Erb Seminar Syllabus
Strategy 525 / NRE 526

Fall B 2016
Monday / Wednesday 5:00-6:30 PM
October 31 - December 7, 2016
[Ross 0420]

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Course Objectives

The Erb Seminar is a 1.5-credit course, designed and delivered by the Erb Institute specifically for incoming Erb students – including both first-year MBA / MS students, as well as second-year Ross and SNRE students who just joined Erb. The course introduces a carefully selected set of sustainability issues and management tools that we believe any sustainability professional should understand before entering the marketplace. The course also provides a framework for career visioning in sustainability, and a structure to tailor the Erb experience to prepare for a first job after graduation on the road to that career vision.

Objectives for Erb Seminar are the following:

- **Sustainability Management:** Develop Erb students as sustainability change agents, by exposing students to a high-level overview of key sustainability topics; practical management tools and approaches; as well as change-management skills to support them through their time at Erb and their careers beyond.

- **Career Visioning:** Help Erbers understand their own skills, assets, and interests; how they relate to a career in business sustainability; and visualize paths to embarking on those careers.

- **Erb Community:** Build community within the new Erb class.

This is a survey course, with a high-level introduction to a range of themes and practical approaches, rather than a theoretical analysis or deep-dive into any one issue. A combination of Erb speakers, U-M faculty, and invited practitioners will lead the sessions. The discussions are designed to be interactive and engaging – which means that the full learning experience will depend on both speaker and student involvement.

The Erb Institute’s perspective on “robust sustainability” covers a broad range of environmental, social, economic, labor, and human-rights risks and opportunities for business. Our “stakeholder based view of the firm” recognizes the role of stakeholders—both internal and external to the organization—in helping companies to understand sustainability issues, minimize risks, and leverage opportunities. Last, by “business”, we mean more fundamentally “markets”—a denomination that covers not only for-profit corporations, but also B-Corps, social enterprises, smaller start-ups, nonprofits that work with companies, and even government agencies that craft and enforce the rules of the game.

Speaker Engagement

Each of the visiting speakers has been hand-picked for their deep social / environmental sustainability experience with business in the US and / or abroad. They may come from a for-profit transnational, a global nonprofit working with business, or an academic institution. However, they all share our conviction that business and markets can be—indeed, must be—a primary driver if we hope to achieve a sustainable world.

Many of the speakers will be visiting from out of town, and we encourage students to take advantage of the various opportunities we’ve created for small-group or one-on-one engagement with the speakers outside of Erb Seminar. In most cases, each speaker has graciously accepted to meet with Erb students across a variety of platforms during their brief time on campus:

- **Erb Seminar:** Guest speaker at an Erb Seminar session (90 minutes)

- **Practitioner’s Workshop:** A deeper-dive workshop at Ross on one of the practical management
tools the speaker presented in Erb Seminar (when speaker schedule allows) (90 minutes)

- **Erb Dinner:** Exclusive, small-group dinner among Erb Seminar students and guest speaker over dinner in downtown Ann Arbor for informal discussion on speaker experience and advice (90 minutes)
- **Career Breakfast:** Small-group career discussion with students over breakfast at SNRE (60 minutes)
- **Coffee Chats:** One-on-one career-advising sessions with guest speaker over coffee in Ross Winter Garden (30 minutes)

**Evaluation**

The course is built around sustainability management—as illustrated by guest practitioners—and career visioning for profession with impact. The course is more intensive in speaker engagement and preparatory readings, than long written analysis. The assignments and evaluation below reflect these priorities.

<table>
<thead>
<tr>
<th>ASSIGNMENT</th>
<th>DESCRIPTION</th>
<th>EVALUATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue Briefs</td>
<td>2 Memos (1-2 pg. each)</td>
<td>30%</td>
</tr>
<tr>
<td>Impact Map</td>
<td>3 Components (1 pg. each)</td>
<td>20%</td>
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<tr>
<td>Session Synthesis</td>
<td>1 Presentation (10 min. per 3-student team)</td>
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<tr>
<td>Participation</td>
<td>Active participation in class discussions</td>
<td>20%</td>
</tr>
<tr>
<td>Attendance</td>
<td>Class attendance (10 sessions)</td>
<td>15%</td>
</tr>
<tr>
<td>TOTAL</td>
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</tbody>
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**Attendance**

The guest speakers provide a unique opportunity for candid, in-depth conversation with sustainability professionals, with time in-class to reflect not only on their comments but also map learnings to students’ own values, career aspirations, and plans for making the most of their Erb experience. The in-class learning can’t happen without being in-class.

The expectation is set high for 100% attendance to class and active participation in the discussions. Absences for Institute-sponsored projects and travel will be excused. Also, the session immediately before Thanksgiving has been cancelled to allow for student travel. Otherwise, please inform the instructors of expected absences, which will affect that the Class Attendance portion of your final grade.

**Disability Accommodation**

If you think you need an accommodation for a disability, please contact the instructors at your earliest convenience. Some aspects of this course (such as the assignments, the in-class activities, and the external speaker engagement) may be modified to facilitate your participation and progress. As soon as you make us aware of your needs, we can work with U-M’s Office of Services for Students with Disabilities to help us determine appropriate academic accommodations. SSD typically recommends accommodations through a Verified Individualized Services and Accommodations (VISA) form. Any information you provide is private and confidential, and will be treated as such.
Instructors

TERRY NELIDOV, MANAGING DIRECTOR, ERB INSTITUTE (ROSS ADJUNCT LECTURER)
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Office Hours: Yes, please come by to talk about the course or broader sustainability. Contact Erb Administrative Assistant Nate Dewey (ndewey@umich.edu | (734) 615-9863) to schedule times.

Terry is a native of Oakland, California and came to the Erb from Hong Kong. He has dedicated his more than twenty-year career to promoting sustainability from a variety of perspectives. Most recently, Terry worked with Business for Social Responsibility and its member companies to make the business case for sustainability across Asia, Latin America, and the US. Terry’s sustainability journey began years ago as a US Peace Corps Volunteer in Paraguay. Later he served as Founding Director of INCAE Business School’s Business Leadership for Sustainable Development Network in Latin America; served as a Founding Partner and General Manager for AmeriCasas, a land-development company in El Salvador; and thereafter worked in advocacy and development—particularly around companies, communities, and mining—with Catholic Relief Services in Peru. Terry holds a BS in Industrial Engineering from Stanford University and an MBA from IESE Business School in Spain. His languages include native English, as well as Spanish, Portuguese and Guarani (Paraguay).

EMILY KEELER, STUDENT-ALUMNI AFFAIRS MANAGER, ERB INSTITUTE (ROSS ADJUNCT LECTURER)
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Office Hours: Yes, please come by to talk about the course or broader sustainability. Contact me or Erb Administrative Assistant Nate Dewey (ndewey@umich.edu | (734) 615-9863) to schedule times.

Emily came to the Erb Institute from U-M’s International Programs in Engineering (IPE) office. She worked at IPE for five years, most recently as an International Programs Advisor where she advised outgoing Engineering students and worked closely with the University’s international partners in Asia, Australia, and the UK. Emily brings experience in program development, student advising, recruitment, and admissions to the Erb community. Emily holds a BA from Grand Valley State University, and an MA from the Center for the Study of Higher and Post-Secondary Education at the University of Michigan. She has studied in Barcelona, Spain and conducted graduate research in Shanghai, China. Emily looks forward to working with the Erb community in order to foster a more socially and environmentally sustainable world.
Class Sessions
Erb Seminar takes a “practitioner’s toolbox” approach to managing sustainability in companies, social enterprises, and the nonprofits that partner with them. Students aren’t meant to finish the course being experts in any one—or all—of the issue areas covered. Rather, the course is intended to provide a high-level framework for thinking about sustainability implementation (actually doing sustainability in today’s companies with today’s tools vs. deep frontier research that will inform practice in years to come).

The course will introduce a select set of tools that we believe any sustainability professional needs to know exist, and illustrate them with real-life field experiences of practitioners drawn from companies, consultancies, and nonprofits. Resources will also be provided for additional information on the tools, for later reference during the three years of Erb—or after graduation.

The toolboxes are designed around the “Erb Sustainability Lifecycle“, which begins with Stakeholder Engagement as a fundamental building block of sustainability management. Based on stakeholder interests and business drivers, a Materiality Assessment prioritizes the sustainability issues that matter most to both company and stakeholders.

Global Supply Chains looks at how to manage sustainability risks and opportunities in complex, remote, and often opaque supply chains, while Human Rights drills down on a particular issue area of increasing importance in supply chains after ratification of the UN Guiding Principles on Business & Human Rights. We then examine how to develop meaningful Metrics & Reporting on sustainability in accordance with the GRI Reporting Principles, and how to bring that report-out back to stakeholders as input for continued dialogue – thus closing the loop back to Stakeholder Engagement. Finally, Sustainability Strategy pulls it all together, providing a framework for crafting strategic pillars, business objectives, and a “level of ambition” for company sustainability efforts.

The toolbox track is accompanied by career visioning throughout the course. Ross Career Services Consultant Melissa Vernon, who advises Ross students interested in impact careers, will walk students through the StandOut Career Assessment and the Erb Impact Map, as tools for career planning. The Impact Map begins with clarification of students’ core values driving their passion and professional choices, and helps map those to career paths for social and environmental impact through business.

The Impact Map provides a simple matrix for students to prioritize choices for many of the extracurricular learning opportunities they’ll have throughout Erb, such as summer internships, Cool Projects, Ross MAP and SNRE MP Projects, and workshops and conferences. The aim is to identify career priorities early in the Erb program, and then be strategic about tailoring the myriad opportunities that will present themselves over the next three years with the goal of landing in a first job after graduation that will take students in the direction they want to go for their long-term careers.
Session 1: Sustainability Landscape - Environmental Issues
Monday, October 31, 5:00-6:30 PM (Ross 0420)

Guest Speaker
- Linda Greer: Senior Scientist, Health Program, NRDC (and Interim Director, Bio Station, SNRE)

Session Objectives
- Review course objectives, approach, and structure
- Understand key environmental risks and opportunities facing business as Part 1 of a two-part “sustainability landscape” assessment
- Introduce career-visioning track

Homework (Bring to Class)
- None

Required Reading (Complete before class)
- Course syllabus (this document)
- How Environmental Scientist Linda Greer Changed the Way Stella McCartney Works (Vanity Fair, Sep. 2014, 1 pg.)

Additional Resources (For later reference)
- Megatrends 2016 (EY, 2016, 30 pg.)
- Green to Gold: How Smart Companies Use Environmental Strategy to Innovate, Create Value, and Build Competitive Advantage (Daniel Esty and Andrew Winston, 2009, 408 pg.)

Session 2: Career Visioning - Self-Assessment, Purpose & Impact
Wednesday, November 2, 5:00-6:30 PM (Ross 0420)

Guest Speaker
- Melissa Vernon: Impact Career Consultant, Ross Career Services (former Director of Sustainability Strategy, Interface)

Session Objectives
- Review individual results from StandOut career assessment
- Identify personal values driving professional purpose, and begin envisioning relevant careers

Homework (Bring to Class)
- Complete StandOut on-line career assessment (15-30 minutes)

Required Reading (Complete before class)
- StandOut career-assessment results
- Expect the Unexpected: Building Business Value in a Changing World (Executive Summary) (KPMG, 2012, 20 pg.) (Erb Institute co-authored!)

Additional Resources (For later reference)
- Expect the Unexpected: Building Business Value in a Changing World (Full Report) (KPMG, 2012, 180 pg.) (Erb Institute co-authored!)
**Session 3: Sustainability Landscape - Social & Economic Issues**

**Monday, November 7, 5:00-6:30 PM (Ross 0420)**

**Guest Speaker**
- None

**Session Objectives**
- Understand key social and economic risks and opportunities facing business as Part 2 of a two-part “sustainability landscape” assessment
- Map career options back to extracurricular opportunities available throughout Erb program

**Homework (Bring to Class)**
- None.

**Required Reading (Complete Before Class)**
- Business & the SDGs: A Baseline (Overseas Development Institute, 2016, 30 pg.)
- Sustainable Supply Chains: Making Value the Priority (PwC, 2014, 35 pg.)
- The Future of Work (EY, 2016, 2 pg.)

**Additional Resources (For Later Reference)**
- Advancing the SDGs: Business action and Millennials’ views (Corporate Citizenship, 2016, 22 pg.)
- Strategic Community Investment (International Finance Corporation, 2010, 182 pg.)
- Community Development Toolkit (International Council on Mining & Metals, 2012, 222 pg.)
- Environmental and Social Management System Implementation Handbook (International Finance Corporation, 2015, 66 pg.)

**Session 4: Stakeholder Engagement**

**Wednesday, November 9, 5:00-6:30 PM (Ross 0420)**

**Guest Speaker**
- Janelle Myers: Director Supplier Engagement & Development, Kellogg Company

**Session Objectives**
- Introduce stakeholder theory, strategy, and implementation as the anchor of Erb’s stakeholder-based view of the firm.
- Illustrate use of the Stakeholder Engagement Toolbox.

**Homework (Bring to Class)**
- Issue Brief #1 - Environmental

**Required Reading (Complete Before Class)**
- Erb Stakeholder Engagement Toolbox (Erb Institute, 2015, 10 pg.)
- Kellogg Corporate Responsibility Report (Kellogg, 2016, 21 pg.) => Scan (don't read line-by-line!) as background for speaker.
- Engage Your Community Stakeholders: An Introductory Guide for Business (Network for Business Sustainability, 2012, 18 pg.)
- Back to Basics: How to Make Stakeholder Engagement Meaningful for your Company (Business for Social Responsibility, 2012, 19 pg.)
**ADDITIONAL RESOURCES** (FOR LATER REFERENCE)

- [Stakeholder Engagement Framework](#) (Department of Education, Victoria State Government, Australia, 2011, 44 pg.)

**Session 5: Materiality Assessment**

Monday, November 14, 5:00-6:30 PM (Ross 0420)

**GUEST SPEAKER**

- [Eric Austermann](#): Vice President, Social & Environmental Responsibility, Jabil Electronics

**SESSION OBJECTIVES**

- Introduce materiality as a concept drawn from financial analysis, now applied to sustainability strategy, implementation, and reporting.
- Understand issues spotting and prioritization under the pressures of real-life global contract manufacturing through the lens of Jabil Electronics.
- Introduce Erb Materiality Assessment Toolboxes as a structured approach for prioritizing “what matters most” in sustainability strategy.

**HOMEWORK** (BRING TO CLASS)

- None.

**REQUIRED READING** (COMPLETE BEFORE CLASS)

- Erb Materiality Assessment Toolbox (Erb Institute, 2015, 12 pg.)
- [Jabil Corporate Social & Environmental Responsibility Report 2015](#) (73 pg.) => Scan (don't read line-by-line!) as background for speaker
- [Materiality Quick Guide](#) (Global Environmental Management Initiative, 2015, 16 pg.)
- [Nestlé Materiality Assessment](#) (Nestlé, 2015, webpage, 2 pg.)

**ADDITIONAL RESOURCES** (FOR LATER REFERENCE)

- [The Essentials of Materiality Assessment](#) (KPMG, 2014, 19 pg.)
- [Defining Materiality: What Matters to Reporters and Investors](#) (Global Reporting Initiative & ROBECOSAM, 2015, 28 pg.)
- [Materiality in Corporate Governance: The Statement of Significant Audiences and Materiality](#) (Robert Eccles & Tim Youmans, Harvard Business School, 2015, 14 pg.)

**Session 6: Global Supply Chains**

Wednesday, November 16, 5:00-6:30 PM (Ross 0420)

**GUEST SPEAKER**

- [Sean Ansett](#): Chief Sustainability Officer, Fairphone
SESSION OBJECTIVES

- Introduce codes of conduct and supply-chain auditing, and discuss some of the challenges of extending social and environmental standards to complex, far-flung global supply chains.
- Illustrate the Erb Global Supply-Chains Toolbox.

HOMEWORK (BRING TO CLASS)

- None.

REQUIRED READING (COMPLETE BEFORE CLASS)

- Erb Global Supply Chains Toolbox (Erb Institute, 2015, 12 pg.)
- *Fairphone Is the Ethical Smartphone that Wants You to Rethink Mobile Technology* (Huffington Post, 2016, 2 pg.)
- *Ethical Trading Initiative Base Code* (Ethical Trading Initiative, 2014, 4 pg.)

ADDITIONAL RESOURCES (FOR LATER REFERENCE)

- *Fairphone Social Assessment Program* (Fairphone, 2013, 17 pg.)
- *The State of Sustainable Supply Chains* (UN Global Compact & EY, 2016, 48 pg.)
- *Measure and Improve Labor-Standards Performance* (Social Accountability International & International Finance Corporation, 2010, 183 pg.)
- *Business as Usual is Not an Option: Supply Chains and Sourcing After Rana Plaza* (NYU Stern - Center for Business & Human Rights, 2014, 65 pg.)

Session 7: Human Rights

Monday, November 21, 5:00-6:30 PM (Ross 0420)

GUEST SPEAKER

- Roger McElrath: Associate Director Human Rights, Business for Social Responsibility

SESSION OBJECTIVES

- Understand the *UN Guiding Principles on Business & Human Rights*, and their application to business strategy and operations—particularly, in global supply chains.
- Illustrate Erb Business & Human Rights Toolboxes with real-life examples from various industries and geographies.

HOMEWORK (BRING TO CLASS)

- Issue Brief #2 – Social & Labor

REQUIRED READING (COMPLETE BEFORE CLASS)

- Erb Institute Human-Rights Risk Assessment Toolbox (15 pg.)
- Erb Institute Human-Rights Business Integration Toolbox (15 pg.)

**ADDITIONAL RESOURCES (FOR LATER REFERENCE)**

- [A Structured Process to Prioritize Supply-Chain Human Rights Risks](#) (UN Global Compact & Enodo Rights, 2015, 21 pg.)
- [Engaging Business on Human Rights: Issues for Responsible and Inclusive Value Chains](#) (CSR Asia, 2014, 23 pg.)
- [Human Rights Impact Assessments of Large-Scale Foreign Investments: A Collaborative Reflection](#) (Columbia Law School, 2-14, 18 pg.)

**Session 8: Career Visioning - Mapping Purpose to Impact**

Monday, November 28, 5:00-6:30 PM (Ross 0420)

**GUEST SPEAKER**

- Melissa Vernon: Impact Career Consultant, Ross Career Services (former Director of Sustainability Strategy, Interface)

**SESSION OBJECTIVES**

- Based on previously envisioned careers, map needed skills and experiences to specific learning opportunities (summer internships, Ross MAP / SNRE MP Projects, Cool Projects, workshop, conferences, etc.) during the Erb program.
- Complete Erb Impact Map.

**HOMEWORK (BRING TO CLASS)**

- Erb Impact Map (draft)

**REQUIRED READING (COMPLETE BEFORE CLASS)**

- Part I (62 pg.), [Profession & Purpose](#) (Katie Kross, 2014, 184 pg.) => Book to be provided by Erb Institute!

**ADDITIONAL RESOURCES (FOR LATER REFERENCE)**

- [What Is Job Crafting and Why Does It Matter?](#) (Amy Wrzesniewski, Nicholas Lobuglio, Jane E. Dutton, and Justin M. Berg, 2007, 10 pg.).
- [CPO Job Crafting Exercise](#) (Center for Positive Organizations, 2015)

**Session 9: Triple-Bottom-Line Decision Making**

Wednesday, November 30, 5:00-6:30 PM (Ross 0420)

**GUEST SPEAKER**

- Dave Mengebier: Senior Vice President of Governmental, Regulatory & Public, Consumers Energy Company

**SESSION OBJECTIVES**
• Introduce decision theory, its implications for manager and consumer decision making, and its application to triple-bottom-line (TBL) decision making in companies.
• Illustrate TBL decision making with real-life experiences of a senior energy executive.

**Homework** *(Bring to Class)*

• None

**Required Reading** *(Complete Before Class)*


**Additional Resources** *(For Later Reference)*


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**Session 10: Metrics & Reporting**
Monday, December 2, 5:00-6:30 PM (Ross 0420)

**Guest Speaker**

• **Erica Ocampo**: Sustainability Manager Global EH&S and Sustainability, Dow Chemical

**Session Objectives**

• Introduce sustainability-reporting practice in the context of the GRI Principles and stakeholder engagement
• Illustrate reporting practice through the Erb Reporting Toolbox

**Homework** *(Bring to Class)*

• Erb Impact Map (final)

**Required Reading** *(Complete Before Class)*

• Erb Metrics & Reporting Toolbox (Erb Institute, 2015, 15 pg.)
• *Dow Sustainability Goals 2025* (Dow Chemical, 2015, webpage)
• *Dow Sustainability Report 2016* (Dow Chemical, 2016, 148 pg.) => Scan (don’t read line-by-line!) as background for speaker
• *An Introduction to G4: The Next Generation of Sustainability Reporting* (Global Reporting Initiative, 2013, 8 pg.)

**Additional Resources** *(For Later Reference)*

• *Future Fit Sustainability Metrics* (Future Fit Foundation, 2015, webpage - 4 guides)
• *G4 Reporting Guidelines: Reporting Principles* (Global Reporting Initiative, 2013, 97 pg.)
• *Sustainability and Reporting Trends in 2025: Preparing for the Future* (Global Reporting Initiative, 2015, 19 pg.)
Session 11: Sustainability Strategy  
Wednesday, December 4, 5:00-6:30 PM (Ross 0420)

Guest Speaker
- None.

Session Objectives
- Synthesize course learnings, from both practitioner-toolbox and career-visioning tracks
- Apply learnings to a concrete company exercise, utilizing the Erb Sustainability Strategy Toolbox.
- Receive course feedback to improve for next year

Homework (Bring to Class)
- None

Required Reading (Complete Before Class)
- Erb Sustainability Strategy Toolbox (Erb Institute, 2015, 12 pg.)
- Nestlé in Society: Creating Shared Value and meeting our commitments 2015 (Executive Summary) (Nestlé, 2015, 45 pg.) => Scan (don't read line-by-line!) as background for exercise

Additional Resources (For Later Reference)
- Where Is True North for Business? (Ethical Corporation - Peter Lacy, 2012, 2 pg.)
- The Comprehensive Business Case for Sustainability (HBR - Tensie Whelan & Carly Fink, 2016, 7 pg.)
- Nestlé in Society: Creating Shared Value and meeting our commitments 2015 (Full Report) (Nestlé, 2015, 351 pg.)
- Creating Shared Value (HBR - Michael Porter & Mark Kramer, 2011)
- The Shared Value Initiative (webpage)