

2022

Sustainability 
in Retail

PROFESSIONAL PROGRAM

COURSE WORKBOOK



SPEAKERS



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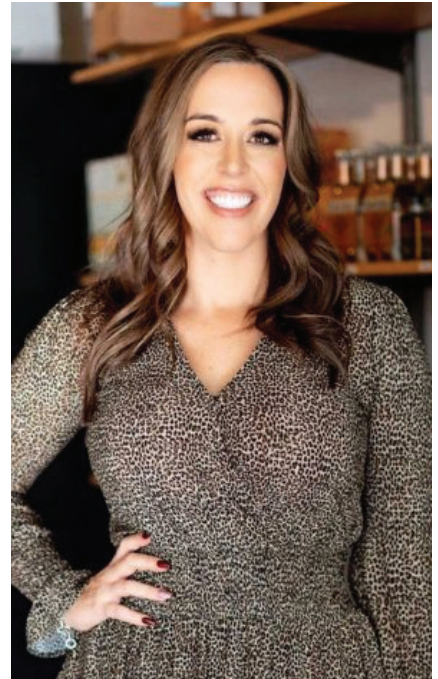
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SUSTAINABILITY + RETAIL ACTION GUIDE

INTRO

SUSTAINABILITY & RETAIL INTRO

This is a living workbook, which you can update and expand, as new data and science is uncovered in the areas of sustainability. This workbook will provide spaces for thoughts, notes, and ideas. Please use and refer to this workbook as you create and evolve your retail sustainability practices and plan over time.



AFTER THIS COURSE, YOU SHOULD BE ABLE TO DO THE FOLLOWING:

- ✓ Understand a clear definition of sustainability
- ✓ Define the 3 key elements of sustainability - Social, Environmental, & Economic
- ✓ Look for strains on natural resources (water, land, air, and biodiversity)
- ✓ View products through the lens of Anthropological Conservation (economics, people, culture, and conservation in one paradigm)
- ✓ Research a product's life cycle
- ✓ Re-examine the sustainability of your store(s), warehouse(s) and workforce
- ✓ Put a "green" value on the cost of your product lines
- ✓ Develop a plan of action for your own retail sustainability
- ✓ Question purchases and product production according to your sustainability plan
- ✓ Know how to strive for a state of homeostasis within your retail operation
- ✓ Strive for ethical sustainable/measurable retail goals, not just financial ones.

INTRO

Lesson 01 What is Sustainability?

In the area provided below, please write down what sustainability means to you.

Why do you view sustainability in this way? (Group session: Share in your groups what you think sustainability means and why you view it this way....)

Working definition: Sustainability is using, without depleting or destroying _____

Lesson 02 The Three Keys to Sustainability: Environmental, Social, and Economic.

(Draw three circles and intersect them, labeling each circle environmental, social, and economic)

Which circle is the most important and why?

All the circles should be viewed in a connective way, as each circle cannot exist without the other, but they are not all equal. If you give equal importance to social, economic, and environmental issues, humans become the center of concerns. This type of environmental sustainability is considered "weak."

The concept of strong sustainability is based on the scientific fact that all human life and activity occurs within the limitations of planet Earth, or the 'biosphere' where humankind lives, including all societal functions, such as the economy.

SOCIAL

Let us examine the **Social Sustainability** key first and what comprises this:

- 1) Ethical sourcing (Intentionally not supporting human trafficking or slavery)
- 2) Diverse sourcing
- 3) Changing an environment, culture, or society
- 4) Population support efforts
- 5) Improving your own community
- 6) Fair and equitable hiring practices
- 7) Staffing pay and promotion systems
- 8) Other ideas

For our next key we will delve into is **Environmental Sustainability:**

- 1) Materials of the natural world (resources)
- 2) Choice of human-made materials
- 3) Natural habitat impact
- 4) Impact of human manufacturing
- 5) Recycled V. New
- 6) Carbon/ecological footprints (merchandise, shipping, utilities, and fixtures)
- 7) Other ideas

Our final key is **Economics:**

- 1) Fair wages
- 2) Focus on community economic empowerment
- 3) Economic change impact(s)
- 4) Goals for profit
- 5) Reinvestments
- 6) Cost savings
- 7) Other ideas



SOCIAL

Lesson 03 What is Social Sustainability?

Social sustainability puts humans as part of the sustainability equation. It is an informal and formal look at systems, laws, relationships, economics, environment, and communities that impact the human condition of today and tomorrow.

This part of sustainability addresses people's needs, quality of life, anthropological conservation, health, infrastructure, language, culture, and environments.

Bottom line, this part of sustainability is looking at justice, equity, access, inclusion, and fairness for all humans; until humanity reaches a point of true homeostasis.

Lesson 04 What are the Impacts of Social Sustainability in Retail?

Retail impacts the environments of humans through factory work, hand crafts, logistics, packaging, waste, wages, benefits, and living conditions. Community retailers are also responsible for their workers, and their own community; all while remembering not to discount other communities for their own gain. "Fair trade," must be fair for all, not just your retail location(s).

Human rights should always be at the center of all retail decisions. Here is an easy way to approach this topic, if you would not like a human right denied to you, do not support others that take those rights from others. Retailers can create positive change for people through purchasing.

Human cost in sustainability

Everything in life has a cost, and human cost is no exception. Every business should have or create a bottom line for human cost. Here are some suggestions on what to measure:

- What is your social footprint – Map and quantify all social connections and look for diversity within your findings.
- What is your social impact – Measure median income of the area to your workers income. Measure all injuries, correct unsafe environments, and attempt to provide a health safety net.
- What is the human condition - Is equity, access, and inclusion measured in costs?
- Risk Mitigation – Establish timelines to react and separate your company from unethical or unscrupulous suppliers. Slow reactions may be seen as condoning behavior and cause public outrage against your company.
- Establish human goals in your budgeting process and measure them.

SOCIAL

Lesson 05 The Lens of Anthropological Conservation

View products through the lens of Anthropological Conservation, by connecting conservation, culture, and commerce in one paradigm. As part of the human story, we need to keep our cultural arts alive for future generations to enjoy, while being ethical in pay, and the treatment of people. We must also strive to reward people when helping with conservation efforts in their part of the world. By connecting conservation with commerce, one may see a positive improvement in the lives of people, and the environment around them. Seeking out products that not only supply jobs to local crafters but gives a portion of money back to a conservation foundation, is a big win for both humanity and the eco systems in which they live.

When working with Indigenous peoples throughout the world, ensure you understand the international laws and treaties surrounding the goods they may be selling you. For example, you can only import certain items from Alaska's Native People to the mainland, due to laws and treaties. Procuring products can become much more difficult when buying internationally. To avoid issues, work with a trusted vendor/importer to purchase your goods. It is always a good idea to work with an LLC or Company to avoid any legal issues. Additionally, The Indian Arts and Crafts Act of 1990 is a truth-in-advertising law that prohibits misrepresentation in the marketing of Indian art and craft products within the United States. It is illegal to offer or display for sale, or sell, any art or craft product in a manner that falsely suggests it is Indian produced, an Indian product, or the product of a particular Indian or Indian tribe or Indian arts and crafts organization, resident within the United States.

Tell the story of your Anthropological Conservation items. Let the public know if an item is hand carved from stone and helps support culture and conservation. Sharing the story is very important, but always research the story to ensure it is true to your knowledge.

What are global key areas of concern in social sustainability?

- ✓ Governmental given or denied human rights
- ✓ Gender equality (including the LGBTQIA2+ community)
- ✓ Children
- ✓ Indigenous peoples (First People of Nations)
- ✓ Education
- ✓ Health/Safety/Food security/ Medical access/Disability
- ✓ Forced labor
- ✓ Organized crime
- ✓ Colorism
- ✓ War or conflicts
- ✓ Climate change/Climate refugees/Forced environmental changes
- ✓ Economic systems (this will connect later in the class)



SOCIAL

What is a story you can tell about a particular product, that would entice a buyer?

Lesson 06 Action Plan for Social Sustainability

Sample Checklist for Worker Social Sustainability

Are workers safe?

Are workers healthy?

Can workers be their true selves?

Is the community engaged?

Are your product supply chains free of conflict(s)?

Are your products destroying eco systems in human communities?

Are living wages being paid?

Are you offering work security?

Do you have a DEAI plan?

Sample Checklist for Consumer Engagement

Does the shopper feel safe?

Are the products healthy for humanity and your shopper?

Does everyone in the community feel welcomed in your business?

Any labels and signs on your products promoting fair trade practices?

Are you highlighting products that clean or help human eco-systems?

How is your community reputation related to your work environment?

Is your shop offering women or minority owned company products?

SOCIAL

How can you Sustain your Local Team?

Create clear and measurable goals based off the individual's capabilities.

Ensure clear and concise dialog with each team member.

Connect reward with action.

Recognize the person before the task. For example: celebrate Birthdays on your team, as that is just about the person.

Have open culture communication(s), and let people share their backgrounds and experiences (ASK sessions).

Review pay equity every year to ensure fair treatment of all team members.

Ensure your mentor program is diverse and accessible for promotions.



What are you currently doing for social sustainability in retail?

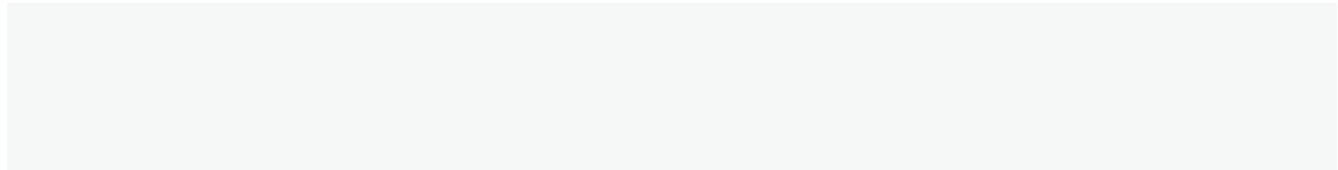
1. _____
2. _____

What comes to mind that you could immediately do?

1. _____
2. _____

ENVIRONMENTAL

Lesson 07 What is Environmental Sustainability?



Environmental sustainability focuses on the conservation of biodiversity without foregoing economic and social progress. The foundations of environmental sustainability are safeguarding water, saving energy, reducing waste, using recyclable packaging, limiting, or eliminating the use of plastics, using sustainable transport, reusing paper, and protecting flora and fauna.

Lesson 08 Impacts & Concerns

Strains on Natural Resources.

Too much of a good thing usually has negative consequences. Companies are not going to advertise what they are negatively doing to natural resources. First, let us define what a natural resource is. A natural resource is

What natural resource can you think of, that is exploited, and why?

Can renewable natural resources become non-renewable? explain

What are the consequences of depleting natural resources?

ENVIRONMENTAL

Your own research is the key to making a difference in your buying strategies. Inquire about the origin of the product(s), and research the area in question. Look for water quality reports of streams and rivers. Investigate air quality within the area of your “origin of product(s).” After you have looked at air and water, learn how the land is in use, this can include mining, deforestation, and erosion.

Places I may find information on natural resources.

What is meant by ROM vs ROI and how does that apply to your operations?



What are global key areas of concern in environmental sustainability?

- International Wildlife Trade Laws – CITES and Lacey Act
- International, federal, and state conservation laws
- Natural resource use in the supply chain – Sustainable harvest
- Indigenous Peoples – Traditional use and sustainable businesses
- Energy use and greenhouse gas emissions – Facility and products
- Environmental impact of products
 - Chemicals and toxics – production, packaging, and product
 - Waste – packaging and longevity of products
 - Biodiversity and habitat loss and disruption
 - Externalities and inefficiencies
- Support of in-country conservation or other conservation efforts
- Climate change

ENVIRONMENTAL

Lesson 09 A Product's Life Cycle

A product's life cycle starts from raw materials to create a product, to the end of use, of a product.

Why is it important to know a product's life cycle?

Your product responsibility:

- 1) Recycle shipping cardboard, plastic, and pallets.
- 2) Ensure a pricing structure of products that is sustainable for your area.
- 3) Discourage excessive waste to sell a product, like tagging, bags, receipts and wrapping.
- 4) Have recycling, composting, and other reclaiming efforts in use at your facility, and communicate these with your guests.

5) Other responsibilities you may have:

Questions to ask in the creation of a product:

Where are the raw materials coming from and are they sustainable?

Are the people mining, gathering, harvesting, and collecting the raw materials ethically and humanely treated?

Are ethics and fair wages prevailing at the point of assembling for the final product?

What are the environmental impacts from creating this product?

What economic impacts does this product produce?

What is the product's packaging?

Questions to ask for the end use of a product:

What is the vendor's plan to recapture the packaging of the product?

What is the vendor's plan to recapture the materials in the product?

Does the company assume any responsibility of the product's end use?

Is the waste of this product toxic to environmental systems?

Which people in the end of a product's life cycle going to affect, and why?

ENVIRONMENTAL

Lesson 10 Action Plan for Environmental Sustainability

Sample Checklist for Environmental Sustainability

- ✓ Are products made from sustainable renewable resources?
- ✓ Is packaging minimal, recyclable, or compostable?
- ✓ Are animal products used and if so sustainably?
- ✓ Are products approved through a third-party certification?
- ✓ Are products locally sourced or community supported?
- ✓ Are building materials renewable, durable, environmentally sensitive, etc.?
- ✓ Is energy use in facility through renewables or conservation practices?
- ✓ Does your product or facility support your mission: ROI vs ROM?
- ✓ Are your products altering or damaging habitats and ecosystems?
- ✓ Are your products sales supporting the environment?
- ✓ Does your facility support wildlife?
- ✓ Is your lighting environmentally friendly?

Sample Checklist for Consumer Engagement

- ✓ Does the environment of your facility and grounds educate consumers of your mission?
- ✓ Are you giving mixed environmental messages?
- ✓ Are surroundings environmentally appropriate and sustainable?
- ✓ Can shoppers learn ideas that they can implement at home?
- ✓ Can shoppers purchase items to support environmental practices at home?
- ✓ Are your products environmentally sustainable?
- ✓ Are there labels and signs on products promoting environmental practices?
- ✓ Are there labels and signs promoting your environmental practices?
- ✓ Are you highlighting products that support biodiversity and ecosystems?
- ✓ Can shoppers support additional environmental and conservation actions?
- ✓ Are you a trusted source for environmentally sustainable products and practices?

What are you currently doing for environmental sustainability in retail?

1. _____
2. _____

What comes to mind that you could immediately implement?

1. _____
2. _____

Lesson 11 What is Economic Sustainability?

For many businesses, economic sustainability equates to generating sales and profit. Although growth is still a primary focal point, true economic sustainability emphasizes long term growth without negative impact to social, environmental, and cultural groups of the community.

Keep in mind that when only the economic aspects of something are evaluated, it may not promote true sustainability. However, when good business practices are combined with the social and environmental aspects of sustainability, you can still have a positive result that is for the greater good of humanity.

Lesson 12 What are the impacts of economic sustainability in retail?

- If unbalanced, it will lead to supply chain and manufacturing issues.
- It may prevent human made disasters such as food insecurities, climate change and Governmental conflicts.
- It motivates human discovery and innovation to secure our natural resources.
- It devises ways to produce less waste and more profit.
- It forces companies to seriously look at renewable resources for manufacturing, transporting or selling goods. This adds to better future profits, and less strain on fossil fuels.
- It helps drive World trade and may help develop Nations for better economic futures.
- It demands a manufacture, supplier, or retailer to look inward at all economic systems and find flaws or losses within their systems.

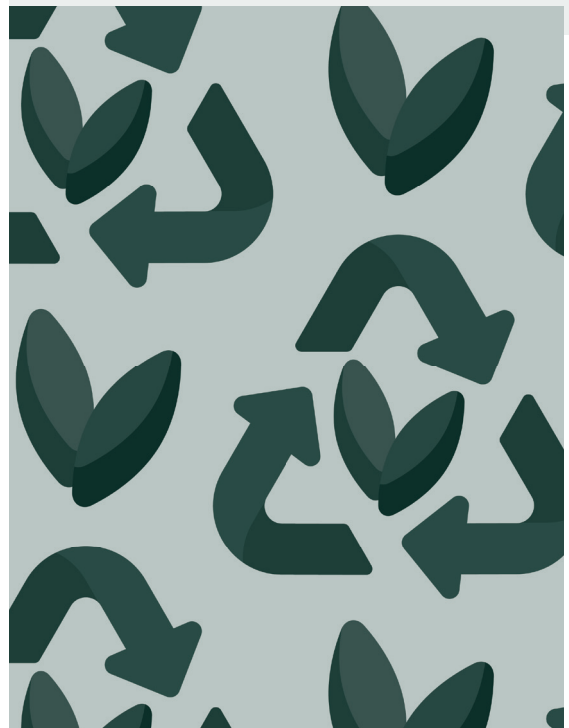
What are global key areas of concern in economic sustainability?

Compliance with laws and regulations

Labor market challenges

Supply chain disruptions

Rising inflation



ECONOMIC

Lesson 13 **Action Plan for Economic Sustainability**

Sample Checklist for Economic Sustainability

- ✓ Are positive values reflected in your decision-making process?
- ✓ Are employees/makers receiving fair wages?
- ✓ Are you positively contributing to community economic empowerment?
- ✓ Are all laws and regulations being followed?
- ✓ Are economic change impact(s) being monitored?
- ✓ Do you have clear profit goals?
- ✓ Are you reinvesting in your store and staff?
- ✓ Are you looking for ways to save money in all aspects of the business?



What are you currently doing for economic sustainability in retail?

1. _____
2. _____

What comes to mind that you could immediately implement?

1. _____
2. _____

ECONOMIC

Lesson 14 Money matters!

After all, you are operating a business. What are realistic ways to save your business money while being sustainable and how can you achieve this? Among the factors to consider include fair wages, a focus on community economic empowerment, staffing pay and promotion systems, economic change impact(s), goals for profit, reinvestments, and more.

When practicing sustainable efforts to support the environment, your store, and your community, how can you do so and save money? Below, share sustainable best practices you have achieved that have also saved your store dollars.

1. _____
2. _____
3. _____

What else can your store proactively do to help reduce spending and be sustainable? Set a goal to achieve these changes by.

1. _____

DATE TO BE IMPLEMENTED BY:

- 2.

DATE TO BE IMPLEMENTED BY

SUSTAINABILITY FYI: Nearly 80% of retailers surveyed by analyst firm Gaggemini believe their sustainability work keeps customers loyal... and they're right! Consumers respond to retailers with loyalty when their values align with their own

RETAIL PLAN

Lesson 15 Goals

When building a sustainability plan, you must first identify the goals of the plan. What is your organization's desired outcome of this plan? To create this plan, we will refer to the assessments for the three keys of sustainability: environmental, social, and economic. First, write down three goals in each key for your plan.

Environmental:

1. _____
2. _____
3. _____

Social:

1. _____
2. _____
3. _____

Economic:

1. _____
2. _____
3. _____

Now that you have your goals, start thinking of ways to reach these goals. Take one goal from each key and describe how you will achieve/measure that goal.

Environmental Goal _____

How do you achieve this goal?

*

*

How do I measure the success of this goal? _____

RETAIL PLAN

Social Goal

How do you achieve this goal? _____

*

*

How do I measure the success of this goal? _____

*

Economic Goal

How do I achieve this goal? _____

*

*

How do I measure the success of this goal?

*

Lesson 16 Marketing

How important is communication to consumers when it comes to sustainable efforts?

In the area provided below, please write down your current methods of sharing your store's sustainable efforts to your customers. If you have nothing to share, simply skip this step.

Sustainable sharing: What my store currently does:

1. _____

2. _____

3. _____

SUSTAINABILITY FYI: A 2022 Treasure Data survey revealed 78 percent of customers said they take the environment into consideration at least occasionally when making a purchase, up 7 percent from the previous year's survey.

RETAIL PLAN

GROUP DISCUSSION: Explore how attendees personally leverage store communication to make purchase decisions.

REVIEW: Key ways stores can communicate with their customers about sustainability efforts and importance include:

1. In-store signage
2. Social media
3. Email blasts
4. Local media
5. Store website
6. Vendor messaging
7. Vendor visits
8. In-store events
9. How else?

Lesson 17 Operations:

GROUP DISCUSSION: Look at a 12-month calendar/budget of retail operations. Identify common expenses and how you can reduce them with sustainable efforts. As a group, list these and share ways to support each of your stores sustainably.

REVIEW: Key factors that can help reduce spending and improve sustainable efforts include:

1. Store waste & packaging. What does your current store recycling program look like? Could it extend further? Are you doing what you can to reduce packaging waste?
2. Energy sources for your operation(s), solar, wind or hydroelectric? How are you reducing your carbon footprint through energy solutions, like LEDs?
3. Are you currently doing anything with marketing and merchandising to reduce footprint?
4. Do you repair, recycle, donate, or give away broken merchandise to keep it out of landfills?
5. Do you have training protocols in place for the onboarding of new team members? Meaningful training will help sustain a good workforce.
6. Bringing inclusion, diversity, equity, access, and treatment of your workforce in full perspective, this will create a sustainable work environment.
7. Anything else?

BUYING GUIDE

Lesson 18 Questioning Purchases According to your Sustainability Plan

You now have an idea of your goals within your sustainability plan, and the next step is applying that plan to your purchases and products. To develop this plan, use a simple checkmark chart, or a list of questions with a number value.

For a checkmark chart make a list of your goals and review the purchase or product against those goals. If it meets the goal standard, it gets a checkmark. If the purchase or product checks all the boxes, then it is in line with your plan.

If you decide to develop a list of questions, with a number value of 1-10, write the question down you will ask about the purchase or product. After you have written the questions down, review the product against the questions, that you have written down and assign it a number 1 through 10. Using a numbered system will give you more flexibility in a decision.

Here is an example of the number value system in use:

Standard: A score of 22 passes the product to purchase.

Score	Question
7	Is this item composed of recycled materials?
8	Is this item free from excessive packaging?
10	Is the item handmade?
25	Total Score

This item scored a 25, above the 22-score needed to purchase, so this item is good to add to your product mix.

In this next exercise, you will make a chart addressing the purchase itself. This will be different from the product, because now you must look at social and economic factors of sustainability within your purchase. Think about things like, does my purchase help a depressed social economic area, or does it give back to a cause.

Think about three questions related to social or economic sustainability. Decide what score your purchase must achieve to pass your test.

(Write down your questions, you will have a chance to score them through a mock purchasing exchange)

BUYING GUIDE

____ Passing Score (Insert a number here from 1 to 30, "hint" 22 is a good passing score).

Score	Question
____	_____
____	_____
____	_____
____	TOTAL

(Breakout in groups to discuss your questions and scores)

Ideas you received from the group discussion:

Lesson 19 "Green" Value

"Green" Value = Cost, what does that mean to you?

As retailers, we all should understand cost of goods, but do we understand the underlying "Green" value of a product. "Green" values/costs can fluctuate on any item, and many factors may attribute to those fluctuations. The biggest of these factors are supply and demand. Demand can increase prices and production, but it could in turn decrease natural resources and habitat loss, thus creating a loss in "Green" value.

Think of an item that has increased in demand and production and has had a negative impact on "Green" value.

Item: _____

Negative Impact: _____

\$ Cost _____ V. "Green" value _____

BUYING GUIDE

Now let us think of alternative items that have a higher “Green” value and will be of equal or greater quality.

1. _____
2. _____
3. _____

Weighing your choices in “Green” value, rather than monetary value, can put your buying plan into a completely new perspective. Think about how much money it will cost to fix an environmental issue caused by a product in your buying plan, which is a true “green” perspective.

Lesson 20 Practice

How important are the products you sell when it comes to sustainability? Do they have to support your sustainable goals?

SUSTAINABILITY FYI: Global energy solutions provider Schneider Electric claims that retail buildings are the largest consumers of energy among non-residential buildings. By reducing their carbon footprint and emissions, retailers can lessen their impact on the planet and improve their brand image, while also saving significant costs.

As the saying goes, “there’s room for everyone”. But when it comes to sustainability, does that mean all vendors are equal?

To help identify the value and importance of sustainably minded vendors and your unique retail store, list why working with vendors who prioritize sustainability is important to you.

1. _____
2. _____
3. _____

Choose a vendor that you are currently working with that offers sustainable minded products. Explain what makes them sustainable and score them based on the rubric you created.

BUYING GUIDE

Lesson 21 Strive for a State of Homeostasis in your Operation.

What is homeostasis, and why is it important?

Homeostasis is a state of balance. When learning about sustainability, one has to understand homeostasis. When there is proper balance, sustainability is possible. In business, think of a profit/loss sheet. If there is more loss than profit, homeostasis is lost. Without good balances, sustainability will always come up short, and move to depleting/destroying, on the sustainability scale.

Strive is the key word, for your success. One may never reach a true state of homeostasis, but it should always be an aspiration for your operation.

List two things you can work on, to achieve a better sense of homeostasis in your operations.

1. _____
2. _____

Balancing sustainability is a game. You must look at all three dimensions of sustainability and decide what may increase or decrease within the environment, social or economic pillars. Depending on your sustainability goals, economics may trump the environment. For an example: a product that lifts people out of poverty in an underprivileged Nation is good, but it may be somewhat negative for the environment, due to the carbon footprint of shipping the product.

Think of an item that may have a positive and negative effect on sustainability. Can you create a balance between the two?

Sustainability is a very complex topic, so break it down into easy and manageable goals. If you focus on six to eight goals in sustainability within your retail operation, it will make an impact. As science changes, sustainability should improve. What might not be possible now, could be possible in the next ten years. Retail is always evolving, and so will our sustainability issues. Retailers have a responsibility to ensure we are protecting the Earth, its people, and creating equity for all.

ACTION GUIDE

- Review and revise your goals as needed to include measurables and strategies to accomplish.
- Do a walkthrough of your store to see if there are any additional items that support economic savings for your retail store directly applied to sustainability.
- Once strategies are finalized, apply deadlines. As needed, also apply who the tasks are to be completed by.
- Review all vendors currently being sold in your store. Identify their sustainable intentions and current actions. Email vendors or schedule phone calls to review the questions with them.
- Decide which vendors – if any – no longer align with your store values.
- Review potentially new vendors to introduce into your store assortment based on sustainable efforts.
- Incorporate marketing efforts that share your sustainable actions with your customers. Include in-store, digital and local media efforts.
- Set 3-, 6-, and 12-month goals to improve your sustainable efforts. What are they? Attach them to your calendar with reminders to ensure they get completed.



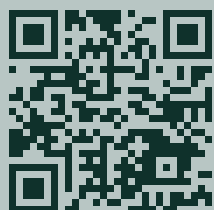
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NOTES



Sustainability in Retail

PROFESSIONAL PROGRAM



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