

CASE STUDY

# Custodial Supplies Management

## City of Portland, OR

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## Abstract

In 2012 the City of Portland’s Sustainable Procurement Program launched an initiative to test whether switching from custodial supplies provided by the City’s custodial service provider to City-provided custodial supplies would improve the consistency in using green cleaning products, build transparency, and save money. The 5-year initiative proved that combining strategic sourcing methods, good project management, and green cleaning best practices results a multitude of benefits. By seeking and achieving benefits beyond green product acquisition, this project earned strong support from stakeholders.

## Summary

<i>Goals</i>	<i>Strategies</i>	<i>Results</i>
Improve consistency in the use of	Established “green only”	All custodial cleaning products

<p>custodial supplies meeting City sustainability requirements</p>	<p>custodial supplies price agreement. Removed, over time, custodial supplies from custodial service provider contract. Established site-specific approved product lists.</p>	<p>provided to the custodial service provider meet City sustainability criteria (not including floor wax and similar hard floor maintenance products). Most paper products meet City recycled content requirements and are sourced from a local manufacturer. Previously, paper products did not contain recycled content and the use of green cleaning products was inconsistent.</p>
<p>Improve product use and cost transparency</p>	<p>Since the City provides the custodial supplies through online ordering, building managers know (in real time) what is being used to clean their building and the associated costs.</p>	<p>Previously, the City did not get accurate, site-specific product usage reports and product costs were sometimes folded into service costs. Now, the City can track and report on products use and costs on demand.</p>
<p>Improve cost control and save money</p>	<p>With switch to City-provided supplies, the City controls costs through its price agreement terms. Pricing is optimized through competitive solicitation and developing a core product list to concentrate product volume.</p>	<p>With the previous lack in product usage and cost transparency, costs were highly variable. By switching to City-provided supplies and better managing inventory, this project realized over a 30% savings on custodial supplies.</p>
<p>Improve ability to budget for custodial supplies costs</p>	<p>Through online ordering, all product spend data is captured for reporting/tracking purposes. Through the Citywide price agreement, pricing is stabilized.</p>	<p>With on-demand usage reports, each site can clearly see how much they spend on cleaning supplies and map that to facility use/programming to improve budgeting. Price stabilization also allows for improved budgeting.</p>
<p>Improve inventory control</p>	<p>With switch to City-provided supplies and on-site ordering, the City controls how frequently to place orders, and thus can better plan and manage inventory levels to match ups and downs in product use.</p>	<p>Since each site now controls order frequency, on-site staff can monitor and plan inventory according to the storage space available and site programming volumes.</p>
<p>Engage on-site City staff in using</p>	<p>The switch to City-provided</p>	<p>15 out of 20 sites made the</p>

green cleaners and safer disinfectants for their own cleaning tasks	custodial supplies involved working with site-specific City staff, which provided the opportunity to engage them on the types of cleaning products they use.	switch to using green cleaning products for City staff cleaning tasks (e.g. office surface cleaning, exercise equipment wipe-down, preschool surface cleaning) as a result of this project.
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## Goals

Despite having a green cleaning product requirements in its custodial service contracts, prior to this project the City’s Sustainable Procurement Program Coordinator (“SP Coordinator”) witnessed a high variability in the actual use of custodial supplies meeting City sustainability requirements. It was also time consuming to try to get accurate site-specific product usage and cost data, as evidenced during a LEED for Existing Building certification process for one of the City’s buildings. As a result, in 2012, the SP Coordinator embarked on an initiative to gain City control over the custodial supplies provided to clean City facilities. Because the lack of consistency in the use of green cleaning products also coincided with a lack of cost and accountability issues, the SP Coordinator saw an opportunity to address multiple concerns in one project. By addressing the numerous accountability and cost control issues while ensuring the supply of custodial products meeting City sustainability requirements, the project achieved multiple goals and broad stakeholder support.

## Strategies and Actions

Upon realizing the opportunity to build consistency in the use of green custodial supplies, the City’s Sustainable Procurement Coordinator (“SP Coordinator”) began a project to switch from custodial supplies provided by the City’s custodial service provider to City-provided custodial supplies.

First, in 2013, the SP Coordinator solicited and established a “green only” custodial supplies Citywide price agreement. The product specifications required:

- All cleaners certified against a reputable third-party green cleaning standard (e.g. Green Seal);
- All paper products must meet EPA minimum recycled content guidelines;
- All disinfecting and sanitizing products must meet “safer” product requirements based on San Francisco’s “Safer Products and Practices for Disinfecting and Sanitizing Surfaces” report;
- Any cleaning products that do not have a reputable green cleaning standard associated with that type of product must meet other sustainability criteria (e.g. low VOC, etc.); and

- Additional cleaning supplies must support high-performance green cleaning practices (e.g. microfiber cloths, HEPA vacuum bags)

The price agreement utilized a “core list” approach, whereby the City reduces the number of products per cleaning application (e.g. only one general purpose concentrated cleaner), to consolidate volume and get lower pricing. Combined with online ordering, procurement card payment option, and next day delivery, the price agreement provided City departments with a convenient and cost competitive source for its green cleaning supplies.

While there was a good argument for changing the City’s approach to sourcing custodial supplies, asking departments to embark on this project was challenging due to staff time constraints and lack of upfront proof that the change would pay off. Eventually, in 2015 the SP Coordinator obtained permission from the City’s Parks and Recreation bureau (Portland Parks and Recreation, or PP&R) to pilot test switching from custodial supplies provided by PP&R’s custodial service provider to City-provided custodial supplies at two community centers.

To start the project, the SP Coordinator met with all stakeholders (e.g. PP&R community center managers, custodial service provider management, City procurement staff) to explain the project and develop roles and responsibilities. The SP Coordinator took the role of project manager and oversaw the pilot projects. In addition to amending the custodial service provider’s contract to reflect the pilot project, the following series of steps were followed to make the switch to City-provided custodial supplies:

1. Retrieve past usage reports from the custodial service provider for the site to understand past product usage (to the extent possible given their poor product usage tracking capabilities);
2. Conduct walk-through of the site with the City’s custodial supplies provider and PP&R site staff to understand current product usage, dispenser types and needs, staff cleaning needs, etc. Identify who at PP&R would oversee inventory management and place orders for the site;
3. Develop approved product lists for the sites and obtain sign-off from stakeholders;
4. Coordinate with the custodial service provider on any product training support needs for their staff (e.g. product information sheets);
5. Set-up accounts with the City’s custodial supplies provider and train PP&R users on the online ordering platform;
6. Conduct the first custodial supplies inventory based on past usage levels and approved product list and place initial order;

7. Remove old/non-approved cleaning supplies (from the custodial service provider) and reorganize custodian closets to make inventory quick and easy for PP&R staff;



Custodian supply closet after removal of non-approved cleaners and organized for ongoing inventory by PP&R staff

8. Submit product credit requests to the custodial service provider;
9. Develop product wall charts or other product usage information for PP&R staff as needed/requested; and
10. Coordinate with City custodial supplies provider staff on applicable dispenser installs.

During this process the SP Coordinator communicated regularly with the custodial service provider and PP&R site staff, with the goal to ensure all stakeholders were prepared for the change in supplies management.

The pilot projects were successful in that they demonstrated that the switch did not unduly impact PP&R staff (time impacts, etc.), that custodial service levels were not compromised, and cost savings were realized. Thus, in 2016 PP&R management agreed to switch all community centers and related offices (20 sites) to this custodial supplies management model. Because it would not be feasible to switch all 20 sites at once, the SP Coordinator worked with PP&R, the custodial service provider, and procurement staff to establish a phase-in schedule over the course of FY2016-17 (July 2016 to June 2017) and amended the custodial services contract accordingly. Four to five sites were switched at the same time, staggered in groups throughout the year.

While the custodial cleaning supplies were the focus of this initiative, the SP Coordinator also used this opportunity to work with PP&R community center staff to “green” their cleaning supplies. During the course of their day, PP&R community center staff use various cleaning products to wipe off countertops/tables, clean popcorn machines, cleanup spills, wipe down gym equipment, etc. The SP Coordinator worked with staff to not only demonstrate cost savings by buying through the

City cleaning supplies price agreement (instead of retail purchases), but also the various benefits in switching to less-toxic cleaning supplies (and consolidating supplies). At some sites, product use “wall charts” were provided to help communicate to staff which products to use for what type of cleaning task. Other times, the SP Coordinator or custodial supplies provider representative provided in-person training to PP&R staff.

Classroom Cleaning Supplies At One PP&R Community Center, Before and After. Product Wall Chart Pictured in After Picture.



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Project results were primarily measured in two ways:

1. Before and after supplies usage and cost comparison – using data from past invoices and new usage reports.

2. PP&R staff feedback survey – to gauge their time input, satisfaction with the switch, etc.

Project results were communicated via a written final report distributed to PP&R management.

## Financial Information

The primary cost associated with conducting this project was the staff time, most notably the SP Coordinator's time. PP&R staff time input was limited by having the SP Coordinator take on many of the "hands-on" activities (e.g. overall project management, establishing approved product lists, cleaning out & reorganizing custodial closets to make future inventories easy and quick). The SP Coordinator also spent approximately \$1,400 over 2 years to facilitate "green" product testing at different PP&R sites.

- In terms of ongoing staff time, in the PP&R feedback survey, staff indicated they spend anywhere from 15-60 minutes each month conducting inventory and ordering custodial/cleaning supplies – with the majority being 30 minutes or less.
- The project demonstrated over a 30% savings in custodial supplies costs.

## Results

Key achievements include:

- Cost savings
- Custodial supplies standardization around products meeting City sustainability criteria (safer products)
- Improved cost controls
- Improved accountability and transparency
- Real time usage data
- Improved inventory control
- Increase in PP&R staff awareness of safer cleaning products and benefits thereof
- 100% of PP&R project participants who responded to the project feedback survey (57% response rate) agreed that the benefits of making the switch to City-provided custodial supplies outweighed the drawbacks.

One of the surprises for the SP Coordinator was how much PP&R staff appreciated having control over their custodial closets, both in terms of inventory volumes and knowing what is being used at their facility. They also appreciated the effort made by the SP Coordinator to make the transition as easy and painless as possible for them.

PP&R community center staff were often surprised by the volumes and overall cost associated with their custodial supplies. Previously, this data was not made available to them.

## Benefits

The specific, concrete benefits of this project are directly in line with the results described in the previous sections. Some other, less tangible benefits include fostering positive relationships across departments (“breaking down the silos”) and the opportunity for the SP Coordinator to really understand the perspectives and challenges faced by PP&R staff. This SP Coordinator gained a lot of value from the project that will apply to future sustainable procurement work.

A potential benefit identified by PP&R staff but not yet realized includes using the custodial supplies data to make a business case for waste reduction projects, such as reducing paper towel usage. Now that the sites know how much they spend on paper towels, they can calculate which waste reduction strategies will pay off.

## Lessons Learned

- Recognizing and taking advantage of benefit synergies makes for wider stakeholder support. In other words, understand stakeholder “pain points” and try to address them within your “ask”.
- Utilizing strategies such as strategic sourcing and good project management skills can be useful tools toward achieving sustainable procurement results.
- When staff are pressed for time, change is particularly hard. As the change instigator, sometimes you just have to get your hands dirty and take the transition burden off their hands as much as possible. Make the change transparent, easy, convenient, and sensible/logical.
- Green specifications in a contract are not always enough to drive change to more sustainable products. Sometimes you must dedicate staff time to engaging stakeholders one-by-one and create the implementation resources they need to make a change.
- Tenacity can pay off.
- Never turn on a custodial closet hose bib without first checking 1) that the hose is securely attached to the faucet, and 2) that you know exactly where the other end of the hose is.

## References and Additional Resources