



**Canadian Stewardship
Services Alliance**

Supporting Stewards in Preparing Their Annual Reports

A webinar for Stewards of Packaging and
Printed Paper

March 3, 2016



Information for webcast participants

- Speaker advances slides
- Sound slider ①
- Questions/comments at
'Ask a Question' ②
 - Click 'submit'
- If you have technical issues also let us know via the "Ask A Question" box





Our Objectives

- Reminder of important dates
- Ensure stewards are well positioned to prepare their 2016 reports and aware of all resources available to assist them
- Provide an overview of some of the programs' key policies
- Consult with stewards of Stewardship Ontario on Rules changes for 2016.
- Provide overview of minor changes to the Membership Agreements for MMBC and MMSW



Agenda

1. Important Dates
2. Tools and Resources for Preparing 2016 Steward Reports
 - I. Updated Guidebook
 - II. Steward List
 - III. Best Practice Reporting Tips and Program-Specific Reminders
 - IV. Portal User Tips
3. Policy Review:
 - I. Review of Steward Initiated Adjustment Policy
 - II. Review of Voluntary Steward Policy
4. Rules and MA updates
5. Questions and Answers



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Important Dates to Remember



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Important Dates:

Program/Stewards	Item	Date
MMBC, MMSM, MMSW, Stewardship Ontario	Steward Reports due	May 31, 2016
MMBC, MMSM, MMSW, Stewardship Ontario	Steward Lists posted on CSSA and program websites	March 4, 2016
MMSW- Transition Period Flat Fee	Registration & Flat Fee Payment	Portal open now
Voluntary Stewards	Execute Voluntary Steward Agreements	Closed for the 2016 reporting period (deadline December 31, 2015)
Voluntary Stewards	Termination of Voluntary Steward Agreements	December 31, 2016 (for the 2017 reporting year)



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Tools & Resources for Preparing 2016 Steward Reports



<http://guidebook.cssalliance.ca/>



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Landing Page provides quick links to helpful resources & downloads

Steward Resources and Downloads

Steward Resources

- [Guidebook Updates](#)
- [WeRecycle Portal](#)
- [Portal User Guide](#)
- [Reporting Webinar](#) - coming soon
- [Best Practice Reporting Tips](#)

PDF Downloads

- [Part One: How to determine if you are a steward](#)
- [Part Two: How to prepare your steward report](#)
- [Part Three: National material list](#)
- [MMBC Material List](#)
- [MMSW Material List](#)
- [MMSM Material List](#)
- [SO Material List](#)



Downloadable
PDF Guidebook

Please contact CSSA at **1-888-980-9549** or stewards@cssalliance.ca

Guidebook Updates

The Canadian Stewardship Services Alliance:
Bringing better recycling options to consumers
through the delivery of harmonized service to
industry stewards.

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Improved Navigation

Part One

Part Two

Part Three



Guidebook Updates

- | | | | |
|-----|--|---------|--|
| 1.0 | Introduction | 1.9.2 | What is packaging? |
| 1.1 | What is product stewardship? | 1.9.3 | Exclusions |
| 1.2 | Why is product stewardship important? | 1.9.3.1 | Packaging for Product Categories Covered by Separate Regulation |
| 1.3 | What is the legislative framework? | 1.9.4 | What is printed paper? |
| 1.4 | What are the Provincial Stewardship Organizations? | 1.9.5 | What does "supplied to the residential consumer" mean? |
| 1.5 | What are the Provincial Stewardship Plans? | 1.10 | How do I Determine if my Business or Organization is Responsible as the Brand Owner, Franchisor or First Importer? |
| 1.6 | Determining if your organization or company is a steward | 1.10.1 | What is a brand owner? |
| 1.7 | How do I determine if my organization or company | | |



Overview of Updates to the Guidebook

Part One:

- **Section 1.7: How do I Determine Residency?** Improved and more detailed residency examples which reflect some of the discussions we have had with stewards over the past 2 years.
- **Section 1.8: What is a Voluntary Steward?** No change to the intent – standardized definition of the Voluntary Steward across the provinces in accordance with the policy and agreements
- Aligns with language in the agreements that Voluntary Stewards can only assume the responsibility for brands they own or for which they have exclusive licensing agreements
- **Section 1.9.1: What is Packaging and Printed Paper?** Definitions of Packaging and Printed now reflect definitions in the Program Plans



Part One Updates Cont'd.....

- **Section 1.9.2: Exclusions:**
 - New comprehensive overview of containers covered under separate regulation
- Explanations to help you decipher what to include in PPP report vs. what to report to other stewardship organizations for the following categories:
 - Non-alcoholic beverage containers
 - Alcoholic beverage containers
 - Paint and Coatings containers
 - Lubricating Oil containers
 - Engine Antifreeze containers
 - Diesel Exhaust Fluid Containers



Part One Updates Cont'd.....

- **Section 1.10: How to Determine if my Business is Responsible as the Brand Owner, Franchisor or First Importer?**
Updated to reflect non-resident franchisor responsibility in BC and SK
- **Section 1.11: What is a Small Business Policy?**
Updated to reflect the MOE's small business exemptions in BC and SK



Part Two Updates

- **2.0 Introduction:**
 - Annual timelines for data year, reporting and invoicing
 - Link to Stats Can site for % population distribution
- **2.1 Identify Scope**
 - There will be a link to the Steward List
- **2.3.1 Data to be Excluded from your Report**

More detail on what materials to be excluded from your reports including:

 - Durable packaging
 - Transportation and distribution packaging
 - ICI packaging
 - Products consumed on-site where the packaging is not taken home i.e. a theatre or quick-service restaurant



Part Three – National Material List Updates

- Reporting categories in the National Material List **have not changed** for any program.
- There are new reporting tips in all Milk and Milk Substitute material categories that clarify which of the milk and milk substitute beverages are on and off deposit in BC and SK (but nothing has changed).



Best Practice Reporting Tips

BEST PRACTICE REPORTING TIPS

These best practice reporting tips have been aggregated from the most common questions received when stewards are preparing their reports. If you have further questions, please contact Steward Services.

COMMON QUESTIONS	REPORTING TIPS	RELEVANT SECTOR(S)			
		ALL	RETAILERS	BRAND OWNERS	SERVICES
I ship to a distribution centre and I don't know the final destination of my product. What do I do?	If you ship products to a third party's distribution centre and are uncertain of the final destination of your products, the best approach to work with your customers to secure data about the 'sold to' parties. If however this information is not available, you may estimate the quantities of PPP supplied to each province (and sold to consumers) by referencing <u>Statistics Canada Population Percentage</u> data as provided in <u>2.0 of the Guidebook</u> .	X			
Do I report transportation packaging?	Do not report transportation packaging such as corrugate shippers or pallet wrap. Please ensure that you only report packaging materials that are supplied to the residential consumers.	X			
What do I do if I supply the same product to both commercial and	If you supply the same product to both residential consumers and to commercial customers (such as hospitals or schools) you may omit from your steward report the product supplied to your commercial customers. We recommend that you consult your sales reports which might help you determine the quantity of material supplied to consumers. Please remember that if the product is supplied to	X			



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Refreshed Steward List



2016 Program Steward Lists Available

- A list of voluntary and resident stewards for each program will be posted on CSSA's and all programs' websites – making it easier for retailers and other first importers to understand which suppliers' products to include or exclude from their reports.
- We'll also include a change log so you can easily identify any changes to last year's list and reason for the change.



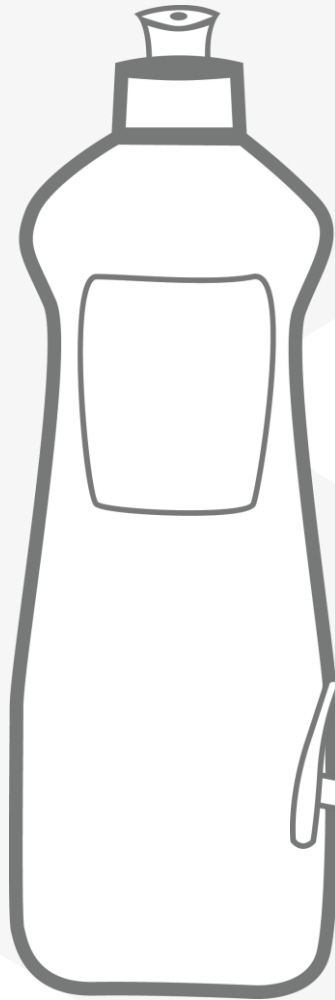
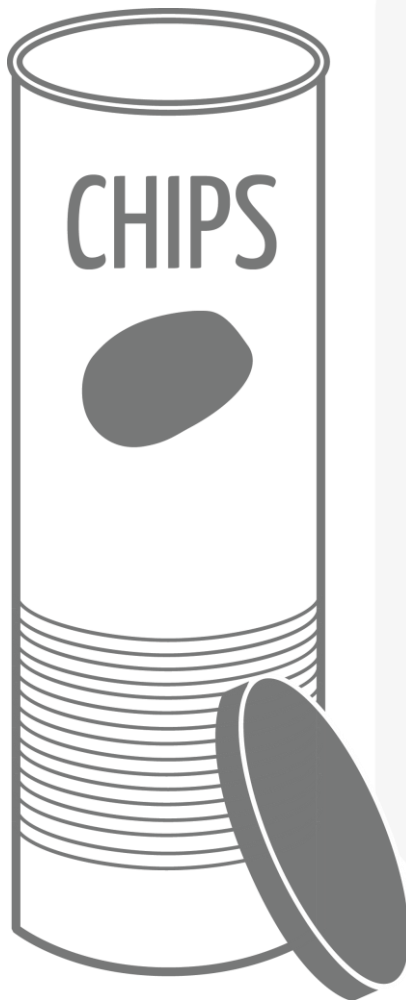
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Best Practice Reporting Tips



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Component Threshold Rule





When You Ship to a Distribution Centre

- Link in Guidebook to Statistics Canada site where population by province is provided.
- Useful when product shipped to regional distribution centre and unable to determine product's final destination.

<http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/demo02d-eng.htm>

Statistics Canada

Canada

Information for... Browse by subject Browse by key resource Help

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% change
Change in thousands
Proportion
Latest news release

Tables by

Subject
Province or territory
Metropolitan area
Alphabetical list
What's new?
Standard symbols

Latest indicator tables

Related tables: [Population estimates and projections](#)

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Population by year, by province and territory (Proportion)

	2011	2012	2013	2014	2015
	proportion of population (%)				
Canada	100.0	100.0	100.0	100.0	100.0
Newfoundland and Labrador	1.5	1.5	1.5	1.5	1.5
Prince Edward Island	0.4	0.4	0.4	0.4	0.4
Nova Scotia	2.8	2.7	2.7	2.7	2.6
New Brunswick	2.2	2.2	2.1	2.1	2.1
Quebec	23.3	23.3	23.2	23.1	23.0
Ontario	38.6	38.6	38.5	38.5	38.5
Manitoba	3.6	3.6	3.6	3.6	3.6
Saskatchewan	3.1	3.1	3.1	3.2	3.2
Alberta	11.0	11.2	11.4	11.6	11.7
British Columbia	13.1	13.1	13.0	13.0	13.1
Yukon	0.1	0.1	0.1	0.1	0.1



Program Specific Reminders

Stewardship Ontario

- Only newspaper publishers that are Members of the Canadian Newspaper Association (CNA) or the Ontario Community Newspaper Association of (OCNA) can report in the designated sub-category: *Newspaper – CNA/OCNA Members*
- Retailers supplying carry-out plastic bags – enter KGs, but optional to report number of units supplied

MMSM

- Beverage retailers that are **registered CBCRA members** complete both the MMSM section of their report and the CBCRA section
- For CBCRA materials please enter both KGs and Units supplied
- Retailers supplying single-use plastic bags - enter KGs and Units supplied.



MB CBCRA Members Take Note

TIP: MMSM materials and CBCRA materials have separate sections on the portal

This applies whether you are reporting **NATIONALLY** or **PROVINCIALY**

This is the MMSM section

Please be sure to

<<<**SCROLL DOWN**>>>

past the MMSM materials in order to report your CBCRA materials

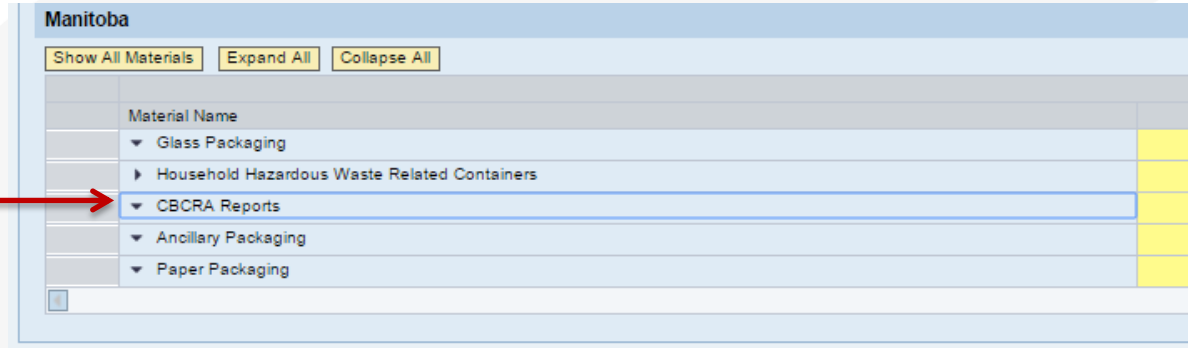
Manitoba	
Hide MaterialsExpand AllCollapse All	
	Material Name
	▼ Printed Paper
	▪ Newsprint
	▪ Magazines and Catalogues
	▪ Directories
	▪ Other Printed Materials
	▼ Paper Packaging
	▪ Gable top containers - beverage
	▪ Gable top containers - non-beverage
	▪ Aseptic containers - beverage
	▪ Aseptic containers - non-beverage
	▪ Paper Laminates
	▪ Corrugated cardboard
	▪ Boxboard and Other Paper Packaging
	▼ Plastic Packaging



CBCRA Members Scroll Down

CBCRA materials all have
CBCRA in front of each
material

It applies for NATIONAL
or PROVINCIAL reporting



TIP:

Remember that you can
click on the arrows at the
side of the header rows
to expand or collapse the
reporting categories





Program-Specific Reminders (con't)

MMBC

- If you qualify under one of the MOE's small business exemption, you are not required to submit a report or upload a Membership Agreement
- Resident stewards who supply 1-5 tonnes of printed paper and packaging - and want to pay a flat fee – can use the low-volume tool (www.multimaterialbc.ca/small-business-assessment-tool). Check the applicable boxes on the portal's Confirm Obligation section to pay the flat fee.

MMSW

- Small business exemption – (Generate less than \$2 million or more than 1 tonne or single point of retail)
- Plastic Laminate beverage pouches are **not** accepted in the SK deposit program and should be reported to MMSW



MMSW Transition Period

- MOE announced two-year transition period for two categories of stewards:
 - Resident stewards with annual revenue between \$2M and \$5M
 - Resident newspaper publishers with revenue over \$2M
- You are required to register and pay the \$500 in the 2016 Invoice Year (this year)
- Portal is open and there are special transition period questions to answer on the obligation page of the portal
- Once these stewards have registered and paid the flat fee no other action required



MMSW Transition Period Stewards Can Register

- **If you have not registered:**
 - Please log on to the portal
 - Complete registration
 - Consult the *Portal User Guide* to learn how to register with MMSW
 - You will need to answer obligations questions
 - We'll show you how in the next slides
- **If you have registered:**
 - Login and click 'Steward Reporting' from the left navigation bar
 - Select 'PPP'
 - Confirm obligation questions
 - Click 'I want to report in MMBC as a Low Volume Steward or register in MMSW to pay the flat fee. Then, click 'next'.
 - Read the Terms & Conditions, tick the check box, and click 'Submit'.



MMSW Transition Period Stewards

When you land on the
'Obligation' section you
will be prompted to
answer several questions

Transition Period stewards
**only click the Transition
Period question** each year

Then, click 'Confirm Answers'
for each year and then click
'Next'

Program Type **Obligation** Preferences Enter Data Methodology Brands & Affiliates

◀ Previous Next ▶

Packaging and Printed Paper (PPP)

	Checked = Yes	Obligation Status	Report Status
▼ 2016 Report (2015 data, 2017 invoice)			
▼ Multi-Material Stewardship Western		I am not obligated	Confirm Answers
• Is your organization resident in Saskatchewan?	☐		
• Does your organization supply Packaging and Printed Paper in the Saskatchewan residential market?	☐		
• Does your organization operate point(s) of retail for, or is a brand owner, first importer, or franchisor of Packaging and Printed Paper?	☐		
• (Non-Residency in SK) Is your organization registering as a voluntary steward for the MMSW Program?	☐		
• Are you a resident business required to register during the Transition Period?	☒		
▼ 2015 Report (2014 data, 2016 invoice)			
▼ Multi-Material Stewardship Western		Obligated	Confirm Answers
• Is your organization resident in Saskatchewan?	☐		
• Does your organization supply Packaging and Printed Paper in the Saskatchewan residential market?	☐		
• Does your organization operate point(s) of retail for, or is a brand owner, first importer, or franchisor of Packaging and Printed Paper?	☐		
• (Non-Residency in SK) Is your organization registering as a voluntary steward for the MMSW Program?	☐		
• Are you a resident business required to register during the Transition Period and pay the flat fee?	☒		
▼ 2014 Report (2013 data, 2015 invoice)			
▼ Multi-Material Stewardship Western		Obligated	Confirm Answers
• Is your organization resident in Saskatchewan?	☐		
• Does your organization supply Packaging and Printed Paper in the Saskatchewan residential market?	☐		
• Does your organization operate point(s) of retail for, or is a brand owner, first importer, or franchisor of Packaging and Printed Paper?	☐		
• (Non-Residency in SK) Is your organization registering as a voluntary steward for the MMSW Program?	☐		
• Are you a resident business required to register during the Transition Period?	☒		



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Portal Tips



One-Time MA Upload

- Stewards only need to sign and upload their membership agreements for MMBC and MMSW once – when they join the program
- While MMBC and MMSW may make changes to the MA from year to year, you are not required to re-sign and upload the MA



Cut and Paste Function Change

In prior years we introduced an administrative convenience to allow for a “cut and paste” for sections of your METHODOLOGY

The screenshot shows a web form for a 2016 Report. At the top, there are tabs for Program Type, Obligation, Preferences, Enter Data, Methodology, Brands & Affiliates, and Submit Report. The 'Methodology' tab is selected and circled in red. A red arrow points from the text 'cut and paste' in the left column to this tab. Below the tabs, there are sections for Data, Changes, Deductions, and Increases/Decreases. The 'Increases/Decreases' section is circled in red, and a red arrow points from the text 'increases or decreases manually' in the bottom column to it. The form includes a 'Save' button at the bottom left.

Welcome [redacted] | Steward# [redacted]

Program Type | Obligation | Preferences | Enter Data | **Methodology** | Brands & Affiliates | Submit Report

2016 Report (2015 data, 2017 invoice) Report Status/New Report

[Copy from previous report](#)

Data

How did you arrive at the numbers you have used to fill out your report? Please provide information on any tools used (e.g., software, mathematical formulas, weights of packaging, average bill of materials [ABOM]).

Changes

Have you made any changes to your methodology from the previous report (e.g., discontinued use of calculators)?

Deductions

What type of packaging and printed paper materials were not included in your report, why were they deducted from your report (e.g., consumed onsite), and how was this determined/calculated (e.g., customer survey)?

Increases/Decreases

If a particular material has significantly increased/decreased (by 20% or more), or if you are reporting different materials from your last report, please explain why (e.g., have you experienced decreases/increases in sales, switched to a light weight material or discontinued a product line?).

[Save](#)

To support CSSA’s report review process and to enable accurate fee setting, please input any significant year over year increases or decreases *manually* to help us understand any fluctuations in your reported kilograms



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Steward Initiated Adjustment Policy



Adjustment Policy Clarified

- The adjustment policy is not new but it is now captured in a policy document that will be posted
- Highlights of the policy are:
 - Stewards can request adjustments to reports going back a maximum of two years from the report submission due date.
 - Adjustments made as a result of a methodology change are not accepted



Adjustments can go back two years from report submission due date

REPORT	2014 Report (2013 Data)	2015 Report (2014 Data)	2016 Report (2015 Data)	2017 Report (2016 Data)
Deadline for Adjustment Request	May 31, 2016	May 31, 2017	May 31, 2018	May 31, 2019



Some adjustment requests cannot be accepted

- Methodology changes
 - Changes from the use of calculators to the reporting of “actual” quantities
 - Subsequent application of studies that revise quantities
- Adjustments on adjustments
 - No requests for changes to a report for which a previous adjustment was submitted and either rejected or accepted
- Changes to your business model
 - Divestments, mergers or acquisitions
- Adjustments for which inadequate substantiation is provided



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Voluntary Stewards



Voluntary Steward Policy

- Definition of Voluntary Steward has been harmonized across all programs
- An organization can become a Voluntary Steward if it meets the following criteria:
 - Not obligated to take on stewardship obligations in the relevant province and not resident in that province
 - Resident in Canada
 - Holds exclusive licensing agreement to sell those products for which it is reporting
 - Supplies more than the de minimis tonnage in that province



Voluntary Stewards

Please remember:

- Voluntary Stewards can only assume the responsibility to report and pay fees on those materials for which it the brand owner or for which it holds the exclusive licensing agreement.
- The Voluntary Steward deadline for this year's reporting has passed – December 31, 2015
- If you would like to report in 2017, you have until December 31st 2016, to execute a Voluntary Steward Agreement.



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Rules and Membership Agreements



Stewardship Ontario Rules Changes minor

- Definition of “Data Year” has been expanded to accommodate new stewards in Section 3.2
- Reference to Adjustment Policy added to Section 3.2
- Standardized definition of Voluntary Steward added
- Minor administrative changes
- A clean version of the new rules will be posted shortly after the webinar for steward review and comment
- Please submit any comments within 30 days of the posting date



Membership Agreements Changes Minor

- There are no significant changes to the BC and SK Membership Agreements
 - Voluntary Steward definition standardized
 - Minor administrative changes (date changes)
- Updated versions will be posted on MMBC and MMSW sites before March 31st
- Reminder - deadline for exiting MMBC and MMSW stewards is May 1st



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Questions



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