



Module 2: Design and Development Stage (2003)

2003

- *Discussions with Charter Partners to plan program specifics and official launch*
- *Program Launch Planning*
- *Development of Partnership Tools and Outreach Materials*
- *Development of Partnership Agreements*

Initial Stakeholder Outreach

- *SmartWay was designed as a collaborative effort; Industry helped EPA create the program*
 - *Carriers*
 - *Shippers*
 - *Industry Associations*
 - *Environmental Groups*
 - *And, Champions from these companies and organizations*
- *This created buy-in from industry, further strengthening SmartWay as a true public-private partnership.*
- *Some Partners were first in a freight workgroup organized by Business for Social Responsibility (BSR)*
 - *BSR is an organization that helps companies achieve social, environmental and ethical success.*

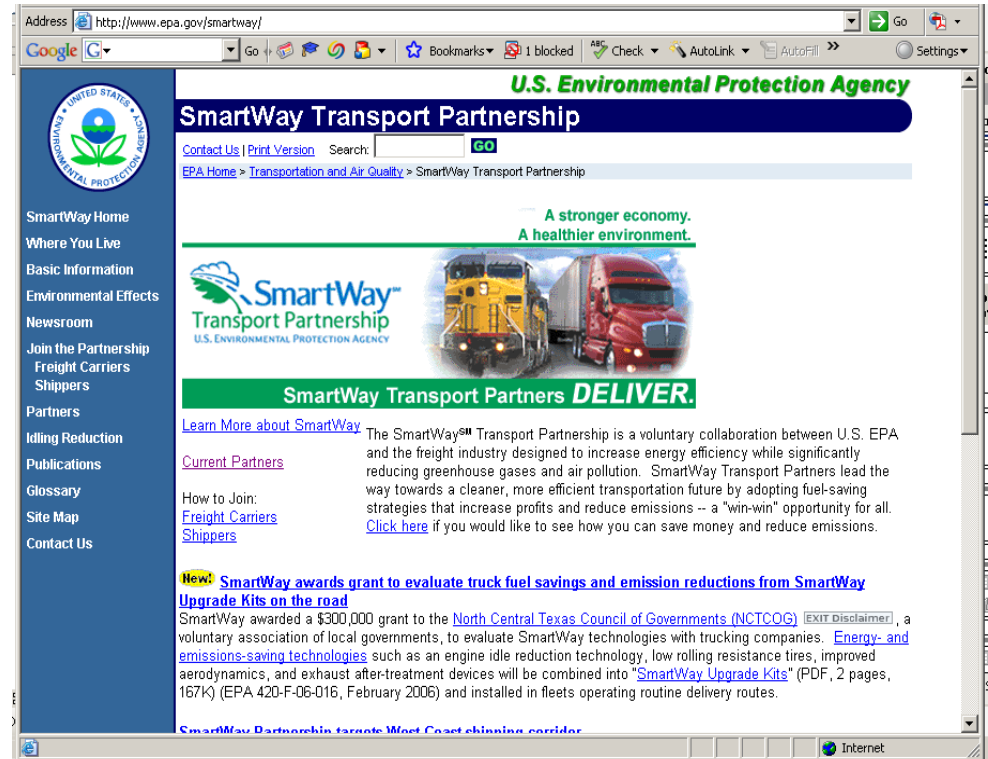
Charter Partnership Group

- 15 Companies joined as Charter Partners, both shippers and carriers
 - Canon, Coca-Cola, CSX Transportation, FedEx Express, HEB, The Home Depot, IKEA, Interface, Nike, Norm Thompson Outfitters, Roadway Express, Schneider National, Swift Transportation, UPS, Yellow Transportation
- Provided EPA with institutional knowledge of the industry, ensuring SmartWay would be viable



Website Development

- Began development of Web site in preparation for program launch
- Includes information on current Partners, news, funding opportunities, official program materials, technical reports, general SmartWay information



EPA's FLEET Model

Creating a Level Playing Field

- *Freight Logistics Environmental and Energy Tracking Performance Model:*
 - *Carriers:*
 - *Estimates tons of CO₂, NO_x, and PM (Baseline and Future)*
 - *Determines effectiveness of strategies used in the fleet (e.g., aerodynamics, idling reduction, speed control)*
 - *Allows fleet to conduct “what if” scenarios to determine best strategies for them*
 - *Projects and estimates cost savings and paybacks*
 - *Shippers:*
 - *Tracks percentage of freight shipped with SmartWay Carriers*
 - *Measures their environmental footprint*

1	Carrier Information	Current Fleet Evaluation	Current Fleet Summary	Action Plan Evaluation	Action Plan Summary	Annual Update Evaluation	Annual Update Summary	Print	Zip File for Mailing
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2 **Fleet Efficiency Evaluation** 0 gallons

3

4 **STEP 1: General Information About Your Existing Fleet:**

5 1. For which year are you estimating the environmental performance of your fleet?

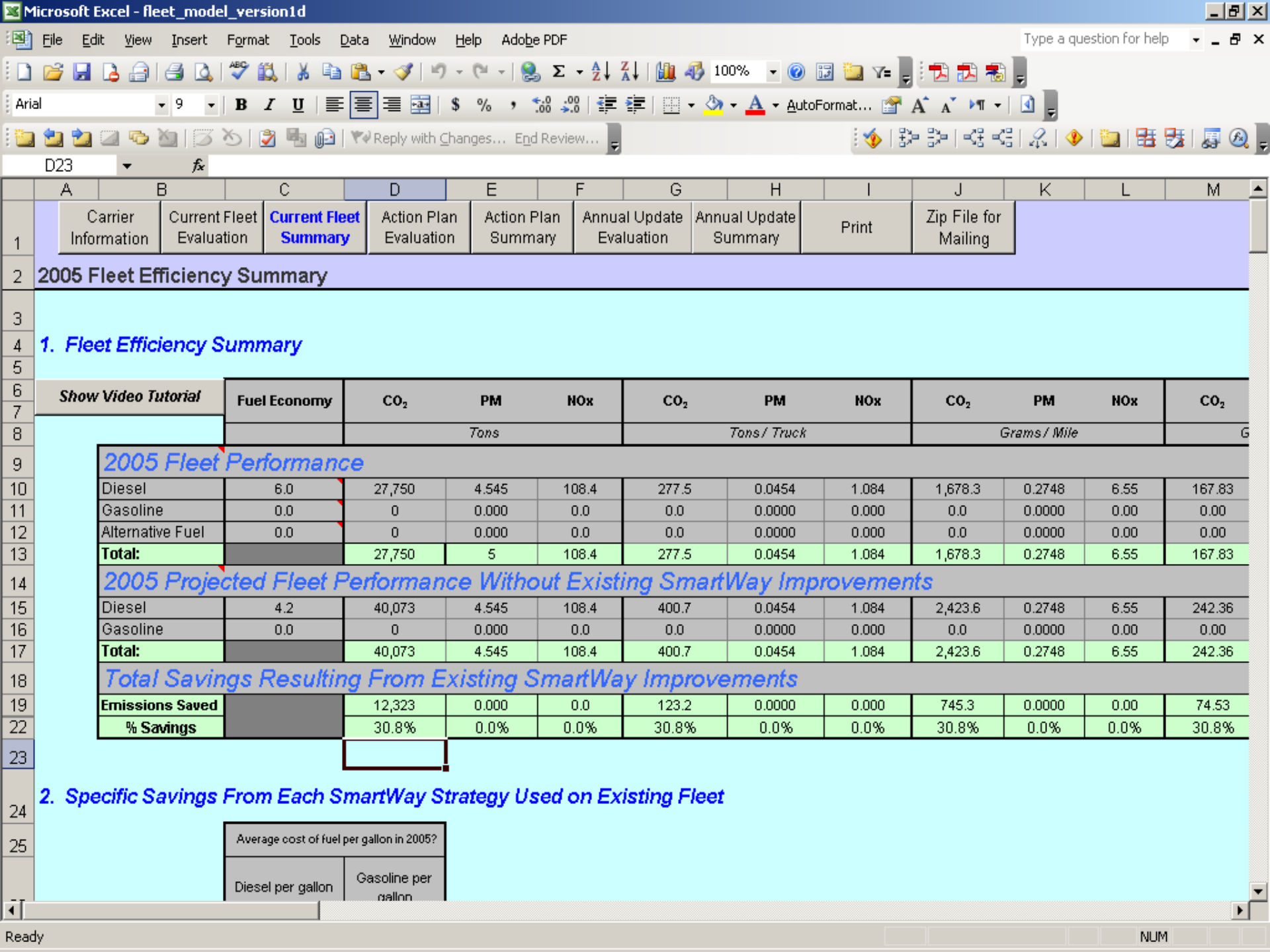
6

7 **Show Video Tutorial** **Straight Trucks** **Print This Table**

		Total # of trucks	Average Miles per truck per year	Total Miles	Total Fuel Consumption Gallons	Average payload (tons) per trip	Average Idling Hours per truck per year	Total Idling Hours
Short Haul	Diesel			0				0
	Gasoline			0				0
	Alternative Fuel	0	0	0	0	0	0	0
Long Haul	Diesel			0				0
	Gasoline			0				0
	Alternative Fuel	0	0	0	0	0	0	0

17 **Combination Trucks**

		Total # of trucks	Average Miles per Truck per Year	Total Miles	Total Fuel Consumption Gallons	Average payload (tons) per trip	Average Idling Hours per truck per year	Total Idling Hours
Short Haul	Diesel			0				0
	Gasoline			0				0
	Alternative Fuel	0	0	0	0	0	0	0
Long Haul	Diesel			0				0
	Gasoline			0				0
	Alternative Fuel	0	0	0	0	0	0	0
Totals	Diesel	0		0	0	0.00		0
	Gasoline	0		0	0	0.00		0
	Alternative Fuel	0		0	0	0.00		0
	All vehicles	0		0		0.00		0



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Carrier Information	Current Fleet Evaluation	Current Fleet Summary	Action Plan Evaluation	Action Plan Summary	Annual Update Evaluation	Annual Update Summary	Print	Zip File for Mailing				
2	2005 Fleet Efficiency Summary												
3	1. Fleet Efficiency Summary												
4	Show Video Tutorial												
6		Fuel Economy	CO₂	PM	NOx	CO₂	PM	NOx	CO₂	PM	NOx	CO₂	
7													
8				<i>Tons</i>		<i>Tons/ Truck</i>		<i>Grams/ Mile</i>					
9	2005 Fleet Performance												
10	Diesel	6.0	27,750	4.545	108.4	277.5	0.0454	1.084	1,678.3	0.2748	6.55	167.83	
11	Gasoline	0.0	0	0.000	0.0	0.0	0.0000	0.000	0.0	0.0000	0.00	0.00	
12	Alternative Fuel	0.0	0	0.000	0.0	0.0	0.0000	0.000	0.0	0.0000	0.00	0.00	
13	Total:		27,750	5	108.4	277.5	0.0454	1.084	1,678.3	0.2748	6.55	167.83	
14	2005 Projected Fleet Performance Without Existing SmartWay Improvements												
15	Diesel	4.2	40,073	4.545	108.4	400.7	0.0454	1.084	2,423.6	0.2748	6.55	242.36	
16	Gasoline	0.0	0	0.000	0.0	0.0	0.0000	0.000	0.0	0.0000	0.00	0.00	
17	Total:		40,073	4.545	108.4	400.7	0.0454	1.084	2,423.6	0.2748	6.55	242.36	
18	Total Savings Resulting From Existing SmartWay Improvements												
19	Emissions Saved		12,323	0.000	0.0	123.2	0.0000	0.000	745.3	0.0000	0.00	74.53	
22	% Savings		30.8%	0.0%	0.0%	30.8%	0.0%	0.0%	30.8%	0.0%	0.0%	30.8%	
23	2. Specific Savings From Each SmartWay Strategy Used on Existing Fleet												
25	Average cost of fuel per gallon in 2005?												
	Diesel per gallon		Gasoline per gallon										

Database Development

- *EPA decided to develop a Customer Relationship Management (CRM) database to organize Partnership contact and communication information*
 - *Partner contact information and history, submission deadlines*
 - *Tool for tracking recruiting and partner management efforts*
 - *Emissions reductions and calculations*

YRC Worldwide Inc.

Partner Code: SWT-C-7
 Company Code: 291

1. General Partner Info:

Partner Account Manager: Matt Payne (Make as Partner) Active Inactive

Company Name: YRC Worldwide Inc. (Charter Partner)

Type Of Company: Truck Carrier Shipper Logistics Rail Carrier Affiliate

Initial Partnership Date: 2/9/2004

Goal and Action Plan Due: 8/7/2004

File Name	View	Reviewer	Date Reviewed	Manager	Date Approved	Stamp
YellowRoadway_Version1.xls	View	Matt Payne	10/19/2004			Stamp
YellowRoadwayActionPlan.do	View	Matt Payne	10/19/2004			Stamp

Annual Updates Due: [] [] []

Shipper Connection: The Home Depot, Nike, Volvo, BND, Sharp

Smartway Logo Use?: Yes

ShipperIndexFactor: 1.25

Carrier SCAC Code: YRCP,

Strategies Used:

<input checked="" type="checkbox"/> Idling Control	<input checked="" type="checkbox"/> Advanced Lubricants	<input type="checkbox"/> NOx Reflash
<input checked="" type="checkbox"/> Aerodynamics	<input checked="" type="checkbox"/> Intermodal	<input checked="" type="checkbox"/> Engine upgrades
<input checked="" type="checkbox"/> Auto Tire Inflation	<input checked="" type="checkbox"/> Trailer Strategies	<input type="checkbox"/> Retrofit technologies
<input type="checkbox"/> Wide based tires	<input checked="" type="checkbox"/> Speed Management	<input type="checkbox"/> Other...
<input checked="" type="checkbox"/> Weight reduction	<input type="checkbox"/> Hybrid Technology	

Interest in SmartWay Truck: Yes No Maybe Potential # SmartWay Trucks: []

3. Company Contact Info:

Website URL: http://www.yellowroadway.com

EPA Region: 7 Conference Speaker: Yes No

Recruiter: Matt Payne

Company Organizations: ATA

Quote: "Roadway Corporation is committed to being known for safety practices and achievements, both in the work practices and achievements, both in the work practices in place across the Roadway highways. The practices in place across the Roadway emphasize preventing pollution and minimizing the..."

	First Name	Last Name	Title	Phone	Fax	Cell	
1	Steve	Shinners					<input type="checkbox"/> SmartWay
2	Mike	Kelley	Director of Government Affairs			@yellowcorp.com	<input checked="" type="checkbox"/> SmartWay
3	Ted	Scott	Exec. Director for Govt Relations			@roadway.com	<input checked="" type="checkbox"/> SmartWay

2. Environmental Performance Data:

	Baseline	Commitment
Year	2003	2006
Number of Trucks	[]	[]
Total Miles	[]	[]
Total Gallons	[]	[]
Average Payload	[]	[]

4. History of Comments:

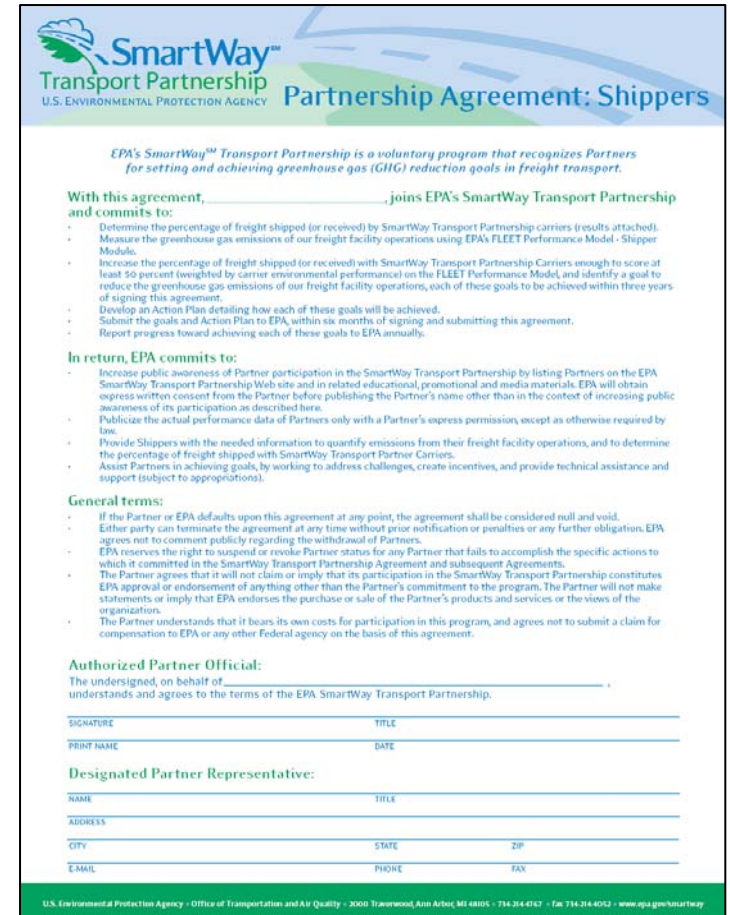
Date / Staff	Comment
3/29/2005 Mike Zatz	Talked to Ted Scott, who indicated Action Plan include only Yellow subsidiaries are included, because largely to operate on their own, companies like Bojmer Express...

Partnership Agreements

- Partnership Agreements formalize commitments
- Common Method for Voluntary Programs (often called a Memorandum of Understanding)
 - Successfully gain commitment from corporate executives, set objectives, and develop timelines
- SmartWay Carrier Partners agree to:
 - Measure the environmental performance of their fleet with EPA's FLEET Model
 - Identify a goal to achieve within 3 years
 - Submit the goals and action plan to EPA within 6 months
 - Report progress annually
- EPA agrees to:
 - Increase public awareness of the Partnership and Partners participation
 - Assist Partners in achieving goals by providing technical assistance, marketing support, and create incentives (subject to appropriation)

Partnership Agreements

- SmartWay Partner Shippers agree to:
 - Determine the percentage of freight shipped with Partner Carriers
 - Increase the amount of freight shipped with Partners to at least 50 percent within three years
- EPA agrees to:
 - Assist shippers quantify the emissions from their warehouse and freight operations
 - Publicize Partner efforts and increase public awareness of these efforts



The image shows a form titled "SmartWay Transport Partnership Partnership Agreement: Shippers". The form is from the U.S. Environmental Protection Agency. It includes a header with the SmartWay logo and the EPA logo. The main text describes the SmartWay Transport Partnership as a voluntary program for setting and achieving greenhouse gas (GHG) reduction goals in freight transport. The form is divided into several sections: "With this agreement, _____, joins EPA's SmartWay Transport Partnership and commits to:", "In return, EPA commits to:", "General terms:", "Authorized Partner Official:", and "Designated Partner Representative:". Each section contains specific commitments and terms. At the bottom, there are fields for the Partner's name, title, address, city, state, zip, email, phone, and fax. The footer contains the EPA's contact information: "U.S. Environmental Protection Agency • Office of Transportation and Air Quality • 2000 Traverwood, Ann Arbor, MI 48105 • 734-214-4167 • Fax 734-214-4032 • www.epa.gov/smartway".

SmartWay™
Transport Partnership
U.S. ENVIRONMENTAL PROTECTION AGENCY

Partnership Agreement: Shippers

EPA's SmartWay™ Transport Partnership is a voluntary program that recognizes Partners for setting and achieving greenhouse gas (GHG) reduction goals in freight transport.

With this agreement, _____, joins EPA's SmartWay Transport Partnership and commits to:

- Determine the percentage of freight shipped (or received) by SmartWay Transport Partnership carriers (results attached).
- Measure the greenhouse gas emissions of our freight facility operations using EPA's FLEET Performance Model - Shipper Module.
- Increase the percentage of freight shipped (or received) with SmartWay Transport Partnership Carriers enough to score at least 50 percent (weighted by carrier environmental performance) on the FLEET Performance Model, and identify a goal to reduce the greenhouse gas emissions of our freight facility operations, each of these goals to be achieved within three years of signing this agreement.
- Develop an Action Plan detailing how each of these goals will be achieved.
- Submit the goals and Action Plan to EPA, within six months of signing and submitting this agreement.
- Report progress toward achieving each of these goals to EPA annually.

In return, EPA commits to:

- Increase public awareness of Partner participation in the SmartWay Transport Partnership by listing Partners on the EPA SmartWay Transport Partnership Web site and in related educational, promotional and media materials. EPA will obtain express written consent from the Partner before publishing the Partner's name other than in the context of increasing public awareness of its participation as described here.
- Publicize the actual performance data of Partners only with a Partner's express permission, except as otherwise required by law.
- Provide Shippers with the needed information to quantify emissions from their freight facility operations, and to determine the percentage of freight shipped with SmartWay Transport Partner Carriers.
- Assist Partners in achieving goals, by working to address challenges, create incentives, and provide technical assistance and support (subject to appropriations).

General terms:

- If the Partner or EPA defaults upon this agreement at any point, the agreement shall be considered null and void.
- Either party can terminate the agreement at any time without prior notification or penalties or any further obligation. EPA agrees not to comment publicly regarding the withdrawal of Partners.
- EPA reserves the right to suspend or revoke Partner status for any Partner that fails to accomplish the specific actions to which it committed in the SmartWay Transport Partnership Agreement and subsequent Agreements.
- The Partner agrees that it will not claim or imply that its participation in the SmartWay Transport Partnership constitutes EPA approval or endorsement of anything other than the Partner's commitment to the program. The Partner will not make statements or imply that EPA endorses the purchase or sale of the Partner's products and services or the views of the organization.
- The Partner understands that it bears its own costs for participation in this program, and agrees not to submit a claim for compensation to EPA or any other Federal agency on the basis of this agreement.

Authorized Partner Official:
The undersigned, on behalf of _____, understands and agrees to the terms of the EPA SmartWay Transport Partnership.

SIGNATURE _____ TITLE _____
PRINT NAME _____ DATE _____

Designated Partner Representative:

NAME _____ TITLE _____
ADDRESS _____
CITY _____ STATE _____ ZIP _____
E-MAIL _____ PHONE _____ FAX _____

U.S. Environmental Protection Agency • Office of Transportation and Air Quality • 2000 Traverwood, Ann Arbor, MI 48105 • 734-214-4167 • Fax 734-214-4032 • www.epa.gov/smartway

How Do Companies Join and Participate?

- *Any size or type of carrier or fleet can join the Partnership*
 - **Sign** the Partnership Agreement
 - **Measure** current environmental performance with the FLEET Performance Model
 - **Establish goals** by developing a 3 year environmental improvement plan
 - **Annually update** the FLEET Performance Model

Funding (2003)

Fiscal Year 2003 Budget: \$1,000,000

○ *Marketing and Recruiting: \$200,000*

- *EPA Contractor Support*
- *EPA Travel*
- *Software, Display Booth, Graphic Development*
- *Marketing Material for Recruiting*

○ *Technology Grants and Testing: \$500,000*

- *Idling Grants and other Technologies*

○ *Outreach and Other Initiatives: \$300,000*

- *BSR (Business for Social Responsibility) Grant*
- *Market Research*
- *General Operating Costs*



Staffing Needs (Design and Development) 2003

- 5-6 FTEs
- Staff should have:
 - Relationships with Stakeholder Groups
 - Trusted Industry Experts and Advisors
 - Staff involved in the initial planning stages
 - Staff w/ technical ability to write and interpret technical reports / convey technical knowledge
 - Public Speaking and Sales/Marketing experience

