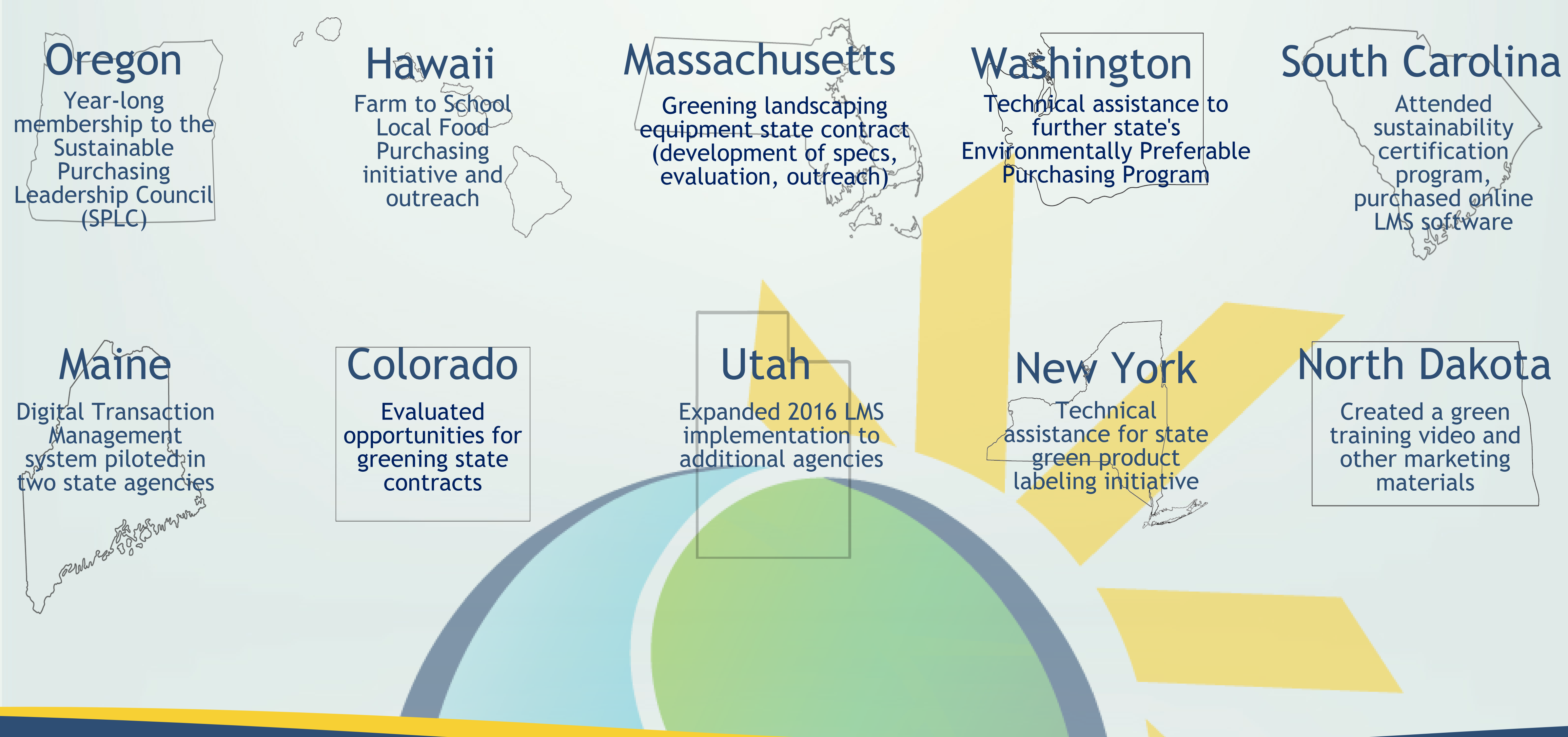


## Completed Projects 2017



Total Green Fund Spend in 2017  
**\$96,528**

### Most Popular Project/Expense Categories in 2017

- ☀ Outreach: Promote agency use of state green contracts
- ☀ Solicitation development for environmentally-preferable products
- ☀ Education/Training on green purchasing

Green Purchasing Funds continue to be offered to NASPO members in 2018

- ☀ Review the Green Funds Policy prior to application submission
- ☀ \$10,000 available to each state in 2018
- ☀ Submit your application by October 1, 2018
- ☀ Questions? [Greenfunds@naspo.org](mailto:Greenfunds@naspo.org)

## 1. 2018 Green Purchasing Technical Assistance Funds now available!



[Kevin Minor](#)

Posted 13 days ago | [view attached \(3\)](#)

[Reply to Discussion](#) ▾

NASPO is pleased to announce the 2018 Green Purchasing Technical Assistance Funds! Each state's central procurement office is eligible for up to \$10,000 to be used for professional services to assist in establishing, implementing, and enhancing sustainable purchasing (green procurement). Through the development of policies, programs and information resources that assist procurement decision makers in their efforts related to environmental issues and solutions, the purchasing power of state government can aid in conserving energy and national resources, limit environmental pollution and waste, improve public health, encourage clean technologies, and create cost savings opportunities and a balanced economy. Please review the [GPTAF Policy](#) and submit your states [application](#) to: [greenfunds@naspo.org](mailto:greenfunds@naspo.org) by October 1<sup>st</sup>, 2018. [Click HERE for the 2018 GPTAF Infographic](#), which includes helpful ideas and examples of unique projects!

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Best,  
Kevin N. Minor, MPA  
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Attachment(s)



[NASPO GPTAF Policy and Guidelines - Approved January 25 2...pdf](#) 578K 1 version



[FINAL\\_GPTAF\\_Infographic\\_2018.pdf](#) 642K 1 version



[NASPO\\_GPTAF\\_APPLICATION\\_2018 \(1\).pdf](#) 909K 1 version



## GREEN PURCHASING TECHNICAL ASSISTANCE FUND POLICY & GUIDELINES

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**NOTE:** Please review this Policy before submitting your state's application, using the standard Green Purchasing Technical Assistance Fund Application Form. All correspondence related to Green Purchasing Technical Assistance Fund and subsequent reimbursement requests for approved projects should be directed to [GreenFunds@naspo.org](mailto:GreenFunds@naspo.org)

### OBJECTIVE

NASPO seeks to leverage the purchasing power of state government to conserve energy and national resources, limit environmental pollution and waste, improve public health, encourage clean technologies, and create cost savings opportunities and a balanced economy. NASPO is committed to accomplishing this through the development of policies, programs and information resources that assist procurement decision makers in their efforts related to environmental issues and solutions.

In keeping with this philosophy, NASPO has budgeted a specific amount of funds to be distributed equitably and used by individual state procurement offices for professional services to assist in establishing, implementing, and enhancing sustainable purchasing (green procurement) in their states. Use of the state allotment is at the discretion of the NASPO primary member (state chief procurement official or his/her designee), in accordance with the guidelines described below and utilizing the process put forward by the NASPO Board of Directors.

NASPO defers to the rules, regulations and policies of its member states. In situations where NASPO's policy—including eligible expenses, amounts and required documentation—differs from state policies, the primary state member is responsible for ensuring expenditures and documentation comply with state requirements and standards. NASPO requires that technical assistance applications and requests for reimbursement use NASPO's official form and process. Members may not seek reimbursement for expenses not allowable under their state policies.

### I. APPLICATION PROCESS

- A. NASPO has established an application process for proposed projects. The NASPO Green Purchasing Technical Assistance Fund Application Form is available from NASPO headquarters and posted on the Reimbursement page in the [NASPO](#) Network. Advance approval is required.
- B. Applications may be submitted to NASPO headquarters as soon as funding is announced (early February) and are accepted through October 1. Late applications may be accepted and submitted to the Advisory Group for their consideration. Reimbursement requests for approved late applications will be deducted from the next year's state allotment should the Green Purchasing Technical Assistance Fund Budget be approved for the next calendar year.
- C. Applications must include the signature of the NASPO primary member to affirm the intended project complies with eligibility requirements (Section II). NASPO will notify the primary member of the application status (approved, denied, or more time needed) within 30 days of receipt.
- D. Applications that require additional review will be vetted by an Advisory Group, who will make the final decision as to eligibility for funding. NASPO will strive to complete all reviews and notify applicant states within 10 working days. The Advisory Group will be comprised of three NASPO



members. The Research and Innovation Champion will serve on the Advisory Group, and will appoint two other NASPO members to the Group. The Group will consist of NASPO who are not involved in the state application under review. In the event there is a conflict of interest, the Research Champion will appoint a member to temporarily replace the Advisory Group member whose state application is under review.

## **II. ELIGIBLE EXPENSE CATEGORIES**

Care and oversight should be given to ensure funds are used with discretion and forethought. Appropriate fund usage should fall into one of the following professional service categories. The category must be noted on the initial project application form and on each subsequent expense form.

- A. Researching market and vendors for developing environmentally-preferable products or service specifications or specific initiatives
- B. Solicitation development for environmentally-preferable products and services (e.g. Request for Proposal, Invitation to Bid, etc.)
  - i. Inclusive of, but not limited to, development of technical specifications and crafting answers to technical bidder questions
- C. Outreach (marketing) of solicitations or contracts for environmentally-preferable products or services
  - i. Maximum exposure of a bidding opportunity to the vendor community
  - ii. Encouraging/promoting agency use of a state contract
- D. Education/training regarding green purchasing/sustainability initiatives
  - i. Including but not limited to education of state central procurement office and user agency staff
  - ii. Participation in sustainability certification programs
- E. Development of metrics/data analysis related to environmentally-preferable products and services
  - i. Inclusive of, but not limited to, procurement trends and environmental impact, program/policy impact
  - ii. May require recommendations of calculations, identification of data needs or methodology, or approach lifecycle impact analysis
- F. Evaluation of bidder proposals/contract content for environmentally-preferable products and services
  - i. Includes assisting in evaluation of technical components
- G. Development of sustainable purchasing (green procurement) state strategy/policy or standards for specific initiatives
  - i. Covers a wide range from research and development to organizational rollout and training, to legislation related issues, to program initiatives or specific procurements (e.g., strategy for best value)
- H. State, or individual dues/fees related to yearly membership to sustainability/green purchasing organizations
- I. Software licensing fees for applications acquired to support green purchasing initiatives (e.g., digital transaction management software, online learning management development and delivery tools, etc.)

J. Travel and lodging required for any approved state application. All travel and lodging expenses must meet NASPO travel policy.

K. Other uses (*as determined by NASPO headquarters and Advisory Group*)

### III. EXPENSES NOT ELIGIBLE

A. Not all expenses are considered appropriate uses for NASPO Green Purchasing Technical Assistance Funds. For instance, funds may not be used for reimbursement of staff time or salaries, or otherwise compensate or reward state staff. Examples of appropriate uses of the GPTA funds are outlined in Section II. If you are not sure whether a project will qualify, please ask for guidance from NASPO headquarters prior to initiating the project application.

B. In exceptional circumstances, as determined at the sole discretion of NASPO, NASPO will consider the eligibility of expenses incurred retroactive to the project's approval date. Retroactive expenses are evaluated on a case-by-case basis by the Advisory Group using the following criteria:

- i. Expenses must meet the eligibility requirements as defined in this policy.
- ii. Justification must be provided and expenses identified as retroactive at the time the application for project approval is submitted.
- iii. Expenses must be directly associated with the approved project.

If you are not sure of the applicability of an expense or have questions, please consult with NASPO headquarters for guidance.

### IV. BUDGET AND USAGE PERIOD

Once the application is approved, the state may initiate the project and begin submitting payment requests using the NASPO Green Purchasing Technical Assistance Fund Reimbursement Form or invoice, as described in Section VII.

Because NASPO's budget year begins January 1, funding aligns with the calendar year. The Green Purchasing Technical Assistance Fund budget is established on an annual basis by the NASPO Board, based on previous year's usage. The Green Technical Assistance Fund is announced to NASPO primary members at the beginning of each calendar year. Funds are available for state use between February and December (specific deadline to be determined by NASPO on an annual basis).

Funding Announced & Applications Open	Early February
Application Deadline	October 1
Period for Review & Notification of Approval	30 days from application
Reimbursement Deadline (for Approved Projects)	Early December

The Green Purchasing Technical Assistance Fund budget is distributed equitably to all member states. Budget balances do not roll over from year to year. Reimbursement/direct payment requests are accepted for expenses incurred for approved projects in an amount not exceeding the state allotment. Expenses will be reimbursed from the budget for the calendar year in which the expense took place, so long as the reimbursement form is received by NASPO prior to the announced deadline.

Reimbursement/direct payment requests received after the announced deadline will be deducted from the next year's state allotment should funds be available for the next calendar year.

### V. SPENDING AUTHORITY

The NASPO primary member has oversight and decision-making authority with regard to how Green Purchasing Technical Assistance Funds are expended for the state. He/she should ensure expenses fall within guidelines and are properly and promptly submitted.

NASPO will accept technical assistance applications from other state staff members only after receiving signed approval from the primary member. Matters of disagreement are to be handled at the state level. Additionally, it is the responsibility of the individual to ensure that claims are consistent with state policies and appropriately authorized, as required.

All requests for reimbursement or payment require the authorizing signature of the NASPO primary member. The primary member may delegate this authority to another state employee only with written, advance notification to NASPO headquarters.

## **VI. REPORTING**

Upon completion of approved technical assistance projects, states are encouraged to provide NASPO with a brief report highlighting the completed deliverable/s and accomplishments indicating lessons learned and whether the results can be generalized. NASPO headquarters may use the report and related deliverable to promote the GPTA funds and educate the membership.

At the conclusion of each calendar quarter, state directors will receive reports detailing expenditures processed by NASPO for that quarter. Directors should track expenses and plan expenditures to ensure funds are utilized successfully without exceeding budgeted amount and within the approved time period.

## **VII. PAYMENT METHODS**

States may choose to be reimbursed for expenses or, under certain circumstances, NASPO will make payment to an outside service/product supplier directly. Direct payment to suppliers will necessitate extra processing time and require an invoice and additional documentation (W-9, tax identification number, etc.) for accounting purposes.

The following payment options are available:

- Direct payment to service or product provider – upon submission of invoice with approval from state primary member or designee. Invoice must include a detailed description of the service provided.
- Reimbursement to state – upon receipt of appropriate documentation, including reimbursement form and receipts. Receipts must include a detailed description of the service provided.

## **VIII. REIMBURSEMENT PROCEDURE**

To receive funds (direct to provider or reimbursement to state), all requests must be submitted prior to the announced reimbursement deadline via NASPO's official Green Purchasing Technical Assistance Fund Reimbursement Form and comply with all other elements described in this policy.

NASPO requires that reimbursement forms be signed by both the requestor and the NASPO primary member. When the primary member is the requestor, NASPO recommends but does not require the signature of his/her superior. NASPO will rely upon such signatures to affirm compliance with NASPO and state policies.