



Environmental responsibility and business success. *Growing together.*

Sustainability Planning Best Practices: Setting the Foundation for a Successful Sustainability Program

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Bryan Sheehan, President

SymbioSus Sustainability Consulting, Inc.

Today's topics

- Introduction and background– SymbioSus™ and Bryan Sheehan
- Sustainability – definition and criticality
- The value of quality sustainability planning
- Sustainability planning key fundamentals
- Properly scaling your sustainability plans and programs
- Sustainability planning best practices
- Summary and key takeaways



Introduction and background: SymbioSus™

- **Mission:** To help small to medium-sized businesses increase profits and competitive advantage by integrating environmental sustainability actions with core business operations
 - **Reduce** risk, cost, energy/resource use, waste, and environmental footprint
 - **Increase** resource efficiency, customer, employee, and community satisfaction, and profits
- Help organizations assess, plan, implement, measure, and report improvements that benefit:
 - People, planet, profit
- We work with wide range of companies and industries, and scale projects to meet the specific needs of each client.



Introduction and background: Bryan Sheehan

- 20 years of business experience
 - Start-ups to Fortune 500 companies
 - Sales, marketing, line management and internal consulting
- 10 years of concurrent sustainability involvement, activity, and expertise development
 - Master's degree in Sustainable Business Management
 - Member of:
 - International Society of Sustainability Professionals
 - Sustainable Business Network of Greater Boston
 - Vermont Businesses for Social Responsibility
 - New Hampshire Businesses for Social Responsibility
 - Maine Businesses for Sustainability
 - Society of Professional Consultants



Sustainability: The 21st-century definition

Sustainability

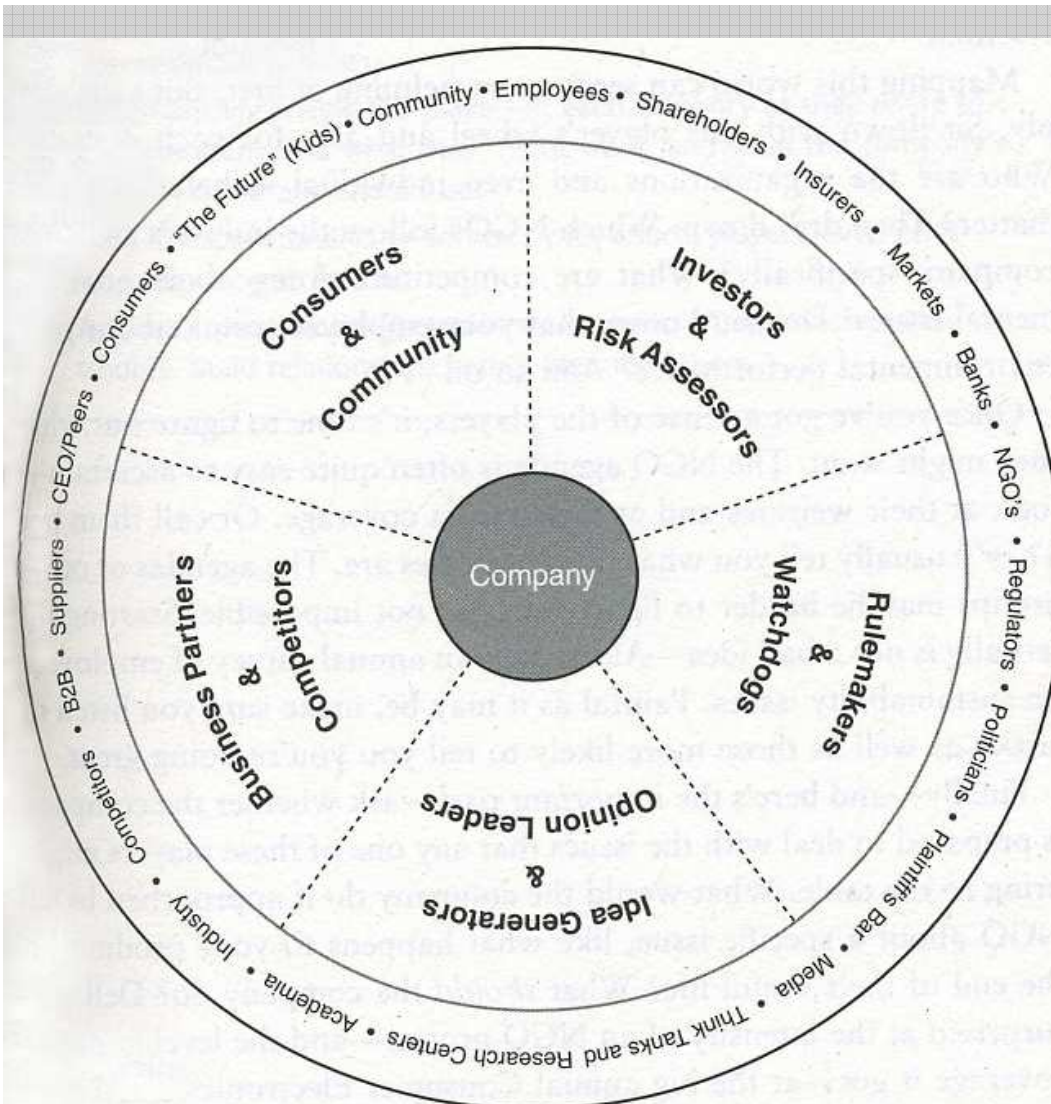
The ability to meet today's economic, environmental, and social needs without compromising the opportunity for future generations to meet theirs.²

A balanced focus on “people, profits, and planet”

Brundtland, G. H. (1987). *Our common future: The World Commission on Environment and Development*. Oxford, U.K.: Oxford University Press.



Sustainability: A broader stakeholder view



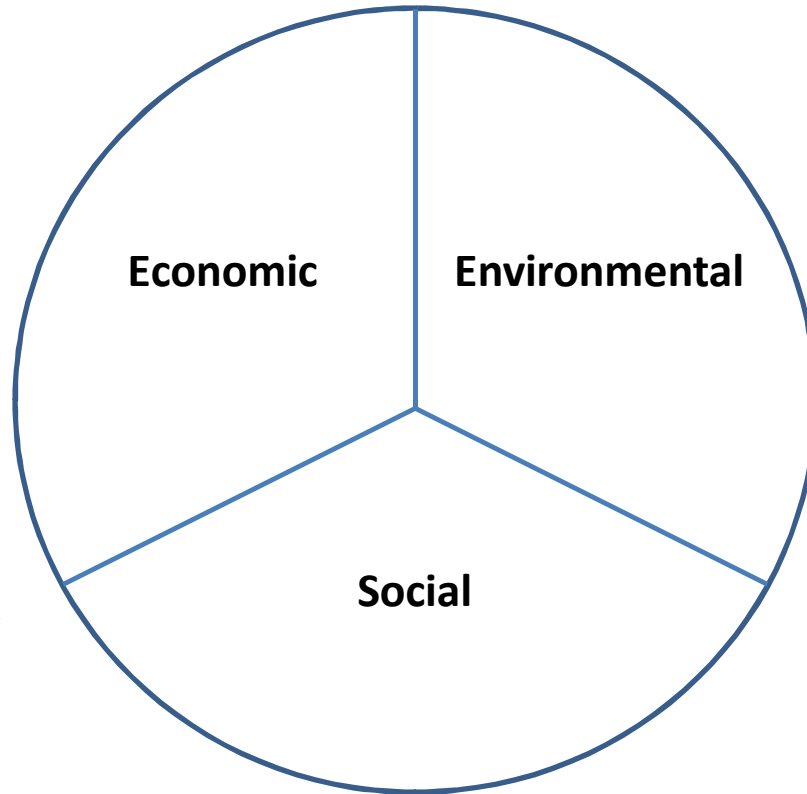
• Stakeholders

- Formerly limited in scope & impact
- New reality
 - Much broader stakeholder awareness & interaction required
 - The environment is a stakeholder in itself
 - Affects:
 - » Employee & community health
 - » Raw material / resource availability & costs
 - » Organizational reputation

Esty, D. C., & Winston, A. S. (2006). *Green to gold: How smart companies use environmental strategy to innovate, create value, and build competitive advantage*. New Haven, CT: Yale University Press.

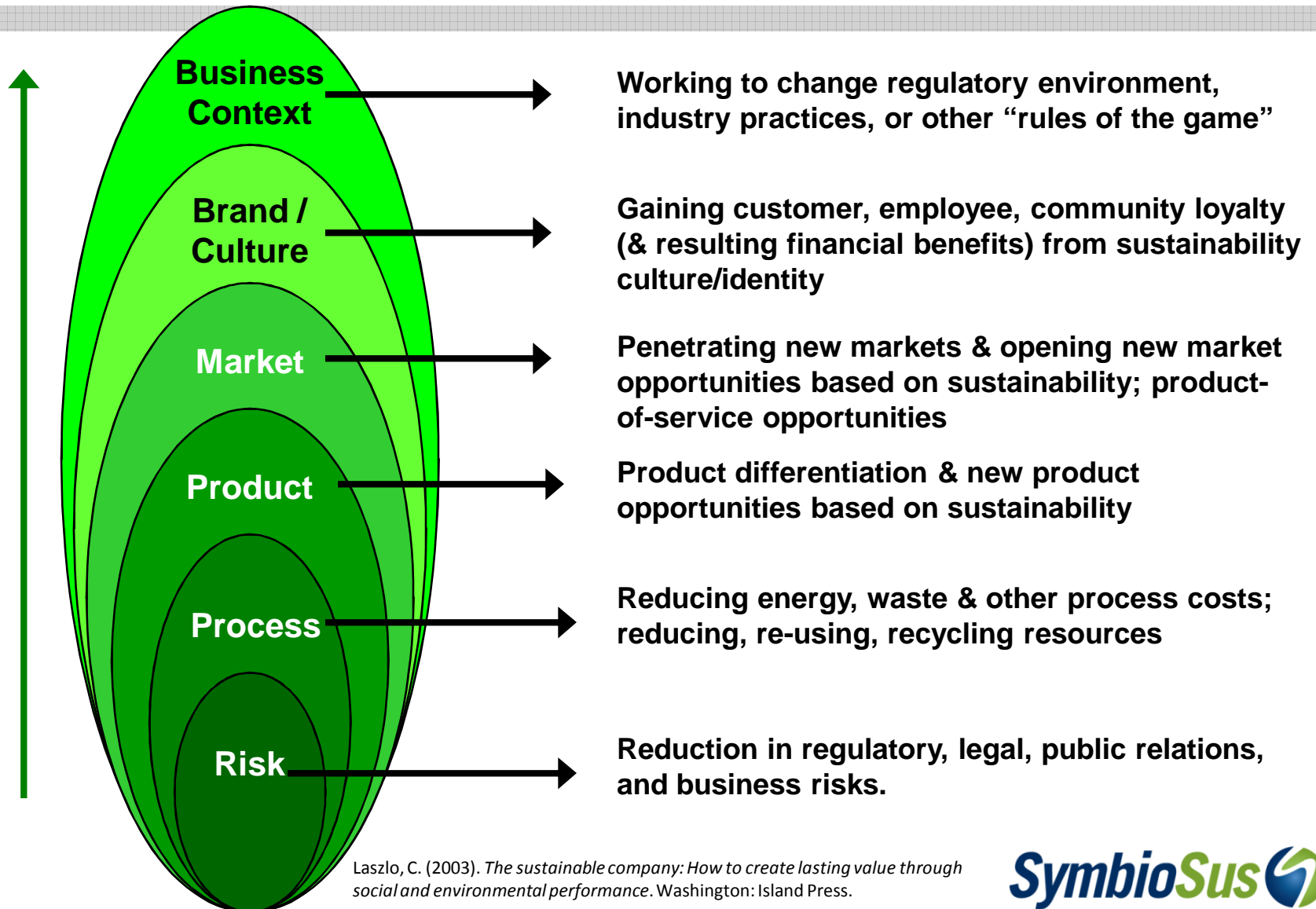


Why sustainability is critical



The business case for sustainability

6 sources of business value



Laszlo, C. (2003). *The sustainable company: How to create lasting value through social and environmental performance*. Washington: Island Press.



Indicators that sustainability planning may need to be implemented or optimized

- Some successes have been achieved, but hard to keep momentum
- Activity led by one key champion; if champion departs, progress stalls
- Actions thus far have been isolated rather than integrated
- Completed or active projects are not tracked in organized way to determine successes, needed course corrections, or new ideas
- Ideas for best projects to do next are unknown or unclear
- Many ideas for possible projects, but which should take highest priority is unclear
- Projects / actions are less efficient than they could be, feeling like add-ons, rather than integrated, normal business habit



Benefits of sustainability planning

- Proactive rather than reactive
- More strategic, less ad-hoc
- Allows for prioritization of opportunities/activities
- Maps the terrain and optimal course given the situation
- Allows clear communication of goals & methods to all involved

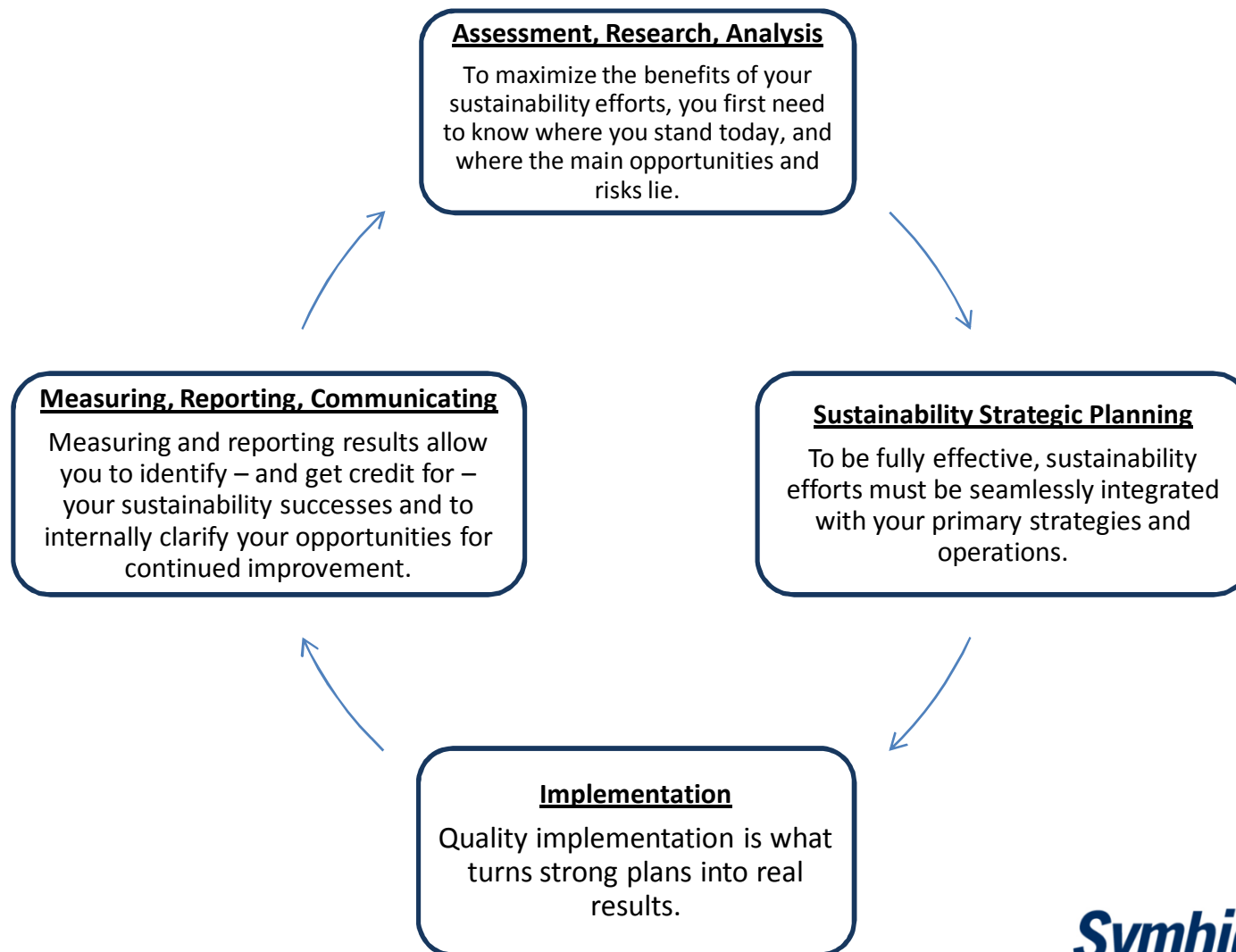


Benefits of sustainability planning

- Systematic approach increases organization & discipline
- Allows for more integrated, habitual, efficient implementation
- Helps embed continuous improvement and learning into organization
- Reduces risk & cost of false starts or blind alleys
- Not dependent upon one or a few champions
- Makes your sustainability efforts sustainable themselves



The sustainability planning cycle (Sustainability Management System - SMS)



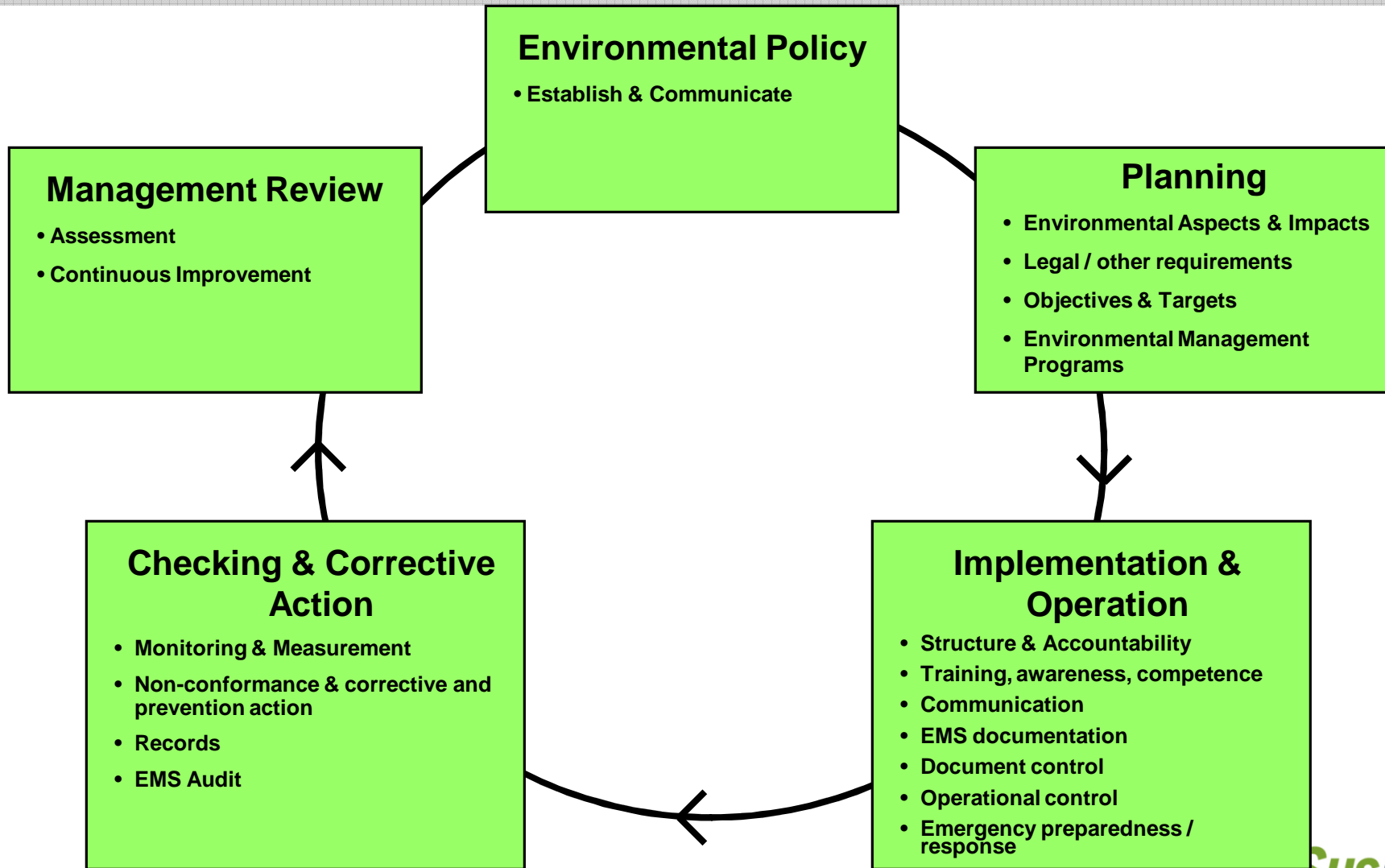
EMS, SMS, ISO 14001 introduction

- **EMS** : A process for organizing and integrating actions for improved environmental performance (reduced impact, increased efficiency) into the core operations of a business or organization
- **SMS** : Similar to an EMS, but with a slightly broader view, including all aspects of sustainability, including environmental, social, and economic impacts; looks at more than environmental impact and pollution prevention
- **ISO 14001**: A set of standards to enhance and document the organization, rigor, and robustness of the EMS or SMS planning and implementation process.
 - Can be conforming, 2nd-party audited, or 3rd-party audited (certified)

- EMS or SMS is the “WHAT”
- ISO 14001 is one way “HOW”



The EMS process - with ISO 14001 elements



Cheremisinoff, N. P., & Bendavid-Val, A. (2001). *Green profits: The manager's handbook for ISO 14001 and pollution prevention*. Boston: Butterworth-Heinemann.



Properly scaling your sustainability planning

- Two critical concepts: **“continuum”** and **“scalability”**
 - A continuum of options, levels of comprehensiveness, detail
 - Scaling your plan and programs appropriately is the key:
 - Size and complexity of organization
 - Size and complexity of sustainability opportunities and risks
 - Available human, financial, and other resources
 - Even ISO 14001 does not require set levels of performance attainment
 - Requires that you set appropriate goals and demonstrate /document that you are systematically working to attain them on a continuous-improvement basis



What scalability might look like

| Aspect | Comprehensiveness | | |
|-------------------------------------|--|---|---|
| | Low | Medium | High |
| Assessment, Research, Analysis | Internal, pilot-team / 'green team' assessments | More detailed, systematic | Comprehensive 3 rd -party assessment process. |
| Sustainability Planning | 'EMS/SMS Lite' – periodic task-team-based assessment, planning, and review. Brief, scaled-down plans and key metrics. | Expanded EMS / SMS – begin to connect to existing planning cycles (budget, forecast, quality, ongoing training processes) | Highly comprehensive, detailed, ISO 14001 certified EMS/SMS. |
| Implementation | Smaller, pilot teams or 'green teams' ; task forces. Focus on simplest 'quick win' projects that tie in to initiatives already under way (quality, safety, etc.) | Expanded level of systemic integration of projects; begin to implement structures, training, longer term & larger projects. | Combination of full-time internal sustainability manager/team plus integrated training & implementation within all functions. |
| Measuring, Communicating, Reporting | Periodic, basic, internal reporting of progress, milestone achievement, additional needs. | Internal and external communication – commitments, reports, case studies, website, etc. | 3 rd -party-audited, GRI-conforming public sustainability report & related communications. |



Sustainability planning best practices

- Top management (i.e., CEO, management team) commitment
- Broad grass-roots buy-in, empowerment, involvement
- A committed, core implementation team
- Regular, transparent communication
 - Published plan/summary, communication of results
- Linkage with performance review & reward system



Sustainability planning best practices

- Remember that it is a cyclical, iterative process
- Continuous improvement is more important than perfection
- Scale the plan and activity to the resources available
 - Don't set team up for failure
 - Achieve continued success & improvement through phases
- Consider pilot, expansion, and full-integration stages



Sustainability planning best practices

- Distinguish the larger, strategic plan portion from the more focused, project-specific plans (but you do need both)
- Seek synergy with operational projects/goals that already exist (i.e., efficiency goals, scrap minimization, employee health & safety, etc.)
 - leverage existing planning systems, processes
- Consider integrating sustainability concepts in current training, rather than separate training
- Set, communicate, measure and report on key metrics
 - This is very often the main source of loss of momentum & downfall of efforts – don't track, report, learn, and improve



Sustainability planning best practices

- Set clear roles & responsibilities
- Set clear cyclical process (planning/implementation calendar)
- Choose criteria specific to your situation to prioritize projects
- Consider sustainability planning process as being as mission-critical as processes for:
 - Budgeting/forecasting/financial reporting, product quality, employee safety



Key takeaways

- **Increased business sustainability is critical – for environmental, social, and economic reasons**
 - It can also help businesses attain benefits and avoid risks if managed well.
- **Increasing business sustainability is as mission-critical as other key processes**
 - Product quality & performance, employee health & safety, budgeting, forecasting
- **Sustainability programs will not be fully successful unless well planned**
- **Planning and implementation of sustainability efforts can be scaled to your needs, resources, and specific situation**
- **Choose the proper scale & scope, implement the best practices discussed, and get started today!**



Thank you!

Questions / Discussion

For more information:

www.symbiosus.com

bsheehan@symbiosus.com

