, under the purchasing section, there are two documents titled “Procurement and Sustainability Policy,” and “Women and Minority Owned Business” (Colgate University, n.d.-a). Overall, these documents appear to indicate efforts from Colgate to include environmental and social considerations in its purchasing structure. Nevertheless, interviews with John and Alan reveal that these documents are not used or implemented. What’s more, in these same interviews John and Alan both speak of how there is currently not a formalized inclusion of sustainability in any of the primary purchasing mechanisms. While John has worked to include sustainability in processes such as RFPs, this inclusion of environmental and social considerations is not standardized, nor is it a normal occurrence. Thus, it appears that there is not a formal inclusion of sustainability within Colgate’s current purchasing structure.

Best Practices at Peer Institutions

We discerned a number of best practices at our peer institutions, but many of these practices were difficult for them to implement due to various barriers. First, peer institutions will be discussed, and their most successful policies or actions. Then, an explanation of why effective policies can be difficult to implement will be given.

Emory University, a leader in sustainable purchasing, ensures that environmental and social considerations are “taken with equal weight to the price, availability, and performance criteria” used to make purchasing decisions (Emory University, 2014). Their areas of focus lead to an emphasis on environmental responsibility, and set the standard for purchasing on campus. Furthermore, they are a part of the Sustainable Purchasing Leadership Council (SPLC). Their rigorous benchmarking process through this council holds them accountable for their purchasing choices, and provides support for the ongoing development of successful implementation. Having strong guidelines and the commitment to a third party council, not unlike Colgate’s commitment to the ACUPCC, gives their program validity and future directions.

Oberlin College provided several interesting methods of including sustainability in the purchasing program. The first is their way of accessing the users of “P Cards” or university credit cards. When users are given their credit cards, a booklet describing how to use them accompanies the card. In this booklet is a link to Oberlin’s Green Purchasing Policy, an addendum to the College’s overarching environmental policy. This attempts to provide an aspect
of sustainability in one of the most decentralized parts of purchasing programs, which are users who can make small, independent purchases via individual credit cards linked to the College’s account. Decentralized purchasing is also addressed through the purchase of office supplies. Oberlin’s office supply company, Staples, defaults to showing the most sustainable option for purchases before showing any other option. For example, recycled paper is shown before virgin paper, and users must click out of that interface to access the less sustainable option. This encourages ease of incorporating environmental responsibility into the everyday purchases that can accumulate costs over time.

While Bucknell University does not have a formal sustainable purchasing policy, it is interesting to note that all of their future buildings must receive at least a LEED silver designation. This is an encouraging step, as it ensures that some consideration of environmental and social responsibility will be considered in these large projects. Furthermore, it sets a precedent on campus, and the attention that new buildings attract will lead others to become aware of LEED certification and the importance of purchasing sustainable materials.

Similarly, Hamilton College also does not have a formal purchasing policy. However, as our interview led us to discover, they plan on implementing sustainability in purchasing through a “commodity basis.” This ensures individual attention to specific items, which may lead to an examination of overall purchasing structure.

**Barriers to Sustainable Purchasing**

Like Bucknell University and Hamilton College, St. Lawrence University does not have a formal purchasing policy, and there is no current effort to develop a sustainable purchasing plan. This leads us to examine the barriers that have kept these three institutions from implementing a plan. Bucknell University and St. Lawrence University cited the barrier of cost. Environmentally friendly goods are still more expensive than standard goods. This extra cost, especially for a reason that the average purchaser may not understand, is simply not equal to the benefits. This may be affected by the fact that while the good itself is tangible, such as a pen, or a new vehicle, the effects of environmental and social responsibility are less visible and can be spatially distant. Another barrier cited by both interviewees from Oberlin College and Bucknell University is the difficulty of encouraging users that the sustainable good is of equal value to the standard good.

Donald Krech, Director of Procurement Services at Oberlin College, described this as a lack of “public buy-in” (personal communication, March 24, 2015). This could be caused by an overall lack of understanding of the issues driving the sustainability movement in higher education. It could also be caused by an inconvenience: when there is established vendors, methods, or good that are standard purchases, it is an extra effort to research alternative options or to go to other lengths in order to find a more sustainable item. These barriers are more relevant to the decentralized aspects of purchasing, such as individuals who own P Cards or academic departments.

A significant barrier is the structure of purchasing departments themselves. All of the peer institutions interviewed had both centralized and decentralized purchasing. Larger purchases, like specific equipment, or searches for campus-wide vendors are affected through the official purchasing department. However, smaller purchases like office supplies, food for meetings, or other items of this nature are in the hands of smaller departments. Therefore, the official purchasing departments are unable to oversee all purchases, which enables missed opportunities for the inclusion of sustainability. This also presents the issue of who is responsible for enforcing a sustainable purchasing plan: the purchasing department itself, the heads of
academic departments, administrative assistants or the office of sustainability could all be held responsible. The complicated infrastructure pushes back against the simple inclusion of sustainability, as there are hundreds of facets of purchasing at each institution, from carpeting to dining services to technology like computers and printers. These facets create a diffuse population of individuals and departments who have the ability to purchase goods and services, making it difficult to tailor sustainability to each of these varying kinds of purchases.

Two of our peer institutions, Emory University and Oberlin College, had formalized sustainable purchasing policies. Emory’s Sustainable Procurement Policy and Oberlin’s Green Purchasing Policy both list desired environmental attributes like being recyclable, biodegradable or energy efficient. They also include facets such as the life cycle of a product, which Emory’s policy defines as “the examination of a product’s environmental and economic effects throughout its lifetime, including new material extraction, transportation, manufacturing, use, and disposal” (Emory University, 2014). Furthermore, Oberlin targets the Purchasing Office specifically as the party responsible for implementing the policy, while the “Committee on Environmental Sustainability will help the Purchasing Office establish goals, benchmarks, assessments, reporting mechanisms etc.” By making this relationship defined and clear, both parties are held accountable to uphold the policy as per their outlined roles. A helpful aspect of both policies is the list of definitions of sustainable purchasing terms such as a “refurbished product” or “virgin material” (Oberlin College, n.d.). This will enable the average consumer to access the information in a clear, succinct and tangible manner. Overall, the need for a written and well-recognized Sustainable Purchasing Policy is clear, as it provides definition, clarity, tangibility and responsibility for implementation.

Conclusions and Recommendations

Based on our literature review, interviews with the Sustainability and Purchasing Departments at Colgate, and our structured interviews with peer institutions, this report finds that RFPs (Request for Proposals) are the best purchasing mechanism to integrate sustainability into purchasing at Colgate. Given that RFPs are under the direct purview of the purchasing department, and typically involve the largest sums of money as well as long-term service contracts, integrating sustainability into RFPs could affect widespread change in Colgate’s purchasing decisions.

Consequently, we recommend the following actions:

1. That a written policy be incorporated into the RFP procedure, stating that there must be a consideration of social, environmental and economic characteristics of both the vendors themselves and the goods or service the vendors provide.

2. That a specific member of the RFP committee be designated as the responsible member to uphold this policy throughout the RFP process. This member may be a representative of the Office of Sustainability, or a person otherwise qualified to understand the sustainability criteria.

   a. If necessary, this person may create a task force within the RFP committee to research the vendors and the goods or service the vendors provide, in order to develop thorough knowledge of the issue.

3. That these recommendations be incorporated for all future RFP’s, beginning at the conclusion of the 2015-2016 academic year.
References


Appendix

Appendix A: Structured Email Interview Sent to Peer Institutions

Colgate University
Community Based Studies of Environmental Issues
Research Project on Sustainable Purchasing

1. Would you characterize the purchasing system at your institution as centralized or decentralized, and why?

2. Is there currently a sustainable or environmentally preferable purchasing policy implemented at your institution?
   a. If so, what does this policy entail, and to what degree is it enforced?
   b. If so, what are the best practices of the plan?
   c. Who created, or controls the sustainable purchasing policy?

3. What are some barriers towards implementing sustainable purchasing at your institution?

4. If there is no sustainable purchasing, are there plans in place to create or implement one in the future?
Appendix B: Questions for First Interview with Alan Leonard

1. What is your current understanding of the term “sustainability”?

2. Are you aware of Colgate's Green Purchasing Policy?
   a. Are there any written guidelines that the purchasing office consistently conforms to in reference to sustainability?
   b. What are these guidelines?
   c. How are these guidelines enforced in the department?

3. What do you think sustainability means in the context of the purchasing department?

4. Are you working with the sustainability department in order to achieve this goal?

5. On the vendor profile form which all vendors that wish to do business with Colgate must fill out, there is a section on “Business and Classification.” This includes classifications such as “Disadvantaged, Women owned, and minority owned.” We were wondering where these classifications come from, and what are the benefits to fitting within one of these classifications?
   a. Our follow up to that: is it possible to include an environmental/or sustainable classification? (This may include businesses certified by an environmental organization).

6. What are some of the successes in the purchasing department in implementing green guidelines?

7. What are the barriers towards implementing sustainability initiatives in the purchasing department?

8. In the University’s Procurement Policy, page, it lists the requirements for purchases within certain dollar ranges. Do you think it would be possible to include environmental considerations within these requirements?
   a. If so, where would this be most effective? In the smaller purchases, larger purchases, or throughout the policy?

9. Who are the largest contractors Colgate University currently works with? Do they offer any indication of environmental concern or impact?
   a. Do we discriminate based on these criteria?
Appendix C: Questions for Second Interview with Alan Leonard

1. We know that R&R, and minor department purchases are primarily made by the departments themselves, but their options for purchasing are limited by Colgate’s current contracts. From our understanding, these contracts are determined by an RFP process, which goes through the purchasing department. Would you say this is accurate?

2. Who creates the RFP? Which individuals/departments at Colgate are consulted?

3. Is the RFP process standardized? In other words, is it the same every time?
   a. If it is standardized, what are the requirements?

4. How can social and environmental concerns be integrated into the RFP process?

5. Who determines large purchases (such as scientific equipment, large furniture orders etc.)?
   a. Is this process standardized? If so, what are the requirements?

6. How can social and environmental concerns be integrated into large purchases?

7. What is the Purchasing Departments role in capital projects?
   a. Is this process standardized? If so, what are the requirements?

8. How can social and environmental concerns be integrated into capital projects?

9. Is there anything else that falls under the centralized control of the Purchasing Department?

10. If we were to propose creating a task force for integrating sustainability into purchasing, what areas should the task force focus on?
   a. Who should participate in this task force?
Appendix D: Questions for Interview with John Pumilio

1. What do you think sustainability means in the context of the purchasing department?

2. In your opinion, what are the aspects of sustainable purchasing that Colgate would be able to incorporate?

3. Is Colgate's Green Purchasing Policy actually incorporated into the purchasing department?
   a. Are there any written guidelines that the purchasing office consistently conforms to in reference to sustainability?

4. Are you working with the sustainability department in order to achieve this goal?

5. What are some of the successes in the purchasing department in implementing green guidelines?

6. What are barriers towards implementing sustainability initiatives in the purchasing department?

7. In the University’s Procurement Policy, posted on the purchasing department’s web page, it lists the requirements for purchases within certain dollar ranges. Do you think it would be possible to include environmental assessments of purchases, or sustainable competition?
   a. If so, where would this be most effective? In the smaller purchases, larger purchases, or throughout the policy?