Improving Sustainable Supply Chain Efforts Among Retail Leaders

Final Deliverable

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Executive Summary

The landscape of sustainability supply chain activities among United States retailers was assessed in order to understand what retailers are doing, why they are doing it, what challenges they are facing, and what can be done to catalyze action in this area. Secondary research was performed by reviewing relevant articles and publications, including corporate responsibility reports of major retailers. Primary research was conducted through interviews, which were primarily with key representatives from retailers within the Retail Industry Leaders Association (RILA), a trade association representing leading United States retailers.

Our key finding is that the retail companies that perceive sustainability to be a source of competitive advantage are more active in sustainable supply chain engagement – and derive more benefit from those activities – than do companies that address sustainability from more of a risk management standpoint. These leaders are integrating sustainability strategically into their business model and pursuing tactics i) directly with supply chain partners, ii) internally at various functions and levels of the organization and iii) externally through collaboration with other players in the industry – often through industry-led working groups – as well as governments and non-governmental organizations, which offer guidance and support for various initiatives.

Other key findings are as follows:

- An increasing number of companies are assessing, addressing and reporting supply chain impacts, creating momentum within the retail industry.

- There does not appear to be a single standard formula or process that companies follow to address supply chain sustainability.
• Motivations to adopt such initiatives tend to evolve from concerns about compliance, risk management, and cost savings to a perception of sustainability as a way to obtain competitive advantage.

• “Embracers” see supply chain sustainability as a competitive advantage and are:
  o Making the greatest improvements in sustainability,
  o Greatly influencing industry standards, and
  o Deriving the most gain from their efforts.

• “Cautious adopters” are recognizing a trend toward sustainability in the supply chain and are beginning to explore how to engage.

• Retailers are facing similar difficulties internally and externally in furthering their strategies, though a corporate commitment to sustainability from top leadership appears to be a common theme among the most active and successful companies.

• Despite the competitiveness of the industry, collaboration has proven to enhance retailers’ efforts due to the complexity of the retail supply chain.
  o Supplier collaborations enhance relationships and build capabilities
  o Industry collaborations develop common language and catalyze progress
  o NGO collaborations offer expertise and guidance
  o Government collaborations help to set policy and guidelines

In the future, we see sustainable supply chain efforts continuing to evolve from closely held independent activities to transparent collaborative approaches that will lead change in both retailer and supplier behavior. We expect to see:

• Comprehensive reporting, with increasing transparency and a consolidation of financial & non-financial data,
• Integrated corporate structure, including the development of cross-functional roles and teams with enhanced internal objectives, communications and incentives,

• Increased investment in supplier capacity building for improved engagement and performance, and

• Growing collaboration among suppliers, industry, and other stakeholders around approaches, monitoring and measurement tools, management of customer demand and engagement in policy change and development.

Opportunities to pursue sustainability in the supply chain are extensive and offer retailers myriad opportunity to take a leadership role. Trends suggest that those retailers successful in this area apply a sustainability lens across their firm’s activities. Sustainability in the supply chain offers an excellent entryway for established firms to take a leadership role in the industry, and for those new to the issue, to quickly get up to speed and perhaps influence sustainability efforts more broadly within their firm.
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I. Introduction

Over the past couple decades, retailers have become increasingly interested in sustainable supply chain engagement. Initially, negative publicity over working conditions in supplier factories prompted retailers to address some of the labor issues in their supply chains. More recently, retailers have increasingly begun to address environmental concerns as well; in many cases, the bulk of sustainability-related issues of consumer products lie upstream in the supply chain, outside of direct retail operations. Sustainable supply chain engagement is important, not only because it is necessary in order to address key impacts in product life cycles, but also because it represents opportunities for retailers to minimize risks, cut costs, enter new markets, and build their reputation among consumers.

The Retail Industry Leaders Association (RILA) is a trade association representing leading US retailers. RILA seeks to improve its members’ involvement in supply chain sustainability initiatives. While some retailers are quite advanced in terms of addressing supply chain sustainability, there is little understanding of an industry baseline.

Through this study, RILA seeks to better understand the landscape of existing supply chain engagement activities, at an individual company level and a broader industry level in order to actively promote deeper supply chain engagement within its membership. RILA sees a role in supporting its members’ product and supply chain efforts by highlighting and disseminating the learning’s, as well as potentially exploring opportunities for greater member collaboration.

This introductory section explains the scope and objectives of this study and describes the employed methodology. Subsequent sections describe existing activities around sustainable supply chain engagement, important considerations for retailers, the characteristics of successful companies and initiatives, challenges that retailers face, and recommendations for RILA to facilitate future activity among retailers.
Scope and Objectives

The purpose of this study is to:

1. Understand the landscape of existing supply chain engagement activities, both at an individual company level and an industry level
   i. For companies – Understand why companies are pursuing sustainability activities within supply chain and what are they doing
   ii. For associations – Research relationships with their members (who and how are they interacting with them) what they are doing and how have they engaged members to pursue sustainable supply chain

2. Understand RILA members’ perspectives on sustainable supply chain engagement

3. Provide recommendations for RILA in promoting supply chain engagement among its members

Methodology

Initial secondary research focused on reviewing relevant articles and publications, including corporate responsibility reports. The next step was to conduct primary research with sustainability professionals in the retail industry. We secured nine interviews with relevant employees in various companies and industry groups (see Appendix 1 - Interview Guide for a list of sample interview questions). The companies interviewed were selected to reflect a range of industries and experience with sustainable supply chain engagement.

The final report and the accompanied deck for RILA focus on high-level learning’s and trends gleaned from a focused review of secondary sources, as well as our one-hour interviews with seven major retailers, one sustainability consulting firm and one industry association. The report suggests emerging trends based on information gathered through a limited sample size. For clear determination
of industry-wide conclusions on this topic, further research and analysis through a wider sample is highly recommended.

II. Retailer Activities

A large degree of variability exists between different retailers in terms of sustainable supply chain activities, but general trends and similarities can be observed, which are described in this section. First, the evolution of sustainable supply chain engagement within the industry is described. Next, companies and their motivations are compared. After an overview of various retailer activities is provided, some common themes, in terms of the types of activities and methods of engagement is provided. Finally, the role of collaboration in these efforts is discussed.

History and trends

Examining the period from 1990 through to the present, there has been a notable shift in thinking about sustainability on the part of retailers, their customers, government and civil society. Therefore, the types of activities pursued by retailers have evolved as well, as indicated in the timeline below:

Figure 1. Timeline of Sustainable Activities
Starting in the early 1990’s, the public became aware of various labor issues, specifically in relation to the use of child labor in the production of high profile products – the most renown case being that of Nike. As a result, many companies started developing codes of conduct and began auditing factories to mitigate the potential of bad publicity. In this time period, compliance and risk management appear to be the main drivers of the field. However, at the same time, a few innovators started to design products, even their whole business, from an environmental perspective. These companies led the charge and became familiar with the related environmental harm of various conventional products throughout the product life cycle. They invested in designing products with new materials, using new approaches, and developed their own supply chain.

Recently, many others began engaging in environmental initiatives, often as a demonstration of corporate responsibility. Also, in many instances, companies have been able reduce costs in their supply chain by addressing issues of environmental sustainability. This “low hanging fruit” was an easier sell to top management. Concurrently, more and more consumers are being educated on related issues. In response, companies are now offering more sustainable products.

Thus, companies’ views on sustainability have evolved (Figure 3). A number of companies began their efforts as a result of external pressure and compliance. Slowly, more and more companies started to view sustainable practices enable them to gain competitive advantage as it allows them to anticipate future regulations, ensure the sustainability of their resources, and obtain consumer trust.

![Figure 2. Evolution of drivers to adopt sustainable initiatives](image)

**Typology of companies**

While major retailers are at various stages of sophistication in terms of their sustainable supply chain engagement, many companies can be categorized into two general types of firms – as suggested
by a recent study conducted by BCG and the MIT Sloan Management Review – (1) Cautious Adopters and (2) Embracers\(^1\). Cautious adopters tend to view sustainability initiatives as being important simply in terms of risk management, as well as cost savings through improvements in efficiency. Embracers, however, also see sustainability as a competitive advantage. Consequently, embracers tend to be leaders and have been far more aggressive than the cautious adopters.

We independently subdivided the Embracers into two sub-categories: Early Embracers and Late Embracers, recognizing that a number of firms have been later in engaging in sustainability while some have embraced the idea from the start. Furthermore, the initial motives for addressing sustainability issues tends to vary between those who have done so since conception and those who only later decided to focus on such issues (Figure 4).

Encouragingly, Cautious Adopters are increasingly aware of the importance of these initiatives, and are exploring the field, perceiving a need to ‘catch up’. Some are doing better than others. Challenges mainly emerge when sustainability is perceived to be an “add-on” or fad as opposed to recognizing it as an emerging success driver.

\(^1\) ‘Sustainability: The ‘Embracers’ Seize Advantage” MIT Sloan Management Review Research Report 2011
Motivations

While “achieving healthier communities and a sustainable environment” seems to be a shared vision publicly articulated by retailers, there are many differences in the specific motivations for different initiatives (see Figure 4). Among the companies studied, the majority of sustainability initiatives in the supply chain are motivated by cost savings and risk management objectives. Retailers are pursuing a large number of sustainability initiatives to cut operational costs (inputs/energy used or consumed, time/money spent on meeting regulation) while reducing environmental impacts. These initiatives are under the control of retailers, create immediate value and are often referred to as the “low-hanging fruit” of possible sustainable supply chain initiatives.

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There are many risks related to the global supply chain and competition, and new risks are being realized as companies learn more about the implications of various production processes. Risk management initiatives are motivated by the need to control or anticipate issues environmental and social issues. Firms are thinking about how they will address the possibility of legislation that would require firms to change their business practices. For example, by providing “guidelines to suppliers” for using a new technology or a “fair labor tool kit”, retailers attempt to prevent a situation in which suppliers do not meet all legal requirements. Retailers are clearly looking carefully at their “license-to-operate” and becoming increasingly conscious about increasing demands from legislation, consumers and NGOs (illustrated in the lower quadrants of Figure 4).

Although integrating sustainability with the business seems to be important for retailers, very few initiatives now are truly leveraging the “upside of sustainability” (i.e. through the upper quadrants of Figure 4). By designing new materials, launching green brands or using organic materials, companies

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3 Adapted from “Green to Gold plays”, Green to Gold, D.Esty, A.Winston
Based on information gathered through CSR reports
can create new market opportunities, and this kind of approach could also answer customer’s needs and build customer loyalty. These products can build revenue, but can also serve to enhance company reputation. Image can also be improved through communication with consumers and other stakeholders, including through corporate responsibility reports and product indices.

With few exceptions of companies trying to perform well in all four quadrants, we found that there is still significant opportunity for the retail industry to improve / develop its “environmental stewardship” or “corporate greenness” and transparency to a level that could increase brand reputation, improve employee morale and engagement in the company, generate growth (e.g. higher volumes and premium prices) and increase the ability of the company to make a significant change in the world.

**Influencing the supply chain**

Retailers often find it challenging to exert influence over their supply chain in order to improve their companies’ and products’ sustainability. Consequently, some choose to focus narrowly on issues only within their own operations. However, some of the greatest sustainability concerns lie outside of retail operations. In many cases, the greatest impacts lie within the supply chain.

Figure 5 illustrates various strategies for retailers to address sustainability-related issues within a product’s life cycle. Retail operations fall under *distribution*, and these issues tend to be more visible and easy to address than those within the supply chain. Companies have direct control over their transportation fleets, stores and employees; thus they have the power to improve fleet efficiency, store energy efficiency, and employee benefits. These changes are more visible to consumers and, and in many cases, offer the potential to reduce operational costs. While important, they do not capture other important sustainability issues within a product’s life cycle such as material extraction, product manufacturing, consumer use, and product disposal.
A good area for retailers to begin to engage in sustainability is through their private brands. Here, retailers have the ability to improve the sustainability of products throughout their life cycle by designing them with such issues in mind. They can be designed to require less raw materials, be processed at lower temperatures and with less hazardous substances, use less packaging, operate more efficiently during consumer use, and be recycled after the consumer is finished. While retailers have less of an ability to affect products from supplier brands, it is nonetheless possible.

While directly affecting the labor and manufacturing practices of private label products can be challenging, some success has been achieved in improving labor practices in factories supplying private brand products. This has largely been aided by industry-wide and collaborative efforts that have put pressure on suppliers to obey codes of conduct. Similar efforts in the area of manufacturing, even sourcing, could achieve success if adopted across an industry. For example, electronics companies are making progress in diminishing the sale of conflict metals by collectively adopting uniform standards for the smelters in their supply chains. Different strategies for engaging suppliers are discussed below.
Engaging suppliers

The way retailers are engaging suppliers is changing. Initially, the retailers did not consider themselves responsible for the actions of their supply chain partners. It was not until the charges against Nike of child labor and sweatshop conditions that the debate about responsibility into the supply chain began. Although a few firms, such as Levi-Strauss, required supplier acceptance of code of conducts prior to Nike’s acceptance of responsibility for actions of its supply chain, the majority of retailers started after. As codes of conduct appeared to be of limited compliance use, auditing became the standard by which suppliers operations were assessed. The earliest audits were generally led by apparel firms and focused primarily on labor issues. Over time, audits have broadened to include safety, health, and environmental issues.

Other forms of engagement include asking suppliers through questionnaires. For example, Walmart has developed a list of 15 basic questions with input from suppliers, academia, non-profit organizations, government, and the retail community to better understand the status of supply chain partners and to encourage them to consider sustainability targets. According to Walmart, “the questions come from our discovery that taking steps to measure sustainability impacts, and setting targets to reduce those impacts lead to reduced waste and costs, as well as innovation and new revenue streams. To that end, measurement and transparency into the supply chain are the focus of these initial questions.” Questions focus on Energy and Climate, Material Efficiency, Nature and Resources, People and Community. The questionnaire allows companies to figure out the right way to engage suppliers. In addition to the questionnaire, a few companies now offer suppliers access to webinars and other online resources.

More recently, a move towards training and capacity building appear to be emerging among the most advanced retailers. In fact, we heard from some firms which are beginning to recognize

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4 Walmart, Supplier Sustainability Assessment Format, 2009
sustainability as a strategic advantage, and for which sustainability in their supply chains is embedded into their operations. They are also considering developing deeper relationships with fewer suppliers. They choose to source from “companies that share their values” and provide broader-based management training and capacity building with factories that accept responsibilities in addressing social and environmental impact. Such risk management model should lead to deeper relationships with suppliers and more alignment.

As public demand for quality production and fair labor practices grown, supplier dependability will become of increasing importance. The following outline some of the typical ways retailers can engage their suppliers.

<table>
<thead>
<tr>
<th>Compliance</th>
<th>Supplier Assessment</th>
<th>Supplier Capacity Building</th>
<th>Collaborations</th>
</tr>
</thead>
</table>
| Activities | • Develop code of conduct  
  • Audit factories      | • Survey supplier conduct through questionnaires  
  • Develop vendor portal | • Train management to better manage compliance  
  • Encourage certification  
  • Provide financing/tools |
| External Stakeholders Involved | • GSCP  
  • Auditors | • Suppliers  
  • Consultants | • Suppliers  
  • Consultants  
  • NGOs |
| Internal Stakeholders Involved | • Sourcing  
  • Social team  
  • Designers | • IT  
  • Sourcing | • Sustainability team (labor and environment) |
| Benefits | • Reduce potential reputational risk | • Identify cost-saving opportunities | • Improve engagement  
  • Set industry standard  
  • Share knowledge |

**Figure 6. Types of supplier engagement**

The move towards longer term relationship bodes well for sustainability but at the same time, it raises the question of how to manage the balance between the needed investment in capacity building and the highly competitive nature of the sector. We have seen some firms are choosing to work with
fewer partners and focus on specific programs such as waste or water reduction as a way to maximize their influence.

**Collaborations**

With the growing complexity of compliance issues and costs related to the need for capacity building, we have seen that the leaders in the field are moving increasingly towards collaboration, despite the competitiveness of the industry. Collaboration is happening both internally and externally as recognizing that sustainability is a company-wide strategy and not a discrete program.

The idea of collaborating can be perceived as a challenge for private sector companies. At the same time, pressure from NGOs and consumers will continue to be a major driver for the industry and will likely grow; as consumers are able to access more information on firm policies, procurement and activities through the internet and social media, scrutiny will likely grow and as will the possibility of less than desirable publicity. Consequently, retailers’ ability to understand their supply chain will be crucial. This, of course, will require significantly more resources, making it increasingly challenging for retailers to manage their issues individually, thus driving the industry towards collaboration. We see this happening already, as the number of industry led working groups has grown in recent years.
Growing interest in joint auditing through collaborative organizations such as the Global Social Compliance Program is resulting in practical programs and tools that can help members reduce their costs and time commitments. As the value of collaboration becomes increasingly tangible, it is likely that even reluctant retailers will see its benefits, as it will be too costly and time consuming to manage the tasks on their own.

Engagement with a range of stakeholders will also likely grow, as the issues ranging from life cycle analysis to materials procurement to disposal can be complex. As illustrated below, the types and benefits of collaboration with different parties are diverse.

**Figure 7. Collaborative organizations**

<table>
<thead>
<tr>
<th>Apparel, footwear, and household goods</th>
<th>Outdoors</th>
<th>Electronics</th>
<th>Agriculture</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSR Social Working Groups</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>UN Global Compact</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>BSR Environmental Working Groups</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Smart Way (Transportation)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Global Social Compliance Programme</td>
<td></td>
<td></td>
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<tr>
<td>The Sustainability Consortium</td>
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<tr>
<td>RILA/BRC Quality Product Safety</td>
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<td></td>
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</tr>
<tr>
<td>OIA Eco-Index</td>
<td>Sustainable Food Lab</td>
<td></td>
<td></td>
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<tr>
<td>Sustainable Apparel Coalition</td>
<td>Energy Star</td>
<td></td>
<td></td>
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<tr>
<td>ILO/IFC Better Work Program</td>
<td>Cotton Sourcing Coalition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EICC</td>
<td>Dairy Industry</td>
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</tbody>
</table>

| BSR Social Working Groups             |          |             |             |
| UN Global Compact                     |          |             |             |
| BSR Environmental Working Groups       |          |             |             |
| Smart Way (Transportation)            |          |             |             |
| Global Social Compliance Programme    |          |             |             |
| The Sustainability Consortium         |          |             |             |
| RILA/BRC Quality Product Safety       |          |             |             |
Figure 8. Benefit of collaboration.

Likewise, many of these benefits are heard through our interviews with various retailers:

“You need a common set of rules before someone can win and collaboration is the only way rules can be created.” (Large outdoor company)

“At the end of the day, it’s about consumers. The more they can collaborate, the more value they can bring to consumers.” (Department store)

“We need to get moving quickly....so have to coordinate cross functionally. There is value to collaboration. We have a history partnering with key academic institutions.” (Grocery Chain)

Close engagement with key stakeholders results in positive feedback loops that promote closer engagement and greater collaboration. Industry working groups seem to be an excellent first step for organizations new to the area to get up to speed on issues quickly and to benefit from the experience of their colleagues and competitors.

III. Discussion

Characteristics of Embracers
The leaders in sustainable supply chain activities tend to have certain characteristics in common. Figure 9 contrasts common traits of cautious adopters with those of embracers. Retailers who look for competitive advantage in their sustainability strategy tend to be more active in fomenting sustainability within their supply chains and derive the most benefit from their efforts, whereas others who do not see the business case for sustainability tend to only do what they see as necessary to manage risk, such as resource availability. Also, those who see sustainability as a competitive advantage tend to look further into the future when developing related strategies. They commonly look across the life cycle of their products, including the supply chain, rather than focusing narrowly upon retail operations. They generally apply metrics in order to set measurable goals for their efforts, and they are moving toward the development and use of industry-wide and universal metrics, rather ones that are defined internally.

**Cautious Adopters**  
- Risk management
- Short-term
- Internal / Limited
- Isolated / Siloed
- Bottom-up
- Audits
- Internal Operations
- Minimal

**Embracers**  
- Competitive Advantage
- Long-term
- Universal / LCA
- Integrated internally and externally
- Top-down & Bottom-up
- Capacity Building & Financing
- Supply Chain / Life Cycle
- Industry, NGOs, Gov’t, etc.

*Figure 9. Comparison between Cautious Adopters vs. Embracers*

Another common theme amongst the leaders in supply chain sustainability is support at the top. When upper management does not see the business case for sustainability, it is hard to garner support for related initiatives. However, when upper management understands the competitive advantage, not only is it easier to garner support, but it makes employees work to incorporate sustainability into their
jobs. In fact, the sustainability strategy tends to become integrated throughout the company, rather than being isolated among a few positions.

Furthermore, embracers are changing the way they approach stakeholders. Instead of focusing exclusively on demands and audits of their suppliers, they are moving toward capacity building in which they help their suppliers to be more competitive. Additionally, recognizing that they cannot address sustainability issues alone, these leaders are reaching out to collaborate with other organizations – They are working with others in industry to tackle global issues and create common standards and language, with NGOs to gain knowledge on issues and assistance in developing related strategies, and with governments to utilize resources, as well as to influence public policy and create uniform standards.

**Future of Supply Chain Sustainability**

In the future, we see sustainable supply chain activities change from closely held independent efforts to more transparent and integrated efforts that will lead change in both retailer and supplier behavior. Fig. 12 illustrates the evolving, merging directions of supply chain engagement.

![Figure 10. Future of Sustainable Supply Chain Engagement](image-url)
Internal and cross boundary collaborations can drive the less advanced retailers to move from a one/two dimensional and short-term view of sustainability to a multi-dimensional long-term sustainability strategy. Opportunities to pursue sustainability in the supply chain are extensive and offer retailers myriad leverage points to take a leadership role. Trends suggest that those retailers successful in this area apply a sustainability lens across their firm’s activities. Sustainability in the supply chain offers an excellent entryway for established firms to take a leadership role in the industry.

**Challenges**

As retailers begin or continue sustainable supply chain efforts, they face a number of challenges including:

- Obtaining and analyzing data from all tiers of supply chain in a fast, yet fruitful manner
- Developing comprehensive metrics and standards
- Encouraging supplier cooperation and transparency
- Balancing collaboration and competition with industry peers
- Gaining support from leadership
- Creating new innovative ideas that will address ongoing challenges
- Aligning interests of all parties and communicating the importance of sustainability

However, we have seen that there are ways to overcome some of these obstacles. Through collaborative efforts with industry peers can address concerns relating to standards, and increasing top level awareness on the issues. Promoting transparency can overcome data challenges. Partnerships with academia / NGO’s and entrepreneurs can help drive innovations.
Appendix 1 - Interview Guide

- General thought on Industry
  - In your opinion, what do you feel are the three main challenges for retailers in term of addressing sustainability in the retail industry’s supply chain?

- Past/Current Efforts on Sustainable Supply Chain
  - What is overall strategy/goals of your supply chain sustainable efforts?
  - (If not available on internet) When did the company start supply chain initiatives? How was it done? What progress has been made?
  - What motivated the company to start sustainable supply chain initiatives? How do these initiatives fit with the overall business or sustainability strategies?
  - What challenges have been faced in garnering support within the company and outside the company? What has worked and what doesn’t?
  - What challenges have been faced in executing supply chain initiatives? What has worked and what doesn’t?

- Future plans
  - What are some of the activities related to sustainable supply chain you are looking to implement in the near future?

- Collaboration
  - What sort of supply chain programs/initiatives do you see collaborative efforts would be valuable? What type of ‘collaboration’ do you see?
  - What resources could RILA/collaborative members provide that to help you effectively meet your supply chain sustainability goals?
  - What retail companies do you think are the leaders in supply chain engagement for sustainability?