



Assessment of State Purchasing Protocols Related to Innovative Wood Products Scope of Work

In recent years, forest product innovation has produced a number of groundbreaking products that provide a suite of societal benefits. Examples include mass timber, cellulosic nanocrystals, and biochar. These unconventional products facilitate reduction of GHG, carbon storage and air emissions reduction, to name a few of the environmental benefits. In addition, these products make possible value-added uses for typically under-valued byproducts of forest restoration and forest fuels reduction.

In order to realize the full suite of societal and environmental benefits, accommodations within the marketplace need to be made to accept and utilize these forest products at scale. The state of California regularly purchases forest products to support various agencies and communities. Product purchasing by the state relies on a very defined set of structured protocols that provide guidance (for implementation by state agencies). This project will assess current state purchasing protocols and identify barriers and implications of updating the protocols to facilitate procurement of innovative wood products. In addition, the work product from this assignment will include detailed solutions and pathways that allow for timely implementation over a 2-year-period. The final ADA-compliant report will include an executive summary and clearly defined policy recommendations as well as a timeline.

This scope of work includes monthly or bi-monthly conference calls (as needed) between TSS, and Joint Institute staff, and quarterly progress reports to the Joint Institute as well as the following tasks:

Task 1. Project Implementation Meeting

Conduct a project implementation meeting with Joint Institute (JI) staff and project steering committee to review scope of work and implementation timeline. The draft list (provided by TSS) of market-ready innovative wood products (e.g., mass timber, biochar) and targeted state agencies (also provided by TSS) that are most likely to procure wood products) will be reviewed and finalized. A draft project overview document (not to exceed two pages) will be reviewed. Overview document will provide a high-level project summary, and include social benefit implications (e.g., C storage, GHG mitigation, jobs, forest health), as well as high-level estimate of potential scale¹ of markets for innovative wood products.

Deliverables:

- List of market-ready wood products.
- List of target agencies.
- Project overview.

¹ Based on state of California's scale of procurement for like products.



Task 2. State Procurement Protocol Review

Review other state's purchasing protocols (e.g., Oregon, Washington) that currently facilitate purchase of innovative wood products. Utilize existing west-wide organizations (e.g., Council of West State Foresters, International Biochar Initiative, WoodWorks) and their resources to facilitate outreach. Consider outreach to provinces (e.g., British Columbia) that are advocating for wood products innovation. Key discussions will include observations regarding purchasing protocol updates required to facilitate innovative wood product purchasing. Summarize findings and lessons learned.

Deliverables:

- Summary of existing innovative wood products purchasing protocols (by state and or province).
- Contact list of key procurement personnel (by state and province).
- Summary of any county-level procurement opportunities identified in California as well as procurement personnel contact information for those opportunities.
- Findings, observations and lessons learned (including pricing data and volumes if reasonably available) from other state and provincial agencies currently procuring innovative wood products. How innovative products perform relative to those that are replaced. Observations from procurement personnel regarding rollout of new protocols and resulting market response will be key.

Task 3. California Agency Outreach

Review existing California state agency wood product procurement protocols. Interview California agencies with a focus on personnel directly involved in product purchasing. Interviews will be structured (defined set of questions) with both in-person and remote meetings.

Deliverables:

- Matrix of existing wood product procurement protocols (by agency).
- Summarize any concerns/perceived barriers from agency staff regarding procurement of innovative wood products, helping to identify unforeseen barriers.
- Observations regarding current wood product purchasing protocols.
- Confirmation of steps required to update purchasing protocols.

Task 4. Innovative Wood Producer and Vendor Outreach

Interview innovative wood product producers and vendors. Confirm current markets (including state and provincial agencies – both in California and other states/provinces) for products. Interviews will target personnel directly involved with product marketing to agencies. Interviews will be structured (defined set of questions) with both in-person and remote meetings. Observations and/or recommendations from producers and vendors regarding current purchasing protocols used both in California and other states/provinces will be a key outcome.



Deliverables:

- Observations regarding wood product producers and vendors current wood product marketing experience working with agencies.
- Summarize wood producer and vendor concerns/perceived barriers regarding the marketing of innovative wood products to agencies.
- Summary of product producer and vendor recommendations.

Task 5. Draft Wood Product Procurement Protocols

Using findings from Tasks 1, 2, 3 and 4, create a set of innovative wood product purchasing protocols. Protocols will be structured such that state agencies will be able to readily implement. Vet the draft protocols with select state agencies and product producers/vendors.

Deliverables:

- Draft innovative wood product purchasing protocols.
- Recommendations regarding key steps required for state agencies to incorporate protocols into purchasing guidelines.
- Timeline for purchasing protocol rollout, acceptance and implementation.

Task 6. Draft Report

Utilizing findings from tasks 1 through 5, prepare a draft report. The draft report will include, but not be limited to, the following:

- Title page
- Table of contents
- List of tables/figures
- List of Appendices
- Executive Summary
- Policy Recommendations
- Investigation Objectives (Scope of Work Tasks)
- List of Innovative Wood Products
- Out-of-State Procurement Protocol Review
- California Procurement Protocol Review
- Wood Producer and Vendor Outreach
- Draft Wood Product Procurement Protocols
- Draft Implementation Timeline
- Appendices

The draft final report and executive summary document (not to exceed two (2) pages; produced with state agency purchasing personnel as the target audience) will be delivered to the Institute 10 days prior to the meeting at which the draft will be presented in person or remotely for review. All comments received from Institute members will be addressed Institute representatives, creating an Institute-approved draft report.



Task 7. Final Report and Executive Summary

The Institute-approved final draft report and executive summary document will be presented to the Board of Forestry in-person for review and feedback. The final draft report and executive summary documents will be finalized, made ADA-compliant, and presented to the Institute for adoption consideration.

Project Management

Contractor shall submit a brief verbal or written progress report monthly to the Cal Fire Project Representative or their designee over the course of the Agreement. Contractor shall conduct virtual or in-person quarterly presentations to the Institute.

Scope of Work – Implementation Budget

The cost for this project will be \$99,500.

Scope of Work - Timing

Posted below is a table summarizing projected task completion dates.

Task	Completion Date
Task 1. Project Implementation Conference	7/11/2023
Task 2. State Procurement Protocol Review	11/2023
Task 3. California Agency Outreach	01/2024
Task 4. Innovative Wood Producer and Vendor Outreach	03/2024
Task 5. Draft Wood Product Procurement Protocols	05/2024
*Task 6. Draft Report to Institute, including Executive Summary Document. Present in person or remotely.	09/2024
*Task 7. 1) Institute-Approved Draft Report and Executive Summary Document to Board of Forestry – In-Person Presentation	11/2024
*Task 7. 2) Final ADA-compliant report to Board of Forestry for Approval	12/2024
All Invoicing due to Institute	05/01/2025
*Reports due 10 days prior to the meeting at which they will be presented.	