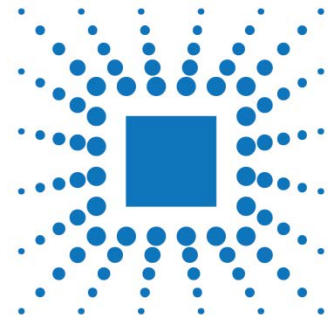


CASE STUDY

Sustainable Procurement Program Evolution through Strategic Planning

City of Portland, OR

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Abstract

In 2017 the City of Portland’s Sustainable Procurement Program celebrated its 15th year. To mark the occasion, the Sustainable Procurement Program seized an opportunity for continuous improvement by taking the time and money to engage stakeholders, reflect on priorities, and develop the Program’s first Strategic Plan. Although the City’s Sustainable Procurement Program can claim numerous achievements from over the years, the 2017 strategic planning process was invaluable in terms of reengaging stakeholders and preparing the Sustainable Procurement Program to be more effective as sustainable procurement evolves.

Summary

Goals

Prepare the Sustainable

Strategies

Hire Strategic Planning

Results

First ever Sustainable

Procurement Program for the current evolution of sustainable procurement and foster continuous improvement	Consultant Assess current Program against best practices in sustainable procurement program strategies Conduct robust strategic planning process	Procurement Program Strategic Plan addresses current gaps in Program and actions needed to achieve the Sustainable Procurement Program vision
Re-engage internal City stakeholders to better understand their sustainable procurement needs	In-person stakeholder workshops Multiple stakeholder input surveys aligned with different phases of the strategic planning process Develop Sustainable Procurement Program Communications Plan	Renewed stakeholder engagement and awareness of Sustainable Procurement Program Improved understanding of what stakeholders need from the Sustainable Procurement Program Communications Plan provides structure for consistent, ongoing, effective sustainable procurement communication
Improve capacity of procurement professionals and key City staff to initiate and embrace sustainable procurement best practices	Conduct multiple stakeholder workshops Build audience-specific tools and resources Foster robust communication and feedback loops	Workshops highlighted many opportunities to better support City staff. Tool development and other resources built into Sustainable Procurement Program Strategic Plan Communications Plan provides structure for consistent, ongoing, effective sustainable procurement communication

Goals

While the City of Portland’s Sustainable Procurement Program is well established (15 years) and can claim many achievements, in 2016-7 Program staff also realized the need to “refresh” the program to 1) prepare for evolving/future sustainable procurement best practices and tools; 2) re-engage internal stakeholders and improve overall Sustainable Procurement Program stakeholder engagement; and 3) advance the City’s Sustainable Procurement Program and achievements by having a robust strategy and action plan.

Strategies and Actions

A lot has changed with the sustainable procurement field of practice since 2002 when the City of Portland initiated its Sustainable Procurement Program. Expectations have increased – from the

variety of issues sustainable procurement is intended to tackle (greenhouse gas reduction to conflict minerals) to the sophistication of the data and tools needed to demonstrate costs and benefits. In 2016 the City conducted a Sustainable Supply Chain Analysis that not only brought to the forefront the environmental impacts associated with the City's supply chain, but also a key realization that the Sustainable Procurement Program needed to evolve. In 2017, we officially hit the "refresh" button and began the process to reinvent the Sustainable Procurement Program to be ready for the future and be more effective in identifying, prioritizing, and tackling what matters. The first step in this process was to develop a strategic plan.

In June of 2017 the Sustainable Procurement Program Coordinator seized an opportunity to hire a strategic planning consultant. Over the course of the next ten months, Program staff and the consultant took on the following:

1. Discovery Process
 - Conduct initial internal City stakeholder interviews to gauge effectiveness of program and unmet needs
 - Assess Sustainable Procurement Program against best practices in sustainable procurement (utilizing SPLC Benchmark, ISO 20400, Sustainable Procurement Playbook for Cities, and similar resources)
 - Identify critical issues, strategic recommendations and next steps
2. Development of Sustainable Procurement Vision Statement, Measures of Success and Program Strategic Plan
 - Hold intensive visioning sessions with small group of key internal stakeholders
 - Draft vision statement and measures of success (How will we know we have achieved the Vision?), and Strategic Plan
 - Hold broader stakeholder feedback sessions – both in person and via online survey
 - Revise documents; develop final drafts
3. Initiate Foundational Elements for Strategic Plan
 - Develop City Sustainable Procurement Guiding Principles
 - i. Test through online internal stakeholder surveys
 - Develop Sustainable Procurement Program Communications Plan
 - Initiate Update to the City's Sustainable Procurement Policy

- i. Draft Policy update based on internal stakeholder feedback during strategic planning process
 - ii. Conduct stakeholder feedback, both in person and through online survey (*currently underway at time of submitting this application*)
- 4. Finalize the Strategic Plan (summary version attached)
 - o Utilize input from initiating the foundational elements to finalize the strategic plan.
 - o Circle back with stakeholders on strategic planning results (introduce the plan and reiterate actions currently underway and next steps)

A common thread throughout this work was facilitating a variety of stakeholder engagement to ensure effective feedback and input. Types of stakeholder engagement included:

1. **Internal Stakeholder One-on-One Interviews** were used during the Discovery Process to gauge stakeholder perspectives of the City’s Sustainable Procurement Program. This information contributed to the assessment of the Sustainable Procurement Program against known sustainable procurement program best practices.
2. **Internal Stakeholder Small Group Intensives** were used to during the sustainable procurement program visioning process. Participants were stakeholders with a substantial vested interest in the City’s Sustainable Procurement Program and the capacity to see connections, desirable outcomes, and how to get there.
3. **Internal Stakeholder In-Person Workshops** were used while developing the details of the Strategic Plan to gauge support for the plan, needed improvements, what’s missing, and implementation strategies. Participants represented a variety of departments, job responsibilities, procurement roles, and demographics (age, ethnicity, etc.). This workshop approach was also used when drafting the update to the City’s Sustainable Procurement Policy.
4. **Internal Stakeholder Online Surveys** were used while developing both the Strategic Plan and the Sustainable Procurement Guiding Principles. These surveys allowed for wider/broader stakeholder input, since few stakeholders have time for in-person meetings. The surveys (example attached) were designed with questions that would generate meaningful indicators and feedback. They were very useful in telling us whether we were on the right track or not. Online surveys (both internal and external) are planned for the draft update to the City’s Sustainable Procurement Policy (planned for late March/early April 2018).

The variety in stakeholder engagement approaches allowed for both meaningful and diverse input during the sustainable procurement strategic planning process. This not only “refreshed”

awareness of, and interest in, the Sustainable Procurement Program, but also was key in shaping the Sustainable Procurement Communications Plan so that the momentum is not lost. While the strategic planning process was internal-focused, the program work moving forward, including the revision of the City's Sustainable Procurement Policy and any supplier-related resources, will incorporate external stakeholder input.

The Sustainable Procurement Strategic Plan provides the foundation for “refreshing” the City's Sustainable Procurement Program to be more effective with limited program resources. The work done to date is only the beginning. Over the past ten years, the City's Sustainable Procurement Program embraced a “technical assistance” model, using the limited program resources to educate, conduct best practice research, write “green” specifications and procurement solicitations, and engage in select implementation projects. While this model produced positive results (see [online case studies](#) and [reports](#)), the Program lacked a strategic approach needed for City sustainable procurement to be consistent and transformative. The new Sustainable Procurement Strategic Plan is a roadmap for an “enabler” program model that fosters sustainable procurement as “how we do business”, with technical assistance as just one piece of the puzzle. Key themes to the Strategic Plan that will foster organizational change include:

- Consistent and audience-specific messaging (communications plan)
- Audience-specific tools and resources, including prioritization and decision-making tools/guidance
- Program metrics and feedback loops (for engagement & continuous improvement)

While there is a lot of work yet to accomplish, this first step of establishing a Sustainable Procurement Strategic Plan was a rewarding and invaluable foundational step for revitalizing the City's Sustainable Procurement Program.

Financial Information

The Strategic Planning Consulting Services cost the program approximately \$35,000.00. Other costs included staff time and some minor in-person meeting costs and online survey platform costs.

Results

The Sustainable Procurement Strategic Plan provides the foundation for “refreshing” the City's Sustainable Procurement Program to be more effective with limited program resources. The new Sustainable Procurement Strategic Plan is a roadmap for an “enabler” program model that fosters sustainable procurement as “how we do business”.

The variety in stakeholder engagement approaches used during the strategic planning process allowed for both meaningful and diverse input. This not only renewed awareness of, and interest

in, the Sustainable Procurement Program, but also was key in shaping the Sustainable Procurement Communications Plan so that the momentum continues.

While there is a lot of work yet to accomplish, this first step of establishing a Sustainable Procurement Strategic Plan was a rewarding and invaluable foundational step for revitalizing the City's Sustainable Procurement Program.

Benefits

- Strategic Plan provides roadmap for transforming the existing Sustainable Procurement Program to be more proactive, enabling and effective. The plan helps prioritize actions among limited program resources.
- Renewed internal stakeholder awareness of, and interested in, sustainable procurement

Lessons Learned

Communications is key. Both in terms of maintaining connections with, and enabling stakeholders, but also in terms of understanding how to best communicate with different audiences.

Taking the time to step back and evaluate an existing program and ask “what do we want to achieve and what needs to change to get there” is very rewarding.

References and Additional Resources

Attachments:

- City of Portland Sustainable Procurement Program Strategic Plan (Summary)
- Stakeholder Survey Example Questions