

Urban Sustainability Directors Network's

MUNICIPAL WORKPLACE & NEIGHBORHOOD CHALLENGE IMPLEMENTATION MANUAL

prepared by





About Delta Institute

Founded in 1998, Delta Institute is a Chicago-based nonprofit organization working to build a more resilient environment and economy through sustainable solutions. Visit Delta Institute online at www.delta-institute.org.

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INTRODUCTION

Background

In March 2014, the Ten Local Government Consortium led by Miami, FL with supporting partners Asheville, NC; Boston, MA; Fairfax, VA; Knoxville, TN; Nashville, TN; Orange County, FL; City of Durham and Durham County, NC; and Sarasota County, FL was awarded \$75,000 to create an online template to enable Urban Sustainability Directors Network member municipalities to efficiently launch turnkey neighborhood and workplace sustainability challenges. Of that grant, \$50,000 was provided to SGS Technologie LLC (SGS) to develop a customizable website for communities, and Delta Institute was awarded \$25,000 to provide an implementation manual that would provide the following details and guidance:

- General tactics for program design;
- Day-to-day implementation guidance including road maps and sample work plans;
- Marketing and sponsorship development;
- Program and website administration;
- Resources for activity content, sponsorship packages, recognition, and impact metric calculators; and
- Report summarizing results and lessons learned after one year.

This manual provides those deliverables and is intended to be used in conjunction with the website developed with SGS.

This manual was developed by Delta Institute under direction from the Ten Local Government Consortium in which City of Miami Environmental Programs Manager, Ajani Stewart, provided programmatic coordination for the overall project.

Sustainable Neighborhood & Workplace Challenge Strategy

Cities and counties are uniquely positioned to embrace sustainability practices. Local governments can be more flexible than state or federal agencies, and they are also immediately accountable to their constituents. In addition, municipalities are composed of residents, businesses, institutions, and facilities that are represented by both municipally elected officials as well as state and federally elected officials. Finally, local government staff directly manage the water, waste, transportation, and open space systems that immediately impact the sustainability of a community.

Throughout the United States, municipalities are challenging their neighborhoods and businesses to adopt and implement more sustainable practices. These challenges are customized to each locality's need with an emphasis on either measurable environmental impact or on community building by informing and educating residents on sustainable home practices. The Sustainable Neighborhood and Workplace Challenge can facilitate either model, because both share the goal of bringing numerous parties together to accomplish what cannot be done by a

single party. In doing so, the challenge model shares responsibility of improving a community's sustainability with actors that are empowered to have a direct impact. The challenge model described in this manual was largely based on the model developed in the City of Chicago and supplemented by Local Government Consortium Members, such as the City of Nashville's successful Mayor's Workplace and Neighborhood Sustainability Challenges, which includes green, healthy, and involved components, where involved refers to increased volunteerism by residents and workplaces in the community. However, lessons learned from other challenges across the United States have also been incorporated.

How to Use this Manual

This manual has been developed to provide guidance and tools for municipalities to design and operate Workplace or Neighborhood Sustainability Challenges (Challenge). A municipally-engaged Workplace or Neighborhood Challenge is defined as a contest to encourage friendly competition among commercial offices and communities to adopt sustainable practices. The Challenge is a vehicle for engaging residents, civic groups, or businesses to create healthier workplaces and neighborhoods, become more actively engaged in improving their community, and incorporate environmentally responsible practices into everyday activities. It also provides an opportunity for communities to improve their quality of life while working together toward common sustainability goals.

This manual and its appendices provide tools for designing and operating a Workplace or Neighborhood Challenge. It is designed as a step-by-step guide that provides actionable plans, advice, and examples from previously executed challenges that successfully engaged workplaces, neighborhoods or residents. The objective of this manual is to remove some of the barriers associated with developing and operating a challenge so that other cities and counties can more easily host a challenge and benefit from others' previous experience. This manual will provide sufficient instruction to complete the following steps in designing and implementing a successful Challenge:

Figure 1. Steps for Setting up a Municipal or Workplace Challenge



**STEP ONE:
DEFINE YOUR CHALLENGE
PRIORITIES**

1

2

3

DEFINE YOUR CHALLENGE PRIORITIES

Identifying and refining the priorities of your Neighborhood or Workplace Challenge (Challenge) is critical to its success. Challenge priorities should be used to inform the design of the administration, programmatic goals, and participant experience. Successful administration of your Challenge relies on assembling the correct team, including internal staff as well as partners, whose motivations and skill sets align with your priorities. Target participants should also have goals and available resources that align with your Challenge's priorities.

Align with Municipal Sustainability Goals

In addition to bridging the gap between local governments and the business sector or neighborhoods, the Challenge is also an opportunity to encourage the business sector and neighborhoods to support your municipality's sustainability initiatives. By structuring activities and focus areas to complement your current municipal sustainability plan, you can achieve immediate benefits while helping to build a community of sustainability-focused individuals and businesses that will continue to champion your initiatives and create long-term impact in your community.

Consider capitalizing on existing initiatives in your community as well as those that are in development. For example, your municipality may have a goal of increasing active transportation, so a Challenge may encourage and reward residents for biking to work instead of driving.

The Challenge can also become an opportunity to measure progress toward your municipality's goals. If the achievement of your goals is attached to specific measures, assure that those measures are reflected in Challenge activities, so you can tell a more compelling success story for both the Challenge and your municipality. An example of this is provided in the figure below titled, "Example: Sustainable Chicago 2015."

 **DISCUSSION TOPIC**
What focus areas within your sustainability plan can be supported by the Challenge? How?

EXAMPLE: SUSTAINABLE CHICAGO 2015



Sustainable Chicago 2015 is the City of Chicago’s action plan to make Chicago a healthier, more livable, and prosperous place. The plan is organized into seven categories: energy efficiency and clean energy, transportation options, water and wastewater, waste and recycling, among others. The plan includes concrete initiatives, metrics, and strategies aimed at advancing the sustainability of Chicago. The Chicago Green Office Challenge (CGOC) is one of many programs supporting the plan. The Challenge was designed to directly support the initiatives outlined in the plan.

Sustainable Chicago 2015 Goal	Sustainable Chicago 2015 Measure	CGOC Message	CGOC Impact Activities	CGOC Measure
Energy Efficiency and Clean Energy Goal #3	Change in kWh	The Challenge encourages businesses to improve energy efficiency by retrofitting their spaces and empowers individuals to reduce energy use by changing their behaviors	Energy-06: Retrofit Lighting and Lighting Controls Energy-11: At-home: Lighting Energy-12: At-home: Plug Load	Estimated kWh change based on activity
			Energy-03: Track Energy Use with ENERGY STAR Portfolio Manager	Change in kWh of submetered tenants

 **ADD TO YOUR PLAN**
Add a similar chart to your Communications Plan in Appendix E

Leverage Existing Programs

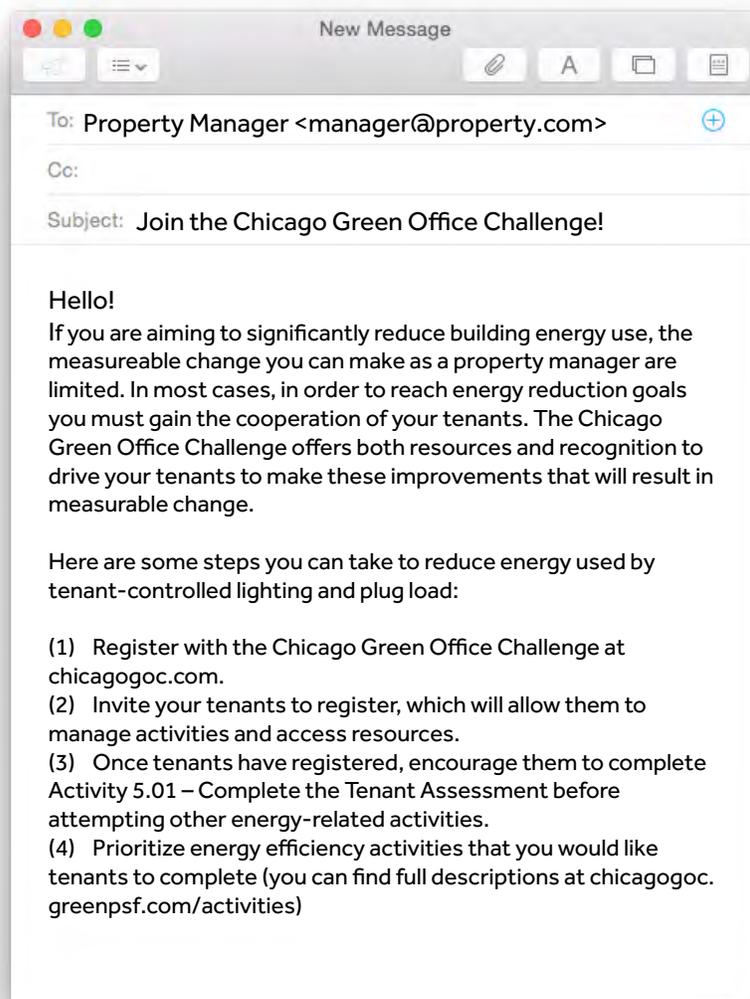
As you identify opportunities to align Challenge goals with municipal sustainability priorities, you should also look to existing programs to achieve impact and resource efficiencies. For example, if your municipality’s transportation department has a program dedicated to the installation of additional bike lanes, you can explore opportunities to leverage that program’s existing resources

 **DISCUSSION TOPIC**
What municipal programs exist that either align with your goals or share the same audience?

and tools for a Challenge activity around biking. Look to the departments that are responsible for transportation, water management, waste management, planning, building services, and other similar additional resources for leverage opportunities. Each of these departments may have public-facing materials, tools, and other resources that can add value to your Challenge.

EXAMPLE: CHICAGO COMMERCIAL BUILDING INITIATIVE

The Chicago Green Office Challenge works closely with Retrofit Chicago's Commercial Building Initiative (CBI). CBI works with large commercial buildings to reduce energy use by at least 20% in 5 years. Many buildings involved in CBI have been implementing building-wide efficiency strategies for several years and will have to gain cooperation from tenants in order to meet their goals. Bringing the Chicago Green Office Challenge to their tenants added value and offered support and resources for implementing efficiency measures at the tenant scale.



 **ADD TO YOUR PLAN**
Develop similar language to include in your Communications Plan

EXAMPLE: BIKE COMMUTER CHALLENGE PARTNERSHIP



The Chicago Green Office Challenge partnered with Active Transportation Alliance to promote alternative transportation options in Chicago through their Bike Commuter Challenge program. The partnership allowed the Green Office Challenge to leverage the excitement and loyalty of Bike Commuter Challenge participants and offer them an outlet for their competitive energy beyond the week of the Bike Commuter Challenge.

The partnership involved:

- Co-marketing and social media
- Opportunities to earn Green Office Challenge points for participating in the Bike Commuter Challenge
- Opportunities to earn Bike Commuter Challenge points for joining the Green Office Challenge
- Co-hosting an awards and recognition ceremony for participants

 **DISCUSSION TOPIC**
Discuss potential partnerships with your team.

In municipalities with limited resources, this practice can further goals for outreach and measurement for both the Challenge and these programs. Your municipality may have civic partners that would be interested in supporting your Challenge. Research sustainability-focused groups, such as nonprofits, special interest groups, private businesses, and utilities, in your community to find those that share common goals and could become potential partners. As an example, the below scenario summarizes how Retrofit Chicago's energy reduction initiative assisted with the Chicago Green Office Challenge.

 **DISCUSSION TOPIC**
What focus areas within your sustainability plan can be supported by the Challenge? How?

Organizational Model

The organizational model defines the structure of the program and identifies the entity that is going to manage the planning and day-to-day implementation of the Challenge. While some communities have maintained an "in-house" or internal management approach to the Challenge where the municipality is responsible for coordinating all functions associated with the Challenge, other communities

have bid or entrusted operation of the program to a third party, or external administrator, with the goal of reducing municipal staff time. While both strategies can be successful, they present different challenges and resourcing requirements. Additionally, different organizational models will require different approaches to resourcing and sponsorship.

An internally-managed Challenge has the benefit of being more easily coordinated and branded by a community or municipality. The community has the benefit of directly marketing the Challenge. Additionally, staff managing the Challenge are directly accountable to their supervisor who is ultimately accountable to local elected officials. The simplicity of an in-house Challenge can provide the opportunity for focus on recruitment and encouraging participants to implement Challenge strategies. However, there are drawbacks to an in-house strategy. The municipality may not have adequate contacts for recruiting their intended audience. Additionally, the municipality may have very talented staff, but they may not have specific expertise in marketing or sustainability strategies. Also, the municipal staff may not have sufficient time or monetary resources to spend on the Challenge, thereby diminishing results. Finally, municipal staff may not be positioned to seek sponsorship from businesses for the program or need to be careful to avoid potential conflicts of interest. While it is possible to create a sponsorship program for a municipally-staffed program, the staff will have to take special care to avoid quid pro quo scenarios with businesses that may feel empowered to seek a return on their investment beyond legitimate recognition and marketing.

An externally-managed Challenge is one where the municipality or county bids or entrusts the operation and management of the Challenge to a third party. This third party may be a sustainability-focused business, nonprofit, or a chamber of commerce with direct ties to businesses whose participation is sought in the challenge. The pros of using a third party include: access to subject matter expertise for key aspects of the Challenge; the opportunity to use a partner who may have very strong relationship with your key audience; and the ability of the third party to more freely seek sponsorships for resourcing the Challenge without creating an ethical problem for the municipality.

The third party may be either a vendor under a contractual relationship that receives remuneration for their services for running the Challenge or a partner that voluntarily performs the services under a less formal agreement. The drawbacks of using a third party vendor include: investing municipal staff time and energy in managing an outside partner, determining the autonomy and authority of the contractor, and securing funding for the third party vendor to manage the program. If the municipality does not have adequate funding, then it needs to be prepared for the third party to dedicate time to recruiting sponsorships. Also, the municipality may need to be prepared for a sliding scale for results, as the resourcing for the project would be in flux. If the third party Challenge administrator is a nonprofit that is not under a contractual relationship, it will be important to have clear roles and an understanding of what resources will be provided by each partner to ensure the success of the Challenge.

DISCUSSION TOPIC

Discuss whether you have the capacity and skills internally to effectively develop and implement the Challenge.

REFER TO APPENDIX

Use the Challenge Budget Template, Appendix J, to help guide this discussion.

Your municipality should select the model that makes the most sense given your specific Challenge goals, resourcing capability, and the availability of trusted local partners.

Your municipality should carefully consider the management and implementation of your Challenge. Though the online Challenge platform is an automated way for participants to report sustainable actions, there are significant staffing needs to ensure the Challenge is engaging and user-friendly both on- and off-line.

Identify available staff time and skill sets early, as it will influence the program model and the municipal staffing strategy. For example, if your municipality has decided that the Challenge will have a strong focus on businesses implementing measurable energy efficiency practices, your Challenge team should include staff with sufficient knowledge of energy efficiency in commercial buildings. Staff should also have sufficient time dedicated to the project to both provide technical support to participants and to calculate energy efficiency impacts at the close of the Challenge. Alternatively, if your Challenge is prioritizing high participation rates with success measured through engagement rather than hard impact metrics, Challenge staff should have experience in marketing and outreach in order to drive high enrollment and sustain engagement.

Depending on your Challenge priorities, relevant skill sets may include expertise in: marketing and sales, communications, graphic design, building science, data analysis, event planning, fundraising, energy and water efficiency, waste reduction, transportation, health and wellness promotion, civic engagement, and impact evaluation. Challenge priorities will also determine which tasks within the implementation of the Challenge will require more staff time than others. The table below depicts the relationships between skill sets and resource intensity throughout various stages of the Challenge.

In the below table, a typical staffing schedule is presented with some suggested time allocations to help a municipality determine whether an internal or external management program would be more appropriate.

Table 1. Challenge Staffing Needs

Stages of Challenge Implementation	Skill Sets	Resource Intensity
Recruitment	Marketing/sales	High
Communications	Marketing/communications	High
Program Reporting	Data management	High
Activity Review	Statistical analysis	Medium
Events	Event planning	Medium
Technical Support	Customer service and specific technical knowledge	Medium
Sponsorship Cultivation	Development	Medium

EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE WORKPLAN

This is a sample staffing plan for the Chicago Green Office Challenge including high-level stages of the Challenge, specific tasks, and estimated hours per month needed to implement.

	Tasks	Outcomes	Hours/month
Recruitment	<p>Research speaking/networking opportunities</p> <p>Email and/or call:</p> <ul style="list-style-type: none"> relevant organizations and professional associations (re: newsletter placement, attending events, etc.) all registered but inactive companies past participants <p>Conduct outreach via:</p> <ul style="list-style-type: none"> networking opportunities lobby/tabling events property manager-led meetings with tenants (through CBI, EDF, BOMA, independent request) peer-to-peer recruitment 	50-300 businesses	40 hours
Communications	<p>Regularly develop newsletter content geared toward participant engagement, maintaining updated list of participants and highlighting key sponsors and Challenge team efforts</p> <p>Maintain a consistent and engaged social media presence with sharable content and updates</p> <p>Conduct targeted press outreach at Challenge launch and completion to tell stories of impact</p>	12 press releases	8 hours
Program Reporting	<p>Track weekly progress</p> <p>Record all impact numbers</p> <ul style="list-style-type: none"> manage spreadsheets put together monthly reports for sponsors and partners 	6 monthly reports and 1 final report	20 hours
Activity Review	<p>Look at all new activities</p> <ul style="list-style-type: none"> compare to already completed activities in same category contact those who need to revise submissions <p>Make updates as needed:</p> <ul style="list-style-type: none"> create and update the activity review rubric make changes to activity language as needed <p>Attend site visits to help tenants complete activities</p>	10 + reviewed and updated activities	40 hours
Events	<p>Plan and execute training events, which includes:</p> <ul style="list-style-type: none"> Scheduling speakers, including speaking opportunities for key sponsors Securing in-kind donations like venue, food, refreshments Preparing presentation content and event promotion collateral <p>Plan and execute networking events</p>	6 seminar style events, 3 networking events, kick off and close out event/award ceremony	12 hours
Technical Support	<p>Provide general support (via phone and email) for online Challenge platform or other mode of Challenge reporting as well as assistance with links to technical information and resources.</p> <p>Develop "toolkit" resources list that Challenge participants can use to access helpful information on local programs and other resources.</p>	Assistance to 20 businesses a month	20 hours

 **ADD TO YOUR PLAN**
Plan for staffing needs for your Challenge.

Awards and Recognition Resources

Recognizing the achievement and effort of your participants is an important component of the value proposition and is also important to keep participants engaged throughout the Challenge. Positive feedback and acknowledgement of the efforts of businesses, individuals, and communities on behalf of the Challenge encourages those participants to become ambassadors for the Challenge and share their experiences with other prospective participants. Ideally, Challenges can inspire a virtuous cycle where participants feel valued for their efforts, proudly and publicly share their progress, and encourage others to participate and seek the same experience.

Awards and recognition for Challenge participants can take many different forms, including intrinsic and extrinsic rewards. Intrinsic rewards emphasize the participant's sense of achievement and growth, whereas extrinsic rewards are more tangible, like a monetary prize or a gift card. Whatever recognition strategy you choose should be aligned with your Challenge priorities. It is important to continuously recognize and motivate participants as soon as they log their first activity (See Step 4 to see where this fits into your Communications Calendar). For example, if your Challenge prioritizes participation rates and engagement, recognition should be a friendly and frequent feedback loop that continues to inspire participant action and engagement. Vehicles for this kind of recognition could include social media mentions or shout-outs in Challenge or partner newsletters. Alternatively, if your Challenge prioritizes metrics and numbers for large-scale measurable reductions in environmental impacts, your recognition should be more significant and occur at the end of the Challenge to provide participants with time to achieve meaningful impacts. Vehicles for this kind of recognition could include press releases, a municipal resolution recognizing top performers, print advertisements, an awards ceremony with high-level city officials in attendance, and/or news media coverage.

It is important to consider a mixed-recognition approach that rewards participants for both small victories throughout the Challenge and larger achievements at the close of the Challenge. Different types of recognition approaches will appeal to different kinds of participants. The below example describes how the City of Chicago administered their Challenge by rewarding participants with recognition in lieu of monetary prizes.

Determining what resources are available for awards and recognition early in the planning of your Challenge will be helpful in articulating the value proposition for offices and residents to participate. In some cases, you may secure funding to offer monetary prizes. Monetary-based awards can help communities further their sustainability goals, to help residents pay for utility costs, or further incentivize businesses to compete. Funds may be secured via sponsorship from municipal, community, or corporate partnership. Think about your audience and Challenge priorities while you consider how to incorporate monetary prizes into overall rewards and recognition. Your knowledge of your target audience will help you make the best choices. Incentives might also include awards that have a monetary value, but are provided for free by a sponsor like services that relate to the

 **DISCUSSION TOPIC**
Brainstorm potential sponsors or resources for obtaining prizes.

EXAMPLE: CGOC AWARDS & RECOGNITION CEREMONY



The Chicago Green Office Challenge awards system was based solely on recognition with no monetary prizes. Recognition was available throughout the Challenge through social media mentions, newsletter spots, and spotlights at Challenge events.

Recognition was also available at the end of the Challenge at the Challenge Awards Reception. At the reception, participants were recognized for their efforts and achievements by receiving trophies and certificates presented by the City of Chicago's Chief Sustainability Officer. Categories meriting recognition included:

Participation

- Most points earned in each category

Impact awards

- Greatest energy reduction
- Greatest water reduction
- Greatest waste diversion

Individual awards

- Recruitment, most referrals
- Social media, most posts about the Challenge
- Property management, most engaged manager

DISCUSSION TOPIC

What types of awards and recognition would be valuable to your participants?

Challenge (e.g., an Energy Star verification, energy or water audit, etc.), amenities that help commemorate the achievement (e.g., a tree, park bench, sign, etc.) or a special event (e.g., block party or training). For the City of Chicago Neighborhood Challenge, both recognition and monetary awards were assigned as described below.

EXAMPLE: CNEC AWARDS STRUCTURE

The Chicago Neighborhood Energy Challenge (CNEC) had resources to distribute both recognition-based awards and monetary prizes.

Extrinsic/Monetary prizes included:

Buildings:

- First place in overall reductions: \$25,000
- Second place in overall reductions: \$7,000
- Third place in overall reductions: \$3,000
- One-time award to building with largest increase in participation: \$500

Individuals:

- Largest monthly electricity reduction: \$200
- Largest monthly natural gas reduction: \$200
- Membership passes to City programs, museums, events
- Small raffles at events

Intrinsic/Recognition-based rewards included:

Individuals

- Green Leader completion certificate
- Participant completion certificate
- Monthly participant recognition at workshops
- Participant completion badges for actions

 *REFER TO APPENDIX*

Find descriptions of different awards events in Appendix I.



STEP TWO: IDENTIFY YOUR AUDIENCE



IDENTIFY YOUR AUDIENCE

Now that you have determined your Challenge priorities and the recognition strategies you intend to employ, it is important to get to know your audience. Since you are offering a voluntary program, it is critical to design the program to meet their needs, interests, motivations, and concerns. The first step is to identify your audience, the potential participants.

Get to Know Your Potential Participants

Executing a successful Challenge is made easier if you know your community and how to reach the audience most likely to participate. Both the Workplace and Neighborhood Challenge each have potential participants to consider:

Workplace audiences: This could include industrial businesses, churches, private or public learning institutions, commercial office tenants, retail stores, multi-unit commercial buildings, small or large businesses interested in sustainability, and individuals interested in sustainability,

Neighborhood audiences: This could include individuals interested in sustainability, neighborhood organizations, block clubs, homeowners associations, apartment or condominium managers, and renters.

For the workplace challenge, it is critical to appeal to both businesses that will participate as an organization as well as individuals within those businesses who will champion the Challenge and potentially encourage peer businesses to participate. Consider the types of businesses you are targeting (local/national/international, by sector, or size: small/large) and what specific individuals might champion the Challenge within the business (e.g., building owners and managers, office managers, and/or marketing managers, junior staff, and green teams).

For your neighborhood challenge, you will likely need to appeal to both homeowners and renters. There are unique challenges each type of resident will face when trying to implement sustainable strategies in their home and communities. Consider these unique challenges when selecting activities, so each group derives benefits from the Challenge and is on a level playing field. Also consider how you plan to reach your potential participants and if there are existing networks to be leveraged (homeowners associations, community groups, web presence, etc.).

Define your audiences further by answering the following questions for each group:

- What are they trying to achieve?
- What are their motivations?
- What are their strengths and abilities?
- What are their weaknesses and restrictions?

 **ADD TO YOUR PLAN**
Add your key audiences and perspectives to Section 3 of your Communications Plan, Appendix E.

Develop Value Propositions

Once you have identified your audience, the next step is to articulate the value of the Challenge to them. A value proposition describes what the participant will gain from participating, and it will help you design a Challenge that is attractive to your potential participants. Value propositions may include appealing to environmental and civic responsibility, employee or neighborhood engagement, team building, operational cost savings, public relations benefits, or inclusion in a growing community of sustainability-minded businesses and individuals. Presented below is a broad list of potential Challenge benefits by audience. Please note: this list is not exhaustive, and the applicability of each point will be dependent on the conditions found in your municipality and whether you are implementing the Workplace Challenge or the Neighborhood Challenge.

Overall Workplace Challenge benefits could include:

- Become more efficient, save money, and reduce greenhouse gas emissions.
- Leverage easy-to-use tools to improve sustainability in the workplace and beyond.
- Help achieve city-wide goals outlined in your sustainability plan.
- Market your business as providing sustainable goods or services to grow your client base.
- Empower teams and promote workplace relationships and engagement.

Overall Neighborhood Challenge benefits could include:

- Become more efficient, save money, and reduce greenhouse gas emissions.
- Get to know your neighbors and build a stronger sense of community within your neighborhood.
- Become recognized as being a neighborhood that is an asset to your community.
- Creating a safer and more connected community.
- Create opportunities for team work and community engagement and opportunities to cultivate a stronger sense of community.

Benefits to building participants (property managers) include:

- Leverage easy-to-use tools to engage tenants to achieve your company's operating efficiency goals.
- Attract and retain tenants by offering a more comfortable space that costs less to operate.
- Increase building value and the ability to command higher rents.
- Work toward green building requirements, including benchmarking, Energy Star and LEED.
- Earn recognition from clients, peers, media, and trade associations for your leadership in sustainability.
- Help to mitigate environmental risks as your city experiences a changing climate.

Benefits to office/tenant participants include:

- Leverage easy-to-use tools to improve your office's competitiveness, efficiency, and sustainability.

 **ADD TO YOUR PLAN**
Add value propositions for your own audiences to your Communications Plan Template, Appendix E.

- Engage your employees in a meaningful way, and build a culture that helps you attract and retain employees.
- Meet your corporate social responsibility (CSR) and other internal sustainability goals, while improving reputation and brand image for your customers and staff.
- Help grow the market for sustainable office products.
- Become an innovator in your office and challenge your peers to become sustainability leaders.
- Create a workplace that promotes health and wellness with the resultant productivity and cost benefits.
- Build camaraderie and team spirit through group volunteerism or working collaboratively to make improvements in the office or community.
- Have fun, get creative and celebrate achievements with recognition from municipality and by peers and the media.

Benefits to individual participants include:

- Leverage easy-to-use tools to be a sustainability leader at work and in your community.
- Network with other businesses and other like-minded individuals participating in the Challenge.
- Saving money at home or community would be a potential benefit for neighborhood Challenges.

Determine Engagement Level

There is a spectrum of engagement associated with workplace and neighborhood challenges. On one end is active engagement that involves businesses and communities learning and taking new actions that drive impact and earn recognition. On the other, businesses and communities are simply reporting their existing practices and earning recognition for their sustained efforts. The engagement level will influence the activities you choose for participants.

When determining the level of engagement you want your participants to have, you should consider your Challenge goals and your audience.

For example, if your Challenge highly prioritizes collecting information on sustainability actions that are already taking place throughout your municipality, and recognizing those who have taken those actions, your activities should primarily capture participation for the sake of recognition (see Round 2 Activity in the example below).

Alternatively, if your Challenge is interested in providing instructions and resources to those who will be taking new sustainability actions, your activities need to be built to both teach participants how to take action and to record the completion of the action (see Round 4 Activity in the example below). It may be appropriate for your Challenge to include both kinds of activities in order to meet the needs of multiple audiences.

 **DISCUSSION TOPIC**
What combination of the following models would be the most attractive to both you and your audiences?

EXAMPLE: ROUND 2 AND ROUND 4 CGOC ACTIVITIES

Round 2 Lighting Audit Activity:

Have you conducted a lighting audit and implemented at least one of the recommendations from the audit report?

- Yes
- No

Round 4 Lighting Audit Activity:

Conduct a Lighting Audit

400 points

COMPLETE THIS ACTIVITY

Introduction: For most businesses, lighting accounts for about 25% to 40% of electricity consumption. Making adjustments to lighting systems is one of the most effective ways to reduce energy use in your office, and the first step to making those adjustments is to understand how your current lighting system works.

Complete this activity:

- Identify a qualified lighting contractor
- If you have a ComEd account, call 855-433-2700 for a free assessment
- Conduct the lighting and lighting controls audit
- Optional for ComEd account holders: Apply for pre-approval for ComEd Smart Ideas for Your Business® lighting incentives using the Pre-Approval and Final Application Form

Earn Challenge points:

- Click 'Complete this Activity'
- Answer the following questions in the text box provided:
 1. On what date was the audit completed?
 2. Was a lighting retrofit recommended?
 3. What is the likelihood that you will be completing a retrofit?
 4. Did you apply for lighting incentives?

Optional: Socialize success

Let others know about your commitment to energy efficiency!

Tweet about it: "25-40% of office electricity use is from lighting. We learned how much we can save and earned points in the @ChiGreenOffice Challenge"

Resources

How Lighting and Lighting Controls Audits Work
Pre-Approval and Final Application Form

Identifying the level of engagement that you are looking for from your Neighborhood Challenge depends on both the audience that you are targeting and the goals of the Challenge. To start, determine what the goals of your neighborhood challenge are and what level of engagement will be necessary to achieve them:

- Are you trying to expand sustainability practices beyond the workplace to homes throughout your city? Read about the Chicago Green Office Challenge – Bring the Challenge Home model.
- Are you trying to build a community of sustainable-minded individuals using neighborhood-based programs throughout the city? Read about the Chicago Neighborhood Energy Challenge Pilot model.
- Are you trying to encourage measurable environmental impact reduction in residential units throughout your city? Read about the Chicago Neighborhood Energy Challenge Pilot model.
- Are you trying to measure the ability for existing community and neighborhood groups to implement and report sustainability actions for recognition? Read about the Nashville Mayor's Neighborhood Challenge model.

Chicago Green Office Challenge – Bring the Challenge Home

The Bring the Challenge Home section was first introduced to the Chicago Green Office Challenge in Round 3. Though there are many actions that businesses can take to make their operations more sustainable, many of these actions require support from decision makers and may take time for approval and implementation. Encouraging employees to apply their new knowledge at home where they have more control allows for a more immediate benefit that can inspire them to keep working toward long-term goals in the workplace.

Benefits:

- **Audience:** You already have a captive audience from all the hard work you and your team have done in the Green Workplace Challenge. Encourage those individuals to apply the knowledge they have gained as participants in the Green Workplace Challenge to practices and operations in their own homes. This expands your Challenge's impact with limited additional strain to support further recruitment efforts.
- **Sustainability Leadership:** This helps develop more well-rounded leaders who can become ambassadors for sustainability in both their offices and throughout their communities.

Limitations:

- **Individual:** It largely encourages individual action without establishing a community or neighborhood-based support system.

Chicago Neighborhood Energy Challenge Pilot

The Chicago Neighborhood Energy Challenge (CNEC) Pilot was a collaboration between the City of Chicago, Enterprise Community Partners, Delta Institute, and the University of Chicago. There were several objectives of this Challenge, including building a community of sustainability-minded individuals, encouraging residents to take action to reduce energy and water use, and track the program impact using utility bills. The program took place in seven large multifamily buildings in Chicago's Humboldt Park and Logan Square neighborhoods, and each building represented a

Challenge team.

Benefits:

- **Community-building potential:** The CNEC Pilot program included monthly workshops with each building that brought together participants to share stories about their efforts in the Pilot. Beyond educating participants on sustainability and inspiring sustainable practices, these monthly workshops also served to connect neighbors who had lived next door to each other for years and had never met.
- **Hard metrics:** The CNEC Pilot program also had a strong focus on collecting data and calculating impact metrics, including electricity saved, gallons of water saved, and metric tons of greenhouse gases avoided due to participant actions. Developing relationships with utility providers allowed for access to data for the buildings as well as for each individual unit participating.

Limitations:

- **Resource intensive:** Both the monthly workshops and the collection and calculation of the impact metrics were extremely time-intensive activities that require resources and staff time.
- **Multiple stakeholders:** The CNEC Pilot program involved a diverse group of stakeholders, including young families and elderly residents, with different goals and objectives for the program, which can make it difficult to make decisions and result in varying levels of participant engagement.

Nashville Mayor's Neighborhood Challenge

According to Mayor Karl Dean of Nashville, "Through the Neighborhood Challenge, we will help connect our neighborhoods and residents with many resources and services available specifically to help them promote environmental practices, volunteerism and healthy living." This program heavily relied on volunteers to engage residents.

Benefits:

- **Widespread engagement:** Unlike the Bring the Challenge Home model that reached only Green Office Challenge participants or the CNEC model that reached residents in specific buildings, the Mayor's Neighborhood Challenge had a wider reach throughout the city.
- **Comprehensive approach:** Unlike the Bring the Challenge Home and CNEC models that focus solely on green home practices, the Mayor's Neighborhood Challenge had activities related to green, healthy, and involved communities.

Limitations:

- **Lack of focus:** With a broader approach for engagement and impact, it may be challenging to provide effective support for a diverse participant group, and the results of the Challenge may be less focused.
- **Volunteer challenge:** It's great to engage volunteers, but they may not always have adequate time or resources. Additionally, volunteers may prioritize certain initiatives above others because it more directly aligns with their personal interests.

EXAMPLE: NASHVILLE V. CHICAGO HOME ACTIVITIES

Nashville Mayor's Neighborhood Challenge Lighting Activity:

We encouraged neighbors to purchase energy efficient light bulbs. 1 point

- Yes
- No

Chicago Green Office Challenge Bring it Home Lighting Activity:

At-Home: Switch Out Light Bulbs

25 points per household

COMPLETE THIS ACTIVITY

Introduction: One of the quickest and easiest ways to reduce energy use in your home is to replace your incandescent bulbs with more energy efficient CFLs (compact fluorescents) or LEDs (light-emitting diodes).

Complete this activity:

- Identify inefficient incandescent light bulbs in your home
- Purchase more energy efficient CFL or LED replacement bulbs

Earn Challenge points:

- Click 'Complete this Activity'
- Answer the following questions in the text box provided:
 1. On what date did you replace the bulbs?
 2. How many incandescent bulbs were replaced with CFLs?
 3. How many incandescent bulbs were replaced with LEDs?

Optional: Socialize success

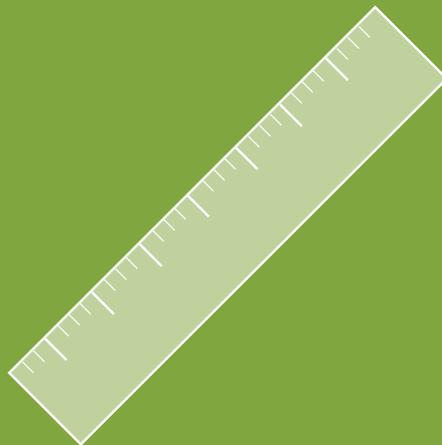
Share how easy it was for you to change out your bulbs and start saving energy.

Tweet about it: "I changed my incandescent bulbs to more energy efficient [CFLs or LEDs]. Can't wait to get my next energy bill. @ChiGreenOffice"

Resources

Saving Energy at Home

**STEP THREE:
DEFINE MEASURES OF SUCCESS**



DEFINE MEASURES OF SUCCESS

After you have defined your Challenge goals and developed a profile of your target audience, you need to determine how you will measure whether your participants are successfully achieving Challenge goals. Defining reasonable yet meaningful measures of success is critical to the effective implementation of your Challenge, as it will affect your ability to attract businesses and individuals to enroll in the Challenge, their experience throughout the Challenge, and how the Challenge results support your municipality's sustainability goals.

Qualitative vs. Quantitative Metrics

There are advantages and disadvantages to selecting either qualitative or quantitative metrics. Some metrics require extensive resources and time on the participants' end, and others require significant time and special skillsets on the administrative end. It is important to consider the additional resources required on both ends when specifying the metrics that will be used.

Depending on your goals and available resources, measures of success could include:

- collecting anecdotal evidence of participant engagement,
- tracking specific actions taken by participants,
- measuring actual or estimated environmental impacts of each action, or
- a combination of these measures.

Generally, it is beneficial to have both process-oriented measures and outcome-related measures. For some groups, outlining and achieving process goals, such as placing new recycling bins in cubicle spaces, may enable them to achieve a greater recycling percentage. By recognizing participants for both process and impact, you can continue encouraging participants for whom it takes a longer time to achieve results.

 **DISCUSSION TOPIC**
Which measures of success line up with the engagement levels you discussed earlier?

This chart outlines the potential measures of success that can be collected to describe the results of your Challenge:

Table 2. Possible Measures of Success

	Anecdotal	Measurable
Engagement	Success stories from participating offices	Counts of participating individuals, businesses, buildings, households
Impact	Summaries of actions taken in an office, such as process-related actions that will enable later measurable actions.	Deemed savings Actual savings

EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE

In Round 3 of the Chicago Green Office Challenge, success was largely measured in terms of both engagement and impact around energy efficiency. Here is an example of the kind of data that was collected in the Challenge to demonstrate success:

	Anecdotal	Measurable
Engagement	One office initiated an intra-office energy challenge, encouraging their employees to reduce energy use through competing in a tangible way with peers.	This tenant had XX employees participating in the Challenge and XX brought the Challenge home with at-home energy efficiency activities.
Impact	Employees successfully reduced energy use by implementing strategies, such as installing appliance controls, educating employees about reducing vampire power, and retrofitting their lighting and lighting controls.	The office manager submitted electricity bills for the last two years to demonstrate the actual change in kWh that was achieved.

EXAMPLE: CHICAGO NEIGHBORHOOD ENERGY CHALLENGE

Success was measured in terms of both engagement and impact around energy efficiency and water use reduction. Here is an example of the kind of data that was collected in the Pilot to demonstrate success:

	Anecdotal	Measurable
Engagement	Residents regularly and enthusiastically attended monthly workshops to learn about energy and water conservation strategies, often sharing their own experiences.	The six month competition included more than 500 units in Humboldt Park and Logan Square. During this time, more than 600 residents attended 36 workshops to learn how to cut down on energy usage.
Impact	Residents commented on noticeable savings on their energy bills during the monthly workshops.	By the end of the Pilot period, buildings had energy savings of more than 5% in electricity, nearly 10% in gas, and more than 45% in water usage, resulting in a total of \$54,000 in overall savings, with each family seeing savings of up to nearly \$110 on their energy bills.

Source: Mayor Emanuel Announces Results of Energy Efficiency Pilot Competition
July 17, 2014 http://www.cityofchicago.org/city/en/depts/mayor/press_room/press_releases/2014/jul/mayor-emanuel-announces-results-of-energy-efficiency-pilot-compe.html

Plan for Effective Reporting

As you are asking participants to fill out questionnaires, submit reports, and log activities on the Challenge website, it is important to consider the necessary effort you are asking of your potential participants.

 **REFER TO APPENDIX**
Use the Webinar in Appendix C to see how you may assign points to activities with varying levels of effort.

EXAMPLE: GREEN OFFICE CHALLENGE “EARN CHALLENGE POINTS” ACTIVITY SECTION

Here’s an example of the specific inputs requested of the participants and why the outputs were important to the municipality.

Earn Challenge points:

- Click ‘Complete this Activity’
- Answer the following questions in the text box provided:
 1. On what date was the audit completed? ●————— This was asked, because it was important to the municipality to know whether or not the activity was completed within the Challenge duration.
 2. Was a lighting retrofit recommended? ●————— This was asked, because the municipality wanted to know at what rate participants took action based on assessments.
 3. What is the likelihood that you will be completing a retrofit? ●————— This was asked, because the municipality wanted to know if the Challenge team should encourage the participant with available incentive programs and additional return on investment (ROI) information.
 4. Did you apply for lighting incentives? ●————— This was asked to track how many participants were taking advantage of incentive programs provided by a corporate sponsor. It also indicated in what form the information would be submitted (if the participant was using the incentive program they were encouraged to submit the same form as was submitted to the utility).

Before asking for participants' time and resources for reporting, it is also important to ask easy-to-answer questions to participants and leave quantification to the Challenge manager. To minimize error, Challenge participants should not be asked to do metric conversions or manipulate data.

Document Data Collection and Analysis Processes

Data collection and analysis can easily become complicated and unmanageable. It is absolutely critical to determine up front which data will be collected, in what form it will be collected, the time period covered, and how it will ultimately be used to communicate success.

Your Challenge priorities (defined in Step One) and the desired level of engagement of your participants (identified in Step Two) will directly inform which data your municipality will collect from participants throughout the Challenge. Being intentional about the level of detail you request will help mitigate unnecessary complication in collection on the participant side and data analysis on the Challenge staff side.

Try to make reporting easy for participants. When asking for specific pieces of data, such as energy savings, waste diversion, or water savings, recognize that there is often no standard format for businesses to store and share this information. Each building, business, and household may have a different waste hauler or electric utility that tracks information and issues bills differently. It is helpful to offer templates for reporting this kind of data, but requiring businesses to copy and paste existing data into new templates is time-intensive and costly, which discourages participation. Allowing data to be reported in its existing form encourages more participants to report. However, the less consistency between data collected, the more effort is required on your end to compare or aggregate data. The format in which data will be accepted should be determined early and communicated clearly to participants in each activity.

Know how you want to communicate results in the end. Ask your leadership how they intend to use calculated results from the Challenge, as it is an important factor in team-wide celebration of success. In most cases, the results of the Challenge will be published in a press release or news article. Documentation of each step in your data collection and analysis process, and noting what your metrics are describing in terms of time frame, actions taken, and whether they are solely attributed to the Challenge will be helpful in maintaining transparency and trust.

 **REFER TO APPENDIX**
Use Appendix K for additional guidance on impact metric strategies.

**STEP FOUR:
MARKETING AND
COMMUNICATIONS**



MARKETING AND COMMUNICATIONS

Now that you have determined your Challenge priorities, your audience and your activities, it is time to communicate to others what the Challenge is, why you are organizing it, and why others should sign up. This section considers how you will talk about your Challenge internally and externally.

These plans will serve as key information hubs to which you will refer for consistent language, key messages about the Challenge, timelines, and a concise list of all of your collateral materials you can use to talk about your Challenge and get others excited about it.

Describe Your Challenge: Master Communications Plan

The Master Communications Plan is the document that outlines the overall objectives of the Challenge, the target audience, and the value proposition for participants. It sets you up for successful recruitment and marketing to participants, sponsors, the press, and your colleagues.

Your Communications Plan consists of the following pieces:

- Positioning and Brand Attributes
- Communications Objectives
- Key Audiences and Perspectives
- Key Messages
- Timeline, Tactics, and Tools
- Appendices

Positioning and Brand Attributes

This section provides the overarching mission, vision and brand attributes for the Challenge. In determining brand attributes, you should consider your core values, how those values translate to the participant value proposition, and how you want to engage with your participants. It is important to be encouraging, informative, practical, and fun, as you do not want the tone to be patronizing or authoritative.

Take time to discuss and come to a consensus on these ideas and concepts as a full team. A consistent voice from all partners and staff is very important when talking about the Challenge to avoid confusion and to drive your audience toward action. Use your Audience Profile and Value Propositions to guide your discussion.

Communications Objectives

The communications plan is the precursor to your Recruitment Plan. This is where you can set numerical metrics for engagement and recruitment such as:

- newsletters reached, website analytics, number of partners sharing your message
- recruitment goals, how many individuals, businesses, and neighborhoods registered

You can also and set goals for what you would like participants to learn from the experience.

**EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE
POSITIONING AND BRAND ATTRIBUTES**

Mission	The mission of the Chicago Green Office Challenge is to engage and support Chicago businesses in adopting sustainable practices that promote efficiency, save money, and reduce greenhouse gas emissions.
Vision	The vision of the Challenge is a business sector that is more sustainable, competitive, and engaged as part of Chicago’s national and global leadership in sustainability.
Values	Impact – Innovation – Engagement – Collaboration
Value Proposition	The Challenge creates participant value by: <ul style="list-style-type: none"> • Providing tools and information to improve resource efficiency, reduce operating expenses, and avoid greenhouse gas emissions. • Creating high-impact opportunities to engage employees in achieving corporate sustainability goals. • Recognizing and celebrating leading businesses and facilities through friendly competition. • Empowering local businesses to help achieve citywide environmental goals outlined in the Sustainable Chicago 2015 Action Agenda.
Voice	Impact-focused – Pragmatic – Optimistic – Inclusive – Energetic

 **ADD TO YOUR PLAN**
Develop similar language to include in your Communications Plan

**EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE
COMMUNICATIONS OBJECTIVES**

- To raise awareness and drive participation in the Challenge, reach the following participation targets:
 - 300 businesses (tenants)
 - 60 buildings
 - 1,250 individuals
- To drive sustainability action and impact through information, friendly competition, and recognition.

 **ADD TO YOUR PLAN**
Develop similar language to include in your Communications Plan

Key Audiences and Perspectives

This section lays out your audiences, what motivates them, and what you want them to do. Fill this section in with information from Step Two: Identify Your Audience.

 **ADD TO YOUR PLAN**
Develop similar language to include in your Communications Plan

Your audience will be divided into primary and secondary audiences. Your primary audience includes the top tier target participants — those who are well positioned to participate in the Challenge. Secondary audiences may include gatekeepers to your target participants or groups who are eligible to participate but may not be well-positioned for success. For example, they may not have electricity sub-meters, or they may be too small of a unit (an individual, not a neighborhood).

EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE KEY AUDIENCES AND PERSPECTIVES

Our target audiences for this year's Challenge include:

- Primary: Chicago businesses and their employees (Point-of-contact: Organizational contacts or green team leaders)
- Secondary: Chicago office buildings (Point-of-contact: Building owners and property managers)
- Secondary: Individuals interested in sustainability

Audience	What motivates them?	What do we want them to do?
Businesses	<ul style="list-style-type: none"> • Corporate social responsibility goals • Resource efficiencies • Employee engagement • Recognition 	<ul style="list-style-type: none"> • Register your office to play. • Adopt sustainable practices at work and at home. • Engage your property manager. • Challenge your peers to play. • Measure your impact.
Building owners & managers	<ul style="list-style-type: none"> • Operating efficiencies • Building value • Tenant retention • Recognition 	<ul style="list-style-type: none"> • Register your building to play. • Recruit and facilitate tenant participation. • Adopt sustainable practices in the building. • Measure your building-level impact.
Individuals	<ul style="list-style-type: none"> • Sustainability goals • Leadership opportunities • Networking opportunities 	<ul style="list-style-type: none"> • Register to play. • Adopt sustainable practices at work and at home. • Challenge your peers to play. • Measure your impact.

Key Messages

This section contains most of the stock language you will use when talking about the Challenge. Achieving consensus on key messages makes it easier for Challenge representatives to conduct effective recruitment and outreach. Below is an example from the Chicago Green Office Challenge.

EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE KEY MESSAGES

The Chicago Green Office Challenge is...

An impact-driven program that encourages friendly competition among commercial offices and individuals to adopt sustainable practices at work and at home. By “playing” or participating in the Challenge, participants take concrete action to earn points for their companies and make our city more competitive, livable, and sustainable.

We believe...

Chicago’s businesses have the power to become more efficient, save money, and reduce greenhouse gas emissions through simple changes in their energy, water and waste practices.

Chicago is positioned for national and global leadership in sustainability. A recent report states that Chicago ranks above any other U.S. city in its environmental governance and projects that by 2025 Chicago will be the 9th most competitive city in the world and the 2nd most competitive city in the U.S. Impact-driven initiatives like the Chicago Green Office Challenge will help us get there by driving economic competitiveness, innovation, and sustainability.

The Challenge aims to...

- Drive results in energy, water, and waste reductions in Chicago’s business sector.
- Help Chicago businesses to be more competitive and efficient.
- Support goals outlined in the Sustainable Chicago 2015 Action Agenda and make Chicago more competitive, livable, and sustainable.

The Challenge does this by...

Educating, engaging and empowering Chicago businesses with an easy-to-use platform and tools to drive sustainability at work and at home.

The Challenge seeks to engage...

All businesses in the City of Chicago—from one-person offices to Fortune 500 companies.

You can get started by...

- Registering your office to play the Challenge.
- Joining our social networks for Challenge updates (Facebook, Twitter, LinkedIn).
- Creating a Green Team in your office and rallying coworkers to join the Challenge.
- Challenging your peer businesses and organizations to join the Challenge.



ADD TO YOUR PLAN
Develop similar language to include in your Communications Plan

Timeline, Tactics, and Tools

This section lays a broad timeline of the phases of communication you will have with participants. This section will look different depending on how you are structuring your Challenge.

If your challenge has a defined start and end, even if it is annual, the example shown

below will be helpful. If your challenge is running continuously, you may want to make a more detailed annual calendar that defines a focus for each month.

Some things to consider as you outline your communications timeline:

- You can choose to continue recruiting even after the start date of the challenge.
- As soon as participants sign up, you should be providing them with updates on the competition, answering questions, and providing information to support activity completion. Sending out regular e-newsletters or notices to all participants will help to stir up competition and share good ideas.
- Continuously recognizing the achievements of your participants is important throughout the challenge and not just the end.

EXAMPLE: CGOC TIMELINE, TACTICS, AND TOOLS

The table below shows the communications phases, each with different key messages for target audiences.

- Phase 1: Recruitment messaging will focus on communicating the value propositions for each target audience to get them to register to play the Challenge.
- Phase 2: Engagement messaging will seek to drive action and measurement. Communications will highlight monthly themes, activities and events to drive active participation and competition among players, and it will also encourage players to begin to measure their reductions in energy, water and waste and report those reductions to us.
- Phase 3: Recognition messaging will highlight Challenge players that are reporting their achievements, rising on the leaderboard, and/or being creative and innovative.

	Phase 1: Recruitment	Phase 2: Engagement	Phase 3: Recognition	Notes:
June				Round 3 Awards Event, Announce Round 4
July				Heavy outreach, promo
August				Heavy outreach, promo
September				Round 4 Kickoff
October				Event/training
November				Event/training
December				Event/training
January				Resolve to measure reductions
February				Event/training
March				Event/training
April				Event/training
May				Round 4 Awards Event



ADD TO YOUR PLAN
Develop similar language to include in your Communications Plan

The tools section contains all modes of communication that are easily at your disposal and that can reach much of your target audience. This section may be filled out now, but may be added to after you complete your recruitment plan.

Continuous Engagement Strategies

Once the Challenge has begun, the work starts for your participants! While you can certainly still recruit once the Challenge begins, your participants will benefit from continued communications from you while they are participating. You can get creative in how you engage your participants, but here are a few ideas:

- Use social media to highlight monthly themes around activities, like energy, waste, water, and purchasing.
- Send out regular e-newsletters with relevant updates about events, activities, resources, and participant achievements.
- Organize networking events to encourage the exchange of best practices and ideas and socializing among participants.
- Organize training events around specific activity themes to share tips and educate participants on how they can achieve impact.
- Use social media to highlight teams that are actively engaged or leading in a particular area. This recognition can drive active participation and competition among players.

Regular communication from the Challenge organizers will keep participants focused and engaged throughout the Challenge. See Appendices C and D for ideas.

Appendices to your Communications Plan

- a. Expanded summary of the challenge
- b. Value proposition for your audiences
- c. Alignment with city and sponsor priorities
- d. List of collateral materials
- e. Challenge timeline

External Communications

Don't forget to tell the story of your Challenge to others! Local press may be interested in covering the Challenge, and it would be a great topic to highlight in your municipality's newsletter, website, or blog. Here are some "hooks" that might be compelling for external audiences:

- The launch of the Challenge
- Is this the first sustainability Challenge that has occurred in your community?
- Have you seen record enrollment?
- Have you reached a significant milestone?
- Are there interesting stories from your teams that you can highlight in participant testimonials?
- Have your participants collectively saved their first ton of paper?
- The Challenge awards or recognition event

These are all opportunities to share the message of the Challenge with your community.

You can see this highlighted in the Timeline, Tactics, and Tools section of your Communications Plan. There are also examples of emails, guest blogs, and other press marketing in Appendix H.

EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE TARGET CONTACTS

1. Organizations and Professional Associations
 - a. Groups with sustainability committees
 - b. Groups with emerging professional committees
 - c. Groups with past participants in membership
2. Past Tenant Participants
 - a. All past tenants and their networks
3. Property Managers
 - a. Past building participants
 - b. Chicago Commercial Building Initiative participants
 - c. Environmental Defense Fund Climate Corps participants
 - d. Offices of buildings in which tenant participants reside

Compile Recruitment Plan

After you finalize the Challenge communications plan, you are ready to go out and get others excited and signed up. Think of each of your audiences as a unique target group in order to plan effective strategies to reach them.

We encourage you to meet your potential participants where they are. Your audience already has trusted sources of information, and they are likely meeting regularly in some professional or neighborhood setting. Think about ways you can leverage these pre-existing communications channels to reach your potential participants.

Additionally, as you are compiling your Recruitment Plan, be aware of your finite resources and staff time and define your recruitment strategy accordingly. Identify gatekeepers and strategic points of contact who can get your message to your target contacts. If many of your target contacts all work within a particular downtown building, set up a meeting with the building's property manager to distribute information, or ask them to organize a tenant meeting where you can reach all of your target contacts in one meeting.

In addition to where they're located, think about your target contacts' networks and add the following to your Recruitment Plan:

- **Associations or groups to which they may belong, like chambers of commerce, the US Green Building Council local chapter, neighborhood associations, and housing developments.** These groups offer opportunities to reach many members at once and where you may be able to take advantage of friendly peer

EXAMPLE: CHICAGO GREEN OFFICE CHALLENGE RECRUITMENT STRATEGIES

Tenant presentations – Appropriate in buildings that have regularly scheduled tenant engagement events; preferable to lobby/tabling events; contact tenant services coordinator or equivalent; secure space for presentation.

Audience: Typically a building-wide 'green team' or sustainability committee with representatives from multiple tenant spaces

Lobby/Tabling events – Appropriate in buildings that do not have regularly scheduled tenant engagement events; appropriate for events held by professional associations or organizations.

Audience: Tenants passing through; event attendees

Membership presentations – Appropriate for organization, chambers of commerce, or professional associations with complementary missions and engaged memberships.

Audience: Staff and members of the organization or association

Newsletter/blog spots – Appropriate for buildings, professional associations, and organizations with regular newsletters or blogs; could feature Challenge announcement or upcoming events. Specific target for building engagement is Building Owners and Managers Association (BOMA)/Chicago's blog.

Audience: Building tenants; staff and members of associations and organizations

Networking events - Networking opportunities at Challenge events and local sustainability-related events.

Audience: Current and potential Challenge participants; sustainability-minded professionals

Peer-to-peer recruitment – Offering points for recruiting peer businesses to play.

Audience: Non-participants (typically in a single business sector)

Sector-based mini-challenge – Encourage competition in a particular business sector.

Audience: All companies or employees in a specific business sector

Social media – Maintain consistent communication, sharing relevant content and updates, educating followers and generating interest, increasing followers through various social media channels (Facebook, Twitter, LinkedIn, etc.)

Audience: Current participants and their networks; similar organizations or programs; sustainability-minded individuals

Earned media – Strategic outreach to media outlets to raise the profile of the Challenge and deliver Challenge messages to target audiences.

Target outlets: Crain's, Redeye, Reader, Sustainable Chicago, WBEZ, Chicagoland Buildings & Environments, WBEZ, Chicagoist, Chicago Tonight



ADD TO YOUR PLAN

Develop similar strategies to include in your Recruitment Plan

pressure and competition within the group. Identify a contact at each group to whom you can reach out.

- **Green nonprofits, organizations, or networking groups, like transportation advocacy groups, business incubators, local green magazines, U.S. Green Building Council chapters, and young professional groups.** These groups often put out an e-newsletter or maintain a social media presence, and they may be willing to share your Challenge content (blog post, Facebook post, newsletter article) through those channels to support outreach. Identify a contact at each group to whom you can reach out. Don't forget your own network of organizations and associations.

Next, compile a list of recruitment strategies and add these to your Recruitment Plan (Appendix F.) These may include: presentations, networking, newsletter spots, or peer-to-peer recruitment.

Compile your recruitment materials and add these to your Recruitment Plan (Appendix F)

These are the collateral materials and tools you will use to get your message out, including a PowerPoint presentation, sample language for social media and newsletters, flyers, and handbooks for distribution.

This is a list of possible recruitment materials. There are examples of each of these materials in Appendix F.

1. Business Cards
2. Program flyer
3. How-to-play postcard
4. General program presentation
5. Captivate slide
6. Challenge gameboard (Scorecard)
7. Municipal Toolkit
8. Neighborhood Toolkit
9. Property Manager Toolkit
10. General newsletter pieces
11. Partner Outreach Toolkit
12. How to initiate a mini-challenge
13. Challenge E-newsletter



ADD TO YOUR PLAN

Develop similar materials to include in your Recruitment Plan



STEP FIVE:
CREATE CHALLENGE FRAMEWORK

CREATE A CHALLENGE FRAMEWORK

Set Up Your Website

Use the Website Manual provided by SGS in Appendix A to get started with your website in order to become familiar with the capabilities and functionality of the website.

Finalize Challenge Timeline

First, identify the appropriate Challenge duration. Most Challenges run between 6-12 months. When deciding how long you would like your Challenge to last, be sure to consider: staff capacity for keeping participants engaged, Challenge goals and how long it will realistically take participants to achieve those goals, and whether or not you are planning to restart the Challenge (if yes, be sure to leave time for closeout and kickoff of the next iteration).

Next, your team should define the appropriate Challenge milestones. These milestones should include:

- ✓ Start Date

It is helpful to begin the Challenge at either a natural time of transition (the beginning of the calendar year) or a time when sustainability is being featured (other city/sustainability events, Earth Day). Reach out to other departments and potential partners to identify opportunities to align your kickoff event with other sustainability events (or make sure it is not overshadowed by other events).

- ✓ Kickoff Event

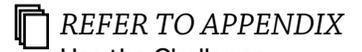
The kickoff event builds anticipation and excitement for your Challenge. Gather a large number of participants in a social setting where they can meet each other, engage with Challenge staff, and ask any questions they may have about the process. Organize an impressive speaker program, including high-level city officials, to motivate participants and help them understand why their participation matters to their community. This is also a great recruiting opportunity. Those who are on the fence about joining can attend your kickoff event and learn more about it.

- ✓ End Date

There are two important considerations when selecting an end date. First, be sure to allow enough time between the end date and recognition ceremony to provide ample time to calculate and quantify results. Second, if your municipality intends to do a recurring Challenge, be sure to allow sufficient time between the end date and the start date of the next Challenge. The final week of the Challenge often brings a higher level of activity submissions, so it would be helpful to avoid overlap with major holidays and prime vacation weeks.

- ✓ Awards/Recognition Ceremony Date

It is recommended to have the recognition ceremony date scheduled for at



REFER TO APPENDIX

Use the Challenge Timeline template found in Appendix B to outline your Challenge milestones and mid-Challenge schedule.

least one month after the close of the Challenge to thoroughly review, vet, and compile results. The event should be announced immediately following the close of the Challenge to maintain engagement. This is another opportunity to conduct press outreach to highlight the accomplishments of the Challenge and its participants, and including high-level officials, like the Mayor, in the event program can make the Challenge more attractive for press coverage.

In addition to outlining milestones for the Challenge, it is also helpful to have a consistent rhythm to the mid-Challenge time period. Some suggestions for building in a rhythm to the Challenge include:

- ✓ **Monthly or quarterly themes**
Themes could align with activity categories within the Challenge (e.g. energy, water, waste, transportation, etc.). Organizing the Challenge according to monthly or quarterly themes helps to break down a long-term Challenge into a manageable segments, during which participants can focus on completing activities aligned with the themes. This can also help your Challenge team to organize its communications and event planning.
- ✓ **Monthly or quarterly events**
Scheduling regular events throughout the Challenge that provide predictability for participants is extremely helpful when trying to build a new or emerging community of sustainability-minded individuals. Educational events with expert speakers could be organized to align with the monthly or quarterly activity theme and could help drive measurable environmental impact. Networking events can serve to bring participants together in a more informal and social way to exchange best practices and build camaraderie. These events would help bolster your sustainability community.
- ✓ **Monthly or quarterly communications**
Consistent, predictable communication encourages consistent participation and helps participants feel like they are well-informed and able to succeed. These communications should contain all information on mini-challenges, events, and themes, and they could also help drive competition by highlighting leading teams and best practices.
- ✓ **Monthly or quarterly mini-challenges**
Small-scale challenges to implement a specific sustainability practice with a quick turnaround can be a powerful motivator to keep participants engaged in the Challenge. This also provides regular opportunities for recognition throughout the Challenge.

Finalize Activity List

Your final activity list should be informed by your discussions around defining Challenge priorities including your areas of focus (step one), identifying your audience including their engagement level (step two), and defining measures of

 **REFER TO APPENDIX**
Use the Activity List, Webinar, and Workbook found in Appendix C to build your activity set.

success including qualitative and quantitative metrics (step three). Be sure to consider the following:

- ✓ Type of Challenge (Workplace, Neighborhood)
- ✓ Categories of activities (Energy, Water, Waste, Transportation, Purchasing, Education and Outreach, Innovation, Healthy, Involved)
- ✓ Level of engagement (Reporting existing actions, Driving new actions)
- ✓ Participant Reporting (Quantitative, Qualitative)
- ✓ Results (Metrics)

Finalize Communications Documents

Use the content and examples from Step 4: Marketing and Communications to have discussions with your team around concepts like the mission, vision, key messages, and communications targets of your Challenge. Use the outcomes of these conversations to fill in the gaps:

Once you are done with this document, distribute it to members of your team, and share it with key partners. It is important that messaging stay consistent.

 *REFER TO APPENDIX*
Use Communications Plan (Appendix E).

Finalize Recruitment Plan

Use the content, examples and templates referred to in the previous step to finalize aspects of your recruitment plan, including collateral materials.

Note that this plan is meant to provide a framework for starting your recruitment activities. New paths to networks, communities, and potential participant will arise as you begin recruiting. Having a robust toolbox of materials and messaging will allow you to adapt to these opportunities.

Once you finalize your messaging and recruitment, confirm that you are ready to start accepting registrants, or that you have a way of collecting information of those who are interested. Contact organizations, associations, and groups and start filling in your recruitment calendar with speaking events and newsletter placements.

 *REFER TO APPENDIX*
Use Recruitment Plan (Appendix F).

Finalize Sponsorship & Partnership Plan

Once you have laid out the majority of your Challenge framework it will be much easier to communicate the benefits of strategic partnerships and sponsorships. Use the outcomes from your discussions about Challenge priorities and audiences to identify potential sponsors and partners. Use the outcomes from your discussions on resourcing and measures of success to determine what you might be able to offer the sponsors for their support.

 *REFER TO APPENDIX*
Use the Sponsorship Packet in Appendix G to develop your strategy for securing partnerships and sponsorships.

More Resources

For additional resources and examples of other challenge frameworks, refer to Appendix M.

 *REFER TO APPENDIX*
Appendix M contains additional resources you can use to put your Challenge Framework together.



STEP SIX:
IMPLEMENT YOUR CHALLENGE

IMPLEMENT YOUR CHALLENGE

Recruitment

When: Beginning of the Challenge and/or before Launch of Challenge
Materials: Communications Plan, Recruitment Plan, Promotional Material, Social Media Accounts

Ongoing Communications and Engagement

When: Throughout the Challenge
Materials: Communications Plan, Educational Materials, Newsletter Template

Technical Assistance

When: Throughout the Challenge
Materials: Website Manual, Activity List, Toolkit, Challenge email address and phone line

Training or Networking Events

When: Monthly or Quarterly
Materials: Promotional Material, Event Registration Service, Event Space, and Speakers. Optional: Food and Beverage Sponsors

Recognition and Awards

When: Throughout the Challenge; End of Challenge
Materials: Communications Plan (Social Media), Appendix I (Sample Awards and Recognition Program Materials)

Closing Out Your Challenge

When: Plan early, end of challenge.
Materials: Communications plan, Activity processing information, Appendix L (Template Report Summarizing Results)

APPENDICES

- A. Website User Manual
- B. Challenge Calendar Template
- C. Activity Lists
- D. Sample Support Material
- E. Communications Plan Template and Examples
- F. Recruitment Plan Template, Examples, and Materials
- G. Sample Sponsorship and Partnership Packet
- H. Sample Drop in Articles on Activities and the Challenge
- I. Sample Awards and Recognition Program Materials
- J. Challenge Cost Estimating Materials
- K. Impact Metric Calculators
- L. Sample Report Summarizing Results and Lessons Learned
- M. References and Resources