



**Canadian Stewardship
Services Alliance**

Ready to Report

Webinar for New Steward Reporters

2020 Packaging and Paper Product Reports

Calla Farn, VP Corporate Affairs

Natalia Chornobay & Paolo Di Bartolomeo, NSS

Mike Terry, Project Management Office

February 25, 2020



**Canadian Stewardship
Services Alliance**

Welcome

- Packaging and Paper Product (PPP) reporting basics
- Resources available to stewards
- Poll questions



Contact NSS: 1-888-980-9549 or stewards@cssalliance.ca



Webcast Information

- ① Main screen displays slides, videos and polls
- ② Current speaker is identified
- ③ Submit your questions
- ④ Direct links to documents and resources

The screenshot shows a webcast interface. On the left, there is a 'Media Player' window (callout 2) displaying a slide with a photo of Calla Farn, Vice-President, Corporate Affairs. Below the media player is a 'Q&A' window (callout 3) with a text input field 'Please enter a question' and a 'Submit' button. At the bottom left is a 'Resource List' window (callout 4) containing links to 'Report to Stewards', 'Today's Presentation', and 'Program Plan Consultation'. On the right, the main 'Slides' window (callout 1) displays the title 'Ready to Report' and 'Webinar for New Stewards and Reporters', followed by the topic 'Packaging and Paper Product Reports' and the speakers 'Calla Farn, VP Corporate Affairs' and 'Natalia Chornobay & Paolo Di Bartolomeo, NSS'. At the bottom right, there is a navigation bar with icons for a presentation, video, document, question mark, Q&A, and user profile.

Technical issues? Send a note in the Q&A box



Agenda

1. Steward Obligation and Onboarding
2. Reporting Resources
3. Data Preparation
4. WeRecycle Portal
5. Report Validation
6. Questions & Answers



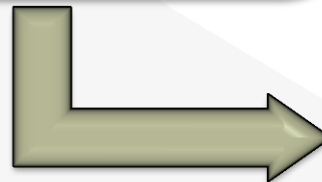
Reporting and Invoice Cycle

Annual Report by
May 31

- Contains data from previous year



Reports inform fee
setting process



Invoices issued
in January

- 2020 report is based on 2019 data;
- Informs 2021 invoices.



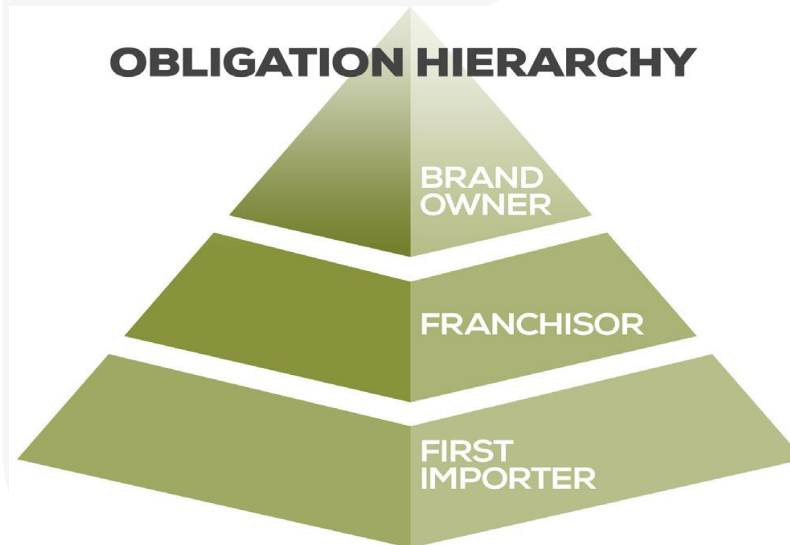
Overview

- Determining and understanding your obligation
- Exemptions from reporting
- Voluntary Stewards
- Onboarding
- Preparing Your Report – Resources



PPP Reporting Obligation

- ✓ Resident
- ✓ Supply designated PPP materials
- ✓ Hierarchy – Brand Owner, First Importer, Franchisor





Understanding Your Obligation

- Determining which organization reports
 - Program specific exemptions
 - Voluntary Stewards
- Onboarding as a newly registered Steward
 - Stewards have a financial responsibility to fund PPP programs
 - Invoice for each year that they supply PPP into the market



Program Exemptions

	Recycle BC	MMSW	MMSM	Stewardship Ontario
Implementation & Industry Share of Obligation	2014 100%	2016 75%	2010 80%	2004 50%
Gross Annual Revenue Exemption	<\$1 Million	<\$2 Million	<\$750,000	<\$2 Million
Tonnage Exemption	<1,000kg	< 1,000kg	No exemption	<15,000* kg
Other Exemptions	Single point of retail (only applicable to retailers)	Single point of retail (only applicable to retailers)	No exemption	No exemption



Voluntary Stewards

- Voluntary stewards are organizations that have assumed responsibility for their PPP in jurisdictions where they do not have residency
 - Policy available
 - Exemption thresholds related to revenue and kilograms do not apply
- Steward Lists
 - Identify resident suppliers and voluntary stewards
 - Avoid double reporting of material



Onboarding Principles

- **Fairness**
 - Ensures stewards pay fees in all periods they supply obligated PPP
 - Subject to Penalty and Interest Policy
- **Cost effective program operation**
- **Estimates or data extrapolation may be required**



Onboarding Example

New Steward that began operations on Oct 17, 2018

	Invoice	Report	Data	Due
1 st	2018	2017	Oct-Dec 2018 * as a proxy for 2016 data	Register: Dec 16, 2018 Report: Feb 14, 2019
2 nd	2019	2018	Oct-Dec 2018 Extrapolated (12 months) * as a proxy for 2017 data	Feb 14, 2019
3 rd	2020	2019	Oct-Dec 2018 Extrapolated (12 months)* as a proxy for 2018 data	May 31, 2019
4 th	2021	2020	2019	May 31, 2020



2020 Reporting Resources

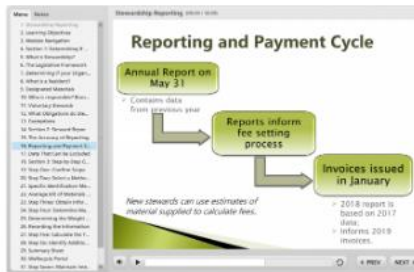
2020 Guidebook for Stewards



Materials Tool



Reporting Overview Tutorial



ABOM Tutorial



- ▶ Using the WeRecycle Portal
- ▶ Rules, Policies & Forms
- ▶ Preparing Your Report
- ▶ Ready to Report Webinars

Contact NSS: 1-888-980-9549 or stewards@cssalliance.ca



**Canadian Stewardship
Services Alliance**

Guidebook For Stewards



Helping Businesses Meet
Their Packaging & Paper
Product Recycling Obligations
in Canada

Updated January 2020

GUIDEBOOK FOR STEWARDS

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

Part One:
Are you a steward?

Part Two:
*How to prepare your
steward report*

Part Three:
WeRecycle Material List



Reporting Overview Tutorial

Menu **Notes**

1. Stewardship Reporting
- 2. Learning Objectives**
3. Module Navigation
4. Section 1: Determining If You...
5. What is Stewardship?
6. The Legislative Framework
7. Determining if your Organiza...
8. What Is a Resident?
9. Designated Materials
10. Who is responsible? Brand O...
11. Voluntary Stewards
12. What Obligations do Stewar...
13. Exemptions
14. Section 2: Steward Reportin...
15. The Accuracy of Reporting
16. Reporting and Payment Cycle
17. Data That Can be Excluded
18. Section 3: Step-by-Step Guid...
19. Step One: Confirm Scope
20. Step Two: Select a Methodol...
21. Specific Identification Method
22. Average Bill of Materials Me...
23. Step Three: Obtain Informat...
24. Step Four: Determine Materi...
25. Determining the Weight of ...
26. Recording the Information
27. Step Five: Calculate the Tota...
28. Step Six: Identify Additional ...

Stewardship Reporting (01:09 / 18:34)

Learning Objectives

- Preparing and filing annual steward reports
- PPP = Packaging and Paper Product
- Overview of reporting concepts and process
- Resources:
 - Guidebook
 - National Steward Services



Accurate Reporting

- Reports must be accurate to ensure fair material rates
- When considering scope, remember to only include PPP:
 - Supplied to consumers in the applicable province;
 - Associated with brands for which you are the brand owner, the first importer, or the franchisor; and
 - Only include designated PPP





Materials Overview

- Report only designated PPP supplied to consumers
- Exclusions: IC&I, Transportation/Distribution, Durable
- Deductions: form required
- PPP material categories and sub-categories:
 - Paper Products
 - Packaging: Paper, Plastic, Steel, Aluminum, Glass
- Components





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Materials Tool



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Is it packaging?



Is it paper product?

Not sure? 



Data Preparation

- Calculate total weights for each material category
- Set up spreadsheet(s)
- Obtain sales data
- Workbook xls file

Per Product						Total			
Product	Other Printed Paper (kg)	Plastic – PET (kg)	Glass – Clear (kg)	Steel – Cans (kg)	SALES QUANTITY	Other Printed Paper (kg)	Plastic – PET (kg)	Glass – Clear (kg)	Steel – Cans (kg)
Product A	--	0.01	0.2	---	1,000	--	10.0	200.0	--
Product B	0.03	0.05	--	0.1	5,000	150.0	250.0	--	500.0
					TOTAL	150.0	260.0	200.0	500.0



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Your Methodology

- Outline preparation of data
- Changes to process or method
- Increases and decreases?
- Maintain records





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WeRecycle Portal

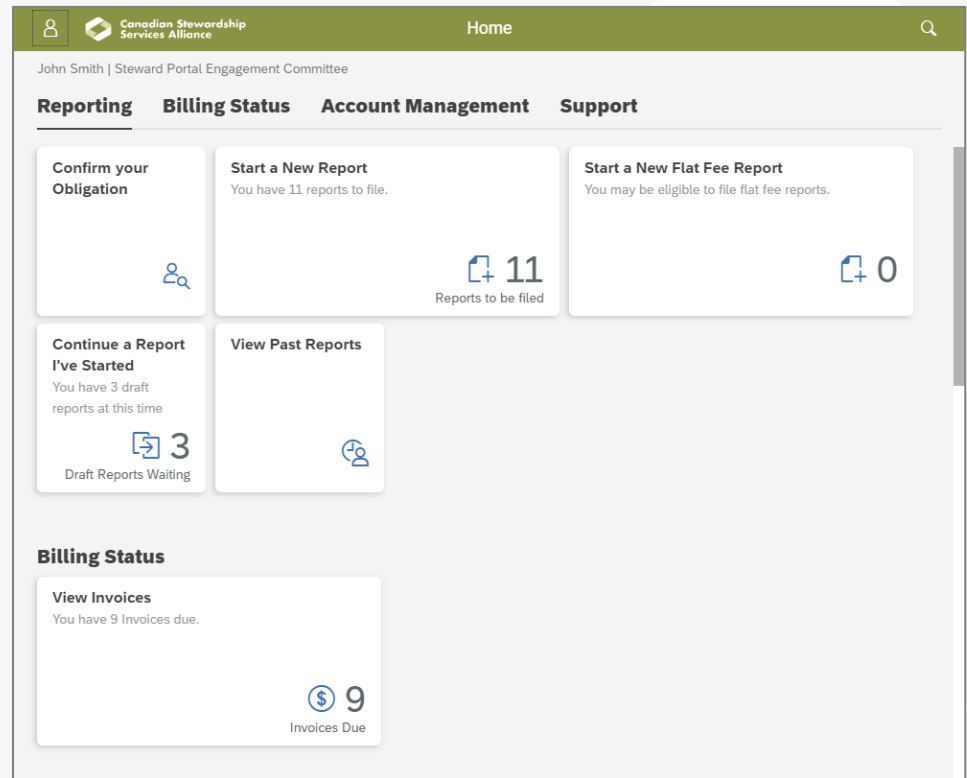
- 2020 upgrade!
- User ID and password
- Manage contacts
- Register for programs
- Membership Agreements
- Confirm obligation
- Submit reports
- Review reports/invoices

A screenshot of the WeRecycle Portal login page. The page has a green header with the text "Welcome to the WeRecycle Portal!". Below the header is the Canadian Stewardship Services Alliance logo. There are two input fields: "User ID" and "Password". The "Password" field has a toggle icon (an eye) to the right. Below the "Password" field is a link that says "Did you forget your password?". Below that is a green "Login" button. At the bottom of the login section, there is a link that says "New to the WeRecycle Portal? Create an Account". The footer of the page contains logos for RECYCLEBC, Multi-Material Stewardship Western, MMSM Multi-Material Stewardship Manitoba, Stewardship Ontario, and Automotive Materials Stewardship.



Annual Portal Actions

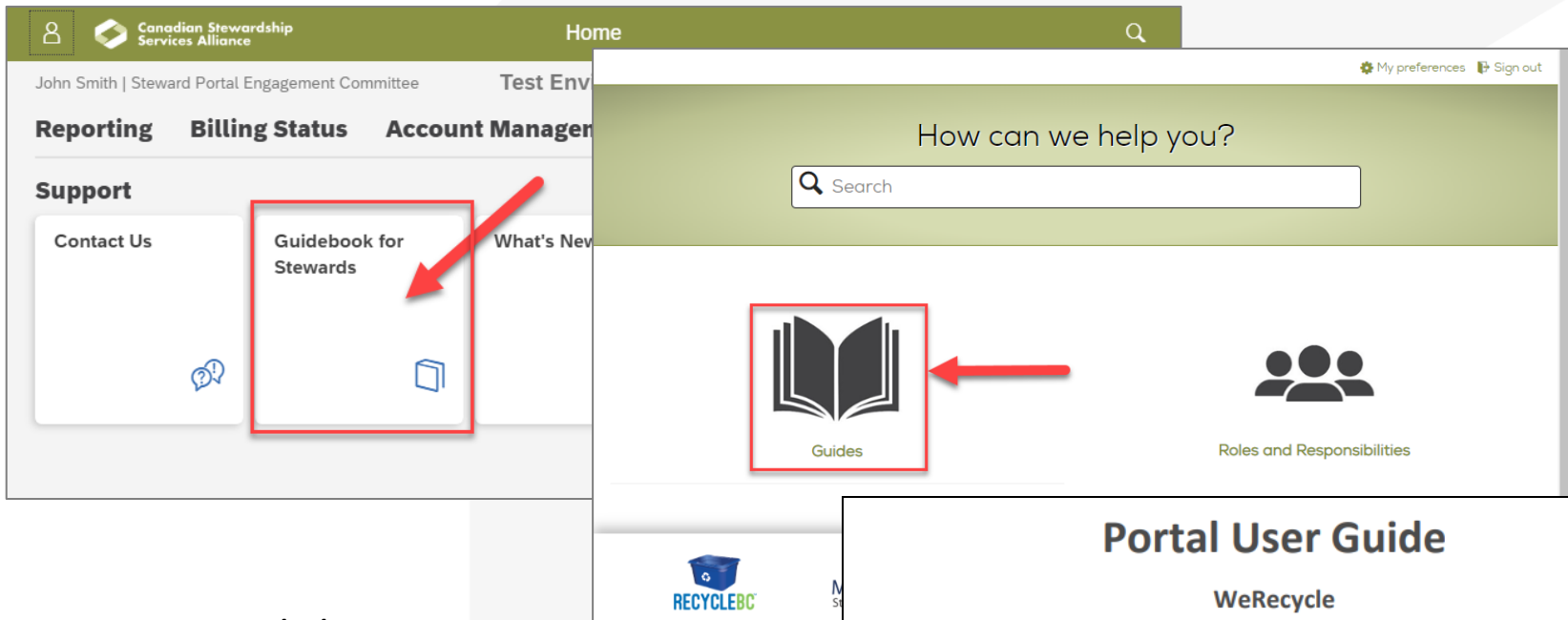
1. Make sure contacts are up to date
2. Confirm obligation
3. Submit reports
4. Invoices
\$5000 or less payable via Portal





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Guidance and Assistance Available

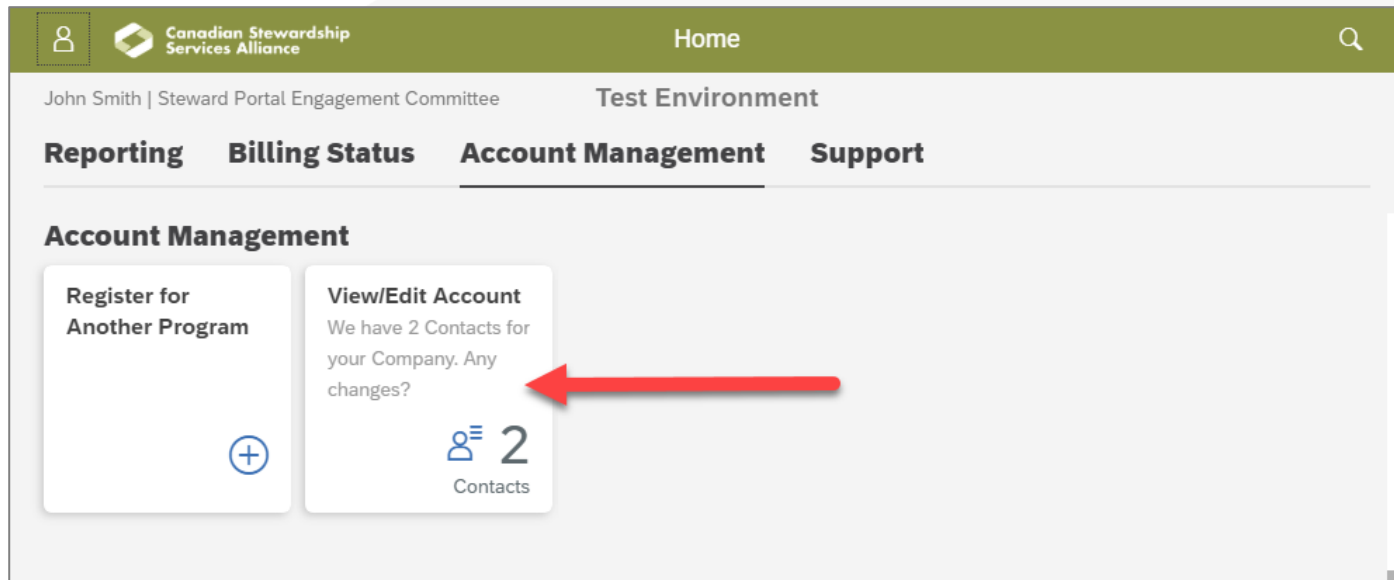


*Click icon to
access
Guidebook
information*





Manage Contacts



- Manage separately for each program;
- Must have Primary Contact (prepare and submit reports, manage contacts, obligation)
- Secondary, Billing and Environmental Lead Contacts



Obligation

- Must confirm before reporting!
- Table indicates where confirmation is needed

John Smith | Steward Portal Engagement Committee

Test Environment

Reporting Billing Status Account Management Support

Confirm your Obligation

Start a New Report
You have 11 reports to file.

Continue a Report I've Started
You have 3 draft reports at this time

View Past Reports

Choose a Program

The check mark(s) in the table below shows the years your organization has indicated it is obligated to submit reports and the question marks indicate the years that are outstanding. Click on the icons to view the obligation questions and to determine your reporting requirement for the outstanding years.
Please complete all obligation questions for the outstanding years.

Your Obligation Status	2020 Report (2019 data, 2021 invoice)	2019 Report (2018 data, 2020 invoice)	2018 Report (2017 data, 2019 invoice)	2017 Report (2016 data, 2018 invoice)	2016 Report (2015 data, 2017 invoice)
Recycle BC	✓	✓	✓	✓	
Multi-Material Stewardship Western	✓	✓	✓	✗	
Multi-Material Stewardship Manitoba	?	✓	✓	✗	
Stewardship C			✓	✓	

Questions to be Answered - Multi-Material Stewardship Manitoba 2021

You still need to answer your obligation questions for **Multi-Material Stewardship Manitoba for 2021**.

Did you make a mistake when answering the questions?
No problem, give us a call at 1-888-980-9549 and we can reset your answers for you

Close




Obligation Options

- Obligated: confirm resident and obligated
- Voluntary: confirm voluntary
- Not Obligated: indicate why not obligated
- Unsure: answer questions to determine obligation

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Confirm your Obligation 



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Test Environment



Determining Your Obligation(s)

Multi-Material Stewardship Western • 2021 invoice, 2020 Report (2019 data)

Is your organization an Obligated Steward under the **Saskatchewan Multi-Material Stewardship Western** in the following period: **2021 invoice, 2020 report (2019 data)**?

Obligated Stewards will be invoiced in January **2021** based on their **2020** Annual Steward Report submitted by **May 31st, 2020** (based on **2019** data).

 [More Information](#)



Reporting

- Three options: Start New, Start Flat Fee (BC and SK), Continue
- Table shows where reports are needed, started, finished; choose a year, program

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Test Environment

Reporting Billing Status Account Management Support

Confirm your Obligation

Start a New Report
You have 11 reports to file.

Start a New Flat Fee Report
You may be eligible to file flat fee reports.

Continue a Report I've Started
You have 3 draft reports at this time

View Past Reports

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Steward Reporting

Test Environment

Program

Program	2020 Report (2019 data, 2021 invoice)	2019 Report (2018 data, 2020 invoice)	2018 Report (2017 data, 2019 invoice)	2017 Report (2016 data, 2018 invoice)
Recycle BC		✓	✓	✓
Multi-Material Stewardship Western			✓	✗
Multi-Material Stewardship Manitoba	?	✓	✓	✗
Stewardship Ontario Blue Box	?	✓	✓	✓



Reporting Options

- Indicate up front if any apply to a report:
 - Report by percent
 - Program material list
 - Divisions
 - Calculators
- Streamlines experience for simple reports
- Drives presentation of screens later on

A screenshot of a web application interface for the Canadian Stewardship Services Alliance. The header bar is green with a user profile icon, navigation arrows, the organization's name, a dropdown menu labeled 'St...', and search/magnifying glass icons. Below the header, the user 'Michael Terry | Widget Retail Inc.' is logged in. A green tab labeled '1 Program' is active. The main content area contains a form with the following sections:
5. Do any of the following apply to your report:
Report by Percentage
Report using Provincial Material List
Report with Divisions
Report with Product Calculators
Buttons: Yes (selected), No
6. Report by Percentage
Buttons: Report by Percentage (selected), Report by Kg
7. Choose a Material List
Buttons: National List (selected), Provincial List
8. Report Using Divisions
Buttons: Report Without Divisions (selected), Report With Multiple Divisions
9. Report Using Product Calculators
Buttons: Yes (selected), No
At the bottom is a green 'Save Preferences' button.



Enter Reporting Data

- Hover to highlight material row; selected cell is orange
- Click and drag to resize columns (like Excel)
- When data complete, must be submitted by Primary Contact

Material Quantities: First Division						
Material		Total All programs	MMSM	BC	SO	
▼ Printed Paper						
Newspaper-CNA/OCNA Members	KG				<input type="text"/>	
Other Newsprint-Non-CNA/OCNA Members	KG				<input type="text"/>	
Newspapers	KG		<input type="text" value="1000"/>	<input type="text" value="1000"/>		
Newsprint (inserts and circulars)	KG		<input type="text" value="1"/>	<input type="text"/>		
Magazines	KG		<input type="text"/>	<input type="text"/>	<input type="text" value="1000"/>	
Catalogues	KG		<input type="text" value="1000"/>	<input type="text" value="1000"/>	<input type="text" value="1000"/>	
Directories	KG		<input type="text" value="1000"/>	<input type="text" value="1000"/>	<input type="text" value="1000"/>	



Methodology

- Explain how you calculated your figures
- Detail is appreciated

Steward Reporting ▾

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Test Environment

Material Quantities

MethodologyBrands & Affiliates

Tell us About Your Methodology

2020 Report (2019 data, 2021 invoice)

Copy From Previous Report

Please take a few moments to complete the following sections as the information is very helpful when conducting report validations.

1. Preparation of Data



Please clearly describe the process you have used to calculate the data you reported.How did you calculate your obligated sales? *(Did you use sold-to sales information, bill-to sales information, population percentage method, etc.).*How did you calculate your weights? *(ABOM, supplemental calculator, vendor provided the information, used a scale to weigh packaging components, etc.)*

Conducted packaging audit for each SKU...





Submitting Completed Report

- Make sure logged in as Primary, all sections complete, accept terms and conditions




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Steward Reporting 




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Test Environment

 Material Quantities

 Methodology

 Brands & Affiliates

 Report Submission

2020 Report (2019 data, 2021 invoice)

Your Organization's Annual Steward Report

Company: **Steward Portal Engagement Committee**

Name: **John Smith**

Steward No: **0001008837**

Title: **Analyst**

Canadian Stewardship Services Alliance 2020 Report (2019 data, 2021 invoice)

82,300 kg

2. Terms and Conditions

[Download Terms and conditions](#)

Terms and Conditions

By clicking on the button below, you confirm the following:

- You are either the Primary Contact for your company or are the authorized agent for the Steward that you are reporting on behalf of.
- You have read the program rules and/or have uploaded your signed membership agreement.
- The information and data contained in your report and any uploaded documents are complete and accurate.
- Where applicable, your deduction declaration form will be provided by the report submission deadline and you will provide documentation to support your deductions upon request.
- You understand and agree that your company must retain supporting documentation for five years from submission date and that your report may be subject to audit.

☒ I agree and confirm the above

Submit Report



Report Validation

- All reports are reviewed for accuracy – vital step in fee setting
- Validation process begins with submitted report
- Common issues include:
 - Updates to brands and methodology.
 - Explanation of material tonnage variances
 - Deduction methodology review



**Canadian Stewardship
Services Alliance**

Q&A

Reporting deadline is May 31
Webinar presentation available online

Contact NSS: 1-888-980-9549 or stewards@cssalliance.ca



**Canadian Stewardship
Services Alliance**

Thank You!

www.cssalliance.ca

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