
THE 2007 LEONARDO ACADEMY SUSTAINABILITY SURVEY REPORT

A
REPORT
BY
LEONARDO ACADEMY INC.

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Preface

This report summarizes the results of the 2007 Leonardo Academy Sustainability Survey conducted in the Fall of 2007. This annual survey is designed to track the evolving status of sustainability awareness and implementation of sustainability among companies and organizations. Questions in the survey cover a broad scope of sustainability from the environment to social equity and to economics.

Leonardo Academy thanks all participants in the 2007 survey.

Leonardo Academy encourages everyone to participate in the 2008 survey. Go to Leonardo Academy's web site and click on 2008 Leonardo Academy Sustainability Survey 2008 to fill out the survey or click the following link:

http://www.surveymonkey.com/s.aspx?sm=PhEl_2bS_2fca63ss6FJP5mT0Q_3d_3d.

If you have any questions or comments on this sustainability survey or the report, please contact Leonardo academy at: info@leonardoacademy.org or 608-280-0255.

Michael Army
President
Leonardo Academy
November 10, 2008

About Leonardo Academy

Leonardo Academy is a charitable 501(c)(3) non-profit organization that is dedicated to improving the environment, advancing sustainability and putting the competitive market to work on improving the environment. We are a Think and Do Tank that develops new methods, metrics and standards for environmental improvement and also helps businesses, organizations, families and individuals implement sustainability measures and document their achievements. By working on both the thinking and the doing sides of addressing environmental issues, we are able to make implementing sustainability very practical. Leonardo Academy services include overall sustainability, LEED implementation and certification, emissions inventories and offsets, certification of emission offset achievements through Leonardo Academy's Cleaner and Greener® Program, sustainable land use management, sustainability education and training and tools for sustainability.

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Section 1: Introduction

The sustainability awareness, actions and achievements of companies and organizations are rapidly evolving. This 2007 edition of the Leonardo Academy Annual Sustainability Survey is designed to capture snapshots of the rapid evolution of sustainability. This survey collects information regarding how businesses are currently viewing and implementing sustainable practices. Leonardo Academy is a non-profit organization dedicated to advancing sustainability and putting the competitive market to work on improving the environment. This survey is one of our contributions to the ongoing progress of sustainability implementation.

The questions in the survey cover the full range of sustainability components:

- Environmental responsibility
- Social equity
- Economic performance

A copy of the survey instrument used can be found at the end of this document in the Appendix.

Overall, we received 408 responses to the survey from a variety of respondents from a variety of international locations, including the United States, Canada, Mexico, Taiwan and Malaysia. Participants also varied in their business/organization sector. Universities, construction companies, design and architectural firms, city planners, manufacturing businesses, processing institutions and non-profit organizations were some of the groups who participated in the survey. The information these surveys provided has been compiled and is summarized below.

Section 2: General Sustainability

The first section of the survey deals with attitudes towards sustainability. One major trend was identified: both industry and consumers are becoming more actively engaged in issues surrounding sustainability.

The survey provided direct insight into the sustainability trends seen in the industry and business sectors. Over 90% of respondents reported that sustainability is currently important in their organizations/businesses. This high number indicates that issues of sustainable business and buildings are becoming increasingly important. The survey results also showed that companies are making a more concerted effort to incorporate sustainability into their practices, as over 90% of respondents had some kind of sustainability plan started or in the developing stages. Forty-five percent of these businesses/organizations have a sustainability plan in place, with about 45% in the development stages of a sustainability plan. Only 7.5% of the survey participants reported that their business/organization did not have an existing strategy to develop a sustainability plan in the future. More than half of all the 408 survey participants represented businesses/organizations that have a sustainability manager or department within their organization.

In addition to industry, consumers have shown an interest in sustainability as well. Almost 80% of the respondents revealed that their customers are inquiring about their sustainability achievements. Because of this consumer awareness, industry is being heavily encouraged to comply with the subsequent demand for more sustainable products and services.

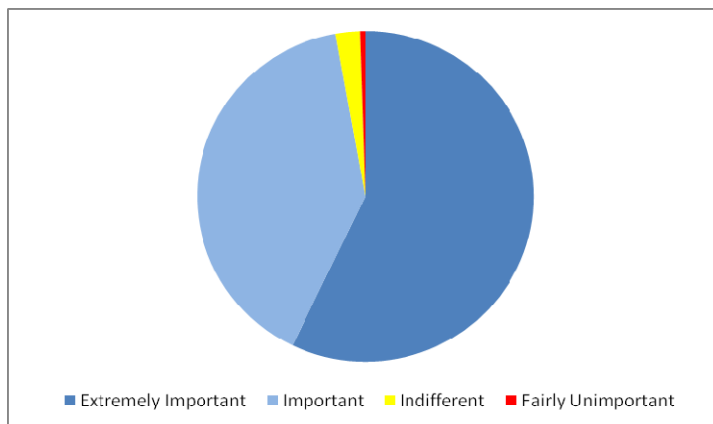


Figure 1: How important is sustainability for your organization or company?

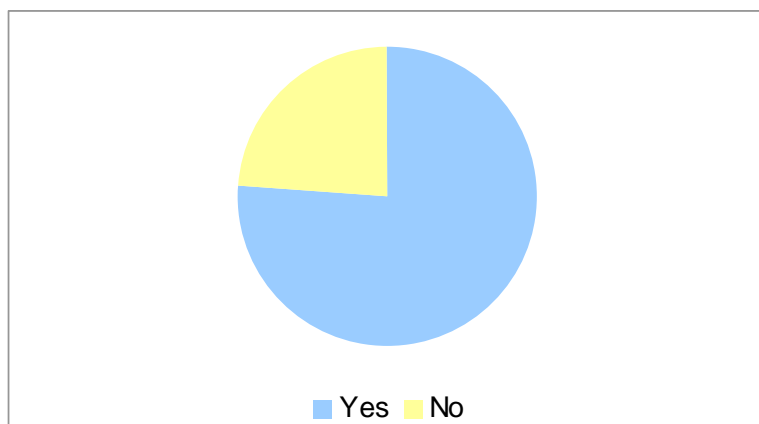


Figure 2: Are your customers/clients/audience asking your company/organization what your sustainability achievements are?

Section 3: Emissions

The second part of the survey addressed emissions. The purpose was to identify the awareness of businesses/organizations regarding their emissions and whether or not they have taken any role in reducing or off-setting them. Results showed that most businesses/organizations do not have or are unaware of any plans to inventory greenhouse gases (GHGs), nitrogen oxides (NOx), sulfur oxides (SOx), particulates, or mercury emissions. However, it was apparent that, of all of the emissions covered in the survey, GHG emissions are more frequently inventoried. About 30% of all respondents have performed an inventory of GHGs, compared to the 80% of respondents who have not performed an emissions inventory on NOx, SOx, particulates, or mercury. In addition, of the 70% of respondents who do not currently perform an inventory of GHG emissions, almost 60% of them have plans to develop one within 10 years.

Survey results on emissions that affect human health are not as optimistic, however. Of the 80% of respondents who do not have an inventory in place for NOx, SOx, particulates, or mercury emissions, only 7-10% of respondents have plans to develop an inventory in the near future. In terms of reducing emissions, GHGs again take the lead. More than 60% of respondents are currently implementing actions to reduce GHG emissions, and about 25% of respondents are currently implementing actions to reduce NOx, SOx, particulates, and/or mercury.

Offsetting emissions, or contributing to projects that help reduce these dangerous emissions from our atmosphere, is a popular practice among respondents. More than 45% of respondents are currently taking action to offset their GHG emissions. In addition, about 15% of respondents are currently taking action to offset NOx, SOx and mercury emissions alike. More than 20% of respondents are currently taking action to offset particulate emissions. These projects are taking numerous forms. The most popular method of emissions offsetting by respondents is carbon sequestration in existing forests (13%). In addition, another 10% of respondents sequester carbon in existing grasslands. Seven percent of respondents sequester carbon in new forests, while 4% of respondents sequester carbon in new grasslands.

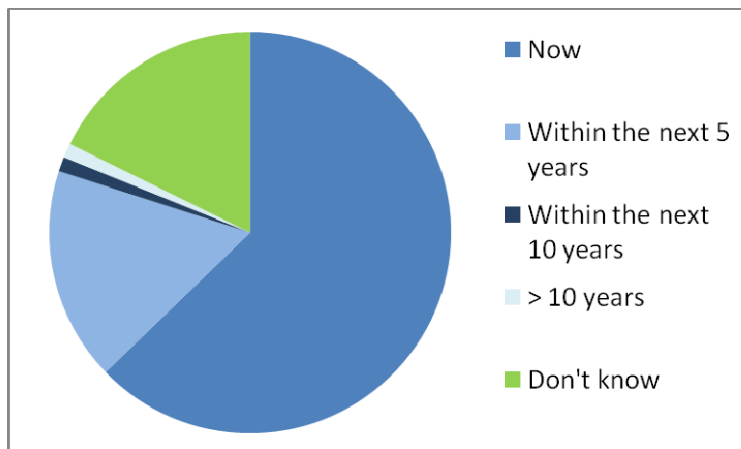


Figure 3: Is your company taking action to reduce greenhouse gas emissions?

Section 4: Buildings

A significant way to help a business/organization focus on sustainable practices is through sustainable design. The third section of this survey addressed current building construction and operating practices of businesses/organizations and the scope of businesses/organizations that are engaged in the LEED certification process for their building(s).

Most respondents own between 1-5 buildings, although 15% of respondents own more than 100 buildings. Over 70% of respondents lease between 1-5 buildings.

LEED certification for New Construction (LEED-NC) was the most prevalent rating system used among survey respondents. Almost 20% of respondents own at least one LEED-NC building. Other LEED accreditations include LEED certification for Existing Buildings (LEED-EB), LEED certification for Commercial Interiors (LEED-CI) and LEED certification for Core and Shell (LEED-CS). Only 10% of respondents own at least one LEED-EB building and only 10% of respondents own at least one LEED-CI building. In addition, less than 5% of respondent own at least one LEED-CS building.

Despite these seemingly small percentages, interest in sustainability for buildings still appears to be high. More than half of all the respondents have plans to move forward with LEED implementation throughout their owned buildings within the next 10 years. In addition, about 65% of respondents consider building sustainability of high importance to their overall sustainability plan. There are some challenges in implementing these changes, however. The greatest challenges for implementing LEED-NC, according to the majority of respondents, were cost and staff time. Results were the same for LEED-EB procedures. Assistance can come from a number of resources, including internal staff, consultants, and a mixture of the two. The majority of respondents (55% +) reported that they would be most likely to use a mix of internal staff and consultants to implement LEED policies.

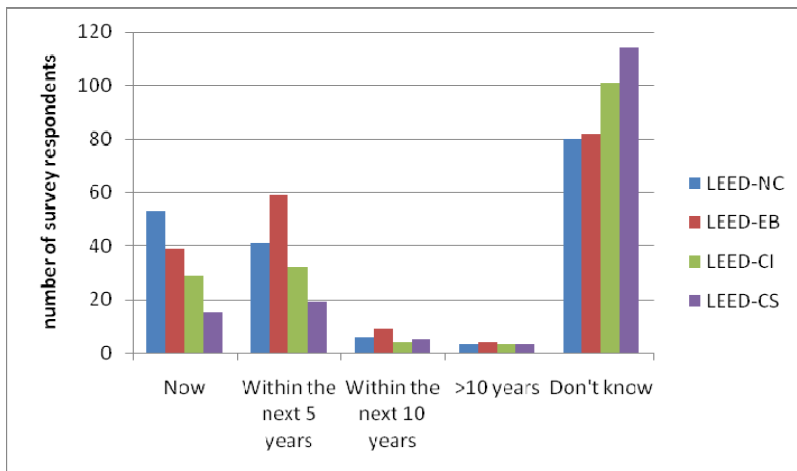


Figure 4: Does your company have plans for moving LEED implementation through owned buildings?

Section 5: Procurement and Business

Developing and implementing sustainable business procedures is a complex process and involves all aspects of business management. Sustainable purchasing is a large and important aspect of this process. According to the survey results, sustainable purchasing is very important to businesses and organizations. Over 60% of all respondents are currently using sustainability standards in procurement. In addition, of the 40% of respondents who are not using sustainability standards in procurement, 70% are planning to implement these guidelines within the next 10 years. Attitudinal measures are also accurate ways to determine a subject's importance. More than 85% of respondents believe sustainable procurement is an important part of their individual business/organization's success. In addition, a majority of respondents fit sustainability into the overall business plan through overall organizational sustainability, building sustainability and products and services.

In addition to taking responsibility for the physical aspects of their buildings, many organizations/businesses have shown that they are mindful of the sustainability opportunities regarding their employees and their communities. According to the survey, the most common way in which organizations have attempted to better the lives of their employees is hours of continuing education and providing health care. In addition, respondents reported that the most common actions taken by organizations to improve the world and their community are donations and company sponsored volunteering.

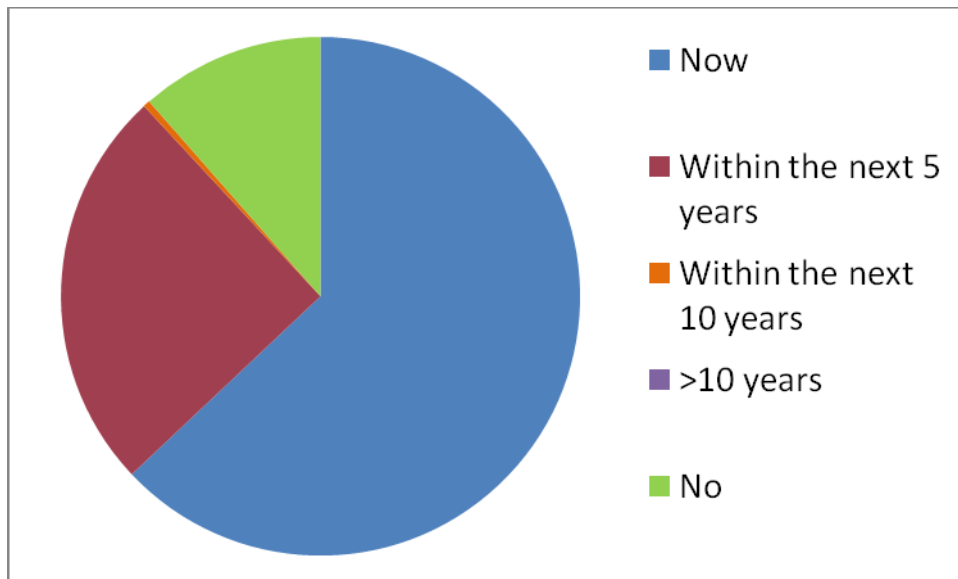


Figure 5: Is your company/organization using sustainability standards in procurement?

Section 6: Conclusions

This 2007 sustainability survey shows that sustainability is rapidly becoming entrenched in companies and organizations.

General Sustainability Awareness and Action:

Over 90% of respondents reported that sustainability is currently important in their organizations/businesses.

Over 90% of respondents had some kind of sustainability plan started or in the developing stages.

Almost 80% of the respondents revealed that their customers are inquiring about their sustainability achievements.

Emissions that Affect Climate:

About 30% of all respondents have performed an inventory of GHGs.

Of the 70% of respondents who do not currently perform an inventory of GHG emissions, almost 60% of them have plans to develop one within 10 years.

More than 60% of respondents are currently implementing action to reduce GHG emissions.

Emissions that Affect Human Health:

About 20% of all respondents have performed an emissions inventory of emissions that affect human health like NOx, SOx, particulates, or mercury.

Of the 80% of respondents who do not have an inventory in place for emissions that affect human health, 7-10% of have plans to develop an inventory in the near future.

About 25% of respondents are currently implementing action to reduce the emissions that affect human health.

Buildings:

Most respondents own between 1-5 buildings, although 15% of respondents own more than 100 buildings. Over 70% of respondents lease between 1-5 buildings.

20% of respondents own at least one LEED-NC building. Other LEED building certification includes LEED.

10% of respondents own at least one LEED-EB building.

10% of respondents own at least one LEED-CI building.

Less than 5% of respondent own at least one LEED-CS building.

About 65% of respondents consider building sustainability of high importance to their overall sustainability plan. The greatest challenges for implementing LEED-NC were cost and staff time.

The greatest challenges for implementing LEED-EB were cost and staff time.

Procurement:

Over 60% of all respondents are currently using sustainability standards in procurement.

Of the 40% of respondents who are not using sustainability standards in procurement, 70% are planning to implement these guidelines within the next 10 years.

More than 85% of respondents believe sustainable procurement is an important part of their individual business/organization's success.

Appendix: Original Sustainability Survey 2007

1. How important is sustainability for your organization/company?

	Extremely Important	Important	Indifferent	Fairly Unimportant	Extremely Unimportant
Now	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Within the next 5 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Within the next 10 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beyond the next 10 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Is there an existing sustainability plan for your organization?

- Yes, existing sustainability plan in place
- No existing plan or plans to create a plan
- Sustainability plan in development
- Preliminary sustainability plans developed
- Sustainability plan underway
- Other (please describe)

3. Is there currently a sustainability manager/officer for your company/organization?

- Yes
- No

4. Are your customers/clients/audience asking your company/organization what your sustainability achievements are?

- Yes
- No

5. Has your company/organization performed an inventory of greenhouse gas (GHG) emissions?

- Yes
- No

6. If not, when do you plan to develop some sort of GHG emissions inventory?

Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
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	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
Emissions Inventory of GHG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Has your company/organization performed an emissions inventory of other non-greenhouse gas emissions, such as Nitrogen Oxides (NOx), Sulfur Oxides (SOx), Particulates, or Mercury?

- Yes
- No
- Other (please specify)

8. If not, when do you plan to develop some sort of non-GHG emissions inventory?

	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
NOx Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOx Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Particulate Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mercury Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)					

9. Is your company implementing actions to reduce emissions?

	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
Greenhouse Gas Emissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOx	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOx	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Particulates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mercury	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)					

10. Is your company taking action to offset emissions?

	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
Greenhouse Gas Emissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOx	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOx	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Particulates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mercury	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)					

11. Is your company/organization engaged in a program for reporting emissions?

- Yes
- No

12. Does your organization/company own any carbon sequestration assets?

	Yes	No
Existing forests	<input type="checkbox"/>	<input type="checkbox"/>
New forests	<input type="checkbox"/>	<input type="checkbox"/>
Existing grasslands	<input type="checkbox"/>	<input type="checkbox"/>
New grasslands	<input type="checkbox"/>	<input type="checkbox"/>
Other (please describe)		

13. How many buildings does your organization/company own?

Number of Buildings Owned	<input type="checkbox"/> 1-5	<input type="checkbox"/> 6-10	<input type="checkbox"/> 11-20	<input type="checkbox"/> 21-50	<input type="checkbox"/> 51-100	<input type="checkbox"/> >100
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14. What is the total floor area of the buildings and spaces your organization/company owns?

Square Feet Owned

15. How many LEED certified buildings are owned by your company/organization?

	0	1	2-5	6-50	51-100	>100
LEED-NC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-EB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. Does your company/organization have plans for moving LEED implementation through owned buildings?

	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
LEED-NC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-EB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. How many buildings does your organization/company lease from others?

Number of Buildings Leased	<input type="checkbox"/> 1-5	<input type="checkbox"/> 6-10	<input type="checkbox"/> 11-20	<input type="checkbox"/> 21-50	<input type="checkbox"/> 51-100	<input type="checkbox"/> >100
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18. What is the total floor area of the buildings and spaces your organization/company leases?

Square Feet Leased

19. How many LEED certified buildings are leased by your company/organization?

	0	1	2-5	6-50	51-100	>100
LEED-NC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-EB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Does your company/organization have plans for moving LEED implementation through leased buildings?

	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
LEED-NC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-EB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEED-CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. How challenging do you see the following to implementing LEED-NC in new buildings?

	Small Challenge	Medium Challenge	Great Challenge
Cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of Expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. How challenging do you see the following to implementing LEED-EB in existing buildings?

	Small Challenge	Medium Challenge	Great Challenge
Cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of Expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. How important is building sustainability in your organization/company's overall sustainability plan?

	Low	Medium	High
Importance of Building Sustainability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. What resources do you see using for implementation of LEED-NC?

- Internal Staff
- Consultants
- Mix of Internal Staff and Consultants
- Not Applicable

25. What resources do you see your company/organization using for implementation of LEED-EB?

- Internal Staff
- Consultants
- Mix of Internal Staff and Consultants
- Not Applicable

26. Is your company/organization using sustainability standards in procurement?

	Now	Within the next 5 years	Within the next 10 years	>10 Years	No
Sustainable Purchasing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

27. In which of the following categories is your company/organization using sustainability criteria in purchasing decisions?

	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't Know
Purchasing Buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Constructing/ Designing Buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leasing Space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment/Supplies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building Maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Products/Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vehicles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Car Rentals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Airplane Transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hotels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conference Spaces	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

28. Do you view sustainable procurement as being an important part of your organization's success?

	Now	Within the next 5 years	Within the next 10 years	>10 years	Don't know
Yes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

29. How has your organization/company fit sustainability into the overall business plan?

- Overall organizational sustainability
- Building sustainability
- Products and services
- Travel and hospitality
- Marketing, products, services to sustainability audience

30. How has your organization/company attempted to better the lives of the employees?

- Hours of continuing education for staff
- Health care provided for employees
- "Minority Purchasing Program"

31. What is your organization/company doing to improve the community/world outside of business activities?

- Grants
- Donations
- Company sponsored volunteering
- Not applicable

Contact Information

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About Leonardo Academy

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