

## Sustainability Project Fund Application

**Project Title:** Sustainability Procurement Officer (application #13-170)

**Budget Requested:** Full salary of the new position (\$80,000/year) for two-year term, starting as of August 2013 (*Note – Flexible to reduce the term to one year should the proposed 2 year term not be feasible for SPF– however, for the integrity, continuity and success of the project, dedicated skilled staff in sustainability for at least two years, if not longer is highly recommended.*)

**Applicant/Project Leader:** Kathy Zendehbad, Associate Director, Strategic Business Platform (Procurement Services)

**Contact Information:**

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First Name: Kathy

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Daytime Phone: 514-398-4608

Role (Undergraduate, Post-Graduate, Staff, Academic): Staff

Faculty/Unit: Procurement Services

**Project theme(s):** Procurement

*Options: community, food, wellness & health, energy, academics, water, materials, land, social justice, finance*

**Project Group:**

*Please include the names and contact information of all group members*

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### I. Project Overview

Procurement Services recently engaged in a series of reflection sessions with its core team to develop a vision statement and goals for sustainable procurement. The vision statement declare that “Procurement plays a central role as a strategic partner, is empowered and provided with the resources to promote and lead the way to establish sustainable practices and culture at McGill and in the wider community.” Similarly, the goals have been identified through this multi-stakeholder consultation process. While we are progressively instructing our Procurement agents in sustainable procurement, we are faced with their obvious lack of experience and formal training which limits their role as change agents and the Office of Sustainability can only offer limited capacity to compensate. A Sustainable Procurement Officer would therefore greatly facilitate transition of the unit, and through it of the whole University, to sustainable procurement and the achievement of our sustainability goals.

This initiative is similar to the Food Systems Coordinator hired by McGill Food and Dining Services. However, our project is much broader, covering all aspects of University sustainable procurement; the range of products, goods and services available requires a wider range of technical knowledge to identify more sustainable alternatives while maintaining quality service to our clients in the McGill community. Challenges with sustainable procurement include implementation and transitioning to using life-cycle costing in procurement decisions within the parameters and regulations regarding procurement in the public sector, addressing cultural biases toward traditional goods and services as well as an ongoing climate of budget cuts and economic crisis. However, the Vision2020 under way provides a means of legitimizing our efforts in that the goals and objectives would have been identified by members of the community and eventually approved by the senior administration, providing us with community buy-in as well as a mandate to achieve said goals. Because of our role, Procurement would be best placed to not

only identify opportunities for sustainable alternatives at the macro level (establishment of call for tenders and writing contracts in favor of sustainability) but to work with members of the community (suppliers as well as internal clients) to influence development and uptake of sustainable alternatives in their practices.

The support of a Sustainability Procurement Officer is critical to increase capacity in this domain to facilitate and support the Procurement Services team in its transition to sustainable procurement, who is otherwise entirely dependent upon the Sustainability Office.

As a way of benchmarking, Université Laval has led other Quebec Universities by created a similar role in their Procurement department. The contribution of the sustainability procurement officer at Laval has gone beyond the institutional goals, extended to other Quebec institutions through sharing best practices and training material as well as influencing the suppliers.

### Project eligibility:

The premises of the Procurement Sustainability Strategic plans are built on the following pillars: **Leadership, Education and Awareness, Procurement Processes and Logistics, Resources and Sustainability Tools**; and last but not least the **Triple Bottom Line Perspective**.

The Sustainable Procurement Officer would facilitate building a culture of sustainable Procurement through coordination of actions that would lead to achievement of the strategic goals. Examples are:

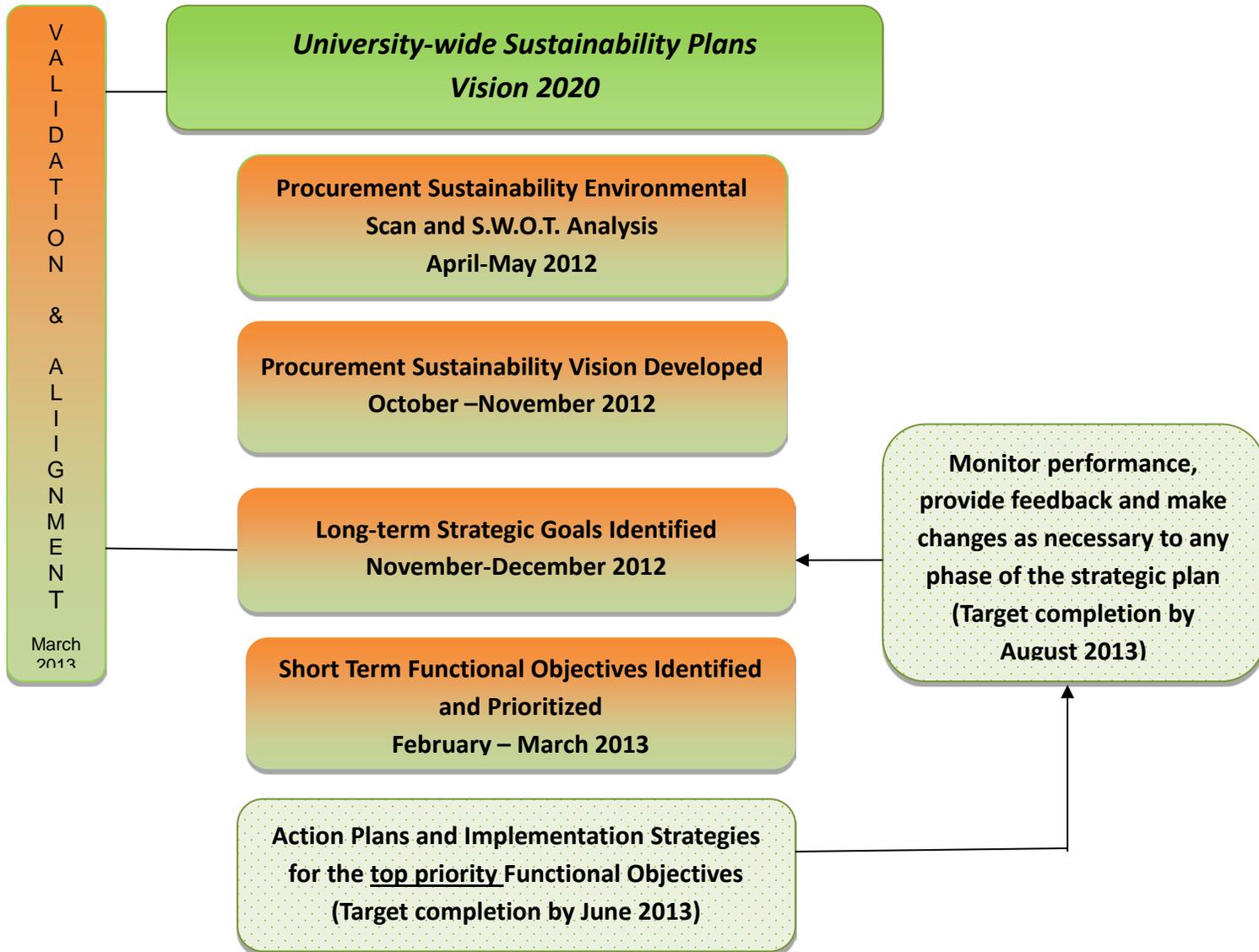
- 1) Working with Procurement officers to implement sustainable procurement practices into all University procurement exercises
- 2) Communicating and training in sustainable procurement practices to facilitate departmental purchasers in making more informed decisions about the impacts of their procurement decisions and favoring more sustainable alternatives where feasible
- 3) Form multiple working groups among University stakeholders (both internal and external) to identify needs and best practices (community of practice) for different projects and at different levels
- 4) Develop roadmaps and procedures and identify resources in preparation for implementation of various sustainability related projects
- 5) Review and plan for logistical changes in Transportation / Delivery/ Waste Management and Asset Management
- 6) Implement infrastructure to better track University procurement of goods and services
- 7) To establish benchmarks and indicators for performance
- 8) Develop partnerships with relevant organisations such as government actors, industry, purchasing association, utilities, other universities and funding agencies to identify potential sustainability projects.
- 9) Evaluate and incorporate environmental management criteria for the selection of vendors (ISO 14001, for example)
- 10) Develop and implement methodology for considering total cost of ownership
- 11) Ensure that social, economic and environmental aspects are considered in procurement related decision-making.
- 12) Identify small group projects that can help change behaviour and generate a positive impact
- 13) Celebrate the successes of departments who are taking leadership with regards to making their procurement practices more sustainable through recognition programs
- 14) To institutionalize the unit's sustainable initiatives in collaboration with researchers and academics.

At the end of the grant period, we expect that the culture of sustainable procurement would have been ingrained within the mindsets of existing Procurement agents and departmental purchasers, effectively institutionalizing the project without requiring separate support.

Timeframe/Milestones:

The first step toward building the foundation for a sustainable procurement at McGill started with the unit developing a 5-year Procurement Sustainability Plan in collaboration with multi-stakeholders who were identified through an Environmental Scan and S.W.O.T. exercise (the “Core Team”). The diagram below demonstrates different phases of this planning exercise, timelines and how it correlates with Vision 2020 plans.

**Procurement Sustainability Strategic Planning Process**



**Legend:**



Appendix A shows the outcome of the Core Team's work to-date: the Procurement Sustainability Vision statement, the Strategic Goals and Short Term Functional Objects - prioritized (but not short listed yet) and aligned with the Vision 2020 goals (refer to page 18 of Vision 2020 – Vision & Goals Report draft of Nov. 2012 [http://www.mcgill.ca/sustainability/sites/mcgill.ca.sustainability/files/2012-11-20\\_vg\\_draft.pdf](http://www.mcgill.ca/sustainability/sites/mcgill.ca.sustainability/files/2012-11-20_vg_draft.pdf)). The engagement of a Procurement Sustainability Officer who would be skilled, educated and experienced in the field of sustainability will allow the unit to create focus on the targeted sustainability actions (that will result from the planning exercise) and be able to deliver and communicate results in a timely and coherent manner. The performance of the Procurement Sustainability Officer will be measured according to the delivery of different milestones that will be set for each action plan.

### Stakeholders:

The Food Systems Coordinator is the only similar project we could identify. McGill Food and Dining Services is part of the Core Team identified by Procurement. Other internal partners include, but not limited to:

Partner	Role*	Contribution	Member of the Core Team?
Energy and Utilities Management	ST	Identifying equipment that minimize unnecessary resource consumption	Yes
McGill Food and Dining Services	ST	Identifying opportunities for more local, socially and environmentally responsible alternatives for food as well as equipment/physical development	Yes
Faculty of Medicine, Associate Dean (Research)	AC/Research	Identifying opportunities for sustainable alternatives in equipment and practices in research activities	Yes
Faculty of Agriculture, Department of Plant Science	AC/Research	Identifying opportunities for sustainable alternatives in equipment and practices in research activities	Yes
Department of Biochemistry	Research	Identifying opportunities for sustainable alternatives in equipment and practices in research activities	
Waste Management (Environment, Health & Safety)	ST	Identifying opportunities for safe disposal of obsolete products	Yes
Office of Sustainability	ST	Consultation as needed	Yes
SSMU	ST	Sharing practices and involving students	
Office of Sponsor Research	Research	Collaboration to proactively identify sustainability initiatives through awarded research grants	
CIO Office	ST	Identifying opportunities for applying IT governance to IT related acquisitions	
Network and Communications Services	ST	Identifying opportunities for sustainable alternatives and technological solutions to facilitate transition to sustainability in IT equipment and services as well as responsible method of re-distribution and/or disposal of e-waste	Yes
McGill Computer Store	ST	Identifying opportunities for management of sustainable alternatives in IT equipment and services as well as a centre for creating awareness in IT related sustainability efforts	
Hazardous Waste Management (University Safety)	ST	Providing support in projects involving safe disposal of material	Yes
Parking (University Services)	ST	Identifying opportunities for sustainable management of the University's vehicles	Yes

\*UG- undergraduate, PG-postgraduate, ST-administrative & support staff, AC-academic staff, CO-external community

The Procurement Sustainability 5-year planning initiative has already fostered collaboration between different stakeholders as identified on the Core Team, as well as with suppliers such as Fisher Scientific and other active organization promoting sustainability practices (i.e. Sustainability group of all Universities at CREPUC and ECPAR). The Sustainable Procurement Officer can provide assistance with strengthening these existing relationships by providing additional support, as well as fostering new ones as new stakeholders in the community are identified.

The entire University will be affected by the initiative; we are considering the Vision2020 project as our community consultation. Notwithstanding, implementation of new practices will need to be made in collaboration with departmental purchasers in all McGill units, which the Sustainable Procurement Officer is expected to do.

## II. Project Implementation

### Tasks and Responsibilities:

Type of Activity – Task	Estimated Time Required	Group Member in Charge
Developing the Job Description	Completed – a draft copy is attached	Kathy Zendeabad
Submitting a request to Human Resources, job profile match	2 months	TBD
Hiring	1.5 month	Human Resources

## III. Financials

- *Funding is required by July 2013.*

### Detailed expenses:

Expense Description	Estimated Cost
Salary (August 1, 2013- September 30, 2014)	\$80,000
Salary (August 1, 2014- September 30, 2015)	\$80,000

### Detailed revenues:

Revenue Source	Amount Requested	Confirmed?
Sustainability Projects Fund	\$ 160,000 over 2 years period	No

- **Sharing Knowledge**

It is part of Procurement Services plans to present its 5-year Sustainable Procurement Plan to senior management of the University and obtain their endorsement and support. Consequently, the plan will be communicated at large with the McGill community and more in details with the affected department/faculty involved with the action plans. Procurement Web Site will be the platform we intend to use for posting regular communication on the various projects and activities, sharing the results, performance indicators and success/challenges stories with the McGill internal and external community. Consideration will also be given to bring our success stories to other higher-education networks such as CREPUC, RGAUQ and CAUBO.

## IV. Additional information:

Please see Appendix B – Procurement Sustainability job description

## Appendix A - Procurement Sustainability 5-Year Plan

### Vision Statement:

Procurement plays a central role as a strategic partner, is empowered, and is provided with the resources to promote and lead the way in establishing a culture of sustainable procurement practices at McGill and in its wider community.

### Strategic Goals:

#### Leadership

*Demonstrate leadership in Sustainable Procurement through the development and deployment of sustainable practices and procedures applicable to the supply chain.*

#### Vision 2020 Goal Alignment

Vision 2020 - Vision & Goals Report  
Nov 2012

<b>Functional objectives</b>	1. Obtain upper management's commitment to sustainable purchasing / In progress	AG2, AG4, AG5, AG6
	2. Develop partnerships with relevant organisations such as government actors, industry, purchasing association, utilities, other universities and funding agencies to identify potential sustainability projects. / Within the next five years.	C3
	3. Procurement services collaborate with research units and departments in developing sustainability related procurement projects (Create the "L	E4, C2, O5, O4
	4. Keep track of McGill's comparative performance in sustainable purchasing (continuous benchmarking) / On-going	E2
	5. Implement transparency and/or reporting activities and develop communication channels for Sustainable Procurement initiatives	AG3

#### Education and awareness

*Elevate the level of awareness and knowledge about Procurement Sustainability through effective communications and training activities in support of sustainability.*

#### Vision 2020 Goal Alignment

Vision 2020 - Vision & Goals Report  
Nov 2012

<b>Functional objectives</b>	1. Ensure that all buyers (procurement team first) have mandatory sustainability training and can apply life cycle thinking in their purchasing decisions. Monitor and update training as needed	C2, E2, R2, AG3, AG4, AG6, O2
	2. Ensure that training is specific to commodities / by area of specialization	E2, O2
	3. All those involved in purchasing should be made accountable and/or compliant with PMAC codes of ethics	AG3
	4. Inform and work with vendors on McGill's sustainability efforts (increase their awareness) and encourage them to offer more sustainable options	C3, O2, AG6

#### Procurement Processes and Logistics

*Encrypt sustainability in the "sourcing-to-procure-to-disposal" process by implementing sustainable operations across purchasing and asset management activities.*

#### Vision 2020 Goal Alignment

Vision 2020 - Vision & Goals Report  
Nov 2012

<b>Functional objectives</b>	1. Develop sustainability criteria to be included in tender documents (for goods and services), and perhaps a supplier "sustainability code of conduct"	O2, R2
	2. Work on consolidation, standardisation (for some products) and centralization of purchases	O2
	3. Implement 4Rs (Rethink, Reduce, Reuse, Recycle) in purchasing and asset management	O2, O3
	4. Identify priority areas for behaviour and logistical change ( in purchasing activities) across campus.	O2, O5, AG4
	5. Review and plan for logistical changes in Transportation / Delivery/ Waste Management and Asset Management	O3
	6. Build on existing asset management efforts and promote coordination across units and departments.	AG2
	7. Identify small group projects that can help change behaviour and generate a positive impact (no disposable cups, for example).	O3, O5
	8. Explore the idea of including environmental management criteria for the selection of vendors (ISO 14001, for example)	C3
	9. Incorporate commodity coding and sustainability rating of products, and report on what has been bought + what was the rating	O2, AG4
	10. Document processes (CFTs Development how and why), and develop a corporate memory	AG4, AG2, AG6

<b>Resources and Sustainability Tools</b>		<b>Vision 2020 Goal Alignment</b>
<i>Facilitate Procurement Sustainability by providing the necessary resources and access to analytical tools, methodologies and computational capacity.</i>		Vision 2020 - Vision & Goals Report Nov 2012
<b>Functional objectives</b>	1. Provide the necessary human resources and funding to move forward with sustainable purchasing initiatives	C1, E2
	2. Develop and implement sustainable asset management (including tracking of valuable / durable goods) based on 4R (Rethink, Reduce, Reuse, Recycle)	O2, O3
	3. Enable / empower purchasing team to assess suppliers' green claims through audits, use of analytical tools, or access to relevant experts	R3, E2
	4. Identify revenue generating sustainability projects related to purchasing across campus	AG5, AG6
	5. Keep track (with visual and analytical tools) of purchasing activities at McGill (by department, by goods category, by service, by expense level etc.)	AG6
	6. Track benefits of sustainability initiatives (cost reductions/GAG reductions, etc.)	AG5, AG6, C1
	7. Develop and implement methodology for considering total cost of ownership	AG5, AG6
<b>Triple Bottom Line Perspective</b>		<b>Vision 2020 Goal Alignment</b>
<i>Articulate the procurement department's understanding of sustainability and how it intends to consider social, economic and environmental aspects in decision making.</i>		Vision 2020 - Vision & Goals Report Nov 2012
<b>Functional objectives</b>	1. Make sure that all three pillars (social, economic and environmental) are presented in sustainability training and education for buyers	C1, C2, O2
	2. Ensure that social, economic and environmental aspects are considered in procurement related decision-making.	C1, R3, O2
	3. Identify and apply best practices in developing sustainable purchasing criteria	O2

Position Title: Procurement Sustainability Officer  
Faculty/Unit: Procurement Services  
Reporting To: Associate Director, Strategic Business Platform  
Hours:  
Duration:  
Reference Number:

### **Position Context**

In support of the Procurement Sustainability Vision, the Procurement Sustainability Officer will plan, implement, coordinate and monitor the ongoing sustainability initiatives of the unit. This role will partner closely with the University senior leadership, Procurement Services staff and various members from faculties and administrative units, as well as external partners to articulate and promote Procurement Services' leadership role in establishing a culture of sustainable procurement practices at McGill and its wider community. By closely partnering with collective stakeholders, this person will raise awareness, provide training, and communicate with buyers, Fund Financial Managers and users of products and services across campus to ensure that social, environmental and economic criteria are taken in consideration throughout various stages of the supply chain process.

### **Duties and Responsibilities**

1. Procurement Sustainability Planning:
  - Coordinate procurement sustainability planning exercise along with McGill's Sustainability Office, Procurement Services and other partners across campus.
  - Develop consensus around defining goals, action planning and identifying performance metrics.
  - Align Procurement Services' sustainability initiatives with McGill's Vision 2020 goals, the University's Sustainability Policy, the Procurement Policy and all related Spend Category Regulations.
  - Align Procurement sustainability efforts with best practices such as STARS and ISO 26000 certification.
  - Lead the activities of a permanent inter-departmental working group focusing on sustainable purchasing to ensure organizational buy-in, implementation, and continuous feedback.
2. Training Material and Sustainability Tools:
  - Assess buyers' training needs pertaining to sustainability matters, and develop necessary training material.
  - Deliver training activities and workshops for Procurement staff and other buyers across the University, in support of life cycle thinking and the adherence to 4Rs (Rethink, Reduce, Reuse, Recycle).
  - Introduce buyers to total cost of ownership (TCO) calculation methods.
  - Develop quick reference tools enabling buyers to distinguish different product characteristics (logos and certifications).
3. Advisory Role:
  - Provide ad hoc expert advice to buyers in all areas of sustainable procurement.

- Help inform decision-making processes when buyers face complex environmental / social / economic trade-offs.
- Develop sustainability criteria to be incorporated in tender documents; provide support in evaluating bidders' compliance with the required sustainability criteria.
- Develop a supplier code of conduct for inclusion in the University purchasing contracts.
- Conduct research on products / services / substances to support buyers decision-making.
- Provide expert advice to other departments and administrative units on matters pertaining to overall life-cycle management of specific products.

#### 4. Awareness, Engagement and Commitment:

- Use sustainability planning to raise awareness, bolster commitment and nurture collaboration across departments.
- Develop communication tools aimed at the broader McGill Community; Develop and maintain content of the Procurement Services' Sustainability web-page.
- Generate awareness about importance of sustainable purchasing and identify possible means of involvement for various stakeholders (students, staff etc.).
- Engage members of the community in matters pertaining to overall life-cycle management of specific products and advocate commitment on part of involved parties.

#### 5. University-wide Collaboration and External Partnership:

- Promote collaborative work on Procurement sustainability projects with Research, Academic and Administrative areas of the University.
- Ensure Procurement Services' collaboration with broader sustainability initiatives (ex. on issues pertaining to climate, green house gas reduction, water management, and so on).
- Represent McGill's Procurement Services within ECPAR (Espace Québécois de Concertation sur les Pratiques d'Approvisionnement Responsable).
- Generate sustainable procurement projects with other universities at Provincial and National levels.
- Explore opportunities for partnerships with industry leaders in sustainability such as utility firms and NGOs (defined as operational or advocacy focused non-profit organizations on a local, national or international level).
- Support Procurement staff dialogue with vendors to encourage supply of more sustainable products/services.

#### 6. Monitoring Performance and Communicating Results

- Implement continuous improvement methodology for assessing progress and building on successes.
- Identify and communicate Procurement sustainability goals and targets.
- Develop methods and tools to track and communicate the economic, social and environmental results of McGill's sustainable purchasing efforts.
- Continuous benchmarking with other institutions, identifying best practices and sharing McGill's success and lessons learned.

### **Education/Experience**

Masters Degree in a relevant field (i.e. Environmental Studies, Environmental Management, Sustainability Studies, Corporate Social Responsibility)

Minimum 4 years' related experience.

### **Other Qualifying Skills and/or Abilities**

Knowledge and experience in developing sustainability policies, the best practices, techniques and other related tools and methodologies. Demonstrate effective stakeholder management skills and strong project management abilities. Excellent conceptualization, analytical, and logic skills. Strong people management skills with a change management approach. In-depth knowledge of best business practices as well as understanding of University culture, policies and procedures is highly desirable. Proficiency with the Microsoft Office Suite (including Microsoft Project). Effective verbal and written communication and presentation skills in English and French.

### **Specialized knowledge**

Sound knowledge and understanding of Life Cycle Analysis methodologies, and Environmental Management Systems is an asset.

An understanding of the current regulatory context for issues pertaining to waste management and conditions imposed for contracting by public bodies is also an asset.

### **Other characteristics**

Ideal candidate will be self-driven, collaborative, eager to share expertise, and willing to learn from other experts acting in a variety of different fields.