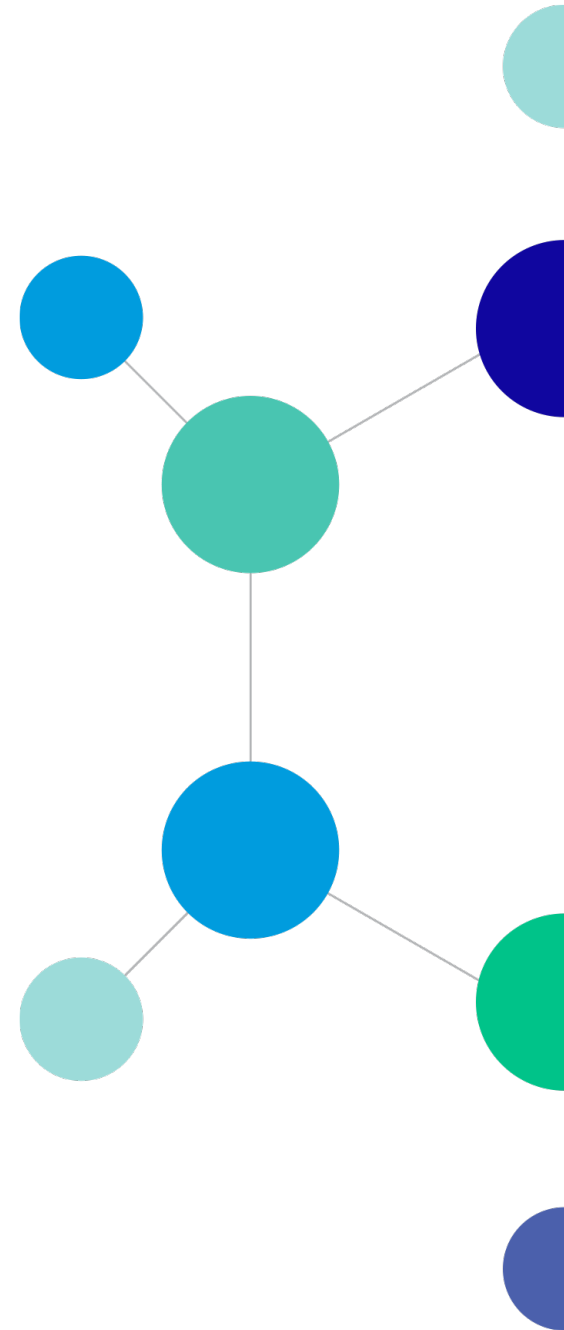


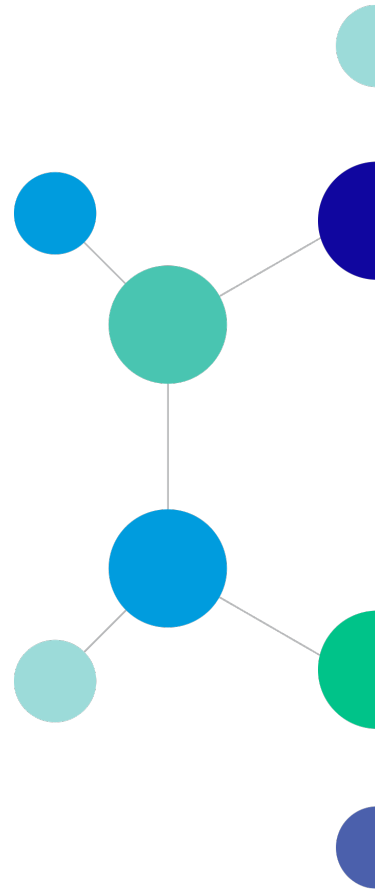


ESG & Sustainability Workshop
April 1-2, 2025
Indianapolis, IN



Agenda

- 8:00am Welcome & Opening Remarks
- 8:30am Intro Session: Monument Chemical Sustainability Journey
- 9:00am Session 1: Global Regulatory Update
- 9:30am Session 2: Setting & Achieving ESG & Sustainability Goals
- 10:15am Break
- 10:30am Session 3: The Modern Era of ESG Compliance: Reporting Essentials in Action
- 12:00am Lunch
- 1:00am Session 4: EcoVadis – Focusing Your Efforts
- 1:30pm Session 5: Sustainability Talking Points & Elevator Pitch
- 2:00pm Break
- 2:15pm ToolBox Session: Sustainability Journeys - Are You On Track?
- 3:15pm Closing Panel: Future Trends in ESG & Sustainability
- 4:00pm Wrap up and Departures



Thank You to Our Sponsors

Workshop Host



ESG Champion Sponsor



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Intro Session: Monument Chemical Sustainability Journey

Gloria O'Bannon



**HSSE Compliance
Coordinator**

Monument Chemical

Monument Chemical's Sustainability Journey

**2025 SOCMA ESG & Sustainability
April 2, 2025**



Who We Are

Our History

Monument was founded by The **Heritage Group** and the Grube Family, both of Indianapolis, with the objective of **building long-term value** through a **growing presence** in specialty chemicals.



Our businesses



Monument Solvents is a leading, global provider of organic solvents, intermediates, and specialty custom manufacturing services.



Monument Europe provides custom manufacturing services for several of the world's largest producers of fine and specialty chemicals – and supplies high-purity oxygenated solvents into many industries.

Our businesses



Monument Renewables & Fuels serves as a key partner in the transformative shift toward renewable fuels — and offers a wide range of specialty fluids products and custom manufacturing services.



Monument Oxides is a leading global provider of polyether polyols, alkoxylated surfactants, glycols, glycol ethers, and speciality custom manufacturing services.

Commitments

- Our quality promise to our customers is simple: ***do the job right – with every single product and service we offer.***
- As part of this commitment, we follow all industry-leading standards – aiming to push beyond expectations to ensure the highest possible level of quality for all of our key stakeholders.
- ISO, ChemSteward, GMP, etc.

Sustainability Journey Begins - 2023

- Prior to 2023
 - What's Sustainability/ESG?
- February 2023
 - Customer “requests” us to get EcoVadis Certified
 - Called in the experts (ClimeCo)
 - THG Climate Summit kickoff to discuss future climate ambitions
 - Monument Chemical Bayport EcoVadis Bronze
- April 2023
 - Attended SOCMA ESG workshop
- May 2023
 - 2022 Scope 1 & 2 Baseline Assessment with THG
 - Together for Sustainability (TfS) Assessment – Achieved 95.5% Rating (Bayport)
- June 2023
 - Monument Chemical LLC achieves EcoVadis Bronze
 - Kallo Site – Silver Certified
- July 2023
 - EcoVadis gap closures
 - Key Policy Completion – GLT Approval
 - Environmental
 - Labor & Human Rights
 - Responsible Procurement

Sustainability Journey Continues - 2024

- January 2024
 - GLT approves Sustainability Strategy – 4 pillars (Environmental Stewardship, Labor & Human Rights, Ethical Operation & Responsible Procurement)
- April 2024
 - Attended SOCMA 2nd ESG Summit
 - Development of Sustainability KPI's
- May 2024
 - Signed UN Global Compact
- June 2024
 - Supplier Code of Conducts sent to Tier 1 Suppliers
- August 2024
 - Monument Chemical EcoVadis Silver
 - Kallo Site – Silver Certified
- September 2024
 - Global Sustainability Charter Teams Created
- October 2024
 - Monument Chemical Antwerp Completes CDP with improved score

2025 Sustainability Focus Areas

Achieve a Global MC Certification from EcoVadis:

- Mid Year Submittal

Implement Chartered Strategy Pillar Teams:

- Continuous Improvement Driven

Antwerp Site Meets All European Legislation & Reporting Requirements

- CSRD Requirements are on hold

Site Abatement Surveys Completed:

- Percent Carbon Reduction Target Driver

Business & Site Goal align with Sustainability Improvements

- Project pipelines with focus on electrical, gas and water reduction

Key Takeaways

1. Set Clear Goals/Objectives – Commitments

Identify the key areas where your organization impacts sustainability. This involves understanding your carbon footprint, resource usage, and other environmental impacts

2. Engage Stakeholders

Involve employees, customers, suppliers, and other stakeholders in the process. Their input and support are crucial for the success of the program

3. Develop a Sustainability Plan

Create a detailed plan that outlines the steps to achieve your sustainability goals. This should include initiatives for environmental, social, and governance (ESG) aspects

4. Implement and Monitor

Put your plan into action and continuously monitor progress. Use key performance indicators (KPIs) to track your achievements and work towards gap closures

5. Communicate Transparently

Keep stakeholders informed about your sustainability efforts and progress. Transparency builds trust and encourages ongoing support

Key Takeaways

6. Invest in Sustainability

Allocate resources and budget for sustainability initiatives. Adequate investment is necessary for the success of the program

7. Continuous Improvement

Regularly review and update your sustainability program to adapt to new challenges and opportunities. Continuous improvement ensures long-term success

8. Align with Business Goals

Ensure that your sustainability program aligns with your overall business strategy. This integration helps in achieving both sustainability and business objectives

9. Technology

Use technology to enhance your sustainability efforts. This includes tools for monitoring, reporting, and improving sustainability practices


10. Leverage Ideology

Don't reinvent the wheel

Sustainability at Monument Chemical

We are passionate about operating as a team with responsibility and integrity. Our commitment is to constantly focus on sustainable business practices for our customers, our employees, the communities in which we live and operate, and our industry as a whole.


Monument Chemical is committed to:



Environmental Stewardship

Protecting the planet for current and future generations through the resources we use and the products & tolls we create.

- Combat climate change by reducing energy use and GHG emissions in line with technology developments and science
- Minimize freshwater use, waste creation, and local pollution
- Advance health, safety, and promote circularity through the materials we use and create
- Promote sustainable materials, products & solutions and minimize use of potentially harmful chemicals



Labor & Human Rights

Upholding human rights, promoting a safe and fair workplace, and enabling employee growth.

- Ensure employee safety and foster mental & physical health
- Maintain responsible working conditions & hours, global pay equity, and social dialogue
- Promote diversity, prevent harassment & discrimination and retaliation
- Enable talent development through career management and trainings
- Support communities through local giving and outreach
- Prohibit child labor, forced labor and human trafficking



Ethical Operations

Maintaining effective governance mechanisms to support the responsible management of our business.

- Prevent corruption through combating bribery, fraud, and conflicts of interest
- Prevent anti-competitive practices
- Promote information security
- Maintain robust risk governance and mitigation
- Ensure regulatory compliance
- Encourage oversight through third-party reporting hotline



Responsible Procurement

Directing our suppliers to meet high ethical, environmental, and social standards.

- Require regulatory compliance with all applicable domestic and foreign regulations and ethical practices
- Support labor and human rights standards within our supply chain
- Support environmental standards within our supply chain

Sustainability

ORG PROPOSAL

Chief Executive
Officer
Paul Raymond

Sustainability Pillar Manager
Rick Caines

Functional Roles – Global Specialization Leads

GLT Sustainability
Champion

VP, Operations
Adam Pingel

VP, Commercial
Dan Malone

CHRO
Sharon Barclay

CFO
Bill Grube

Business Leaders – Support and Alignment with Functions

VP, Solvents
Renee Harvilla

VP, R&F
Sarves Peri

VP, Oxides
Don Phillips

VP, Europe
Peter
Michielsen

Responsible Procurement

Labor and Human Rights

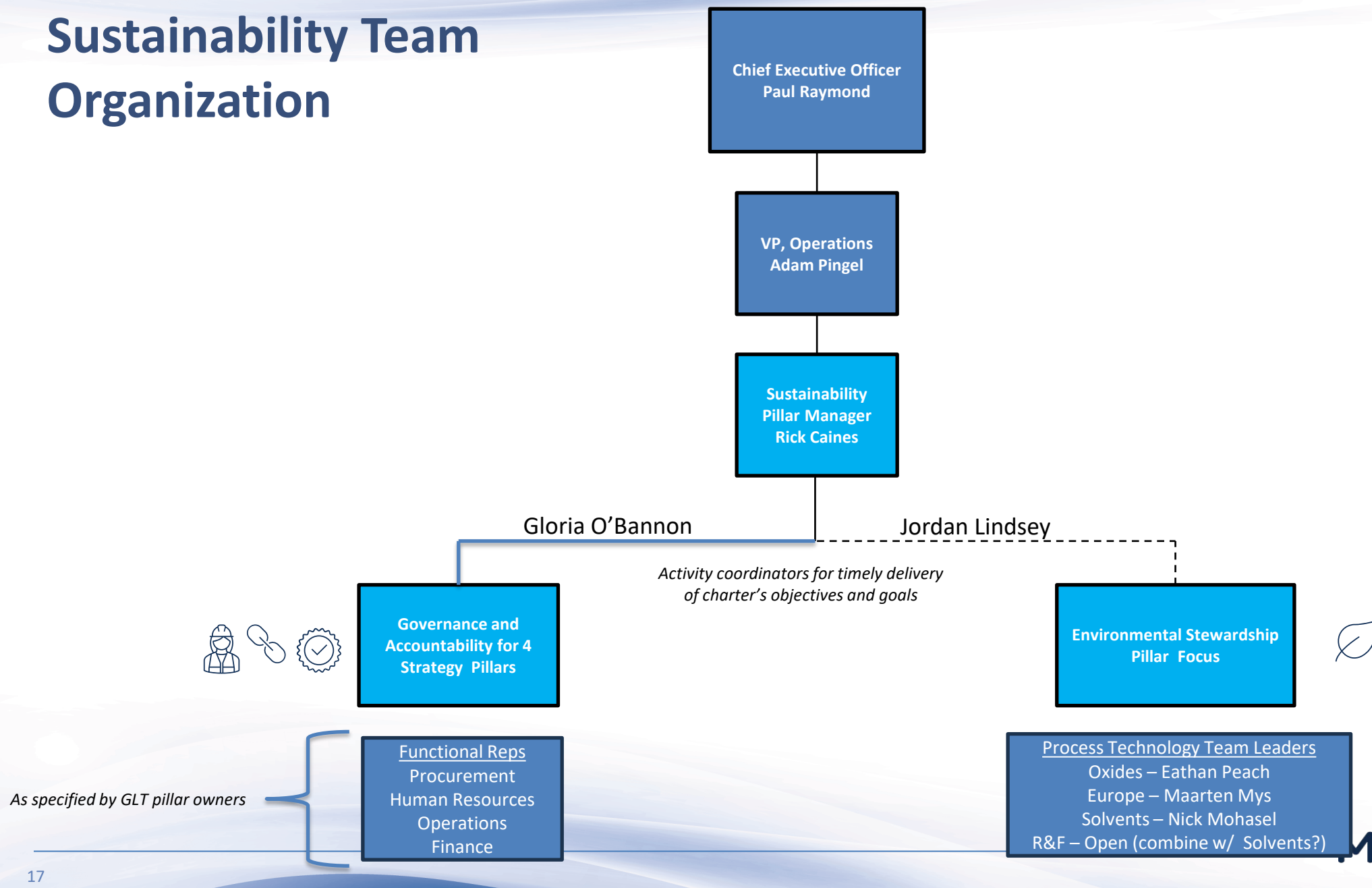
Environmental Stewardship

Ethical Operations

Governance & Accountability

Functional Roles are the Global Specialized Leads for each respective pillar working directly alongside Business Leaders for support and ensuring alignment in all areas.

Sustainability Team Organization



Global Sustainability Team Charter

PROJECT DESCRIPTION	
<i>Our commitment to global Sustainability needs to be designed to meet stakeholder expectations. We must align our practices with our customers’ sustainability goals and meet government requirements. In addition, we need to strive to achieve certifications requested by our customers to demonstrate that we are addressing sustainability goals and using the right methodology to prove our measured values and successes. The current organization is not set-up to tackle these Sustainability goals. The goal of this team is to bring clarity in ownership, consistency to the work process, develop a roadmap, develop KPI’s within Monument Chemical across the 4 pillars of the Sustainability strategy and Improve efficiency including energy reduction on projects</i>	
OBJECTIVES AND DELIVERABLES	
<ol style="list-style-type: none">1. Serve as Steering Team for Pillar Sub Teams2. Define Sustainability Organization (Short and Longer Term)3. Define Global Share Point Structure and Document Management Process4. Define Continuous Improvement Process – Annual – All Pillars5. Develop a Sustainability Roadmap Packet for Agency / Customers communications	
SCOPE	
In scope: <ul style="list-style-type: none">• 4 Strategy Pillars• Customer Goals / Certifications and Government Requirements• Growth Project Pipelines• ESG Philosophy	Out of scope: <ul style="list-style-type: none">• Business / Customer Strategies• Life Cycle Analysis
KEY RISKS / OTHER CRITICAL FACTORS	
<ul style="list-style-type: none">• Lost Customers / Lost Sales => EBITDA Loss• Negative Scoring on certification / Industry Visual => Negative image of our business	

TEAM COMPOSITION		
PROJECT SPONSOR Adam Pingel (GLT)	PROJECT LEAD Jody Caines	
CORE TEAM		SUPPORT TEAM
<ul style="list-style-type: none">• Gloria O’Bannon• Jordan Lindsey• Leen Props• Rick Caines		<ul style="list-style-type: none">• Sarves Peri• Renee Havrilla• Peter Michielsen• Don Phillips
PROJECT MILESTONES		
Kick off	MM/YYYY	
Introduction - Team Path Forward	10/2024	
Sub Charters Defined	11/2024	
Sustainability Roadmap	1/2025	
KPI Delivery	4/2025	
Continuous Improvement Process Plan Documented	6/2025	
Completion	12/2025	
BUSINESS NEED/ RATIONALE		
It is a clear expectation of customers globally that Monument Chemical participate in the Sustainability arena. Several have stated that GHG/PCF reporting (and reduction) is tied into future business opportunities.		
Not meeting customer sustainability expectation may result in loss of business/revenue.		

PROJECT DESCRIPTION	
<i>Monument Chemical’s commitment to global Sustainability needs to be designed to meet stakeholder expectations. Our practices must align with our customers’ Sustainability goals and meet all government requirements. In addition, we need to strive to achieve certifications requested by our customers to demonstrate that we are addressing Sustainability goals and using the right methodology to prove our measured values and successes. The current organization is not set-up to tackle these Sustainability goals. The goal of this team is to bring clarity in ownership, consistency to the work process, develop a roadmap, develop KPI’s within Monument Chemical across the 4 pillars of the Sustainability strategy and Improve efficiency including energy and water reductions on projects.</i>	
OBJECTIVES AND DELIVERABLES	
<ol style="list-style-type: none">1. Develop a Sustainable Roadmap to ensure Environmental Stewardship into the future2. GHG % Reduction Targets for Monument Chemical3. Develop and Track KPI’s regarding Environmental Stewardship Pillar4. Develop / Implement an “Efficient Customer and Agency Requests Response Process”5. Incorporate Sustainability project pipeline into MC Capital Work Process6. Develop and implement a communication package for stakeholders including employees, customers, suppliers and Government agencies with focus on Environmental Stewardship.	
SCOPE	
In scope: <ul style="list-style-type: none">• Customers’ goals, certifications and government requirements.• Current and project development pipeline• Environmental Stewardship Philosophy within organization• Environmental Stewardship policies	Out of scope: <ul style="list-style-type: none">• Business / Commercial Strategy• Other pillars
KEY RISKS / OTHER CRITICAL FACTORS	
<ul style="list-style-type: none">• Lost Customers / Lost Sales => EBITDA Loss• Negative Scoring on certification / Industry Visual => Negative image of our business	

TEAM COMPOSITION		
PROJECT STEERING	PROJECT LEAD	
Adam Pingel	Rick Caines	
CORE TEAM	OWNER	
<ul style="list-style-type: none">• Jordan Lindsey• Maarten Mys• Nick Mohasel• Ethan Peach• Tom Del Prato (Chair)	<ul style="list-style-type: none">• Adam Pingel (Process Technology)• Sarves Peri (Business Leader)• Peter Michielsen (Business Leader)• Renee Havrilla (Business Leader)	
PROJECT MILESTONES		
Kick off	12/24	
Monument/ClimeCo develop Sustainable Roadmap	3/2025	ClimeCo send to Tom
Incorporate sustainability project pipeline into CapEx process	3/2025	Tom
Process defined for timely response to Customers on Scope 3 GHG requests	3/2025	Rick & Jordan discuss
KPI Development and Implementation	5/2025	Team
Kallo % GHG reduction target (CSRD)	9/2025	Maarten
Site GHG Feasibility Study (Kallo complete)	9/2025	Team & ClimeCo
Global % GHG reduction target Approved by GLT	6/2026	Adam
BUSINESS NEED/ RATIONALE		
It is a clear expectation of customers globally that Monument Chemical participate in the Sustainability arena. Several have stated that GHG/PCF reporting (and reduction) is tied into future business opportunities.		

Sustainability Charter: Labor & Human Rights



PROJECT DESCRIPTION	
Our commitment to global Sustainability needs to be designed to meet stakeholder expectations. We must align our practices with our customers’ sustainability goals and meet government requirements. In addition, we need to strive to achieve certifications requested by our customers to demonstrate that we are addressing sustainability goals and using the right methodology to prove our measured values and successes. The current organization is not set-up to tackle these Sustainability goals. The goal of this team is to bring clarity in ownership, consistency to the work process, develop a roadmap, develop KPI’s within Monument Chemical across the 4 pillars of the Sustainability strategy and Improve efficiency including energy reduction on projects	
OBJECTIVES AND DELIVERABLES	
<ol style="list-style-type: none">1. Develop a Sustainability Roadmap based on the strategy with short (0-3y)- Medium (3-10y)- Long (10+y)-term horizons on dependencies, impacts, risks and opportunities with KPI’s to measure on Labor & Human Rights including required policies.2. Efficient communication by developing sustainability communication package for stakeholders starting with employees, customers, suppliers and government with focus on Labor & Human Rights.3. Continuous Improvement Process on requested certifications on Labor & Human Rights.4.	
SCOPE	
In scope: <ul style="list-style-type: none">• Customers’ goals, certifications and government requirments.• Current and project development pipeline• Labor & Human Rights Philosophy within organization• Labor & Human Rights policies	Out of scope: <ul style="list-style-type: none">• Business / Commercial Strategy• LCA• Other pillars
KEY RISKS / OTHER CRITICAL FACTORS	
<ul style="list-style-type: none">• Lost Customers / Lost Sales => EBITDA Loss• Negative Scoring on certification / Industry Visual => Negative image of our business	

TEAM COMPOSITION		
PROJECT STEERING		PROJECT LEAD
Renee Havrilla (GLT) & Peter Michielsen (GLT)		Jody Caines & Gretel Sandrap
CORE TEAM		OWNER
<ul style="list-style-type: none">• Carolina Barrientos• Tonya Jeffries• Mario Renap....		<ul style="list-style-type: none">• Sharon Barclay• Maria Kraemer
PROJECT MILESTONES		
Kick off	MM/YYYY	
Training in Labor & Human Rights requirements, expectations, methodologies and reporting methods	10/2024	
Input on Labor & Human Rights for small communication package with timeline for customers	10/2024	
Input on Labor & Human Rights for roadmap and KPI’s 1) Kallo 2) Global	1) 12/2024 2) TBD	
Input on Labor & Human Rights for communication package for stakeholders	12/2025	
....		
BUSINESS NEED/ RATIONALE		
It is a clear expectation of customers globally that Monument Chemical participate in the Sustainability arena. Several have stated that GHG/PCF reporting (and reduction) is tied into future business opportunities.		

Sustainability Charter: Ethical Operations



PROJECT DESCRIPTION	
Our commitment to global Sustainability needs to be designed to meet stakeholder expectations. We must align our practices with our customers’ sustainability goals and meet government requirements. In addition, we need to strive to achieve certifications requested by our customers to demonstrate that we are addressing sustainability goals and using the right methodology to prove our measured values and successes. The current organization is not set-up to tackle these Sustainability goals. The goal of this team is to bring clarity in ownership, consistency to the work process, develop a roadmap, develop KPI’s within Monument Chemical across the 4 pillars of the Sustainability strategy and Improve efficiency including energy reduction on projects	
OBJECTIVES AND DELIVERABLES	
<ol style="list-style-type: none">1. Develop a Sustainability Roadmap based on the strategy with short (0-3y)- Medium (3-10y)- Long (10+y)-term horizons on dependencies, impacts, risks and opportunities with KPI’s to measure on Ethical Operations including required policies.2. Efficient communication by developing sustainability communication package for stakeholders starting with employees, customers, suppliers and government with focus on Ethical Operations.3. Continuous Improvement Process on requested certifications on Ethical Operations.4.	
SCOPE	
In scope: <ul style="list-style-type: none">• Customers’ goals, certifications and government requirments.• Current and project development pipeline• Ethical Operations Philosophy within organization• Ethical Operations policies	Out of scope: <ul style="list-style-type: none">• Business / Commercial Strategy• LCA• Other pillars
KEY RISKS / OTHER CRITICAL FACTORS	
<ul style="list-style-type: none">• Lost Customers / Lost Sales => EBITDA Loss• Negative Scoring on certification / Industry Visual => Negative image of our business	

TEAM COMPOSITION		
PROJECT STEERING		PROJECT LEAD
Renee Havrilla (GLT) & Peter Michielsen (GLT)		Sharon Barclay & Mario Renap
CORE TEAM		SUPPORT TEAM
<ul style="list-style-type: none">• ... check meeting certification, government and customer requirements: <ul style="list-style-type: none">• Rick Caines• Gloria O’Bannon• Leen Props		<ul style="list-style-type: none">• Maria Kraemer• Manu Gyselinck• Wendell Borges• Tom Del Prato• Blake Saffer
PROJECT MILESTONES		
Kick off	MM/YYYY	
Training in Ethical Operations requirements, expectations, methodologies and reporting methods	10/2024	
Input on Ethical Operations for small communication package with timeline for customers	10/2024	
Input on Ethical Operations for roadmap and KPI’s 1) Kallo 2) Global	1) 12/2024 2) TBD	
Input on Ethical Operations for communication package for stakeholders	12/2025	
...		
BUSINESS NEED/ RATIONALE		
It is a clear expectation of customers globally that Monument Chemical participate in the Sustainability arena. Several have stated that GHG/PCF reporting (and reduction) is tied into future business opportunities.		

Sustainability Charter: Responsible Procurement



PROJECT DESCRIPTION	
Our commitment to global Sustainability needs to be designed to meet stakeholder expectations. We must align our practices with our customers’ sustainability goals and meet government requirements. In addition, we need to strive to achieve certifications requested by our customers to demonstrate that we are addressing sustainability goals and using the right methodology to prove our measured values and successes. The current organization is not set-up to tackle these Sustainability goals. The goal of this team is to bring clarity in ownership, consistency to the work process, develop a roadmap, develop KPI’s within Monument Chemical across the 4 pillars of the Sustainability strategy and Improve efficiency including energy reduction on projects	
OBJECTIVES AND DELIVERABLES	
<ol style="list-style-type: none">1. Develop a Sustainability Roadmap based on the strategy with short (0-3y)- Medium (3-10y)- Long (10+y)-term horizons on dependencies, impacts, risks and opportunities with KPI’s to measure on Responsible Procurement including required policies.2. Efficient communication by developing sustainability communication package for stakeholders starting with employees, customers, suppliers and government with focus on Responsible Procurement.3. Continuous Improvement Process on requested certifications on Responsible Procurement.4.	
SCOPE	
In scope: <ul style="list-style-type: none">• Customers’ goals, certifications and government requirments.• Current and project development pipeline• Responsible Procurement Philosophy within organization• Responsible Procurement policies	Out of scope: <ul style="list-style-type: none">• Business / Commercial Strategy• LCA• Other pillars
KEY RISKS / OTHER CRITICAL FACTORS	
<ul style="list-style-type: none">• Lost Customers / Lost Sales => EBITDA Loss• Negative Scoring on certification / Industry Visual => Negative image of our business	

TEAM COMPOSITION		
PROJECT STEERING		PROJECT LEAD
Renee Havrilla (GLT) & Peter Michielsens (GLT)		Jacob Davis & Christophe Vergote
CORE TEAM		SUPPORT TEAM
<ul style="list-style-type: none">• Kris Sturgul• Alicia Penny• Phil Hume• Dan Malone• Kyle Tomme• David Zapata• ... check meeting certification, government and customer requirements: <ul style="list-style-type: none">• Rick Caines• Gloria O’Bannon• Leen Props		<ul style="list-style-type: none">• Maria Kraemer• Manu Gyselinck• Wendell Borges• Tom Del Prato• Blake Saffer
PROJECT MILESTONES		
Kick off	MM/YYYY	
Training in Responsible Procurement requirements, expectations, methodologies and reporting methods	10/2024	
Input on Responsible Procurement for small communication package with timeline for customers	10/2024	
Input on Responsible Procurement for roadmap and KPI’s 1) Kallo 2) Global	1) 12/2024 2) TBD	
Input on Responsible Procurement for communication package for stakeholders	12/2025	
...		
BUSINESS NEED/ RATIONALE		
It is a clear expectation of customers globally that Monument Chemical participate in the Sustainability arena. Several have stated that GHG/PCF reporting (and reduction) is tied into future business opportunities.		

Session 1: Global Regulatory Overview

Alex DeBlois



Vice President

LONGVIEW STRATEGIES

LONGVIEW
STRATEGIES

 **socma**
SOLUTIONS FOR SPECIALTIES

Global Regulatory Overview

ESG Under a Trump
Administration

Overall Approach to ESG: Deregulation and Market-Driven Standards



Mandates:

A second Trump administration is expected to de-emphasize ESG mandates, particularly those tied to federal rulemaking, disclosures, or procurement.



SEC Climate Rule:

Likely to roll back or delay SEC climate disclosure requirements and other federal ESG-related reporting obligations.



DEI

There could be backlash for voluntary, market-based practices rather than prescriptive regulatory frameworks. (think about how they are treating government contracts with companies that have DEI policies)

Environmental Policy: Shift Toward Domestic Energy & Industrial Priorities.

ESG-related environmental policies (e.g., decarbonization mandates) take a back seat to energy independence, manufacturing competitiveness, and deregulatory goals.



Expect support for fossil fuel infrastructure, streamlined permitting, and potential rollback of climate-focused EPA rules—which could affect how companies manage emissions and sustainability goals.



Climate action will likely move away from federal mandates and toward state and global stakeholder pressures.



Social & Governance: De-Prioritization of Mandates:

1

Federal focus on DEI and labor transparency policies has basically been eliminated.

2

Governance-related ESG efforts—such as board diversity disclosures or ESG-related shareholder proposals—will lose support at the SEC level.

3

Overall, reduced federal activism in shaping how companies manage and report “S” and “G” elements.

State & Global Pressures Will Fill the Void

- Even if federal ESG mandates soften, pressures from global customers, investors, and states (e.g., CA, NY) will persist.
- Many companies in the specialty chemical space will still need to maintain ESG-related programs to meet supply chain demands and international market access.

Risks to Monitor



Global operations:

Rapid policy reversals can create uncertainty—members with global operations or public investors may still face pressure to maintain robust ESG strategies.



State and Local:

State-level regulations or activist litigation may increase in the absence of strong federal standards.



Caution:

Companies should be cautious about abandoning ESG commitments if they are key to customer retention, financing, or international trade.

Questions?

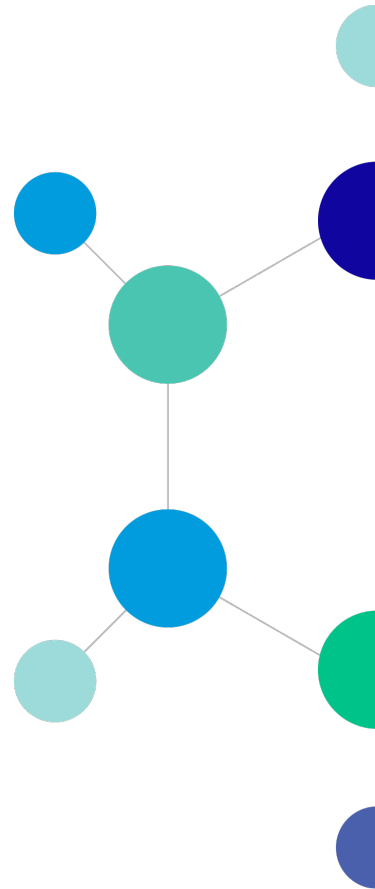


Session 2: Setting and Achieving ESG & Sustainability Goals

Amanda Mast



**Senior Manager
Climate Advisory**





Quick Guide to Goal Setting

SOCMA SUSTAINABILITY WORKSHOP 2025

Amanda Mast - amast@climeco.com

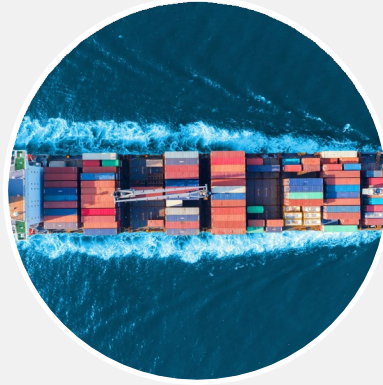
About ClimeCo



**Climate &
Sustainability Advisory**



**Decarbonization
Implementation &
Investment**



**Environmental
Credit Solutions**



**Regulatory
Compliance & Policy
Advisory**



**Digital Solutions &
Product
Certification**

Speakers & Agenda

Introductions

Quick Guide to Goal-Setting

Challenges & Solutions

Final Thoughts



Amanda Mast
Sr. Manager,
Climate Advisory

10+ years in Sustainability
Strategy and Climate Risk &
Regulation



Caroline Kelleher
Associate Manager,
Sustainability Advisory

5+ years in Technical
Decarbonization Strategies and
Target Setting

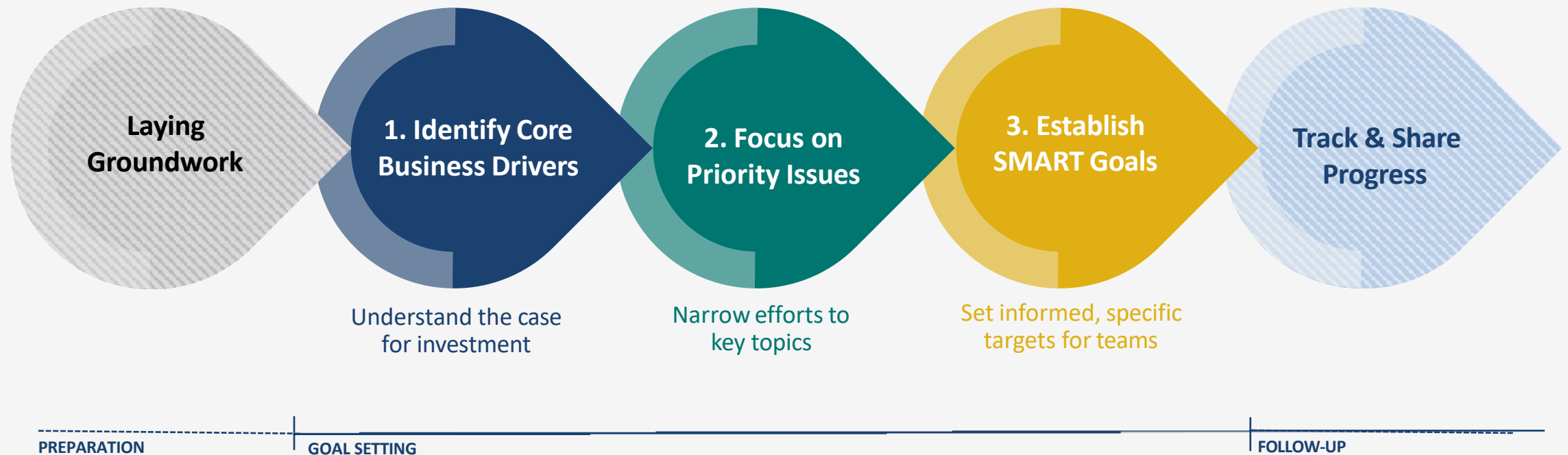
An aerial photograph of a dense, lush green forest. A narrow, light-colored dirt road or path winds through the trees in a series of gentle S-curves. The forest is thick with various types of trees, creating a textured canopy of green. The lighting suggests a bright day, with some areas of the forest appearing slightly brighter than others.

“Sustainability” Defined

Broad range of environmental, social, and governance topics that contribute to a responsibly-run business and long-term value creation. Alternative terms include: corporate social responsibility, social & environmental impact, and business resilience.

A Quick Guide to Goal-Setting

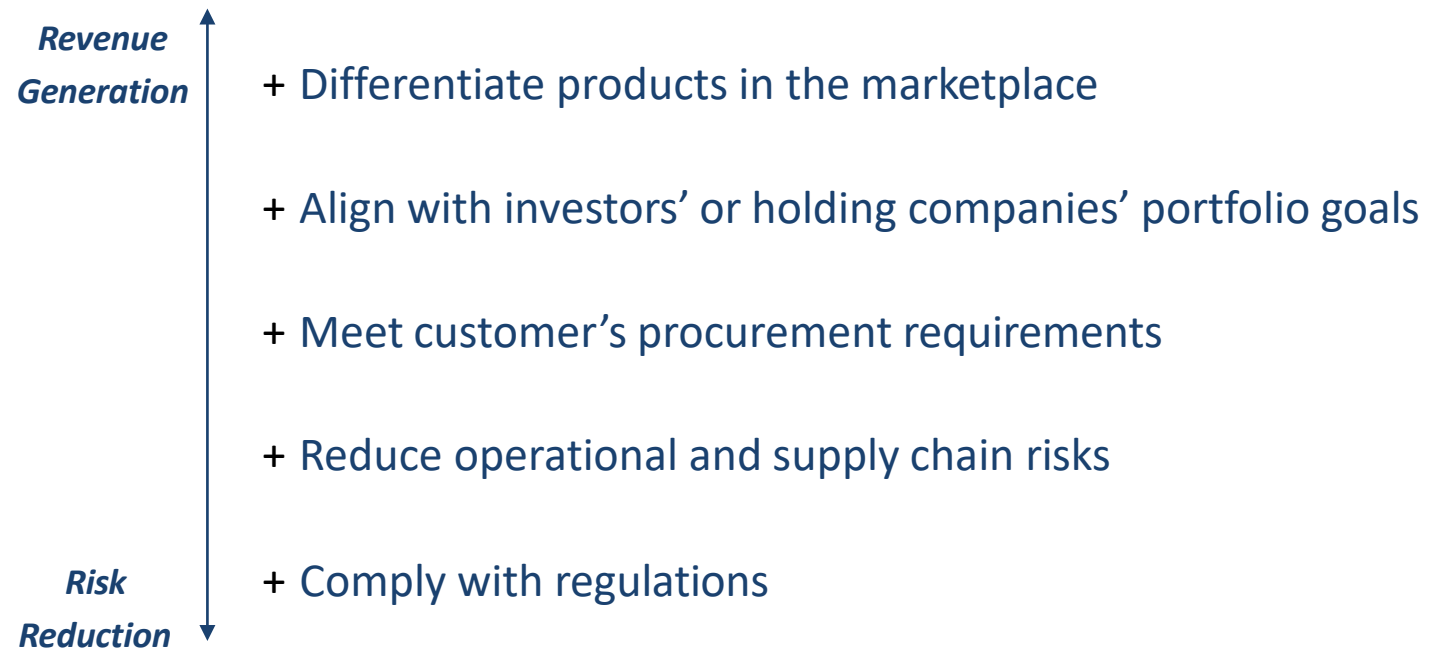
Laying the groundwork before setting goals leads to better use of corporate resources – and better outcomes.



STEP #1

Identify Core Business Drivers

What are the ultimate goals of your sustainability efforts that result in long-term value creation?



Case Study

Industrial Services Provider Engages Chemical Clients

US-based industrial services provider has customers who are members of “Together for Sustainability” – an initiative driving sustainability chemical supply chains. The firm also does business in California and is subject to climate disclosure requirements.



Meet Customer Requirements

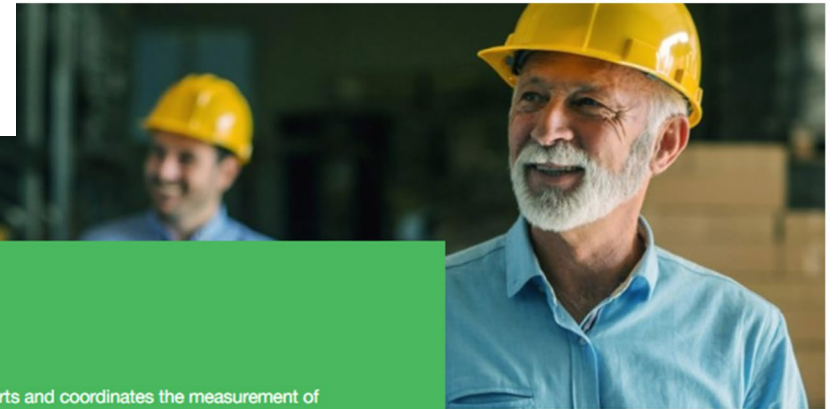
- Build and document sustainability practices
- Meet minimum EcoVadis assessment score



Comply with Regulation

- Assess climate risks to business and measure greenhouse gas footprint
- Report climate risks publicly

Source: [Together for Sustainability](#)



What we do

Together for Sustainability (TfS) supports and coordinates the measurement of sustainability performance of chemical companies and their suppliers. Results are shared with all TfS members, enhancing efficiency and cost-effectiveness while simultaneously encouraging industry-wide collaboration and continuous improvement.

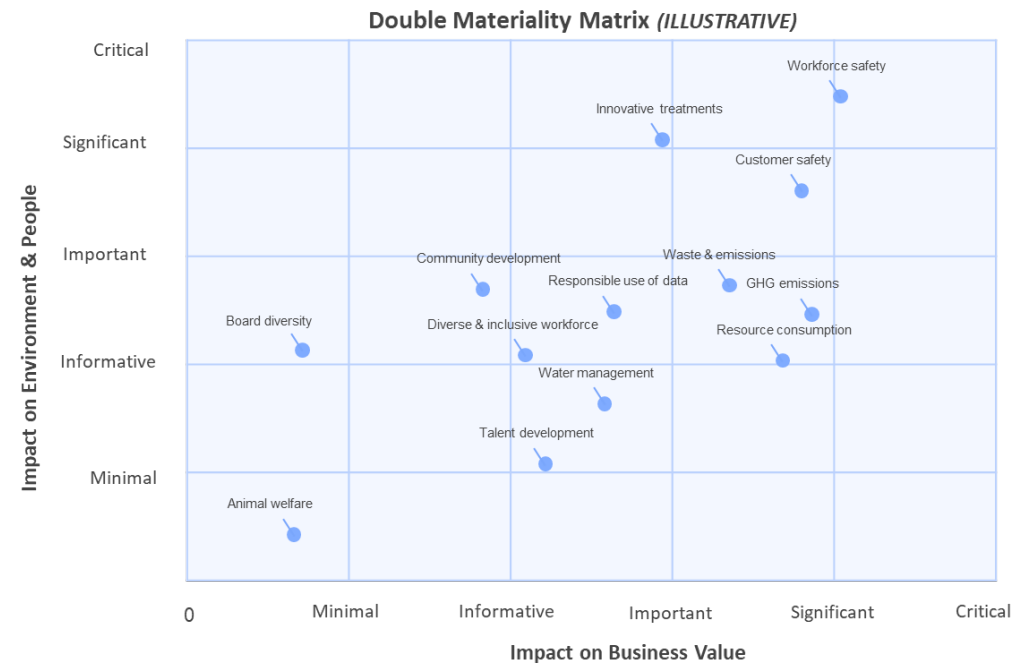
This collaborative approach to sustainable procurement:



STEP #2

Focus on Priority Issues

Identifying the topics that interest stakeholders and impact your business allows you to focus on what matters most.



Case Study

A newly merged oil and gas company looked to integrate and merge its sustainability reporting. This involved consolidating and refreshing a materiality assessment to establish a unified materiality framework that represented the combined interests of the new entity.



Align to internal and external stakeholder priorities

- Identify sustainability topics with high impact and significance
- Align sustainability strategy to the areas that matter most to stakeholders



STEP #3

Establish SMART Goals

Steps 1 & 2 provide a strong foundation for goal-setting through developing the business case, focusing on key topics, and engaging internal stakeholders. Now firms can create goals efficiently and impactfully.

Company without SMART Goals:



- Broad, competing priority areas
- Lack of executive buy-in
- Minimal internal engagement
- Unstructured, underfunded actions

Company with SMART Goals:



- ✓ Focused and informed priorities
- ✓ Executive support
- ✓ Clear next steps
- ✓ Sufficient investment

Case Study – Monument Chemical

S

Specific

Improve EcoVadis scoring through sustainability strategy, policies, and KPIs

M

Measurable

Create 4 policies & 10 KPIs to improve our score by 10%

A

Achievable

SOCMA, EcoVadis, and Heritage have guidance to leverage

R

Relevant

Efforts will help meet customers' requirements and align to Heritage's goals

T

Time-Bound

Complete 6 months ahead of EcoVadis submission



Our Commitments

Our **commitment to safety**, the environment, and product stewardship **guides every step we take.**

Case Study

S

Specific

Set a feasible greenhouse gas reduction target

M

Measurable

Reduce Scope 1 & 2 GHG emissions by 12% by 2030 from a 2023 baseline

A

Achievable

Abatement and MACC modelling determined target ambition level

R

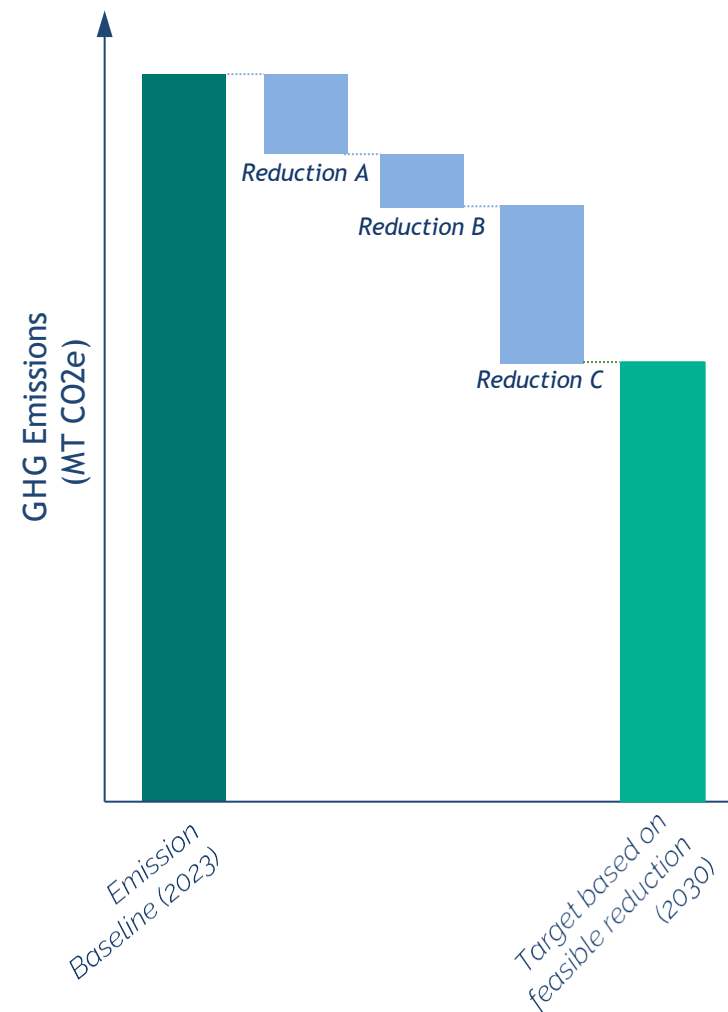
Relevant

Efforts done as part of an overall sustainability strategy refresh

T


Time-Bound

Publish target in upcoming report & defined target year of 2030




Challenges & Solutions

How have you successfully navigated challenges to create goals for your company?



Identifying and engaging the right internal stakeholders and assigning responsibilities



Setting deadlines
What timing creates urgency while remaining feasible?




Getting buy in from senior leadership

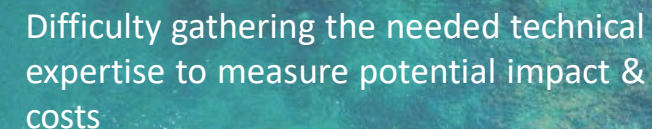


Challenges communicating results and progress to rankers, investors, & employees

Competing priorities & projects



Defining “achievable” goals



Difficulty gathering the needed technical expertise to measure potential impact & costs



CONTACTS

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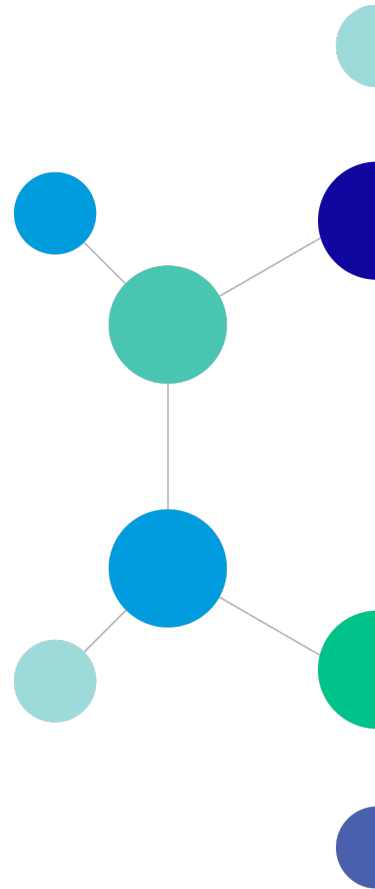
Session 3: The Modern Era of ESG Compliance

Alex DeBlois



Vice President

LONGVIEW STRATEGIES



Sustainability Reporting:

Choosing the right
frameworks and standards
to optimize ESG efforts in
an era of compliance

Workshop Goals:

Understand key compliance frameworks:

Learn the fundamentals of major sustainability regulations like CSRD, SEC climate disclosure, and ISSB standards.



Explore how these frameworks apply to your organization:

Identify the specific reporting requirements relevant to your industry and business operations.



Learn strategies for effective sustainability reporting:

Develop best practices for data collection, materiality assessments, and transparent disclosures.



Address challenges and create value through reporting:

Use sustainability reporting to enhance efficiency, strengthen investor trust, and drive long-term growth.



Sustainability reporting is critical for modern organizations aiming to balance economic goals with environmental and social responsibilities.

By adopting robust frameworks and adhering to regulatory requirements, organizations can foster transparency, trust, and long-term value for all stakeholders.

Effective sustainability reporting drives value



Compliance:

Regulation, supply chain due diligence, customer and investor requirements



Strategic:

Organizational design, intellectual capital – human network structure



Creating value:

Sustainable organizational development

The Value

A Means, Not Just an End

Quality data helps us stay ahead of risk and meet commitments proactively



Organizational Design & Governance

The right policies mean we can confidently meet commitments on anti-corruption, local customs, and maintaining social license



Intellectual Capital: Tools & Comms

A strong strategy means smarter decision-making and greater trust from stakeholders.



Organizational Development

This means integrating sustainability into operations, ensuring long-term success.



The global sustainability reporting landscape is rapidly evolving.

Fragmentation of Standards:

Lack of global consistency.



Data Quality and Accessibility:

Opaque supply chains and the complexity of disclosures.




Stakeholder Expectations:

Discussion on unreliable ESG ratings and noisy data.



Voluntary vs. mandatory

- 
- A- Something about to do good/it's just the right thing to do.
 - To B - Non- financial reporting started as a “comply or explain” framework, which means that firms are expected to comply with regulations applicable in the jurisdictions where they operate plus with generally accepted cultural and ethical standards. The premise is that all firms are complying, they are expected to provide detailed and considerable justification only when they don't.
 - To Z - Mandatory ESG disclosure requires full reporting on these non-financial variables in the countries where the local law requires so or in some specific contexts (applicable to organizations meeting specific criteria, e.g. major Stock Exchanges).

This

Means . . .

Almost everyone

Evolution of Reporting



Early Voluntary Frameworks

- UN Global Compact (2000)
- ISO 26000 (2010)



ESG-Centric Models

- GRI (Global Reporting Initiative)
- SASB (Sustainability Accounting Standards Board)
- TCFD (Task Force on Climate-related Financial Disclosure)



Regulatory-Driven

- CSRD (Corporate Sustainability Reporting Directive, EU)
- SEC Climate Decision Rule
- ISSB (International Sustainability Standards Board)

Framework	Purpose	Audience	Focus Areas	Information to Report
GRI	Promote transparency and accountability in sustainability reporting.	Global organizations of all sizes.	Environmental, Social, and Governance.	Material sustainability topics, impact on stakeholders, and key ESG metrics.
SASB	Provide industry-specific standards for sustainability reporting.	Investors and financial stakeholders.	Environmental, Social, and Governance with financial materiality focus.	Material financial ESG risks and opportunities by industry.
IFRS	Set global standards for sustainability disclosures.	Global organizations and financial regulators.	Governance, Environmental, and Social impacts.	Performance metrics, risks, and strategy related to ESG.
CSRD/ESRS	Ensure consistent and comparable ESG reporting across the EU.	EU companies and subsidiaries operating in EU markets.	Environmental, Social, and Governance.	Compliance with EU standards, sustainability impacts, risks, and opportunities.
TCFD	Enhance and standardize climate-related financial disclosures.	Investors, financial institutions, and regulators.	Environmental with emphasis on climate risks.	Governance, strategy, risk management, and climate-related financial metrics.
WEF Common Metrics	Align sustainability reporting globally using common metrics.	Global organizations and investors.	Environmental, Social, and Governance.	Universal ESG metrics for reporting sustainability performance.
UNGC/SDGs	Align business strategies with UN Sustainable Development Goals.	Global organizations committed to sustainability.	Environmental, Social, and Governance with a global development focus.	Progress on SDG targets, initiatives, and sustainability impact.
CDP	Promote transparency in environmental impacts and actions.	Organizations, investors, and governments.	Environmental with emphasis on climate, water, and forests.	Carbon emissions, water security, deforestation, and climate strategies.
EcoVadis	Assess and rate companies' sustainability performance.	Businesses and supply chain partners.	Environmental, Social, and Governance.	ESG performance benchmarks for procurement and sustainability ratings.
Dow Jones Sustainability Index	Evaluate corporate sustainability performance across industries.	Investors and stakeholders.	Environmental, Social, and Governance.	Corporate ESG performance metrics, governance, and industry comparisons.
MSCI	Provide ESG ratings and data to investors.	Institutional investors and asset managers.	Environmental, Social, and Governance.	ESG risk ratings, industry analysis, and climate risk assessments.
SEC Climate Disclosure Rules	Enhance and standardize climate-related disclosures for public companies.	SEC-registered public companies, investors, and stakeholders.	Environmental with emphasis on climate risks.	Climate-related risks, greenhouse gas (GHG) emissions (Scope 1, 2, and eventually 3), and climate governance.
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ISO 14001	Provide a framework for effective environmental management systems.	Organizations of all sizes and sectors.	Environmental.	Processes for managing environmental responsibilities, compliance obligations, and continuous improvement.
ISO 26000	Guide organizations in integrating social responsibility into their operations.	Organizations of all types (businesses, governments, NGOs).	Social and Governance.	Principles of social responsibility, stakeholder engagement, and sustainable development strategies.

Framework highlights:

1

UN Global Compact:

Focus on 10 principles (human rights, labor, environment, anti-corruption). Global commitment to sustainability principles.

2

GRI:

Comprehensive disclosures with modular options. Broadest global reporting standard, focus on stakeholders.

3

ISO 26000:

Guidance-based, flexible for all industries. It helps organizations integrate sustainability into operations but lacks enforceable reporting requirements.

4

CSRD:

EU-mandated compliance with a focus on comparability. Mandatory in the EU, ensures standardized disclosures.

5

TCFD:

Financial risk lens for climate change. Aligns financial disclosures with climate risk.

6

SASB/ISSB

Tailored standards for specific industries. Focuses on investor-driven insights.

Case Study: CSRD

EU Legislation:

Designed to enhance the scope and quality of sustainability reporting



Robust Framework

Mandates a detailed disclosure of sustainability-related information.



Rigorous Reporting

Sustainability information to be reported with the same level of scrutiny as financial data.



Assurance

Mandatory third-party assurance.



Who is Subject to CSRD:

NFRD Companies: 2025

Publicly listed, employing more than 500 people, a balance sheet over €25 million OR net turnover of €50 million



Large EU Companies: 2026*

If the company fulfills two of the following:
a balance sheet over €25 million, net turnover of €25 million, 250+ employees



Listed SMEs: 2027*

If the company fulfills two or more of the following: a balance sheet over €5 million, net turnover of €10 million, 50+ employees.



Non-EU Companies: 2029*

Non-EU companies with a branch or subsidiary in the EU may also be in scope of the CSRD



	Reporting for Calendar-Year-End Filers			
	2024 (Reporting in 2025)	2025 (Reporting in 2026)	2026 (Reporting in 2027)	2028 (Reporting in 2029)
Scope	Companies already subject to the NFRD, including large US companies with more than 500 employees and listed on an EU regulated market	All large US companies listed on EU regulated markets and all large EU subsidiaries of US companies.	SME subsidiaries of US companies listed on EY regulated market	US based companies with €150 million + in EU in last 2 financial years and at least 1 large subsidiary or a subsidiary listed on EU market with €400M net turnover
Required Standards	ESRS (or equivalent standards)		ESRS or specific SME standards	ESRS, equivalent, or alternative specific standards for non-EU entities to be developed
Reporting Level	Stand alone subsidiary, unless included in the parent's report prepared under ESRS or equivalent standards for non-EU parent (i.e., consolidated group level)			Consolidated group, including non-EU activity
Assurance	Yes, limited assurance over all reported sustainability information			Yes, limited assurance over all reported sustainability information

General Disclosure Requirements

Governance

Structures, policies, and practices related sustainability.



Strategy and Business Model

Sustainability strategy, objectives, impacts on business model and value chain, and influence on strategic planning.



Impacts, Risks, and Opportunities

Processes for identifying and assessing material impacts, sustainability risks, and opportunities.



Metrics and Targets

Specific metrics and targets for assessing sustainability performance.



General Disclosures

ESRS 1
General Requirements

#0

ESRS 2
General Requirements

#219

Topic-specific Cross-sector Standards

Environment

ESRS E1
Climate change

#214

ESRS E2
Pollution

#96

ESRS E3
Water & marine resources

#48

ESRS E4
Biodiversity & ecosystems

#122

ESRS E5
Resources & circular economy

#64

Social

ESRS S1
Own workforce

#196

ESRS S2
Workers in the value chain

#67

ESRS S3
Affected communities

#66

ESRS S4
Customers & end-users

#66

Governance

ESRS G1
Business conduct

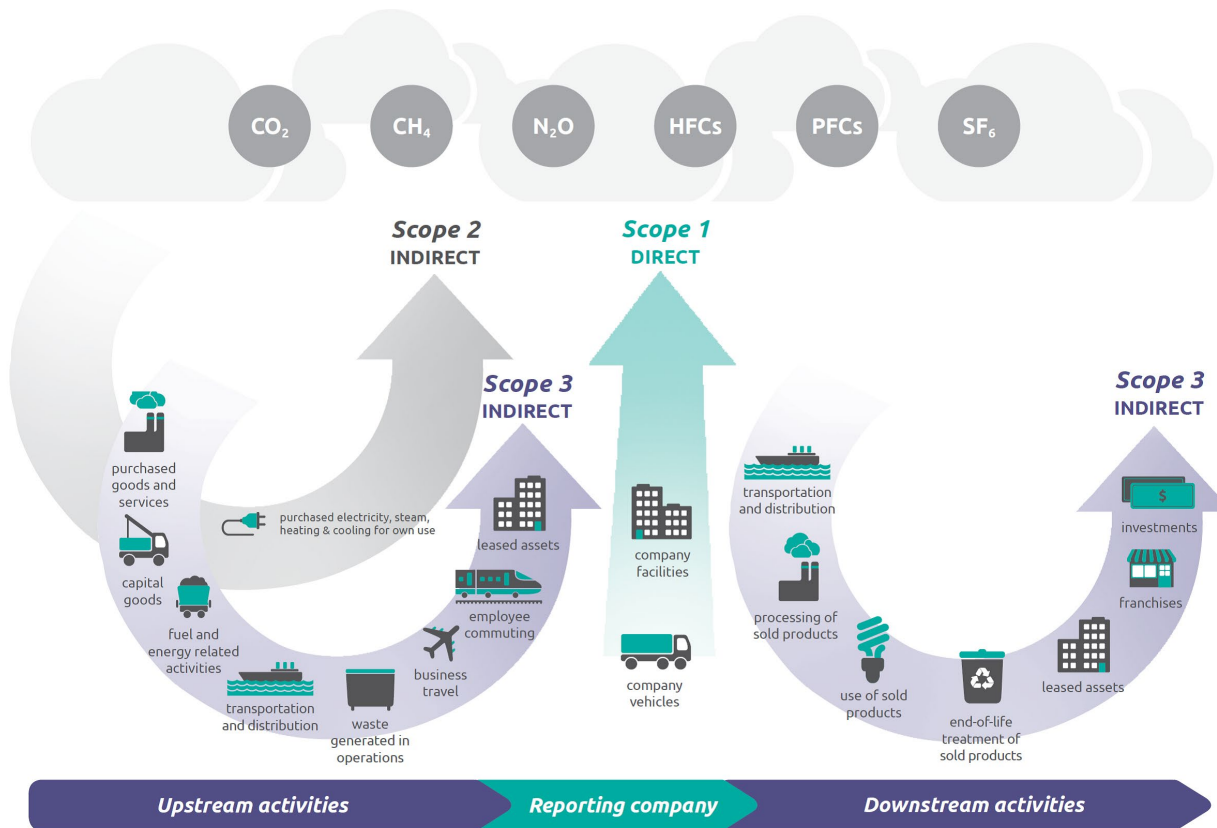
#53

Number datapoints

mandatory

Typically material

GHG Accounting



Operational emissions

Scope 1: owned & operated facilities & fleets

Scope 2: Electricity for those facilities



Value chain emissions

Scope 3: results of activities from assets not controlled by you, but that indirectly affect your value chain

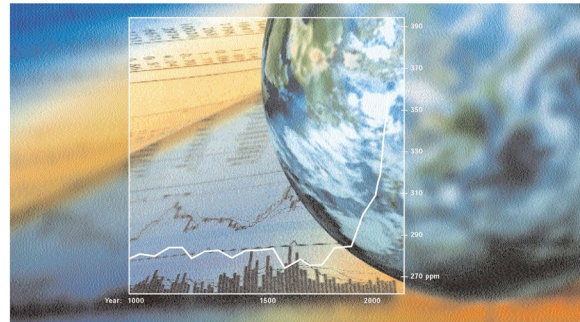


GHG Protocol

<https://ghgprotocol.org/>



The Greenhouse Gas Protocol



A Corporate Accounting and Reporting Standard
REVISED EDITION



Scope 2 Guidance

The Scope 2 Guidance standardizes how corporations measure emissions from purchased or acquired electricity, steam, heat, and cooling (called “Scope 2 emissions”)



Corporate Value Chain Standard

The Corporate Value Chain (Scope 3) Standard allows companies to assess their entire value chain emissions impact and identify where to focus reduction activities.



GHG Protocol

Table 3.1: Purchased goods and services

General description											
Key goods and services		Extrapolation, %		Representativeness		Emission factor source		Assumptions		Absolute (t)	
raw materials - chemicals		NA		Country/regional		USEEIO v1.2 All Other Miscellaneous Chemical Product and Preparation Manufacturing' supply chain emission factor without margins					
supplies		0		981		234		1,234		215	
		Comments		Site No.		Name of Site		No. of staff		Grid Electricity	
				1							
				2							
				3							
				4							
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Details		Sites		Company Cars		Hire Cars		Employee-owned Cars		Taxi	
										Rail	
										Flights	
										Commuting S	

Google: Sample GHG Reporting Template

Part 2: Greenhouse gas emissions data



Scopes and categories ²	Metric tons CO ₂ e
Scope 1: Direct emissions from owned/controlled operations	
Scope 2: Indirect emissions from the use of purchased electricity, steam, heating, and cooling	
Upstream scope 3 emissions	
Category 1: Purchased goods and services	
Category 2: Capital goods	
Category 3: Fuel- and energy-related activities (not included in scope 1 or scope 2)	
Category 4: Upstream transportation and distribution	
Category 5: Waste generated in operations	
Category 6: Business travel	
Category 7: Employee commuting	
Category 8: Upstream leased assets	
Other	
Downstream scope 3 emissions	
Category 9: Downstream transportation and distribution	
Category 10: Processing of sold products	
Category 11: Use of sold products	
Category 12: End-of-life treatment of sold products	
Category 13: Downstream leased assets	
Category 14: Franchises	
Category 15: Investments ³	
Other	

Workshop

What you need for
successful reporting

LONGVIEW
STRATEGIES

Creating impactful sustainability reports is a dynamic process that incorporates data integrity, stakeholder engagement, and alignment with strategic goals.

Outcomes of High-Quality Reports



Business Transformation:

- Enhances resilience through sustainable business strategies.
- Aligns operations with stakeholder expectations.



Improved Sustainability Outcomes:

- Supports profit growth while advancing positive societal and environmental impacts.
- Creates equitable economic models and actionable insights.



Better Decision-Making:

- Enhances resilience through sustainable business strategies.
- Aligns operations with stakeholder expectations.

Additional benefits

- Comprehending risks and opportunities better
- Linking financial and non-financial performance
- Impacting management, business plans and policies in the long-term
- Avoid public exposure of environmental, social or governance failures
- Reduces costs and improves efficiency
- Benchmarking with other firms in the same sector and in other industries
- Benchmarking with legal frameworks and corporate culture
- Allowing external stakeholders to comprehend the organization's value
- Allowing external stakeholders to understand tangible/intangible assets
- Prove the organization's commitment to sustainable development

Regardless of the driver(s), successful reporting and disclosure efforts are built on three foundational elements:

Regulation:

CSRD, EU Taxonomy, ISSB, SEC, California Climate Disclosure rules



Reporting and assessment frameworks:

GRI, ISO, CDP, TCFD, SASB, EcoVadis



Global goals:

UNGC/SDGs, Greenhouse Gas Protocol, Principles for Responsible Investment



The sustainability reporting process:

1

Double Materiality Analysis:

Engage internal and external stakeholders to determine key focus areas.

2

KPI Target Setting:

Define measurement and control objectives.

3

Data Gathering:

Establish protocols, tools, and methods for accurate information collection.

4

Performance Analysis:

Conduct benchmarking against current performance and industry standards.

5

Report Design and Content:

Create a stakeholder-oriented report.

6

Report Launch and Feedback:

Disseminate the report and collect stakeholder feedback for improvement.

The process emphasizes the following principles:

Consider Stakeholders and Goals in Advance:

Align report content with the priorities and interests of stakeholders.



Use Materiality to Combine Reporting Frameworks:

Leverage materiality assessments to integrate multiple reporting standards effectively.



Be Open and Authentic:

Build trust by ensuring transparency and addressing challenges honestly.



Match Information Format and Channel to Each Stakeholder:

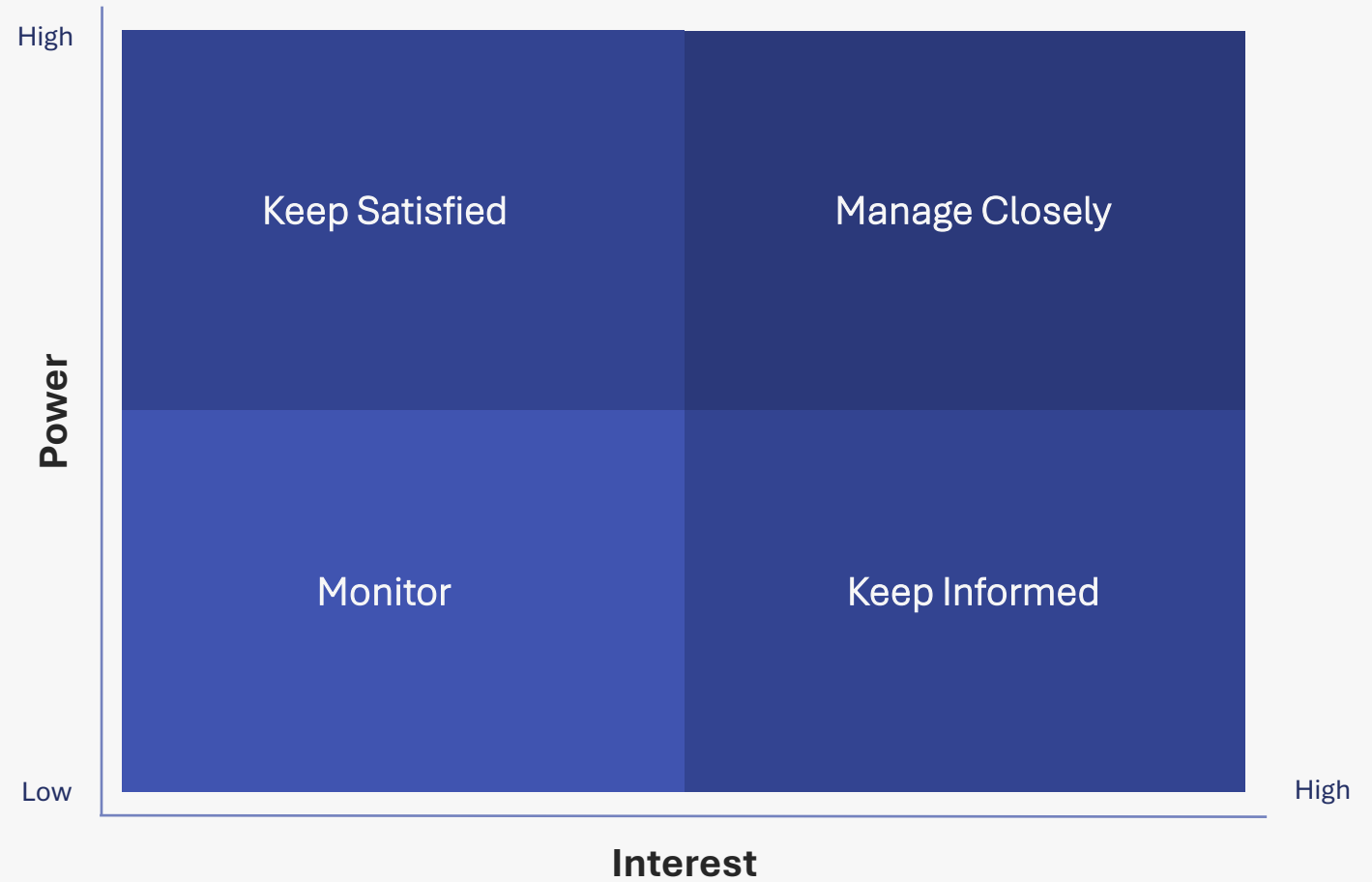
Deliver tailored communication to meet the specific needs of each audience.

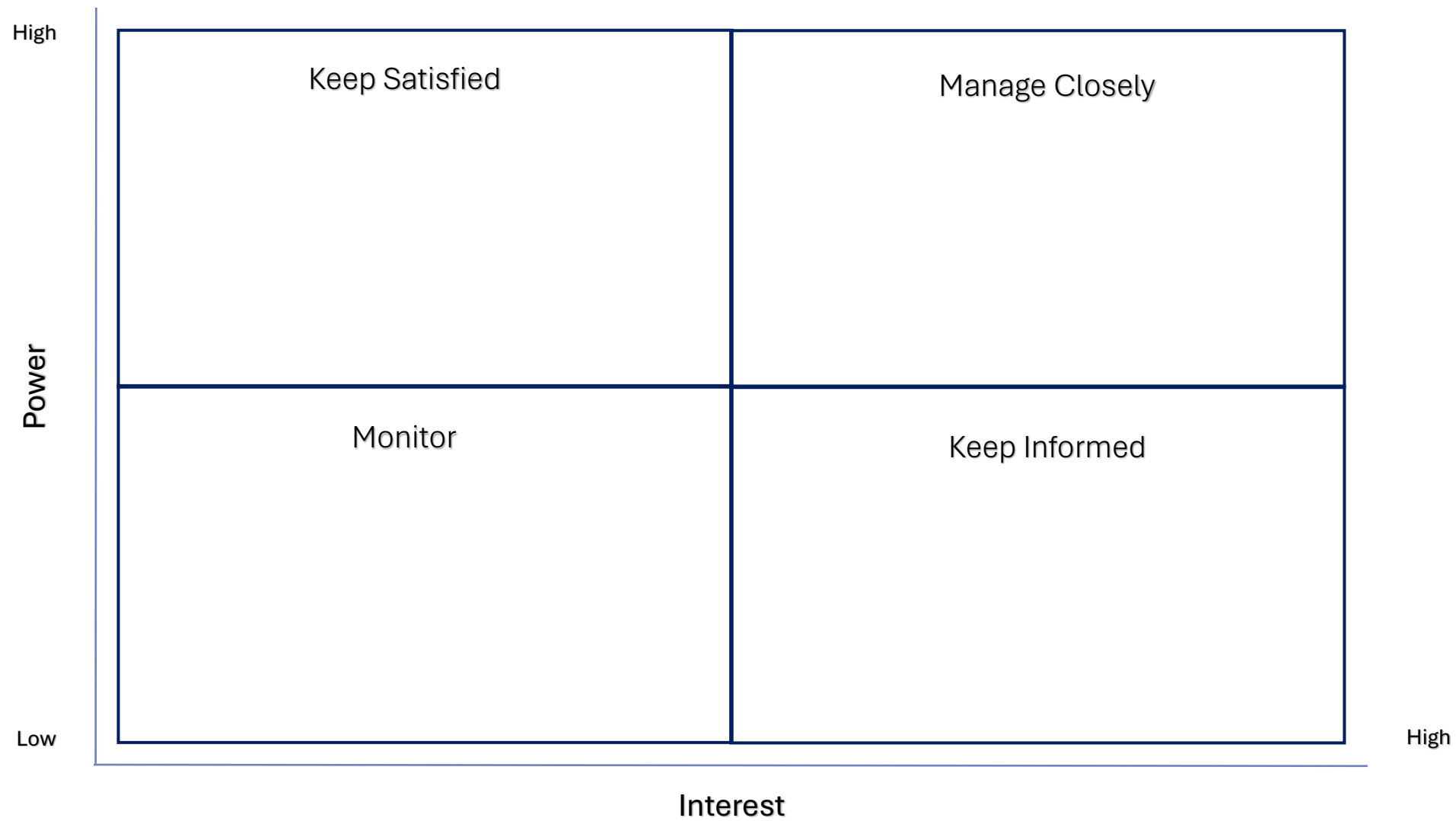


Successfully integrating multiple reporting standards ensures all stakeholders' expectations are met, and informs the reporting process.

**Using your EcoChem company slip sheet
segment the stakeholder groups
according to power
and interest.**

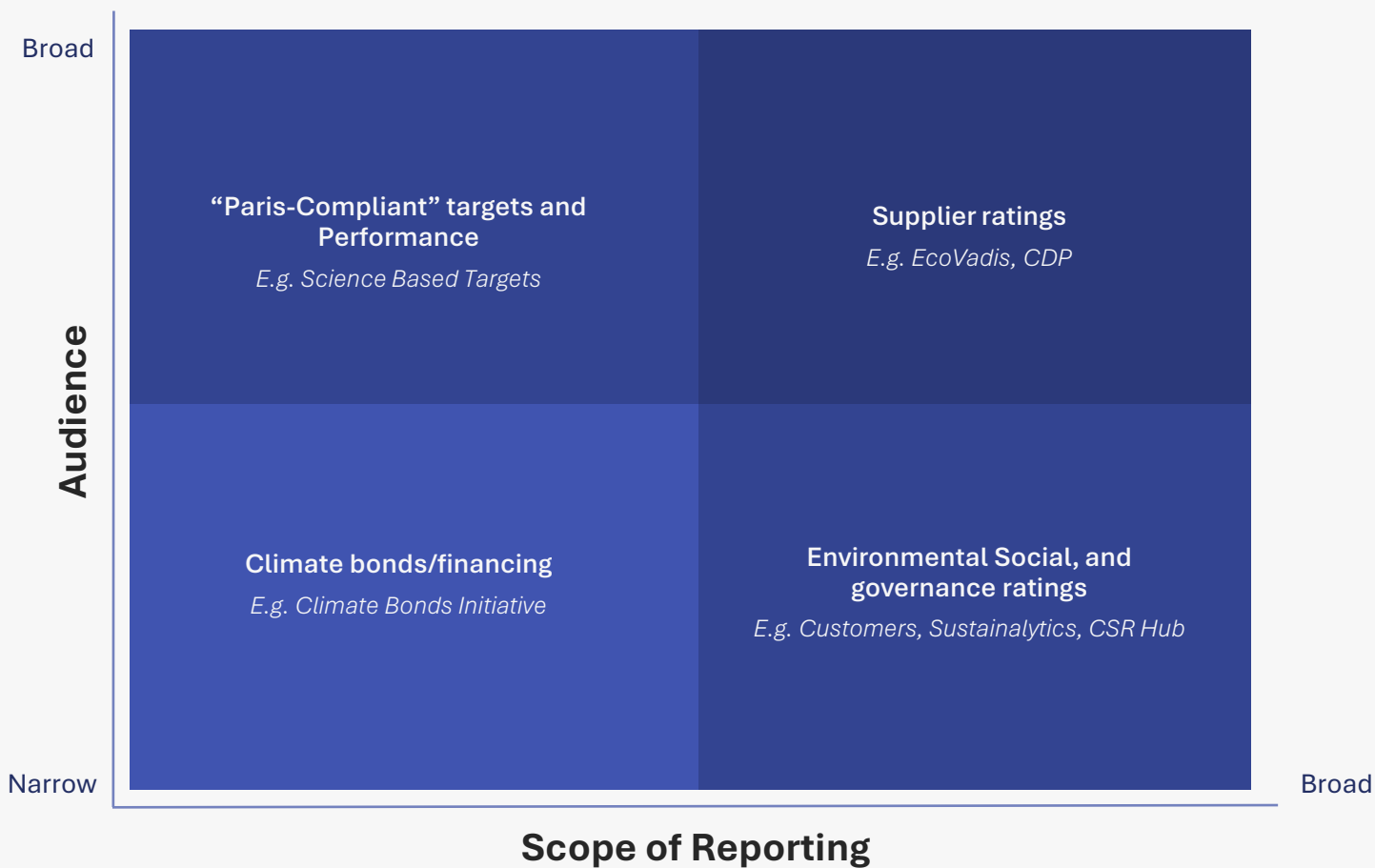
Stakeholder analysis





Based on your stakeholder analysis, try to determine the size and scope of your report.

Size and Scope



While there are many frameworks and standards, all should be evaluated to ensure ESG efforts are comprehensive and aligned with both short- and long-term goals. It does not mean all, or even many, should be used. Reporting against the right mix of global goals, standards, regulations, and customer/investor requirements will make the process more efficient and ensure your ESG initiatives and the overall sustainability program can grow with your company.

Based on the results of your stakeholder analysis and the size and scope exercise,

- Review the frameworks listed in the table below.
 - Identify which frameworks are applicable to your organization.
 - Outline specific challenges or gaps associated with implementing each framework.
 - Brainstorm opportunities for improvement or alignment with organizational goals
-

Framework	Purpose	Audience	Focus Areas	Information to Report
GRI	Promote transparency and accountability in sustainability reporting.	Global organizations of all sizes.	Environmental, Social, and Governance.	Material sustainability topics, impact on stakeholders, and key ESG metrics.
SASB	Provide industry-specific standards for sustainability reporting.	Investors and financial stakeholders.	Environmental, Social, and Governance with financial materiality focus.	Material financial ESG risks and opportunities by industry.
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ISO 26000	Guide organizations in integrating social responsibility into their operations.	Organizations of all types (businesses, governments, NGOs).	Social and Governance.	Principles of social responsibility, stakeholder engagement, and sustainable development strategies.

Questions?

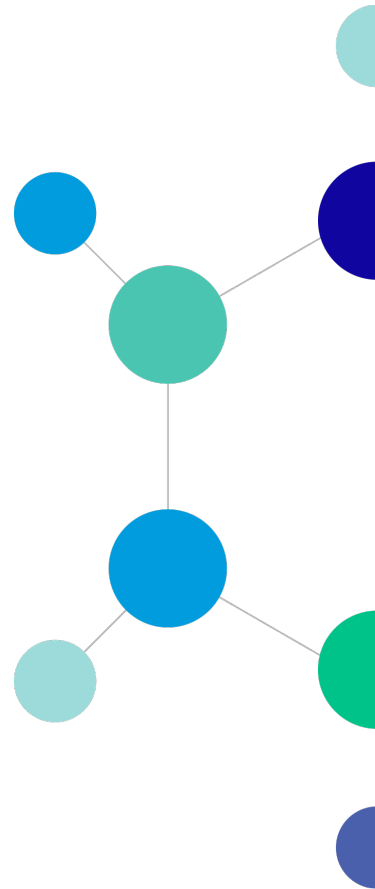
LONGVIEW
STRATEGIES

Session 4: EcoVadis – Focusing Your Efforts

Brooke DiDomenico



**Chief Technical Officer
NATION FORD COMPANY**



An aerial photograph of a chemical plant facility nestled within a dense green forest. The plant features several large industrial buildings, storage tanks, and piping. A river flows to the right of the facility, and a long bridge spans the river in the foreground. A train with several white tank cars is crossing the bridge.

U.S. Production | Fort Mill, SC

NATION FORD CHEMICAL

- Proprietary & Toll Manufacturing
- Single Facility
- 80 Employees

THEMES

21 CSR Criteria



ENVIRONMENT

Operations

- Energy Consumption & GHGs
- Water
- Biodiversity
- Local & Accidental Pollution
- Materials, Chemicals & Waste

Products

- Product Use
- Product End-of-Life
- Customer Health & Safety
- Environmental Services & Advocacy



LABOR & HUMAN RIGHTS

Human Resources

- Employee Health & Safety
- Working Conditions
- Social Dialogue
- Career Management & Training

Human Rights

- Child Labor, Forced Labor & Human Trafficking
- Diversity, Discrimination & Harassment
- External Stakeholder Human Rights



ETHICS

- Corruption
- Anticompetitive Practices
- Responsible Information Management



SUSTAINABLE PROCUREMENT

- Supplier Environmental Practices
- Supplier Social Practices

CSR Management Indicators



CSR Management Indicators

ACTIONS (40%)	MESU 65%	Actions put in place to support objectives and targets	<div>0 No evidence</div> <div>25 Partial</div> <div>50 Confirmed</div> <div>75 Advanced</div> <div>100 Outstanding</div>
	+		
	CERT 35%	Certifications, labels, third-party audits	
	×		
	COVE multiplying factor	Level of deployment of certificates or actions throughout the company	<div>0 Not Applicable</div> <div>25 Low Coverage</div> <div>50 Medium Coverage</div> <div>75 High Coverage</div> <div>100 Very High Coverage</div>

RESULTS (35%)	REPO 40%	Quality of reporting readily available to stakeholders	<div>0 No Evidence</div> <div>25 Partial</div> <div>50 Confirmed</div> <div>75 Advanced</div> <div>100 Outstanding</div>
	+		
	360° 60%	Standpoints of stakeholders' representatives, e.g. administrative & judicial authorities, trade unions, NGOs	<div>0 Severe</div> <div>25 Major</div> <div>50 Minor</div> <div>75 None</div> <div>100 Positive</div>

POLICIES (25%)	POLI 80%	Policies, objectives, targets, governance	<div>0 No evidence</div> <div>25 Partial</div> <div>50 Confirmed</div> <div>75 Advanced</div> <div>100 Outstanding</div>
	+		
	ENDO 20%	Endorsement of external CSR initiatives and principles, e.g. UN Global Compact	

PILLARS

OVERALL SCORE



99th
percentile

ENVIRONMENT



Weight
●●●●

LABOR & HUMAN RIGHTS



Weight
●●●●

ETHICS



Weight
●●●●

SUSTAINABLE PROCUREMENT



Weight
●●●●

Scoring Impact

20%	Policies	80%	Policies	25%
5%	Endorsement	20%		
26%	Measures	65%	Actions	40%
14%	Certifications/Audits	35%		
14%	Reporting	40%	Results	35%
21%	360 monitoring report	60%		

Theme	Weighting	Weighted Scale (1-4)	Impact
Environment	High	4	40%
Labor	High	4	40%
Ethics	Low	1	10%
Procurement	Low	1	10%

Impact	Theme	Indicators
8.0%	Environment	Policies
2.0%	Environment	Endorsement
10.4%	Environment	Measures
5.6%	Environment	Certifications/Audits
5.6%	Environment	Reporting
8.4%	Environment	360 monitoring report
8.0%	Labor	Policies
2.0%	Labor	Endorsement
10.4%	Labor	Measures
5.6%	Labor	Certifications/Audits
5.6%	Labor	Reporting
8.4%	Labor	360 monitoring report
2.0%	Ethics	Policies
0.5%	Ethics	Endorsement
2.6%	Ethics	Measures
1.4%	Ethics	Certifications/Audits
1.4%	Ethics	Reporting
2.1%	Ethics	360 monitoring report
2.0%	Procurement	Policies
0.5%	Procurement	Endorsement
2.6%	Procurement	Measures
1.4%	Procurement	Certifications/Audits
1.4%	Procurement	Reporting
2.1%	Procurement	360 monitoring report

Scoring Change in 2025

NO LONGER ROUNDING!

Current assessment				
	Environment theme	Labour and human rights theme	Ethics theme	Sustainable procurement theme
Rounded score	80	80	80	70
Precise score	78	77	81	74

MEDALS

	2021	2022	2023	2024	2025
Platinum	Top 1% Score 73 – 100	Top 1% Score <u>75 – 100</u>	Top 1% Score <u>78 - 100</u>	Top 1%	Top 1%
Gold	Top 5% Score 66 - 72	Top 5% Score <u>67 – 74</u>	Top 5% Score <u>70 – 77</u>	Top 5%	Top 5%
Silver	Top 25% Score 54 - 65	Top 25% Score <u>56 - 66</u>	Top 25% Score <u>59 – 69</u>	Top <u>15%</u>	Top 15%
Bronze	Top 50% Score 45 - 53	Top 50% Score <u>47 - 55</u>	Top 50% Score <u>50 - 58</u>	Top <u>35%</u>	Top 35%

MEDALS

	2021	2022	2023	2024	2025
Nation Ford Chemical	73	73	79	88	
Platinum	Top 1% Score 73 – 100	Top 1% Score 75 – 100	Top 1% Score 78 - 100	Top 1%	Top 1%
Gold	Top 5% Score 66 - 72	Top 5% Score 67 – 74	Top 5% Score: 70 – 77	Top 5%	Top 5%
Silver	Top 25% Score 54 - 65	Top 25% Score 56 - 66	Top 25% Score: 59 – 69	Top 15%	Top 15%
Bronze	Top 50% Score 45 - 53	Top 50% Score 47 - 55	Top 50% Score: 50 - 58	Top 35%	Top 35%

Session 5: Sustainability Talking Points & Elevator Pitch

Chris Winkler

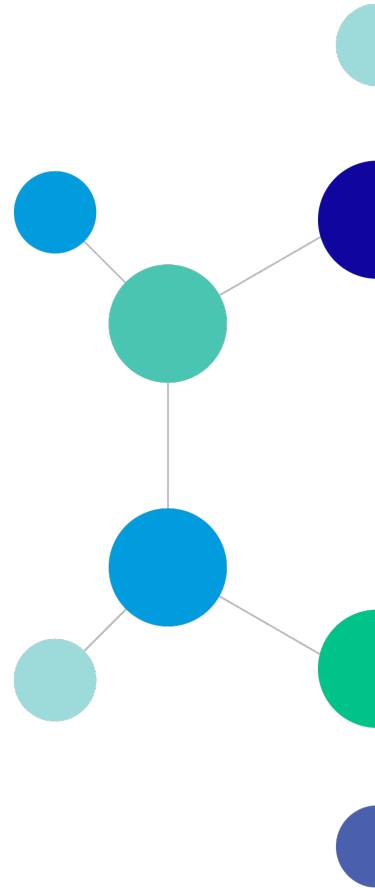


SVP, Sales & Operations
Hoover CS

Peter Olasky



General Counsel
Hoover CS





2025 SOCMA ESG & Sustainability Workshop

Sustainability Talking Points & Elevator Pitch

Chris Winkler, SVP

Peter Olasky, General Counsel



Hoover Circular Solutions

Chemical & Catalyst Packaging Solutions

Reusable Intermediate Bulk Containers, ISO Tanks, and Catalyst Bins, and Related Services



Chris Winkler

Senior Vice President, Sales & Operations

As Senior Vice President of Sales and Operations, Chris is responsible for leading our commercial and operational teams to deliver outstanding service to our customers, execute key growth strategies, and continue to drive circular supply chain solutions.



Peter Olasky

General Counsel

As General Counsel, Peter is responsible for all legal matters for Hoover CS as well as the company's government relations strategy.

Sustainable Packaging Solutions and Services for Circular Supply Chains

Key Points – Reimagining Our Elevator Pitch

- In 2021, we re-envisioned our sustainability messaging, rebranding as Hoover Circular Solutions to better reflect our commitment to circularity and responsible resource use.
- As part of this transformation, we developed distinct internal and external communication strategies—each tailored to its audience.
- Industrial packaging isn't often front and center in mainstream sustainability conversations, so our message has consistently emphasized that our solutions deliver a triple win: economic efficiency, operational and safety improvements, and meaningful sustainability impact.
- Raising awareness is often the first and most critical step – our communication strategy seeks to elevate the visibility of the value we provide.
- This dual focus—business value and sustainability impact—has only become more essential amid the evolving ESG landscape. As regulatory momentum around sustainability has shifted under the Trump Administration, we've leaned into the broader value we create. Regulatory compliance and sustainability benefits are just one element of our offering—not the centerpiece.

Our History with Sustainability Messaging

How we established Hoover CS as a packaging industry leader in sustainability

BACKGROUND

- One-way, single-use IBCs are 95% of the market, but an environmental problem
- We had a more sustainable offering, but needed a new way to communicate that

PHASE I (Discovery)

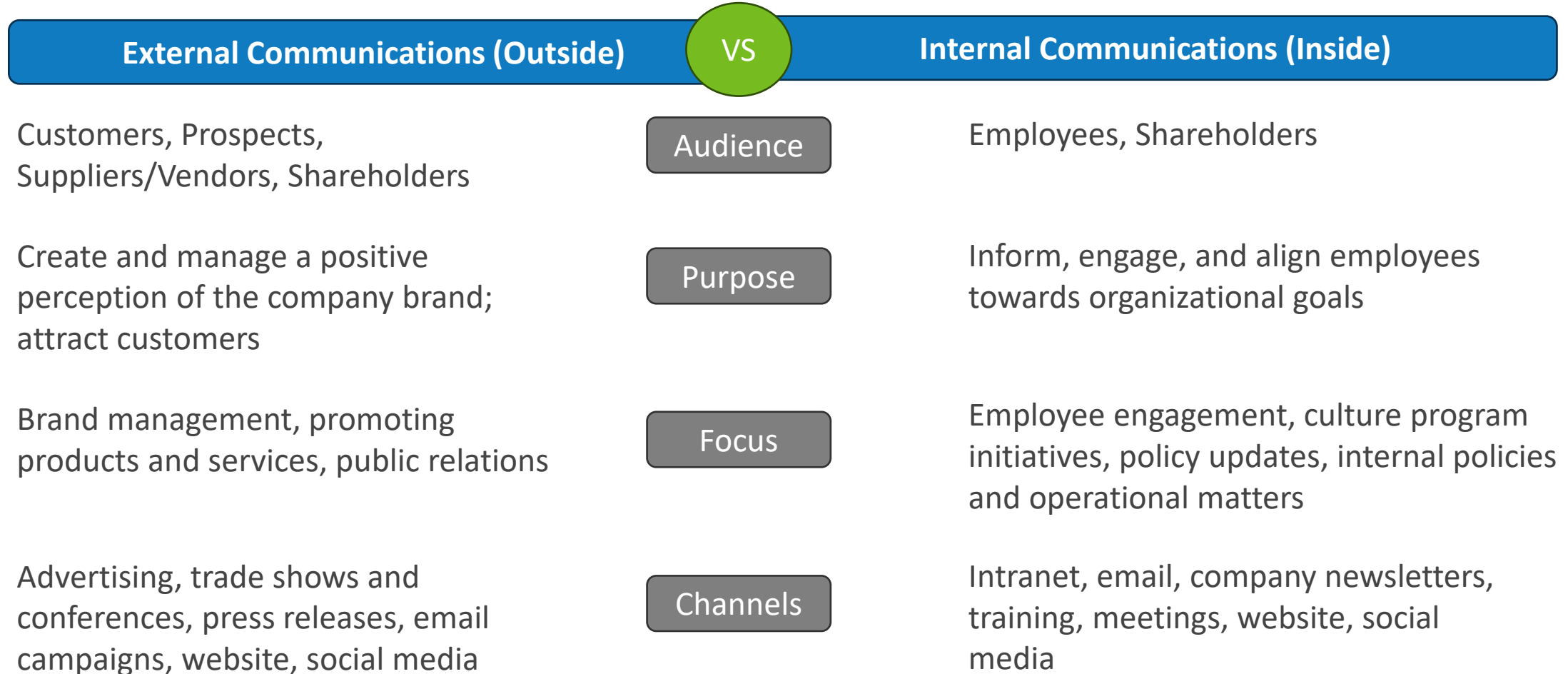
- Company rebrand in 2021
- Partnered with a leading sustainability marketing firm
- Conducted internal and external discovery sessions – interviewed employees, customers/prospects
- Researched market sectors' prioritization of UN SDGs (United Nations Sustainable Development Goals)
- Evaluated our customers' sustainability commitments and identified where we could contribute
- Evaluated various broad messaging approaches/concepts

PHASE II (Execution)

- Updated Mission, Vision, and Culture programming
- Established Messaging Matrix – tailored to the audience (C-Suite, Ops, Procurement, Finance, Sales) and addressed if they are new to reusables, new to leasing, or new to working with us
- Integrated new messaging into all external and internal channels
- Performed comparative LCA of stainless steel and one-way containers, demonstrating improved environmental impacts
- Published first Sustainability Report

Delivering Your Sustainability Messaging

Our Take on Internal vs External Communications



Messaging Examples

Standard PR Boilerplate

Hoover CS is paving the way for customers to move away from single-use containers. Through its large rental fleet of reusable IBCs and ISO tanks, combined with integrity management and fleet management services, Hoover CS's sustainable packaging solutions facilitate circularity across the supply chain, yielding an optimized environmental footprint through reduced plastic, water conservation, and lower greenhouse gas emissions.

**Keywords/terms: sustainable packaging, circular, reusable, environmental responsibility, eliminate single-use containers*

Tagline + social media descriptor

LEAD BY IMPACT
sustainable packaging solutions
for circular supply chains



Website Homepage

At Hoover CS, we believe in the power of sustainable packaging solutions that eliminate single-use containers in the chemical, refining, and other industrial-end markets.

OUR MISSION

To empower environmental responsibility through sustainable packaging solutions.

OUR VISION

To make sustainable packaging the standard in the industries we serve.

Evolving Sustainability Messaging, With a Long-Term Lens

- The sustainability and ESG landscape has shifted since 2021 – both in terms of customer priorities and regulatory direction.
- In 2021, sustainability was a key focus of stakeholders and regulators. Today, the outlook for emerging regulations – especially in the U.S. – is less predictable. However, our customers long-term commitment to sustainability hasn't disappeared and many still view ESG as a strategic priority.
- Meanwhile, EU packaging regulations continue to emphasize reusability, and global companies are increasingly looking to harmonize standards across regions. That means solutions like ours – centered on reuse and circularity – continue to resonate with global organizations.
- Despite these shifts, our strongest value proposition is still the operational, economic, and safety advantages our solutions provide. That was true in 2021, and it's still true today. But we've also learned that sustainability can serve as a powerful additional benefit, reinforcing the broader impact we help deliver.

Questions to Consider when Developing Messaging


Think about your business, your team, your customers, and the market

- ✓ How does your sustainability message align with your company's mission and values...?
- ✓ What product/service offering are your customers seeking – manufacturing, packaging, transportation, etc.?
- ✓ How have companies utilized 3rd party validations or certifications (i.e., EcoVadis)?
- ✓ Is there alignment with your external and internal messaging?
- ✓ Will the message resonate with both industry novices and experts? Does that matter?
- ✓ What are your customers' sustainability goals? And how can you help achieve them?
- ✓ Is your messaging easy for your employees to communicate?
- ✓ What is your competition saying?

Teaming with Hoover CS is a win/win/win for your business, your customers, and our environment. So, let us do what we do best: **transform your supply chain** to meet your sustainability goals, while safely, cost-effectively, and sustainably storing your products.

The time is now— reduce waste, reuse packaging, and create an advantage for both your business and our world.



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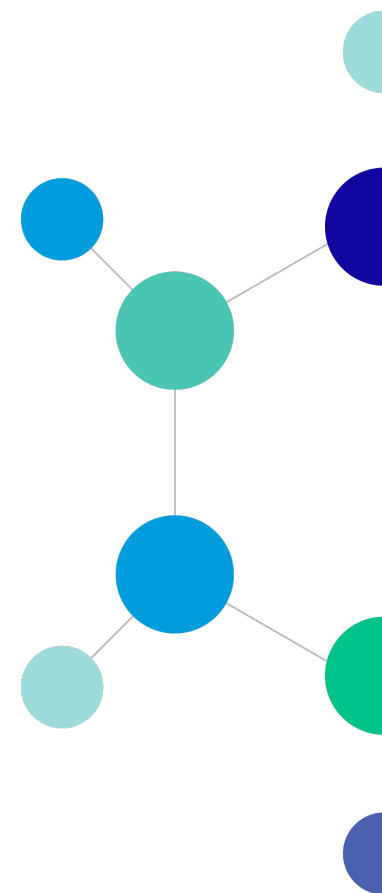
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Toolbox Talks

Sustainability Journeys Are You On Track?

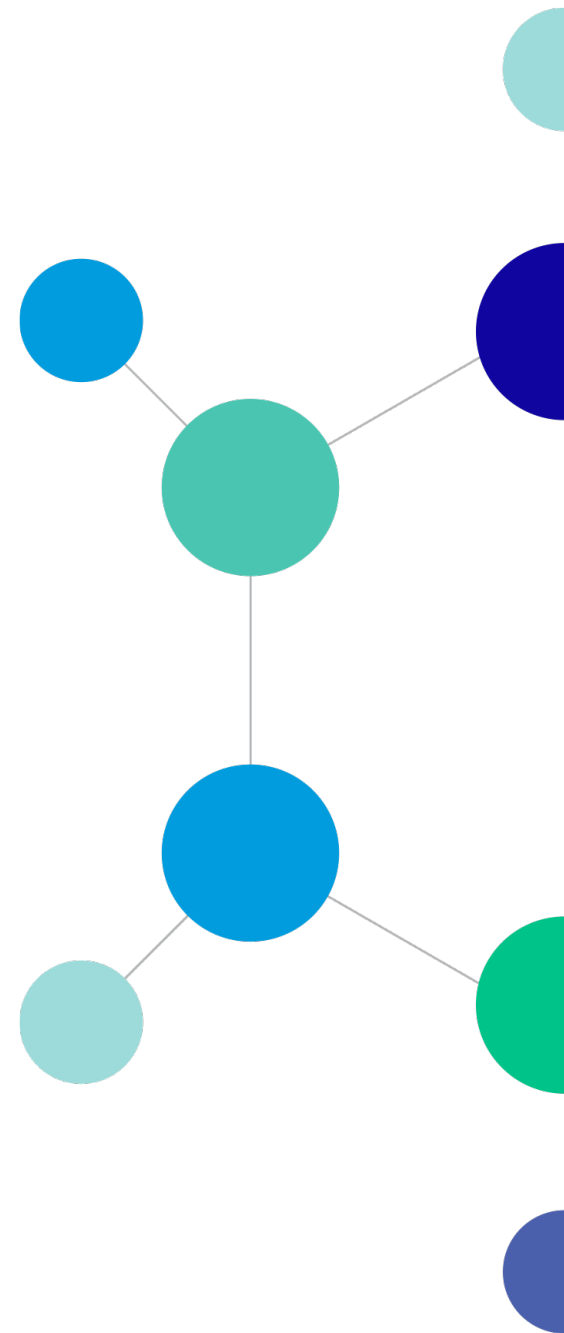


Breakout Group Instructions

- Color on your name badge denotes your breakout group
- Follow SOCMA or The Heritage staff to the breakout rooms
- When you return, please have a representative from your group share key discussion topics, findings and/or hurdles

Group Color	Room Number	SOCMA Staff
Yellow	1 – Upper Quarry	Sarah Williams
Red	2 – Crystal Room	Joe Dettinger
Blue	3 – Lower Quarry	Gloria O’Bannon
Green	4 – Library Room	Emy Noma Reyes

Closing Panel: Future Trends in ESG & Sustainability



Session Speakers

Jenn Pieper-Klein



President

Ohio Chemistry
Technology Council

Evan Zall



President

Longview Strategies

Robert Swim



Chemical Industry
Manager

Rockwell Automation

Robert Cummings



Sustainability Manager

FutureFuel Chemical

Session Speakers

1. As the landscape for both ESG and Sustainability changes and further matures each year, what do you see as the biggest change that is occurring in 2025 and beyond as well as how to best address it?
2. We've all seen how external uncertainty—regulatory changes, politics, market pressure—can shake up ESG plans. How can companies stay committed to their ESG goals when the landscape is constantly shifting? And how can they 'future-proof' their ESG & sustainability strategies today?

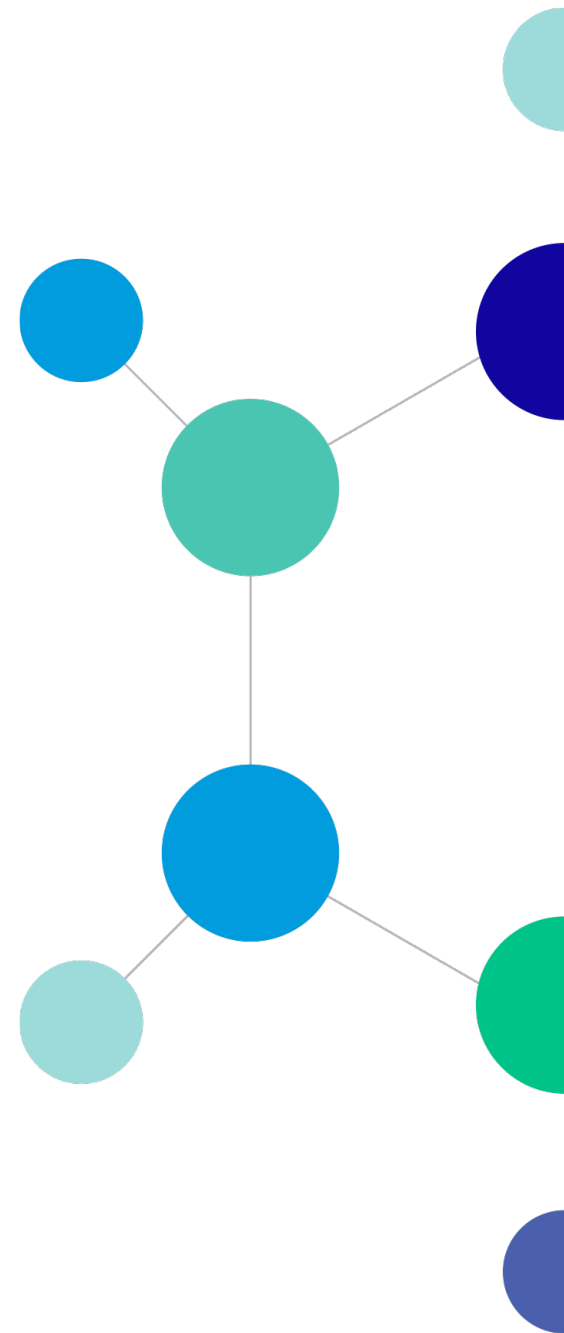
Session Speakers

3. Depending on your position in the Supply Chain and considering your specific sector, where do you see both the asks of your customers and expectations for your suppliers to be heading? For example do you see both SBTi targets and CDP disclosures being required, as well as metrics to demonstrate achieving the next short term Global carbon reduction milestones for Scope 1, 2, and 3 emissions in 2030?
4. Messaging and perception are everything right now. How can companies communicate their ESG story in a way that's authentic and doesn't feel like greenwashing? Any examples of storytelling done right that stand out to you?

Session Speakers

5. Let's close with a fun one. What's one common myth or misunderstanding about ESG and/or Sustainability that you'd love to debunk right here, right now?

Closing Remarks



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