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Greetings,

Being eco-friendly has become mainstream and many members of the National Restaurant Association—be they independent restaurateurs, large chains or industry manufacturers—are working to fit sustainable practices into their business operations every day.

In this report, we are taking a look at the trend of sustainability and why it’s important for the industry to lead on this issue. We’re also providing insight into the various projects the NRA, through its Conserve Sustainability Education Program, is working on to help restaurateurs better understand and adopt responsible practices that can save money, resources and the environment. Much of what we do around sustainability is spearheaded by our board of directors’ sustainability and social responsibility committee. We thank the committee and chair Clarice Turner for their proactive approach to encouraging industry action on this important issue.

Consumers are now more aware than ever before of the need for resource conservation and the impact of what we’re calling the “five Rs” — reduce, reuse, repurpose, recycle and restaurants. They see our industry embracing efforts to be more efficient and less wasteful. And many restaurateurs see the wisdom of practicing sustainability; they can meet those heightened consumer expectations and save resources at the same time.

The industry approach to sustainability is evolving. This report sheds light on where we stand now and, perhaps, where we’ll be in just a few short years. Restaurants across the country are playing their part to improve our environment by operating more efficiently. In this, as in so many ways, they inspire other businesses within their communities.

We hope you are inspired!

Dawn Sweeney
President and CEO
National Restaurant Association

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Becoming a more sustainable enterprise can sometimes be challenging, but leave it to the restaurant and foodservice industry to pave the way when it comes to incorporating environmentally responsible practices into daily business operations.

It was only a few years ago that consumers’ knowledge and understanding of sustainability began to take shape and grow. And as environmental challenges have increased, sustainability has started to come into sharper view. Restaurateurs around the country are embracing a more efficient “green” business model. They have stepped up in new ways to be proactive and responsible community partners, while maintaining their relevance as business operators, increasing their revenue and finding ways to reduce costs at the same time.

Whether it’s by starting a back-of-the-house composting program in a fine-dining establishment or installing more efficient LED display boards on the front of a food truck, the industry is ramping up its efforts to become more sustainable.

Perhaps most important is the industry’s growing willingness to participate in collaborative, cross-industry efforts and engage in conversations with local legislators on issues such as recycling, packaging and composting. Despite facing regulations that can change from city to city and state to state, the restaurant industry has embraced a collaborative posture that enables it to work with lawmakers on sustainability solutions while maintaining operational continuity.

“We need to be able to provide solutions and agree on what those are so it’s not left to individual jurisdictions to try and figure out the ‘right’ way for restaurants to be sustainable,” says Clarice Turner, senior vice president of U.S. business for Starbucks Coffee Co. and chair of the National Restaurant Association’s Sustainability and Social Responsibility committee.

Operators are seeking the most efficient ways to conserve energy and water, determine where and what materials they can recycle and reuse, and compost the organic waste they produce in their kitchens.

The NRA’s Scott DeFife, executive vice president of policy and government affairs, says education is a key factor in forwarding the message of sustainability to restaurateurs, other business operators and policymakers.

“We need to provide solutions and agree on what those are so it’s not left to individual jurisdictions to try and figure out the ‘right’ way for restaurants to be sustainable.”

— Clarice Turner
Starbucks Coffee Co.

“We need to provide solutions and agree on what those are so it’s not left to individual jurisdictions to try and figure out the ‘right’ way for restaurants to be sustainable.”

Seeking out chefs and restaurateurs who readily provide that information.

Many operators are redesigning their menus to reflect the public’s growing desire for sustainable, locally sourced and organic foods. But the interest goes far beyond consumer demand. Chefs and restaurateurs are genuinely committed from a culinary perspective to learning about, sourcing, and sometimes even growing, these products themselves.
The National Restaurant Association’s “What’s Hot 2013 Chef Survey” found that among nearly 1,800 members of the American Culinary Federation, the Top 10 trends for the year included locally sourced or grown produce, seafood and meat, as well as sustainable seafood and environmental sustainability in general.

“Sustainability is one of the fastest growing trends today,” says Jeff Clark, program director for the NRA’s Conserve Sustainability Education Program™. “Little more than five years ago, customers hardly understood what sustainability was, and now a good percentage of them recognize what a sustainable company does.

“Many of today’s consumers are educated about what businesses are doing to become more environmentally conscious,” Clark continues. He notes that as more information becomes available, whether online, via television, or through personal interactions, consumers are much smarter about how they spend their money. “Consumers want to make purchases from those they feel are doing the right thing. Operators who understand that and align their business values with their customers’ values will likely boost their market share.”

As sustainability efforts evolve, the NRA has made a priority of helping restaurateurs share best practices with each other. Education, Clark says, is the best way to accomplish the goal. “By sharing tips, tools and advice from sustainability experts and industry case studies, the Conserve program is putting information into the hands of operators so they can make sustainability a standard part of their business practices. It not only will help them improve their bottom lines, but also help illustrate their involvement and commitment to customers.”

According to the NRA’s 2013 Restaurant Industry Forecast, a majority of restaurateurs across all industry segments are looking to invest in energy- and water-efficient technology. Among restaurateurs surveyed, 85 percent of quickservice and 80 percent of family-dining and fast-casual operators said they planned to invest in energy-saving lighting and equipment. Sixty percent of fine-dining and 55 percent of casual-dining operators said they planned to install water-saving equipment and devices.

So what are the challenges for restaurateurs to expand their sustainability efforts? A dearth of education, limited resources — especially time — and a patchwork of local legislation are the biggest roadblocks to driving environmental initiatives in the industry, operators say. But it is getting better.

Clearly, the message is gaining traction: sustainability can be an economic driver...
Clark says Conserve shows operators that sustainability is attainable.

“When you talk about becoming green, or greener, a lot of people tend to think it’s too complicated and it can’t be done. But the strength of Conserve is that it really breaks this complex issue down so operators can understand it and easily deploy best practices at their restaurants.”

According to Clark, the best part of Conserve is that it shows operators how easy it is to apply many sustainable practices to their daily business routines.

“There is so much on an operator’s plate day to day that anything additional has to show maximum value,” he says. “Conserve’s education program helps explain the value in a simple, step-by-step format. It’s a one-stop shop for the answers that make sustainability achievable. We offer operators tools and resources so they don’t have to figure it all out by themselves.”

Laura Habr, co-owner of Croc’s 19th Street Bistro in Virginia Beach, Va., and a pioneer member of Conserve, says her restaurant has benefited financially from the sustainable practices she has deployed since joining the program. The 125-seat eco-friendly bistro now has the distinction of being Virginia’s first certified green restaurant and saves thousands of dollars a year by recycling its waste and reducing water and energy usage. This year, with a grant from the U.S. Environmental Protection Agency, she started a successful composting test in partnership with several local restaurants and contract foodservice provider Sodexo USA.

“Joining Conserve has really engaged me,” she says. “I’ve been able to see many opportunities I hadn’t thought of, like getting to zero waste. It’s been wonderful.”

Another Conserve pioneer, Atlanta-based George McKerrow Jr., co-founder of the 44-unit Ted’s Montana Grill casual-dining chain, has saved $250,000 a year in electricity by converting to LED lighting systemwide.

The NRA’s Conserve program signals the industry’s seriousness on the subject, McKerrow says.

“The fact that the NRA, our most powerful association, has a dedicated effort under Conserve, and that sustainability is being talked about at the highest levels of the industry, is a major stride, period,” he said. “Just the conversation is a win.

For the restaurant industry, the roadmap to environmental responsibility is made up of incremental steps. It’s an ongoing process that continually challenges businesses to generate greater efficiencies, reduce waste and expand their use of renewable resources.

The National Restaurant Association created the Conserve Sustainability Education Program.SM to provide the industry with the knowledge needed to embark on a sustainable path. The initiative offers tools and solutions that restaurants can implement immediately, and map out longer-range strategies to save on energy and water usage as well as related utility costs.

Developed in 2009, the NRA’s Conserve program began as a kind of clearinghouse of information, Conserve’s Jeff Clark says. The program now features checklists and tracking tools that allows operators to measure their sustainable practices. Created by the industry for the industry, the program offers operators more than 90 best practices to use at all foodservice outlets, from stand-alone to kiosk facilities.

Conserve focuses on five core areas: energy efficiency, water conservation, green building construction, waste diversion, and business administration.
Behaviors are changing. There’s an effort being made. After a while, small things add up to a big difference.”

The NRA’s Scott DeFife says he is excited about Conserve’s future. “I think we’ve really just started. We have data that show great interest among operators in sustainability, but many are not sure how to start. Others who have gotten started are ready to do more.”

The fact that the NRA, our most powerful association, has a dedicated effort under Conserve, and that sustainability is being talked about at the highest levels of the industry, is a major stride, period. Just the conversation is a win. Behaviors are changing. There’s an effort being made. After a while, small things add up to a big difference.”

— George McKerrow Jr.
Co-founder, Ted’s Montana Grill

Since its inception in 2009, Conserve has been moving forward to bring sustainability education and best practices to the restaurant industry. Among the initiative’s most recent steps are:

- **Creation of the Conserve Sustainability Advisory Council**, which is composed of 14 industry experts who share their knowledge, experience and best practices with NRA and Conserve members.

- **Adoption of the Zero Waste Zones program**, an Atlanta-based initiative that seeks to create resources and measure the impact of waste, energy, and water management efforts. The NRA acquired the program in late 2012 and redesigned the initiative to leverage the Conserve Sustainability Education ProgramSM for tracking and education purposes.

- **Partnership with North American LED Lighting** to offer NRA members discounts on energy-efficient LED lighting fixtures and solutions.

- **Partnership with Constellation Energy**, an alternative energy provider, to offer restaurants a competitively priced energy supply, renewable options and enhanced efficiency to improve operating and environmental performance. The program is currently in its test phase in Illinois.

- **Charter member of the Food Waste Reduction Alliance**, a group focused on reducing the food waste that goes to landfills and increasing the amount of food donated to food banks and other like-minded charitable organizations.
The National Restaurant Association formed the Conserve Sustainability Advisory Council as part of its plan to help restaurateurs better understand environmental awareness and become more resource-efficient.

The advisory council is composed of members of the foodservice industry, each a sustainability expert in his or her own right. Council members are tasked with sharing the education, lessons learned, and best practices applied at their own businesses.

“The advisory council was formed with the intent of providing our fellow industry members with the best tools and practices to help them be more sustainable and reduce their operating costs,” says Jim Hanna, director of environmental affairs for Starbucks Coffee Co. and CSAC co-chair. “The NRA is leading on sustainability issues for our industry and trying to help restaurateurs operate smarter and more efficiently. With the advisory council’s input and real-world advice, practicing sustainability will be easier to implement, result in long-term cost savings and benefit the environment.”

“We at Georgia-Pacific Professional are very pleased to be a part of this Council and working with such an esteemed group of individuals and companies,” adds John Mulcahy, vice president of sustainability and compliance for GP Professional and CSAC co-chair. “The CSAC is well positioned to help both its members and the restaurant industry to, first, better understand their current sustainability needs, and second, achieve their environmental and business goals.”

Linda Dunn, vice president of supply chain and sustainability for contract foodservice company HMSHost

Caitlin Leibert, sustainability coordinator for Chipotle Mexican Grill

Andrew Shakman, founder and CEO of LeanPath Inc.

Jeffrey Foote, director of customer sustainability/global customer development for the Coca-Cola Co.

Paula Owens, purchasing and sustainability manager for Ted's Montana Grill

Ruth Watts, product marketing manager for BASF

Joseph Franz, principal, strategic channel partnership development for Constellation Energy

John Mulcahy, vice president of sustainability and compliance for Georgia-Pacific LLC and CSAC co-chair

Wanda Williams, director of alliances and industry relations for Waste Management

Christian Hardigree, director and professor of the Institute for Culinary Sustainability and Hospitality at Kennesaw State University

Kristen Rainey, director of sustainability for Sodexo Inc.’s corporate services

Richard Young, senior engineer/director of education for the Food Service Technology Center

Jim Hanna, director of environmental affairs for Starbucks Coffee Co. and CSAC co-chair

Dave Scholten, commercial segment manager of Gordon Food Service

Caitlin Leibert, sustainability coordinator for Chipotle Mexican Grill

Andrew Shakman, founder and CEO of LeanPath Inc.
Conserve is a benefit of membership

The National Restaurant Association is now offering its Conserve Sustainability Education Program as a member benefit to help make sustainability and sustainable business practices more accessible to the restaurant industry.

The program, an online resource designed by the restaurant industry for the restaurant industry, is not only an introduction to sustainability, but also a tool that can help operators reduce their carbon footprint, save money on utilities, packaging and trash costs.

“We are pleased to be able to offer this program for free,” the NRA’s Scott DeFife says. “This will give many more operators increased access to the educational tools they need to practice sustainability at their establishments.”

DeFife notes that the information available on Conserve’s website will quickly teach operators three things: how to reduce energy, waste and water usage; drive down costs; and help protect the environment. “It’s good for business and the right thing to do.”

Jeff Clark, Conserve’s program director, adds, “Offering this program for free benefits everyone. Restaurateurs can learn more about how to implement sustainable practices at their operations and they won’t have to spend a lot of money doing it. It also will allow us to learn more about what practices restaurateurs are implementing and what they’re interested in. That will help us make the program even better as we move forward.”

NRA seeks to reduce food waste

Reducing the amount of food waste that restaurants produce is one of the National Restaurant Association’s key sustainability objectives.

The NRA, along with the Grocery Manufacturers Association and Food Marketing Institute, has formed the Food Waste Reduction Alliance, which focuses on reducing the amount of food waste going to landfills and increasing food donated to food banks and other like-minded charities.

“Our industries are committed to solving the problem of commercial food waste,” says Laura Abshire, the NRA’s director of sustainability and government affairs. She notes that the effort will take time, with statistics showing that in 2010 alone, the United States generated 60 million tons of food waste, with an estimated 40 million tons of that going into landfills.

“A large portion of food waste is created residentially by consumers, but we in the commercial space want to do our part. That’s why we’ve come together.”

“Our eventual goal is for restaurants and other foodservice companies to be able to donate more food and reduce the amount of waste produced that ends up in the landfill,” she says. “We can compost waste, recycle used cooking oil into biodiesel, use technologies that turn waste into energy and donate more of our food to charity.”

The Alliance is focusing first on helping restaurateurs measure the amount of waste they produce. “Some companies already know how to measure food waste and are already tracking it, but the majority of businesses still need help,” Abshire says.

For more information on the Food Waste Reduction Alliance, visit FoodWasteAlliance.org.
The National Restaurant Association has teamed up with energy-efficient lighting supplier North American LED to offer more efficient lighting solutions to the restaurant industry at discounted prices.

“Through our Conserve Sustainability Education Program, the Association has been working to help restaurateurs better understand the financial and environmental advantages of implementing good practices,” says David Matthews, the NRA’s executive vice president of innovation and membership advancement.

“The overall value of using LED lighting is clear and simple: it is cost-effective and environmentally friendly,” says Lamon Elrod, North American’s president and CEO. “With utility rebates available in many states and energy cost savings that can amount to thousands of dollars a year, the value is built in. By installing LED lighting at their restaurants, we think operators can save between 50 percent and 75 percent in annual energy costs for lighting while reducing emissions from power plants, too.”

According to the U.S. Environmental Protection Agency’s Energy Star program, lighting accounts for 13 percent of an average fullservice restaurant’s energy bill. Switching out old incandescent bulbs for LED lighting can significantly cut into this energy cost, saving a restaurant more than $400 a year just by switching out 10 bulbs to LEDs.

For more information, visit the Conserve Sustainability Education Program at Restaurant.org/Conserve.

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Lighting accounts for about 13% of a fullservice restaurant’s energy bill.

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A recent study conducted by Duke University on behalf of the National Restaurant Association found that the biggest barriers restaurants in Durham, N.C., face in achieving “zero waste” are a lack of affordable composting and recycling options.

Zero waste encourages the reuse of all materials. For businesses, it is often defined as diverting 90 percent of a location’s waste stream away from landfills and into other uses.

The study, commissioned by the NRA’s Conserve team and conducted by graduate students at Duke’s Sanford School of Public Policy, found that for restaurants in Durham to achieve zero-waste status, two things are required:

1. Public/private partnerships
   among local government, waste haulers and local restaurants to create a large composting/recycling customer base that would lower the costs of composting their organic waste.

2. Encourage private businesses to solve potential pick-up problems, such as infrastructure and cost-effective hauling routes, if the Durham city government is unable to handle that on its own.

The study, the second of its kind in two years, was based on a hypothetical policy issue of the students’ design. While Durham does not yet have plans to implement a zero-waste effort, city officials have indicated they are looking into providing commercial recycling or composting services to restaurants in the future. Right now only 24 percent of the city’s waste is diverted from the landfill.

“We are pleased to have partnered with Duke University on this project, which identified some barriers preventing Durham restaurants from reducing the amount of waste material sent to landfill,” says Laura Abshire, the NRA’s director of sustainability policy and government affairs. “This report will act as a policy roadmap for cities like Durham to approach zero waste in a measured and business-friendly way.”

Cities, including Atlanta, Seattle, San Francisco and Los Angeles, already have zero-waste programs in place.

“Restaurant companies are taking a proactive approach to employing sustainable practices at their businesses,” says Dawn Sweeney, the National Restaurant Association’s president and CEO. “A number of our industry leaders already have accomplished much, but there are still issues requiring our focus and attention. Sustainability is here, and embracing it can only help our industry remain vital and strong.”

“Shedding light on sustainability for business and is positive for the environment. Leading-edge operators such as Starbucks, Darden Restaurants and McDonald’s are continuing to work hard to further sustainability efforts.

Industry suppliers are also operating differently.

“We’re changing the way we do business … because our customers and economics demand it. [They] have different needs, expectations and lots of challenges. That means we have to find lots of different solutions,” says William Caesar, president of WM Recycle America LLC and WM Organic Growth Inc., subsidiaries of the Houston-based waste hauling conglomerate Waste Management.

Throughout this report, examples show how the NRA and the restaurant industry are making an impact on business operations, and getting ready for the challenges still to be faced and tackled.

This report will act as a policy roadmap for cities like Durham to approach zero waste in a measured and business-friendly way.”

— Laura Abshire
NRA director of sustainability policy and government affairs

Continued from page 5

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The National Restaurant Association and Constellation partnered this year to offer restaurateurs access to discount, market-driven energy prices and cost-effective, alternative energy sources.

This initiative is currently available to members of the Illinois Restaurant Association as part of a pilot program in that state. If successful, the NRA and Constellation, a Baltimore-based supplier of power, natural gas, renewable energy and energy management products for homes and businesses, will expand the offer to other areas.

“Energy is one of the top 10 expenses for many operators, so our goal is to help ease that burden,” – Scott DeFife, NRA executive vice president of policy and government affairs

“Energy is one of the top 10 expenses for many operators, so our goal is to help ease that burden for restaurateurs so they can better manage costs and be more efficient, the NRA’s Scott DeFife says. “We are pleased that through this program we will be able to help our members not only reduce their energy spending, but also show them easy steps on how to save on energy usage. This is good for their businesses and good for their communities.”

Michael Wajsgras, Constellation’s vice president of channel development, agrees with DeFife, saying the combination of a competitively priced energy supply, renewable options and enhanced efficiency would allow restaurateurs to improve their operating and environmental performance.

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Dear Readers,

Restaurants are the cornerstones of their communities. And our commitment to environmental sustainability and social responsibility is rooted in our mission to improve the quality of life for all we serve.

In the United States, restaurants employ 13 million people and generate annual sales of more than $660 billion. With nearly 1 million restaurant locations across the country, the industry’s sheer size means that collectively we can have an enormously positive impact.

We are seeing significant interest among restaurateurs in reducing energy, waste and water use through the National Restaurant Association’s Conserve Sustainability Education Program. Conserve provides an introduction to sustainability and a roadmap to help operators with practical tips and best practices.

With this publication, we are proud to more broadly share the work our members are doing to make a positive impact — offering insight and inspiration for others to follow.

Thank you for taking the time to explore our report. On behalf of National Restaurant Association’s more than 380,000 member businesses — from restaurants and suppliers to educators and non-profits — I thank you for joining us on this journey.

Warm regards,

Clarice Turner
Senior vice president, U.S. Business,
Starbucks Coffee Company
Director, National Restaurant Association Board

National Restaurant Association’s Board Committee on Sustainability and Social Responsibility

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Vice Chair: Ivan Matsunaga, Madi Ty Inc. (dba Connie’s Pizza)
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Linda Bacin, Bella Bacinos
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- Food Service Technology Center
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