



**Canadian Stewardship
Services Alliance**

Preparing for the 2014 Reporting Year

A webinar for Stewards of packaging and
printed paper in British Columbia,
Saskatchewan, Manitoba and Ontario

March 20, 2014



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 Objective

- Ensure packaging and printed paper stewards in multiple jurisdictions are prepared to meet their 2014 reporting and membership obligations
- Answer your questions about how best to prepare



Agenda

1. Important Dates
2. Upgrades to the WeRecycle Portal
3. New National Steward Guidebook
4. Revisions to the MMBC's membership agreement
5. Questions



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Important Dates to Remember



Mark these dates

Program/Stewards	Action	Date
MMBC, MMSM, Stewardship Ontario	Steward Reports due	May 31, 2014
New Voluntary Stewards (MMSM and MMBC)	Register and sign a Membership Agreement	May 1, 2014
MMSW Stewards	Steward Reports due	June 30, 2014
MMSW Voluntary Stewards	Registered and sign a Membership Agreement	June 1, 2014

Small business /low volume assessment tool

- BC and SK stewards only
 - Available in April



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Enhancements to the WeRecycle Portal

New Navigation Menu

Designed to help stewards move easily to key places throughout the WeRecycle Portal



- Home
- Program Registration
- ▼ Maintain Information
 - Contact Information
 - Company Information
- ▼ Steward Reporting
 - Complete Report
 - View Report
 - Print Report
- Steward Invoice
- Steward Search
- ▼ Special Reports

Welcome March Webinar | Steward# 1006404

Home



Canadian Stewardship Services Alliance



Welcome to CSSA

Please click on "Program Registration" to register for available programs.

If you are ready to report, please click "Steward Reporting" on the left column.



New Programs Available

If your company is obligated in the following programs, please register.

User friendly registration for multiple programs

Stewards may now register for any/all programs for which they are obligated to report



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- Home
- **Program Registration**
- ▶ Maintain Information
- ▶ Steward Reporting
- Steward Invoice
- Steward Search
- ▶ Special Reports

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Steward Program Registration

Start Registration

Program Selection

Obligation

Programs available for selection:

- Stewardship Ontario Blue Box
- Stewardship Ontario MHSW
- Multi-Material Stewardship Manitoba
- Multi-Material Stewardship Western
- Multi-Material British Columbia

Register as a Voluntary Steward for MMBC, MMSM, and MMSW

Prompts are clearer for voluntary stewards

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Steward Program Registration

	Checked = Yes	Obligation Status
▼ Obligation Year: January 1, 2014 - December 31, 2014		
▼ Stewardship Ontario Blue Box		Confirmed - I am obligated
▪ Did your company distribute Designated Blue Box Waste in Ontario?	<input checked="" type="checkbox"/>	
▪ Did your company have gross sales of \$2 million or more in Ontario?	<input checked="" type="checkbox"/>	
▪ Was your company resident in Ontario?	<input checked="" type="checkbox"/>	
▼ Multi-Material Stewardship Manitoba		Confirmed - I am obligated
▪ Did your company distribute Printed Paper and Packaging in Manitoba?	<input type="checkbox"/>	
▪ Did your company have gross sales of \$750,000 or more in Manitoba?	<input type="checkbox"/>	
▪ Was your company resident in Manitoba?	<input type="checkbox"/>	
▪ (Non-Residency in MB) Is your organization registering as a voluntary steward for the MMSM Program?	<input checked="" type="checkbox"/>	
▼ Multi-Material Stewardship Western		Confirmed - I am obligated
▪ Is your company resident in Saskatchewan?	<input type="checkbox"/>	
▪ Does your company supply Packaging and Printed Paper in the Saskatchewan residential market?	<input type="checkbox"/>	
▪ (Non-Residency in SK) Is your company registering as a voluntary steward for the MMSW Program?	<input checked="" type="checkbox"/>	
▪ Did your company have less than \$750,000 in revenues in Saskatchewan? If yes, please complete your registration and contact us	<input type="checkbox"/>	
▪ Do you estimate that your company supplied less than 5,000Kg of PPP? If yes, please complete your registration and contact us	<input type="checkbox"/>	
▼ Multi-Material British Columbia		Confirmed - I am obligated
▪ Does your organization have residency in BC?	<input type="checkbox"/>	
▪ Does your organization supply Packaging and Printed Paper into the BC residential market?	<input type="checkbox"/>	
▪ Is your organization a brand owner, first importer, or franchisor of Packaging and Printed Paper?	<input type="checkbox"/>	
▪ (Non-Residency in BC) Is your organization registering as a voluntary steward for the MMBC Program?	<input checked="" type="checkbox"/>	
▪ Did your company have less than \$1 million in revenues in British Columbia? If yes, please complete your registration and contact us	<input type="checkbox"/>	
▪ Do you estimate that your company supplied less than 5,000Kg of PPP? If yes, please complete your registration and contact us	<input type="checkbox"/>	

Maintain and manage your own contacts

- Create and delete new contacts
- Manage roles (i.e., make a contact either Billing, Secondary, or Environmental)

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Maintain Contacts Information

If you are **registering for a new program**, please ensure the role **PRIMARY CONTACT** has been assigned to one of your contacts.

To assign or modify contact roles (Primary, Secondary, Billing, Environmental) - Click on **Manage roles**.

To create a new contact - Click on **Add another contact**.

To modify contact information (email address, telephone number) - Click on the **contact's name**.

[Add another contact](#)

Name	Job Title	* Telephone	Ext	* Email Address
March Webinar	Steward Services	416-555-5555	N/A	hwoods@cssalliance.ca
User id: WEBINAR	Program	Role		
Manage roles	Stewardship Ontario Blue Box	Primary Contact		
	Multi-Material Stewardship Manitoba	Primary Contact		
	Multi-Material Stewardship Western	Primary Contact		
	Multi-Material British Columbia	Primary Contact		

Customize your reporting and payment preferences

Choose how to enter your data and how to be invoiced (either provincially or nationally)

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

◀ Previous | Next ▶

Reporting for program: Printed Packaging and Paper (PPP) , Year: 2015

- I want to use a National Material List (Displays all materials covered by CSSA programs)
 - I want to report nationally (Reporting nationally allows you to see all provinces on one screen)
 - Report using the national list entering percentages by province
 - Report using the national list entering data by province
 - I want one national invoice
 - I want provincial invoices
 - I want to report provincially (Reporting provincially allows you to use the National List, but you report one province at a time)
- I want to use a Provincial Material List (Displays provincially-specific materials)

Billing Options

- Receive invoices on a quarterly basis
- Receive four invoices with quarterly due dates
- Receive one invoice for the full amount

Report for multiple provinces on a single screen

Report Nationally for MMSM, Stewardship Ontario, MMSW, and MMBC



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

◀ Previous | Save | Next ▶

Printed Packaging and Paper (PPP) Reporting Year: 2015 Report Status:

Divisions

Divisions

- Must be created for each portal calculator used
- Can be used to report data according to your organizational structure
- Please call Steward Services for assistance regarding divisions (1-888-980-9549)

[Add Division](#) [Delete Division](#)

Division Id	Name	Total KGs
001	March Webinar	1,554,784

Division Name PO Number

Total Fee

National Material List

[Expand All](#) [Collapse All](#) [Calculate Totals](#) [Show Prior Report's Data](#)

Material Name	Total	BC		SK		MB
		KGs (Except where	UoM	KGs (Except where	UoM	KGs (Exce
▼ Printed Paper	1,400,000	800,000		200,000		
▪ Newspaper—CNA/OCNA Members	0	0	Kg	0	Kg	
▪ Other Newsprint—Non-CNA/OCNA Members	0	0	Kg	0	Kg	
▪ Newspapers	1,400,000	800,000	Kg	200,000	Kg	

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Program Type | Obligation | Preferences | Enter Data | **Methodology**

◀ Previous Next ▶

Reporting Year 2015 Report Status BB Rpt In Progress

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]).

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Changes

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

Duis quam nibh, adipiscing faucibus massa id, eleifend bibendum ipsum. Nam risus dolor, mattis nec cursus ac, interdum eget mauris.

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)?

Phasellus consectetur justo velit, eu pulvinar orci faucibus ut. Duis facilisis lectus ac metus dignissim ullamcorper.

Increases/Decreases

If your data has significantly increased/decreased, please explain why (e.g., have you switched to light-weight packaging or experienced increased sales)?

Cras vitae gravida odio. Phasellus id scelerisque tellus. Nulla facilisi.

Save time
entering your
Methodology

Click on the
button to
copy and
paste from
previous
reports.

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Data successfully saved

Brands & Affiliates

Submit Report

◀ Previous Next ▶

Program Year 2015 Reporting Status BB Rpt In Progress

Brands

Please list each brand name, trademark, and/or publication title for which you have reported data, including all your private labels and brands for which you are the first importer.

[Download Template](#) [Upload Completed Spreadsheet](#) [Copy from previous report](#)

Brands	Brands	Brands
Brand X		

Changes

Where applicable please document any brands, private labels etc. that you removed or added from your previous report. Please provide rationale for the changes (e.g. a sale or acquisition of a brand), the name of the purchaser or seller; and the date of the transaction(s).

[Copy from previous report](#)

We removed Brand X from sales due to Company B's acquisition of said product

Affiliates and/or Franchisees

Please list the names of all affiliated companies and franchisee locations that you have included in your report.

[Download Template](#) [Upload Completed Spreadsheet](#) [Copy from previous report](#)

Companies	Companies	Companies
Affiliate X		

Save time entering info in Brands & Affiliates Section

Click on the button to copy and paste from previous reports

You can also download an Excel format template and use it to upload hundreds or thousands of brands at once



Print Report Section Updated

See a snapshot view of Submission Detail Reports for all of your programs



- Home
- Program Registration
- Maintain Information
- Steward Reporting
 - Complete Report
 - View Report
 - Print Report**
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Steward Print Report

Below you can see list of available reports. You can view or download the report using the appropriate buttons.

	Invoice Year	Description	Sales Doc.	Report Status	Download Document
	2014	Stewardship Ontario Blue Box	18870	Year locked	Download
	2014	Multi-Material Stewardship Manitoba	18871	Year locked	Download
	2014	Multi-Material British Columbia	18872	Year locked	Download

Review your invoices and payment status

View paid and outstanding invoices for each program

- Home
- Program Registration
- Maintain Information
- Steward Reporting
 - Complete Report
 - View Report
 - Print Report
- Steward Invoice**
- Steward Search
- Special Reports

Welcome Henrik Woods | Steward# 1000002

Steward invoices

You may view your invoice(s) by clicking "view"
Any unpaid invoices are flagged with a red dot:
- Payment status will be updated within 72 hours of payment
- Please note, Invoices will not be populated with fees until fee setting has been completed

[Terms and policies](#)

Program	Invoice year	Assignment	Billing Doc.	Originating doc	Net Value	Tax amount	Document	Document	Paid
							View	Download	⚠
							View	Download	⚠
							View	Download	⚠
							View	Download	🔴 Pay with Credit card
							View	Download	🔴 Pay with Credit card
							View	Download	🔴 Pay with Credit card
							View	Download	🔴 Pay with Credit card
							View	Download	🟢

Please note that invoices will only be available to view once fees are published and invoices have been released

Welcome Henrik Woods | Steward# 1000002

Steward invoices

QA Merchant ONE - Moneris Solutions - Google Chrome

<https://esqa.moneris.com/HPPDP/index.php>

QA Merchant ONE

Customer Details

Customer ID: 0001000002

Email Address: hwoods@stewardshipontario.ca

Note:

Billing Address

First Name: Henrik

Last Name: Woods

Company: Steward Test

Address: 1213 test

City: toronto

Prov/State: ON

Country: CA

Postal Code: M2W 3V4

Phone: 4161111

Fax:

Payment Details

Transaction Amount: XXXXXXXXXX

Order ID: 0090022700



Paid	
	Pay with Credit card
	Pay with Credit card
	Pay with Credit card
	Pay with Credit card

Pay by credit card
- now available
for invoices less
than \$2,500

If you choose to pay by
credit card you will be
redirected to the secure
payment processing site,
Moneris.

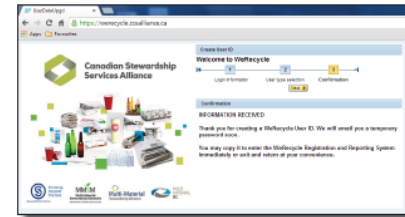


New Portal User Guide Now Available

Step-by-step instructions:

- Create a user ID and Password
- Register to use WeRecycle Portal
- Add or change contact and company information
- Complete a Steward Report in 7 steps
- And many more tips
- Available soon

User Manual



WeRecycle Registration and Reporting Portal



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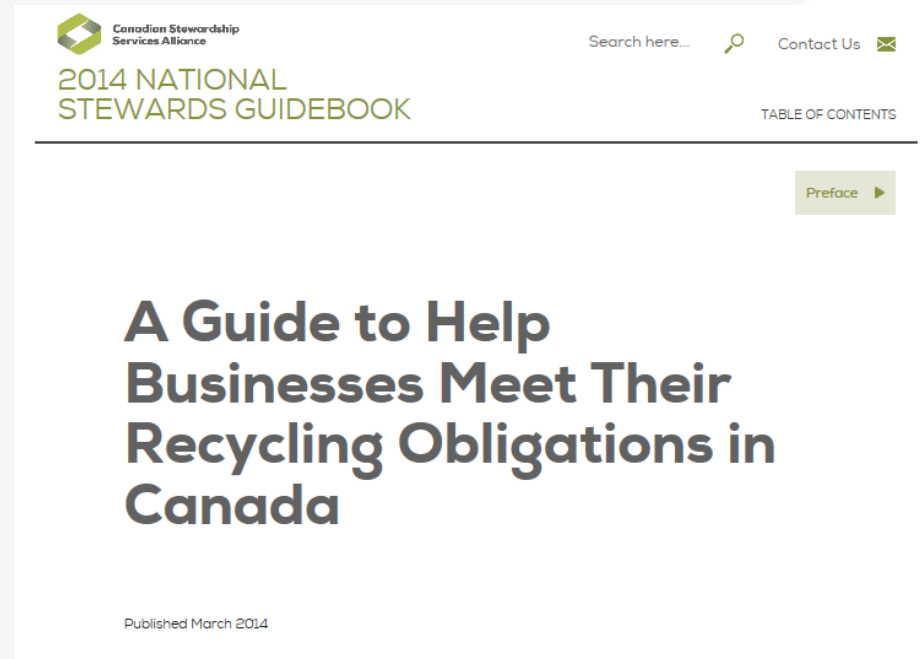
National Steward Guidebook



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New Features

- National Scope (BC, SK, MB, ON)
- New online format
- Convenient “hover notes” packaging examples and reporting tips
- Easy to read tables clarify distinctions between programs
- Available in printable PDF for traditionalists
- Printable province-specific material lists
- Go to <http://guidebook.cssalliance.ca/>





Helpful hover notes

Paper Packaging – Materials List

Please hover your cursor over 'Examples' and 'Reporting Tips' for more information.

Material Category: Paper Packaging ⓘ

Subcategory	BC	SK	MB	ON	
Gable Top Containers – Beverage – Milk and Milk Substitutes ⓘ	✓	✓	✓	✓	Examples ⓘ Reporting ⓘ
Gable Top Containers – Beverage – Wine and Spirits ⓘ	Deposit	Deposit	✓	Deposit	Reporting Tips ⓘ

Examples:
Milk, soy
milk , rice
milk

Reporting
Tips: Please
note that
milk and milk
substitutes
are not on
deposit and
should be
included in
your report



Easy to read tables clarify distinction between programs

Product Category	British Columbia	Saskatchewan	Manitoba	Ontario
Newspapers, inserts and circulars, magazines, catalogues				
Text Books				
Paper Towel or toilet paper sold as product				
Purchased greeting cards				
Paper used for copying, writing or any other general use.				
Purchased calendars				
Free Promotional Calendars				



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Revisions to MMBC Membership Agreement



Valuable Steward Suggestions

- Revisions to the membership agreement (MA) were the result of excellent suggestions from the steward community over the last few months, including industry associations
- Going forward, new revisions to the MA will be considered in Q4 of each year
- Stewards welcome to submit their suggestions throughout the year



Guiding Principles provided lens

- Each steward suggestion was evaluated against key guiding principles:
 1. Protects interests of **collective** membership
 2. Treat each member fairly and equally – no special deals
 3. MMBC committed to non-profit status (seeks to make neither a profit nor incur a loss)
 4. Operate a cost effective stewardship program in compliance with Recycling Regulation and approved Program Plan



Membership meets obligations

Steward Request

Clear language stating that membership in MMBC means steward is meeting all of its obligations under the Recycling Regulation

Revision to MA

New Recital on page 1:
“AND WHEREAS Multi-Material BC Society is duly appointed by You given you comply in all respects with the terms contained in this Agreement;”



Clarified Voluntary Producer Policies

Steward Request

- Set annual cut-off date after which voluntary stewards cannot register for program.

Revision to MA

“If You elect to be a Voluntary Producer, You must register with MMBC according to the dates and policy as posted on the MMBC website...”



Dispute Resolution Provision

Steward Request

Provide a dispute resolution process for stewards similar to the one provided in MMBC's Stewardship Plan for service providers

Revision to MA

New section added:

“Disputes: Disputes between MMBC and You as to Your obligations under this Agreement shall be made under the dispute resolution process that is published on the MMBC website. Referral of any disputed matter shall not act to stay or defer Your obligations under this Agreement”



Limit the interest rate

Steward Request

Maintain interest charges on late payments at 4% above the prime lending rate.

Revision to MA

“If any sum payable by You to MMBC under the is Agreement remains unpaid for more than thirty (30) calendar days from the date of the invoice, MMBC may charge You interest on such sum at four percent (4%) per annum above the Canadian Imperial Bank of Commerce’s (CIBC) prime lending rate. “



Confidentiality provision strengthened

Steward Request

Concern about unauthorized disclosure of confidential information

Revision to MA

“If required by the Director, MMBC will inform You that information is transferred. In all other cases, unauthorized disclosures, reproduction or distribution of such confidential information to any other person or association will first have to be consented to in writing by the disclosing party.”



Future Revisions to Membership Agreement

Steward Request

- MMBC must consult members when making revisions to the MA
- MMBC members need more consultation time to review revisions to MA
- Revisions to MA must be communicated to MMBC members via email

Revision to MA

“Revisions to this Agreement will be considered in Q4 of each year. We will provide advance written electronic communiqué notice of those changes not less than sixty (60) days before May 31st of an Obligation Year.”



Additional MA changes requested by stewards (1)

- Clear distinction when referencing business day or calendar day
- Definitions clarified:
 - “Annual Data Report”
 - “Obligation Year”
- Record Retention Clarified
 - Steward to maintain records for the period of five years following the submission of their last steward report



Additional MA changes requested by stewards (2)

- Steps clarified for verification and audits:
 - Step 1: Steward confirms accuracy of data
 - Step 2: Senior officer in steward organization confirms accuracy
 - Step 3: Participate in audit
- Consolidated MA termination clauses
- Numbering format of clauses revised for clarity



Additional Requests addressed outside of MA

1. MMBC will publish a list of voluntary stewards that is distinct from total list of MMBC members, as requested by RCC
2. MMBC will provide guidance to voluntary stewards on how best to estimate their quantities in multiple jurisdictions



Requested But Not Made

- Some requests could not be met because they either contravened the Regulation/Program Plan or did not meet test of Guiding Principles and therefore were not in the interests of MMBC's collective membership



Termination and Cancellation Provisions

Steward Request

MMBC members be able to terminate their contract at any time without penalty

Reason Provision Cannot be Changed

- The termination provisions are designed to protect MMBC's collective membership from having to cover the costs of stewards (especially those with sizable tonnage) that exit after the May 1st cut-off date.



Return to Retail

Steward Request

Retail stewards would like to be able to deduct material that comes back from consumers through front-of-store return to retail programs

Reason Provision Cannot be Changed

- MMBC service providers must provide chain-of-custody validation that material is recycled which in turn is verified by a third part auditor for MOE as per Stewardship Plan
- Informs MMBC's general recovery rate as well as material-specific recovery rates that support application of 3 factor formula
- No chain of custody is available for Return-to-Retail material but will work with retail community to explore options



Exclusivity of obligation

Steward Request

Remove exclusivity clause which prohibits MMBC members from simultaneously belonging to more than one PPP stewardship organization

Reason provision cannot be changed

- Provision protects the economic viability of the non-profit “basket of goods” approach by not allowing stewards to join multiple PPP programs
- Would compromise MMBC’s general recovery rate which would increase cost to meet mandated target



3 R's Reporting

Steward Request

Pollution Prevention Hierarchy:
Remove requirement for stewards to supply MMBC with evidence of their efforts to address the other two R's (reduce and reuse).

Reason Provision Cannot be Changed

- Government requires and MMBC's Stewardship Plan commits to reports on initiatives undertaken by MMBC members to reduce and reuse their packaging and packaging redesign to improve recyclability
- See Section 5.4 of the Stewardship Plan



Fee Recalculation

Steward Request

- Remove ability of MMBC to recalculate the fees
- Establish a reserve to deal with contingencies that would otherwise trigger recalculation of fees

Reason Provision cannot be Changed

- MMBC must be able to protect its members by reserving the right to raise revenues to address costs if necessary
- Pricing a sizable reserve right now would be costly
- However in later years, once a sufficient reserve is developed the Board will determine if this provision can be removed from the MA



Indemnity

Steward Request

MMBC should protect stewards from its acts and omissions under the program

Reason provision cannot be changed

- MMBC has comprehensive general liability insurance and a certificate of insurance which is posted on the MMBC website
- Clarification of the liability clause was posted on MMBC's website in August 2013.



Next Steps

- Revised MA is currently in legal drafting and will be shared with the Board for approval early next week
- Following Board approval we will distribute the completed document to stewards before March 31st.
- Existing stewards that wish to continue their membership are not required to sign and submit the revised MA
- Stewards' acceptance of the MA will be assumed unless they notify MMBC by May 1, 2014 that they wish to terminate the contract
- **New** MMBC stewards must sign and submit the revised MA



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Questions



**Canadian Stewardship
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info@cssalliance.ca