

Jefferson County Solid Waste and Air Quality Committee

**Policy Development Workshops and Plan:
Environmentally Preferable Purchasing (EPP)
October 15, November 19, December 17, 2004 and
February 18, 2005**

PROCEEDINGS REPORT

Participants

Bob Rupnow, Committee Chair
Paul Babcock, Committee Member
Greg David, Committee Member
Don Reese Committee Member
Sheri Walz, Committee Member

Sharon Schmeling, County Board Chair

Bruce Haukom, Director of Planning and Zoning
Sharon Ehrhardt, Zoning Department
Bob Mueller, Zoning Department

Department Representatives/Advisors

Dave Endl, Highways
Terry Gard, Human Services
Steve Hoefft, Parks
Mark Miller, Courthouse
Randy Knackert, Countryside
Roger Kylmanen, Fair Park
Rhonda Rohloff, District Attorney's Office
Donna Schroeder, Countryside
Roland Welsch, MIS
RoxAnne Witte, Economic Development Consortium
Bill Hausen, County Administrator
Phil Ristow, County Corporation Counsel

Presenters/Facilitators

Steve Brachman, University of Wisconsin-Extension
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Jefferson County Office

April 18, 2005

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This report contains “Proceedings” which have led to the development of a proposed “Environmentally Preferable Purchasing” (EPP) policy by the Jefferson County Solid Waste and Air Quality Committee. In particular, the report includes an educational program presentation summary prepared by the University of Wisconsin-Extension, the ideas and plan direction developed at four workshops, and the EPP policy recommended by the Committee.

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Environmentally Preferable Purchasing

SHWEC *Extension*

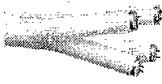
What is EPP?

Environmentally Preferable Purchasing (EPP) is the practice of purchasing products and services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose." – *Federal Executive Order 13101*

Environment + price + performance = EPP

EP Products can include:

Recycled content products, such as recycled plastic furniture

Energy conserving products, such as fluorescent lights

Less toxic products, such as cleaners

Bio-based products, such as inks

EP Services can include:

"Great Printers", such as those that use biobased inks and recycled and chlorine-free papers



Pest control operators that use Integrated Pest Management practices to avoid the regular spraying of pesticides

Definitions:

Purchasing/Procurement: The process for obtaining goods and services to meet the needs of the organization. Between 50 and 80 percent of government purchasing is supervised by purchasing departments.

Environmental purchasing: Incorporating environmental considerations along with traditional purchasing consideration such as price, performance, and availability.

Definitions:

Post-consumer waste: generated by consumer after product has served its use

Remanufactured product: has been made from existing product materials to meet normal specifications

Recyclable product: can be recycled

Definitions:

Bio-based product: A product derived from (rapidly) renewable resources, including plant-based fibers such as kenaf; extracts from oilseeds, nuts, fruits and vegetables; or wood waste.

Volatile Organic Compounds (VOCs): Chemicals that readily evaporate and contribute to air pollution. Many VOCs are classified as toxic or carcinogenic.



The Link Between Environment and Procurement

- Procurement can be front line of defense against pollution and wasteful practices
- Simpler and less costly than end-of-pipe practices
- Large purchasers can drive national and global markets to create the demand for "green" goods and services

Why Use EP Products?

Recycled Aluminum Cans
95% less energy than virgin cans

100% Recycled Paper
1 ton saves 17 trees and 7,000 gallons of water

Energy Star Computers A Monitors
100 machines can save \$10,000 in energy costs in 5 yrs

Less Toxic Cleaning Products
Reduces health risks to janitorial staff and builing occupants while also protecting the environment.

Markets for EP Products

- Greater demand will help increase supply which will help drive down prices
- Buying recycled-content products helps keep recycling programs going
- Many vendors do not carry EP products because their customers have not asked for them

Who Is Doing It?

State and local governments
www.epa.gov/oppt/epp/pdfs/statenlocal.pdf

Federal agencies
www.epa.gov/oppt/epp/pdfs/FedPioneers.pdf

Private companies
www.epa.gov/oppt/epp/pdfs/privsect.pdf

Santa Monica, CA

Replaced traditional cleaners with less toxic alternatives in 15 of 17 product categories, cut spending by 5%, and eliminated 3,200 pounds of hazardous materials:

- Environmental, custodial, and purchasing departments collaborated
- City researched products before switching
- Custodians participated in process

For more information, see
www.epa.gov/opptintr/epp/pdfs/santa.pdf

☐

Extension

**Commonwealth of
Massachusetts**

Increased EPP purchases from \$2.8 million in 1992 to more than \$65 million in 2000:

- Hired 2 FT environmental staff in purchasing office
- Set up state contracts for less toxic cleaners, re-refined motor oil, biobased hydraulic oil, and more,
- Published booklet of EPP contracts for distribution to agencies

For more information, see
www.state.ma.us/osd/enviro/

Lee County, FL

Eliminated 2,150 pounds of hazardous waste and \$17,000 in annual disposal costs by product replacement:

- Performed operations audit
- Established environmental criteria
- Replaced parts cleaning system
- Replaced oil-based paints with water-based
- Installed in-house recycling equipment
- antifreeze and freon

SHWEC

How Do I Start?

- Adopt a team approach including environmental experts, purchasing officials, and end users.
- Consider establishing an EPP policy
- Collect baseline information
- Research options
- Establish criteria
- Talk to your vendors
- Share information throughout purchaser, user, and management circles

SHWEC

What Do I Do?

- Pilot new product
- Talk to people using new product
- Gather information from users
- Track progress
- Celebrate & publicize success; or
- Investigate why not successful and re-plan

Go For It!

- Anyone can start the ball rolling
- Ask for help from relevant departments
- EPP programs always need a champion
- Listen to each other
- Exchange information
- Celebrate Success

MORE RESOURCES

- EPA's EPP program contains interactive tools, case studies, and links at <http://www.epa.gov/opptintr/epp/>
- NPPR EPP Web page with links is at <http://www.p2.org/workgroup/epp/>
- Join the EPPNet Listserve at <http://www.nerc.org/eppnet.htm/>
- Contact NACO for EPP starter kit information at <http://www.naco.org/programs/environ/>

Purpose(s) of an Environmentally Preferable Purchasing (EPP) Policy

Participants summarized the primary purposes for considering the development of an EPP policy in Jefferson County.

- ◆ To provide direction on purchasing in Jefferson County that is environmentally sound
- ◆ To provide leadership for Jefferson County in Environmentally Preferable Purchasing (EPP)
- ◆ To set example/pilot on how to do EPP (County could model this.)
- ◆ To save money, and to consider the integration of environment, price and performance

Possible Functional Components for an Environmentally Preferable Purchasing (EPP) Policy

The participants did a scan of possible "Functional Components" for an EPP policy in Jefferson County.

I. Education

- a. Need education first to get programs through
 - ◆ (Departments, Elected Officials, Administration, Employees, end users, vendors, etc.)
- b. Policy seems daunting; can't get everybody on board just through education
 - ◆ Need to give "strong direction" to departments

II. Purchasing Practices/Assessments

- a. Concern about "past practices" on purchasing
 - ◆ Service considerations very important; performance)
- b. Policy seems daunting; can't get everybody on board just through education
 - ◆ Need to give "strong direction" to departments
- c. Zoning Department has a long list of criteria/questions when they purchase
- d. Have to start slow
- e. Need to find out how purchasing is done now
- f. County is preparing a report on how purchasing is done now
- g. Nobody has done "competitive bid" process analysis in Jefferson County and linked service to cost to environment
- h. Finance Committee working on policy for internal bill-back; looking at how this paper trail is now working (will have a better way of tracking purchases)
- i. Opportunity to incorporate "NACO Baseline Survey" into current County assessments of purchasing procedures
 - ◆ This might follow-up system study, i.e. spring 2005
- j. Opportunity to look into DNR grants/EPA grants to help explore EPP in Jefferson County

III. People Involvement

- a. Zoning Department has a long list of criteria/questions when they purchase
- b. Can jump-start this by providing "key resource" people or advisors to those who purchase
- c. Copy person is now interim, and there is the potential for more emphasis in "EPP Concepts" when this County report/plan is done

- IV. Promising Product Areas - Some of the promising areas include:
- ◆ Electronics (large storage of computer equipment at M.I.S.)
 - Specifics:
 - Purchase from companies that buy-back
 - Evaluate energy usage vs. purchase price
 - Require a “sleep mode” function
 - Consider “duplex printers” for new purchases
 - Some computer software limits duplex
 - ◆ Fleet Considerations
 - Hybrid cars
 - Re-refined oil (not currently used at Highway Dept. – Could consider a pilot)
 - Consider Bio-Diesel use (A study is currently ongoing. UWEX’s Pat Walsh could be contacted.)
 - ◆ Countryside Considerations/Other County Departments (Cleaning Products/Custodial)
 - Cleaning products/janitorial products
 - Countryside housekeeping could possibly pilot
 - ◆ Overall Paper Considerations
 - Could develop target goals for paper use (i.e. could be more stringent than State statutes – State post-consumer: 25%; County possible 100%)
 - Could pilot to see cost differences
 - ◆ Energy Efficiency
 - Audits could be performed
 - All County departments could be audited
 - Some governments are looking at purchasing “green power”

People Involvement

The participants identified a list of possible groups and individuals to involve in the development of an EPP policy in Jefferson County.

- ◆ Facility/Department Reps:
 - Countryside Housekeeping Manager - Randy
 - Courthouse – Mark
 - Highway Shop Superintendent - Dave
 - Parks – Steve Hoeft
 - Human Services/Workforce/UW-Extension – Terry Gard
 - Fair Park – Roger
 - County Administration/Purchasing – Bill Hausen
 - County Clerk/Budget Staff
 - Zoning Department (pilots)
 - MIS
 - Corporation Counsel
 - UW-Extension – Steve and SHWEC
- ◆ Vendors/Outside Folks
 - WSCA (Western States Contracting Alliance) and CDWG (Computer Distribution Warehouse)
 - Jonas/paper
 - Cleaning products
 - Onyx or John's
 - Food vendors
 - Big equipment/autos/vehicle vendors
 - Other vendors
 - School Board/Districts – Joint Purchase of Paper – Ardel Weiderhoeft
- ◆ Other Units of Government
 - Wisconsin Department of Administration – Laura Eagen

People Involvement Guidelines

The participants offered these guidelines and considerations about the role and involvement of groups and individuals.

- ◆ Obtain support of County Board Chair and other County leaders
- ◆ Receive a “briefing” from the County Administrator to find out current purchasing practices and the County’s current purchasing ordinance (85-1)
- ◆ Contact other affected Departments and Committees as guided by County Administrator
- ◆ The level of Solid Waste Committee involvement with individual departments/representatives is uncertain; Committee interface may be more appropriate with “central purchasing”
- ◆ Vendors will be an important “resource” on good products
- ◆ Could bring in “Resource People” from other government units (i.e. Wisconsin Department of Administration)

Measures of Effectiveness

The participants came up with a list of desirable measures that would help us determine if this policy (after implemented) would be effective.

- ◆ Costs would go down (life cycle and environmental)
- ◆ Less waste
- ◆ Healthier/safer workplace
- ◆ Other places come to us for advice
- ◆ Policies would be implemented and accepted by all
- ◆ Interdepartmental cooperation
- ◆ Education in place
- ◆ People take these practices home with them and implement at home
- ◆ County employees feel empowered/good about an important environmental initiative
- ◆ Model in place for other businesses and government units
- ◆ Buying local (in particular food) when efficient

General Timeline Considerations

A general timeline for the development of an EPP policy was suggested.

- ◆ System Research Phase – 2 months (end of December)
- ◆ Baseline Survey Phase – Report (Brachman's PowerPoint); Resolution
- ◆ Taskforce Phase – Broad policy direction, June 2005
- ◆ Implement detailed direction from policy – June 2006

More Specific Timeline Considerations

- ◆ December 2004 Workshop – Invite Bill Hausen for status of current situation and discuss applicability of survey; invite County Board Chair; invite Wisconsin Department of Administration resource on State practices/recommendations for local government
- ◆ January 2005 Task – Work with Administrator on Survey/Assessment needs and possible query areas
 - Give Status Report to County Board
- ◆ February 2005 Workshop
 - Current Situation Findings
 - Assessment/Survey Initiative (possibly include Advisors for input)
- ◆ March 2005 – Formulate Conclusion

- ◆ April 2005
 - Report initial findings to Key County Committees
 - Formulate draft resolution directing more detailed policy development
- ◆ May 2005
 - Go to County Board
 - Share with Key County Committees
- ◆ June, July, August 2005 – Refine policy

Opportunities and Direction: For Overall Purchasing Policy and Environmentally Preferable Purchasing Policy

- ◆ Committee/members review Purchasing Ordinance enhancements currently being led by Administrative Committee
- ◆ Try to merge “overall” enhancements to purchasing policy led by Administrative Committee and “environmental” enhancements that may come from Solid Waste and Air Quality Committee
- ◆ Solid Waste and Air Quality Committee “EPP” ideas could be “incorporated” into ordinance revisions
- ◆ Possible “Philosophical Statement” development could be developed by Solid Waste Committee, i.e.
 - Green Building Suggestions for New Facilities (eventually work with Buildings and Grounds Committee)
 - Building/Fleet Considerations: Purchasing “green power”
 - See Purpose/Philosophy example from City of Long Beach for sample paragraph
- ◆ Could survey/assess departments to get ideas on E.P. potential initiatives (short and long-range)/Opportunity to educate departments
- ◆ Solid Waste staff to review Countryside “hauling” bid
- ◆ Solid Waste Staff/Committee work with Mr. Hausen on survey instrument:
 - Tammie/Mr. Hausen on some baseline information on product use currently
 - Survey questions can do three main things:
 1. Find out about important concerns/issues
 2. Help create the “vision/philosophy for the future”
 3. Help figure out and test feasibility for strategy ideas to develop better EPP policies (from knowledgeable department folks)
 - Staff/Committee to determine who gets survey
- ◆ Staff/Committee Volunteer(s)/Mr. Hausen to draft preliminary survey instrument
- ◆ Committee and Advisors review preliminary survey instrument for “pre-testing” and/or “refinement”

Input and Reaction by County Department Representatives/Advisors

A workshop was convened in which the concepts of an Environmentally Preferable Purchasing policy were summarized for all affected County department representatives. Department representatives were then invited to express concerns about environmentally preferable purchasing. There was also an opportunity to identify an “ideal” County EPP policy and a chance to react to draft policy considerations. This input is provided below.

Concerns About Environmentally Preferable Purchasing

- A. County to continue as a leader in solid waste and environmental matters
- B. MIS has six concerns:
 - 1. Needs flexibility because of relocation
 - 2. Space necessary for packing materials
 - 3. Staff time for removing materials (Clean Sweep is good)
 - 4. Non-MIS-supported equipment also needs to be addressed (i.e. donated equipment from the State of Wisconsin) – Educational issue
 - 5. Ease of accounting/ways to simply pay for this
 - 6. *Have had problems with “Duplex” printers because of paper thinness/bleeding of ink
 - *Sleep mode functions
 - *HIPPA mandates and security
- C. More environmentally friendly fleet vehicles currently cost more – challenging with tight budgets
 - 1. Consider up-front cost and long-term operating costs (i.e. consider life-cycle costs: diesel fuel)
- D. Highways:
 - 1. Now using synthetic oil and have some concerns about “re-refined” oil
 - 2. Exploring bio-diesel fuel, but have to investigate
- E. Concerns on “warranty” issues addressed in Greg David’s DVD of a presentation
- F. Concerns about cost effectiveness of bio-diesel, but costs are coming down and percentages can be phased in. (2% blend is 2% more expensive and 20% blend is 20% more expensive)
- G. Concern about air quality and health
- H. More companies are now providing new “Green” cleaning products and some have been tried and purchased.
 - 1. Vendors coming up with citric-based
 - 2. There has been varied results
 - 3. Most all papers are now recycled

- I. Some copiers “picky” on type of paper
- J. Some trial and error in trying out paper products (Badger Paper is a good 100% recycled paper)
- K. Biggest problem is staff that puts paper in trash
- L. Government will have opportunities in the “Energy Efficiency” and purchase of green power
- M. New buildings will have to consider LEEDs criteria (low voltage lighting, etc.)

Considerations in an “Ideal” County EPP Policy

- A. Flexibility
- B. Be aware of cost implications – recognition of increased up-front costs
- C. Encourages a “Pilot Program” or a set-aside fund for “new environmental products to try”
 - 1. Perhaps a “budget-line” for conducting pilot programs
- D. Facilitates use of special grants that Departments are not aware of
- E. Consider age of technology

Reaction to Draft Policy

- A. Each Department takes lead in purchasing
- B. Internal Department communication/sharing ideas on purchasing does currently take place (i.e. on some products)
- C. Proposed policy does not mandate, but encourages Departments to move more deliberately into an EPP policy
- D. Add some income/possible revenue sources from paper waste and/or other sources
- E. Recognize worker safety as a driving force
- F. Recognize that things are already being done quite well in Jefferson County, and the EPP encourages moving to another level
- G. Invite routine input to Committee from Departments

Recommended Jefferson County Environmentally Preferable Purchasing Policy

1. Purpose and Objectives

This policy shall be known as the “Jefferson County Environmentally Preferable Purchasing Policy.” The primary purposes of this policy are to:

- ◆ Provide direction on purchasing in Jefferson County that is environmentally sound
- ◆ Provide leadership for Environmentally Preferable Purchasing (EPP) in Jefferson County
- ◆ Set an example and pilot how to do EPP

An objective of an EPP policy is to encourage the purchase of services and products that:

- Reduce toxicity
- Conserve natural resources, materials, and energy
- Maximize recyclability and recycled content

A second objective is to employ the EPP policy in several promising areas within Jefferson County government including electronics, fleet, cleaning and custodial; paper, energy and green building.

2. Definitions

Bio-Based Products are derived from (rapidly) renewable resources, including plant-based fibers such as kenaf; extracts from oilseeds, nuts, fruits and vegetables; or wood waste.

Environmental Purchasing is incorporating environmental considerations along with traditional purchasing considerations such as price, performance and availability.

Environmentally Preferable Product has a lesser or reduced negative effect on human health and the environment when compared with competing products, which serve the same purpose. (This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, and disposal of the product. This term includes, but is not limited to, recycled products, recyclable products, low toxicity products, and reusable products.)

Post-Consumer Waste is generated by the consumer after the product has served its purpose.

Purchasing/Procurement is the process for obtaining goods and services to meet the needs of the organization.

Recyclable Product is a product that, after its intended end use, can demonstrably be diverted from the County’s solid waste stream for use as a raw material in the manufacture of another product.

Recycled Product is a product containing recycled material.

Remanufactured Products have been made from existing product materials to meet normal specifications.

Reusable Product is a product that can be used several times for an intended use before being discarded, such as a washable food or beverage container or a refillable ballpoint pen.

Toxic Compounds are chemicals in the land, air and water that affect health and safety. Often these may be regulated by the U.S. Environmental Protection Agency (EPA) or the Wisconsin Department of Natural Resources (DNR).

3. Policies

The County shall acquire its goods and services in a manner that complies with county, state, and federal laws.

Procedures and guidelines may be established as necessary to encourage the continuation of a strong Environmental Procurement Program. It is the policy of Jefferson County to:

County Department Practices

- County departments are encouraged to evaluate Environmentally Preferable Products and purchase them when possible.
- Encourage departments to include specifications for Recycled and Environmentally Preferable Products in all County contracts. The County Policy allows departments to evaluate the efficacy of a product prior to formulation of product specifications and further allows departments to specify both Environmentally Preferable Products and standard products in the same bid. Departments may also specify only Environmentally Preferable Products and select the lowest priced bidder.
- Continue and if possible expand its existing programs to purchase Environmentally Preferable Products (such as re-refined automotive oils and coolants: the use of integrated pest-management, green seal custodian supplies, locally grown food products, etc.).

Products/Services with Criteria

- Procure Environmentally Preferable Products and services where criteria have been established by governmental or other widely recognized authorities (e.g. Energy Star, Green Seal, Green Power/Renewable Energy, and EPA Eco Purchasing Guidelines).

Vendors

- Encourage suppliers and contractors to offer Environmentally Preferable Products at competitive prices.
- Encourage providers of services to consider environmental impacts of service delivery.

Staff Awareness

- Raise staff awareness on the environmental issues affecting procurement by providing relevant information and training.

4. Implementation Recommendations

4.1 Departmental Responsibility

- ◆ Overall responsibility for County purchasing is by the County Administrator (as official purchasing agent).
- ◆ Most all County departments will have a facility or departmental manager involved in leading purchasing activities for the best interests of their respective department.

Typical activities that should occur at the County department level are:

- ◆ Promote and share among County departments the Environmentally Preferable Purchasing efforts that departments are currently undertaking.
- ◆ Evaluate specifications for Environmentally Preferable Purchasing on contracts.
- ◆ Participate in training and ensure that all departments are represented in training to raise awareness of Environmentally Preferable Purchasing practices.
- ◆ Convene periodic workshops to assess program outcomes and accomplishments.

4.2 Specific Purchasing Considerations for County Departments

For illustration purposes, Jefferson County has identified several areas for which an EPP policy could be directed. Listed below are six promising areas and some potential strategies to pursue in implementing the program.

Electronics

- ◆ Purchase from companies that buy-back, take-back, and recycle
- ◆ Evaluate energy usage vs. purchase price
- ◆ Continually evaluate energy and waste reduction opportunities in computers and electronics.

Fleet Considerations

- ◆ Evaluate modifications to the fleet, including: Hybrid cars, re-refined oil and other technologies as they become appropriate and feasible.

Cleaning Products/Custodial

- ◆ Use environmentally safe and least toxic cleaning products that are effective for the job.
- ◆ Pilot new products as appropriate.

Overall Paper Considerations

- ◆ Maximize recyclable content of paper whenever possible.

Energy Efficiency

- ◆ Encourage energy audits of all County facilities.
- ◆ Evaluate purchasing renewable energy and consider the establishment of a reasonable goal.

Green Building

- ◆ Encourage application of “Green Building” principles including LEED (Leadership in Energy and Environmental Design) standards in construction of new County facilities.

April 15, 2005

Jefferson County Solid Waste and Air Quality Committee

ORDINANCE NO. 2005-01

The Board of Supervisors of the County of Jefferson does ordain as follows:

SECTION 1. SHORT TITLE. This ordinance shall be known as the "Jefferson County Purchasing Ordinance".

SECTION 2. PURCHASING AGENT. Pursuant to Sec. 59.52(9), Wis. Stats., the position of Jefferson County Purchasing Agent is created. The Jefferson County Administrator shall serve as Purchasing Agent.

The Purchasing Agent shall perform the duties set forth in Sec. 59.52(9), Wis. Stats. and Sec. 59.52(29), Wis. Stats., and, in addition, shall be responsible for the administration of this ordinance.

SECTION 3. PURCHASING PROCEDURE. (a) All County purchases of goods and services in excess of \$100 not specifically excepted herein shall be by requisition signed by a committee, board or commission chairperson or by the head of a department or agency of County government. Such chairperson or department or agency head may delegate to a deputy, assistant or employee the authority to sign requisitions, but such delegated authority shall be in writing and shall be on file with the Purchasing Agent. Upon receipt of a requisition the Purchasing Agent shall determine whether sufficient funds are available and, if so, deliver any supplies already on hand or, upon completion of the procedures set forth herein, issue a purchase order for the goods or services requisitioned. Purchases less than \$100 shall not require a requisition or purchase order. Such purchases shall be submitted for payment through the regular voucher process.

(b) Professional services purchased from independent contractors such as architects, attorneys, auditors, consultants, counselors, engineers, medical professionals, other treatment services and foster care shall be specifically exempt from Section 10. Architectural, audit, consulting, and engineering services shall, where feasible, be purchased on the basis of competitive proposals. However, in no event shall the Purchasing Agent, an agency or the County Board be required to accept the lowest cost proposal.

(c) The Highway Department and Countryside Home shall not be governed by the provisions of this ordinance as it relates to requisitions and purchase orders for purchases under \$5,000. Nevertheless, the Highway Department and Countryside Home shall be encouraged to utilize the store of supplies maintained by the Purchasing Agent. The Highway Department shall not be governed by the provisions of this ordinance for purchases of repair parts and for repair work involving Highway machinery or equipment, but the Highway Department shall comply with the provisions of Sec. 59.52(29) and Sec. 66.0901, Wis. Stats.

(d) County purchasing procedure shall include review of proposed purchases in light of the guidelines set forth in the Environmentally Preferable Purchasing Policy approved by the Solid Waste & Air Quality Committee. Department heads, the County Administrator, and committees shall, when fiscally feasible, consider purchases that are in accord with such policy. Consideration of environmentally preferable factors may be a reason to accept other than the low bid for a particular product or project not required by law to be let to the lowest bidder. [Created 07/12/05, Ordinance No. 2005-11]

SECTION 4. REQUISITION FORM. Jefferson County requisitions shall be on forms prepared and furnished by the Purchasing Agent. If paper forms are used,

- (a) The original copy shall be sent to the Purchasing Department.
- (b) The duplicate copy shall remain in the originating department or agency.

SECTION 5. PURCHASE ORDER FORM. Jefferson County purchase order forms shall be prepared and furnished by the Purchasing Agent. If paper forms are used,

- (a) The original copy shall be sent to the supplier or vendor.
- (b) The duplicate copy shall be sent to the originating department.
- (c) The third and fourth copy shall be filed in the Purchasing Department.

SECTION 6. STORE OF SUPPLIES. The Purchasing Agent shall, to the extent determined to be advantageous, maintain an adequate supply of items used regularly by the County. Such items shall be distributed only upon receipt of a properly signed requisition. The Highway Department and Countryside Home shall utilize the store of supplies maintained by the Purchasing Agent.

SECTION 7. PURCHASES UNDER \$5,000. If the estimated price of an item is under \$5,000 the Purchasing Agent, Highway Department and Countryside Home shall obtain competitive quotations from vendors dealing with the supplies, merchandise or equipment requested. Whenever feasible the purchase shall be made from the lowest bidder offering quality merchandise.

SECTION 8. PURCHASES OVER \$5,000 AND UNDER \$25,000. Upon receipt of a requisition for an item involving an estimated expenditure more than \$5,000 and less than \$25,000 the Purchasing Agent, Highway Department and Countryside Home shall solicit proposals from vendors wishing to sell the item to the County. Whenever it is in the best interest of the County the purchase shall be made from the low bidder.

SECTION 9. REGULATED CONTRACTS OVER \$25,000. As provided in Sec. 59.52(29), Wis. Stats., all public work, including any contract for the construction, repair, remodeling or improvement of any public work, building or furnishing of supplies or material of any kind where the estimated cost of such work will exceed \$25,000 shall be let by contract to the lowest responsible bidder, provided such bid complies with the specifications. The contract shall be let and entered into pursuant to Sec. 66.0901, Wis. Stats., except the Board may, by a three-fourths vote of all the members entitled to a seat, provide that any class of public work or any part thereof may be done directly by the County without submitting the same for bids.

If the estimated cost of any public work is between \$5,000 and \$25,000, the Purchasing Agent shall give a Class 1 notice under Chapter 985 before contracting for the work or shall contract with a person qualified as a bidder under Section 66.0901, Wis. Stats.

SECTION 10. PURCHASES OVERS \$25,000. All purchases not covered by Sec. 59.52(29), Wis. Stats., involving an estimated cost in excess of \$25,000 shall be let to the lowest responsible bidder, except as provided in (d). The County Board may make purchases from another governmental unit, including the state or federal government, without the necessity of competitive bids. The procedure for a purchase involving an estimated cost of more than \$25,000 shall be as follows:

(a) A report of the proposal, including the estimated cost, shall be made to the County Board.

(b) If the proposal is approved the County Board shall adopt a resolution granting authority to advertise for bids in accordance with the proposal. Notwithstanding the foregoing, the County Purchasing Agent may grant authority to advertise for bids for any item or project funded in the current annual budget without necessity of County Board approval.

(c) Appropriate notices shall be published, plans and specifications shall be distributed and bids shall be received from interested bidders.

(d) Bids shall be opened and examined and a report shall be made to the County Board concerning the bids received. The report shall contain a recommendation concerning the bid to be accepted. If a bid other than the lowest bid is recommended the report shall state the reasons for such recommendation.

(e) If the Board approves the report a resolution may be adopted authorizing the acceptance of the bid.

(f) The County Board may, in times of emergency or when otherwise impractical, waive the provisions of this section.

(g) The Board may delegate authority to approve bids to a committee thereof. The Fair Park Committee is expressly delegated authority to enter into contracts in excess of \$25,000 for entertainment at the County Fair.

(h) The County Administrator is authorized to issue a purchase order without bidding for personal property or services in excess of \$25,000 where sufficient funds are budgeted for such purpose and the property or services are available through the State of Wisconsin Municipal Cooperative Purchasing Service.

SECTION 11. EMERGENCY PURCHASES (a) UNDER \$1,000. The Purchasing Agent shall have the authorization to approve a purchase under \$1,000 made by a committee chair, office, agency or department head or other person authorized to sign a requisition without a purchase order because of an emergency. Any purchase made without a purchase order and not subsequently approved as provided herein shall be paid for by the purchaser and not by Jefferson County. The decision of the Purchasing Agent in refusing to approve an unauthorized purchase may be appealed to the Finance Committee.

(b) OVER \$1,000 AND UNDER \$25,000. In an emergency the County Board Chair, together with two Board members appointed by the Board Chair who are not directly concerned with the proposed repairs or replacements, may authorize repairs or the purchase of replacements

costing more than \$1,000 and less than \$25,000 without bids. A complete report of such emergency action shall be made at the next succeeding County Board meeting.

SECTION 12. RECEIVING SHIPMENTS. The person signing the requisition shall be responsible for receiving and examining the purchase and shall promptly report to the Purchasing Agent advising that the purchase has been received and reporting any shortage, damage or variation of quality.

SECTION 13. INVOICES. All invoices billed against purchase orders shall be referred to the Purchasing Agent who shall note the receipt of the item or items and any shortage, damage or variation of quality and shall then submit all invoices to the Finance Committee.

SECTION 14. RENTAL AGREEMENTS OR LEASES. (a) All County rental agreements or leases involving personal property where the annual rental or lease payment is less than \$10,000 shall be by requisition signed by committee chairmen, or in the case of an office, agency or department completely independent of a committee, by the head of such office, agency or department. Authority is hereby granted to such committee chair, office, agency or department head to delegate to his deputy, assistant, employee or agent, the authority to sign requisitions, provided, however, such authority shall be in writing and shall be filed with the Purchasing Agent. Upon receipt of a requisition the Purchasing Agent shall issue a purchase order adapted to the rental agreement or, in the alternative, shall execute on behalf of Jefferson County, a written rental agreement or lease.

(b) All County rental agreements or leases involving personal property with an annual rental or lease payment in excess of \$10,000 shall be submitted to the County Board for approval, except rental agreements or leases of less than 15 days duration which are specifically authorized to be made by the Fair Park Committee without County Board approval. If the circumstances warrant, the County Board may refer such proposed rental agreements or leases to an appropriate committee to advertise for competitive bids. After approval by the County Board such rental agreements or leases shall be executed by the Purchasing Agent.

(c) In an emergency the County Board Chair, together with two Board members appointed by the Board Chair who are not directly concerned with the proposed rental agreement or lease, may authorize a temporary rental or lease agreement for a period of time not to exceed 60 days. A complete report of such emergency action shall be made at the next succeeding County Board meeting and thereafter the regular rental or leasing procedure shall be followed.

SECTION 15. SALE OF SURPLUS PROPERTY. When personal property owned by the County of Jefferson no longer serves any useful purpose in the department in which it is located the Purchasing Agent shall first determine whether any other County department or agency needs such property. In the event such property can no longer be used by any department or agency of the County the Purchasing Agent shall offer such property for sale if the estimated revenue does not exceed \$25,000. The Purchasing Agent shall determine a plan of sale for each item with the object of obtaining the highest revenue. If the anticipated revenue from the surplus property exceeds \$25,000 the Purchasing Agent shall first present the matter to the County Board and shall obtain authority for the sale.

SECTION 16. ABANDONED OR UNCLAIMED PROPERTY. Pursuant to Sec. 66.0139, Wis. Stats., property which has been abandoned or remains unclaimed in the possession

of any County officer or employee for 30 days after such officer or employee took possession is deemed abandoned property and is subject to disposal. The Purchasing Agent shall determine whether disposal is to be by public sale or other commercially reasonable means. If such abandoned property is not saleable it shall be disposed of as trash or refuse in any reasonable manner. Where disposal is by any means other than public sale, the Purchasing Agent shall maintain a record of the following facts for two years after disposal:

1. Inventory of property.
2. Date of disposal.
3. Method of disposal.
4. Price received, if any.
5. The name and job assignment of the person who took possession of the property.

The cost of keeping and selling such property shall be charged against any resulting moneys. Any remaining amounts shall become the property of the County and shall be deposited with the County Treasurer in the General Fund of the County.

SECTION 17. REPEAL OF PRIOR ORDINANCE. Any ordinance in conflict herewith shall be repealed upon the effective date of this ordinance.

SECTION 18. EFFECTIVE DATE. This ordinance shall be effective upon passage and publication.

Adopted: 04/19/05
Published: 04/25/05

ORDINANCE NO. 2005-11

WHEREAS, the Solid Waste & Air Quality Committee has developed a policy for environmentally preferable purchasing of county goods, which policy would utilize consideration of the environmental impact of a particular purchase as well as the price involved for the item purchased, and

WHEREAS, the Jefferson County Board supports consideration of environmental factors in county purchasing procedures.

THE COUNTY BOARD OF SUPERVISORS OF JEFFERSON COUNTY DOES HEREBY ORDAIN AS FOLLOWS:

Section 1. Section 3(d) of Ordinance No. 2005-01, the Jefferson County Purchasing Ordinance, is hereby created to read:

(d) County purchasing procedure shall include review of proposed purchases in light of the guidelines set forth in the Environmentally Preferable Purchasing Policy approved by the Solid Waste & Air Quality Committee. Department heads, the County Administrator and committees shall, when fiscally feasible, consider purchases that are in accord with such policy. Consideration of environmentally preferable factors may be a reason to accept other than the low bid for a particular product or project not required by law to be let to the lowest bidder.

Section 2. This ordinance shall be effective after passage and publication.

Adopted by the Jefferson County Board of Supervisors this 12th day of July, 2005.

s/Sharon L. Schmeling _____

Sharon L. Schmeling
Chair

ATTEST:

s/Barbara A. Frank _____

Barbara A. Frank, County Clerk

Published the 18th day of July, 2005.

(VOTE: Ayes 27, Noes 2 [Molinaro, Mode], Absent 1)

APPENDIX

**Solid Waste and Air Quality Committee Workshop
October 15, 2004**

AGENDA

1. Review and Discussion on EPP resources - Steve Brachman, UW-Extension, SHWEC
2. Determination of Possible Functional Components and Other Considerations – Facilitated by Steve Grabow, UW-Extension, Jefferson County
3. Determine:
 - ◆ People Involvement Needs
 - ◆ Measure of Effectiveness
 - ◆ General Timelines
4. Adjourn workshop 10:30 a.m.±

**Solid Waste and Air Quality Committee
EPP Policy Workshop
November 19, 2004**

AGENDA

1. Review/Revise Proceedings
2. Refine Plan for Planning/Policy Development/Approach
 - ◆ Clarify Purpose
 - ◆ People Involvement
 - ◆ Steps and Timeline
3. Develop “Assessments/Survey” Step (Current Conditions) – Hold for December meeting the Bill Hausen
4. Adjourn 11:15 a.m.

**Solid Waste and Air Quality Committee
Environmentally Preferable Purchasing (EPP) Policy Workshop
December 17, 2004**

AGENDA

5. Review November 17th Workshop

6. Discussion on Existing Purchasing Policies
 - ❖ Existing Purchasing Ordinance
 - ❖ Overview of County Policies – Bill Hausen

7. Follow-Up Steps
 - a. Philosophy Development at January Meeting (without UWEX)
 - b. Survey Development with Staff/Mr. Hausen/Committee Volunteer(s)
 - c. Invite Department of Administration Resource in February
 - ❖ Invite Advisors (CH, Human Services, Countryside, etc.) for February Workshop

**Solid Waste and Air Quality Committee
Environmentally Preferable Purchasing (EPP) Workshop
February 18, 2005
UW-Extension, Jefferson County Office
Room 8/9**

AGENDA

1. Introductions and welcome to the “Advisors”

2. Background orientation

3. Focus group questions:
 - a. What are concerns you may have about this proposed policy area?

 - b. What would your thoughts be about components of an “ideal policy”?

 - c. What are your specific ideas on possible new purchasing procedures? (See draft survey)