

Adlai Stevenson HS Carbon Management Programming Loyalton Scope Matrix of Services

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Step 2 – Carbon Management Framework

Action	Define	
Outcome / Tool	Carbon Management Framework	
Scope, Details, Timeline		Est. Time
A. Objective Summary: Prepare and issue consumption and reduction behavior plan		
<ol style="list-style-type: none"> 1. Develop a plan with specific enterprise goals, strategies, and projects 2. State mission goals for climate impact, energy management, transportation impacts 3. Build for 'best-practices' across all enterprise, vendor, stakeholder, and investor interests 4. Issue the plan 		
B. Key Outcome Summary: Carbon Management / Reduction Plan		
<ol style="list-style-type: none"> 1. In-depth technical / financial analyses on all prospective CDE reduction or mitigation strategies and projects 2. Prioritization of strategies and projects using cost estimate of implementation, cost benefits, carbon reduction benefits 3. Deploy enterprise appropriate CDE inventory system / tools to track, report, update emissions as required 4. Summarize enterprise-wide impact of final target strategies and projects 5. Identify and program logical and available financing tools and fund sources to implement the strategies and projects 6. Evaluate any business or economic development initiatives that arise from the pursuit of the plan 		
Assess & Draft Plan		6 weeks
<ol style="list-style-type: none"> 1. Identify strengths and weaknesses of enterprise from carbon approach 2. What goals, processes, or outcomes are desired 3. Do these goals and potential outcomes fit the mission of the enterprise 4. Define process, identify key players, set limits of intrusion, set expectations, set control mechanisms to advance the plan 5. Have mandatory reductions been set for your industry or enterprise, do these or will they have an impact and when 6. What are the risks that have to be mitigated ... consumption ... costs ... public relations ... investor perspective ... competitive environment ... reputation ... regulatory positioning 7. What is a carbon rating matrix that works for the enterprise 8. How do we get energy supply and demand under control and stay carbon conscious 9. How do we integrate carbon and fiduciary metrics, what is physical carbon exposure 10. Identify potential funding mechanisms, budget impacts, and financial strategies to achieve potential goals 11. Identify software or management programs available for continuous carbon tracking, reporting, and management 		
Broaden & Clarify Plan Inputs		12 weeks
<ol style="list-style-type: none"> 1. Engage senior individuals across the enterprise ... operations ... human resources ... environmental services ... design/engineering ... finance ... legal/ regulatory affairs ... supply chain ... 3rd party consultants 2. Evaluate draft framework, engage feedback and collaboration to finalize goals, actions, and timelines 3. Secure outside investors or stakeholders input in advance of public rollout 4. Agree on all commitments to guide carbon team as it commences plan roll-out 5. Engage appropriate outside public relations and marketing expertise for final "look-and-feel" and communications essentials 		
Finalize & Issue Plan		16 weeks
<ol style="list-style-type: none"> 1. Finalize executive commitments and enterprise goals 2. Finalize carbon reduction goals, inducements, rewards, corrective actions 3. Finalize carbon management strategies, identify and prioritize according to carbon balance value, cost, and timelines 4. Codify and eliminate from contention unrealistic or ineffective ideas 5. Finalize renewable energy, REC's and carbon offsets strategies 6. Issue detailed carbon management / reduction plan 		

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Step 2 - Notes

1. Anticipated Travel
 - Trip 1 - Orientation and training for site staff. Begin process to assess operational characteristics and collect any additional carbon based data. Evening arrival, day one team orientation, day two detailed site walk, talk, and operational assessment.
 - Trip 2 – Evening arrival, next morning draft carbon management framework and operational review for entire team. Afternoon high-level engagement of additional stakeholders to begin to broaden and clarify.
 - Trip 3 – Evening arrival, next morning final draft review with team, afternoon final outsider review.
 - Trip 4 – Issue, present, and publicize the carbon management plan. Day one full staff and student presentation, day two detailed site and staff training.
2. Note timelines estimated above are dependent upon availability of sight teams to become organized and available for activities.

Step 3 – Carbon Management Details

Action	Measure	
Outcome / Tool	Carbon Details Refinement	
Scope, Details, Timeline		Est. Time
A. Objective Summary: Measure additional carbon or operational behavior <ol style="list-style-type: none"> 1. Collect any additional data or performance metric that arises from development of framework 2. What other “small-impact” carbon activities have large long-term behavioral impacts 3. Determine if complete energy and operational audits are needed for each building, production line, process step 		6 weeks
B. Key Outcome Summary: Update / better inform Final Carbon Management Plan <ol style="list-style-type: none"> 1. Incorporate additional detail into plan 2. What are novel ideas that arose from additional detail collection 3. Building or campus level energy consumption audits are not included within this scope 4. Advance plan forward with assumptions if energy audits are performed at later dates 5. Use best efforts to frame estimated and potential carbon behavior changes if framework is issued without audit details 6. Note that a final strategy plan and carbon reduction prioritizations will need audit details unless client can accept broader assumptions for final plan 		16 weeks

Step 3 - Notes

1. Anticipated Travel Scope – noted in Step 2
2. Note timelines estimated above are coincidental with Step 2 timelines, assuming we have good data collection and operational assessment within the timelines noted. If these additional details drag out, the Step 2 plan may be issued as “draft” and the audit and operational details can be added later.

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Step 4 – Carbon Management Implementation

Action	Implement	
Outcome / Tool	Carbon Management Plan	
Scope, Details, Timeline		Est. Time
A. Objective: Client support and oversight of plan implementation 1. Assist enterprise with program implementation 2. Deliver best practices project management out-sourcing 3. Develop, deploy, and train enterprise personnel in effective use of CDE management plans 4. Report plan compliance and commitment, reinforce behavioral impacts		1 year
B. Key Outcome: Completion of carbon management strategies and projects 1. As requested by client, coordinate design, engineering, development, installation, construction of systems, vehicles, buildings, and operational improvements necessary to achieve strategies and complete projects 2. Take corrective actions with team if strategies or projects are not achieving expectations ... correct and optimize 3. Measure, validate, and report on completion of strategies and projects, compare outcomes to estimated benefits of plan 4. Issue periodic updates and revisions to plan as requested 5. Assist in the economic development of green technologies or new product lines or systems as requested 6. Design and deploy tools to measure performance of developmental strategies (for example, invent a new tool or process) to ensure sustainability benefits are realized 7. Develop project measurement and validation tools to assist enterprise evaluate temporary or pilot project businesses		

Step 4 - Notes

1. It is difficult to determine exactly how an educational organization might want to deploy the plan. It is our experience that carbon management will garner a lot of stakeholder and public interest. In this context, we have included site training and exposure beyond the final issuance of the report. In addition, we will monitor the program for one full year, and update the management plan at that time.
2. Anticipated Travel Scope
 - Trip 1 – Approximately 3-months into deployment, site review and update.
 - Trip 2 – Approximately 6-months into deployment, site review and update.
 - Trip 3 – Approximately 9-months into deployment, site review and update.
 - Trip 4 – 12-months after deployment, site review and update, issue one year update.

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Step 5 – Enterprise Wide Carbon Management

Action	Manage
Outcome / Tool	Enterprise Carbon Management
Scope & Details	
<p>A. Objective: Enterprise wide (EW) support and oversight of plan</p> <ol style="list-style-type: none"> 1. Assist client as requested to advance carbon management across the full enterprise 2. Deliver best practices project management out-sourcing 3. Develop, deploy, and train enterprise personnel in effective use of EW carbon management 4. Report EW enterprise compliance and commitment, reinforce behavioral changes 5. Assist client with corporate citizenship (CS) aspects <p>B. Key Outcome: Consistent enterprise wide operational carbon management</p> <ol style="list-style-type: none"> 1. Measure, validate, and report on completed projects, compare outcomes to estimated benefits 2. Assist in the economic development of green technologies or new product lines or systems as requested 3. Develop validation / optimization tools to assess pilot projects 4. Include metrics and peer benchmarking to gauge the success of future carbon actions as they unfold 5. Gain commitment to establish carbon leaders, with clout to collaborate, implement, integrate 6. Establish accountability for each EW carbon metric 7. Integrate energy operations, carbon policy, and market and regulatory perspectives 8. Synchronize with participation in voluntary EW climate change programs and/or proactive regulatory initiatives 9. Deploy methods to monetize or bank carbon actions, leverage to secure maximum reputational value 10. Deploy EW software tools for on-going GHG emissions tracking, maintenance, and carbon project management 11. Continuously monitor and report carbon actions 	

Step 5 - Notes

1. Not anticipated