



## Acquisition and Procurement Planning Checklist

Updated: 09/26/2007

### PURPOSE

This checklist outlines questions to consider throughout the electronics acquisition and procurement process and can assist in planning and purchasing of environmentally preferable electronic products and services. Completion of this document is required for some Federal Electronics Challenge (FEC) award levels.

### INSTRUCTIONS

- Please consider at least the questions applicable to the FEC award level that you chose: ■ Gold Level ■ Silver Level ■ Bronze Level
- After considering each action item, check "Yes" or "No" to specify if your organization decides to implement the action. If you check "Yes," check who is(are) responsible for ensuring implementation of the action: Program Office/Facility, Acquisition/Contracting, Property Management, Information Technology (IT) or Other.
- Click on blue hyperlinks throughout the checklist for FEC forms, resources and other useful documents related to completion of these actions.
- Actions marked **EPEAT** may be fulfilled by specifying and/or purchasing electronics registered through the [Electronic Product Environmental Assessment Tool \(EPEAT\)](#).

### NEEDS ASSESSMENT

Action	Implement action?	Who is responsible?
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Assess the need to purchase vs. fulfilling the requirement using an alternate method (i.e., internal reuse, leasing, or obtaining excess equipment).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> Assess the possibility of upgrading equipment vs. purchasing of new equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> If equipment is leased, assess the possibility of extending current lease vs. purchasing or leasing of new equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other

### INFORMATION GATHERING/MARKET SURVEY

Action	Implement action?	Who is responsible?
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Discuss with your current equipment vendors the types of environmentally preferable products they offer.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Discuss with your current vendors the <a href="#">environmental attributes</a> of the products you currently purchase.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Require vendors to complete the <a href="#">FEC Product EPEAT Information Sheet</a> , provide similar information, or provide EPEAT registration product details.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other

### OUTREACH TO REQUIREMENT OFFICES

Action	Implement action?	Who is responsible?
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Provide <a href="#">information regarding EPEAT</a> and <a href="#">environmental attributes</a> of electronics to Programs that specify IT requirements.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Request that your Program and/or Contracts office take environmentally preferable purchasing (EPP) training. Training information is available from the Office of the Federal Environmental Executive: <a href="http://ofee.gov/gp/training.asp">http://ofee.gov/gp/training.asp</a> .	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other

### EVALUATION CRITERIA CONSIDERATIONS

Action	Implement action?	Who is responsible?
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Include ability of vendors to provide <a href="#">EPEAT-EPEAT</a> registered products.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other

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<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> <b>EPEAT</b> Include ability of vendors to perform End-of-Life (EOL) management services.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> <b>EPEAT</b> Include at least three identified <a href="#">environmental attributes</a> in purchasing specifications.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> <b>EPEAT</b> Include ability of vendors to provide reduced packaging.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> Include <a href="#">total cost of ownership</a> .	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <b>EPEAT</b> Include environmental factors and attributes in <a href="#">determining "best value"</a> for contract award.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <b>EPEAT</b> Include the ability of vendors to provide <a href="#">eco-labeled</a> products.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> Include ability of vendors to provide training about environmental aspects of their products to users.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <b>EPEAT</b> Include product's design for recyclability.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other

### CONTRACTUAL REQUIREMENTS - SPECIFIC CLAUSES

Action	Implement action?	Who is responsible?
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> <span style="color: brown;">■</span> Include clause requiring <a href="#">EPEAT</a> -registered products <b>EPEAT</b> for all products that are registered by EPEAT.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> Include clause requiring <a href="#">ENERGY STAR®</a> qualified products, for products not registered by EPEAT.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <span style="color: gray;">■</span> Include clause requiring compliance with Executive Order 13221, Energy Efficient Standby Power Devices.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> Include clause requiring manuals to be delivered on compact disc (CD) or made available online.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> Include clause requiring delivery of products in "multi-packs" (i.e., multiple items in one box).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <b>EPEAT</b> Include clause requiring vendors to take-back all packaging or choose <a href="#">EPEAT</a> -registered products that meet optional criteria for packaging take back.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> <b>EPEAT</b> Include clause requiring vendors to take-back products at EOL or utilize vendor's take back service for <a href="#">EPEAT</a> -registered products.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<span style="color: yellow;">■</span> Include clause requiring vendors to provide products designed to require minimal toxic cleaning and maintenance processes, or require no maintenance at all.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other



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### POST AWARD FOLLOW-UP

Action	Implement action?	Who is responsible for action?
<p><span style="color: yellow;">■</span> Obtain reporting from vendors on their sales of environmentally preferable computers or <a href="#">EPEAT</a>-registered electronics.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other
<p><span style="color: yellow;">■</span> Provide oversight of contract to ensure vendor compliance with environmental clauses.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Program <input type="checkbox"/> Acquisition <input type="checkbox"/> Property <input type="checkbox"/> IT <input type="checkbox"/> Other

### CONTACT INFORMATION

If you have questions related to this resource or need other assistance with the Federal Electronics Challenge, please contact your Regional Champion. The list of FEC Regional Champions is available at <http://www.federalelectronicschallenge.net/champions.htm>.

Partners may also request technical assistance by sending an email to [partner@electronicschallenge.net](mailto:partner@electronicschallenge.net).

### FEDERAL ELECTRONICS CHALLENGE

Web site: <http://www.federalelectronicschallenge.net/>  
 E-mail: [info@electronicschallenge.net](mailto:info@electronicschallenge.net)