

# The Green Business Challenge Guidebook

Launching a Program to Engage Businesses in  
Climate Action and Energy Efficiency



June 2012

**I.C.L.E.I.**  
Local  
Governments  
for Sustainability **USA**

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## Overview of This Guidebook

The Green Business Challenge Guidebook presents step-by-step guidance on how to develop and launch a Green Business Challenge program in your city or county. The Challenge is a friendly competition to engage commercial property managers, office tenants, and other business sectors to improve energy efficiency, conserve water, reduce waste, and involve their employees in a concerted effort to improve the environmental performance of their businesses. What makes the Challenge so innovative – and successful – is its emphasis on friendly competition and community-wide recognition for participants. Launching a Green Business Challenge program can be a primary means to engage your business community to reduce greenhouse gas emissions and promote sustainability – and help you reach your community’s climate and energy goals.

The Guidebook will assist you in customizing a program to meet your local goals. It distills the lessons learned from seven local governments that have launched Green Business Challenge programs. The Guidebook includes step-by-step guidance, as well as administrative tools, templates, best practices, and other resources to ensure your success.

### Why the Green Business Challenge?

For many local governments, the commercial sector presents a significant opportunity to achieve many of their environmental goals, and, likewise, many companies aspire to demonstrate their environmental leadership and to be recognized as “green” businesses. ICLEI developed the Green Business Challenge in response to a growing need by its local government members for tools that allow them to engage the business community in climate protection and sustainability, as a forum for education around these critical issues.

In 2009, Chicago Mayor Richard M. Daley launched the Chicago Green Office Challenge as a strategy of the Chicago Climate Action Plan to significantly improve the environmental performance of commercial buildings. The program was developed in partnership with ICLEI as a means to address greenhouse gas emissions from the commercial sector, which accounts for 39% of Chicago’s greenhouse gas emissions. In its first year, the program engaged more than 150 companies and yielded a reduction of 54,000 metric tons of carbon dioxide equivalents and savings of more than \$5 million for participants.

The Green Office Challenge garnered significant interest by local governments throughout the country as an innovative tool to inspire environmental awareness and friendly competition within the business community, and as a means to quantify the results of their climate actions. ICLEI has since assisted six additional communities in launching their own programs based on the Chicago model, and the following programs have since been created:

Jurisdiction	Name of Program	Program Launch Date
Arlington County, VA	Arlington Green Games	October 2010
Charleston, SC	Charleston Green Business Challenge	August 2010
Chicago, IL	Chicago Green Office Challenge	February 2009
Houston, TX	Houston Green Office Challenge	September 2010
Saint Louis region, MO	Saint Louis Green Business Challenge	February 2010
Port of San Diego, CA	Port of San Diego Green Business Challenge	January 2011
Westchester County, NY	Westchester Green Business Challenge	December 2009

The program evolved into the Green Business Challenge as a result of these local governments’ desire to be more inclusive of the broader business community. While each program is unique, the model remains essentially the same. ICLEI welcomes its members to replicate the Green Business Challenge, in part or in whole, and to use this Guide as a starting point to craft the program that works best for your community.

## Is Your Community Ready for the Green Business Challenge?

Before you decide to develop a Green Business Challenge for your community, it is important that your local government has the capacity and readiness to undertake such a program.

### Sustainability and Climate Protection Progress

The City of Chicago embarked on the Green Office Challenge in part because of the significant contribution of the commercial sector to its community-level greenhouse gas (GHG) inventory (39%). Your GHG inventory can provide information about the commercial sector's role in achieving your community's climate protection goals, and can serve as a basis for estimating the potential impact of a Challenge program.

- Have you completed a community GHG inventory?
- If so, what is the percentage of emissions from the commercial sector?
- Do you have a climate action plan establishing a goal for emissions reductions in the commercial sector, and if so, what is that goal?

### Support from Elected Officials

One of the few incentives that local governments can provide to their constituents at low or no cost is that of recognition from the City or County government. The following considerations will help you determine whether your local government is prepared to offer recognition to successful program participants:

- Is your highest ranking elected official committed to creating a Green Business Challenge in your community?
- If your government structure does not include a high profile elected leader, how will you provide recognition to the program and participants?

### Support from Stakeholders

The local business community must be engaged in the development of a Green Business Challenge from the start. Support from Chambers of Commerce, Building Owners and Manager's Associations (BOMA), local business improvement districts, economic development offices, and high-profile companies have all helped launch communities' programs. Consider the following when soliciting support from potential stakeholders:

- What stakeholders are best positioned to help spread the word and secure program participants?
- Have any prospective stakeholders indicated support for the program? Have you worked with them on past sustainability efforts?
- Is there an opportunity to engage the local electricity provider in this program? Do utility companies offer any existing incentives for commercial efficiency improvements?

### Availability of Resources

Based on the collective experience of all communities that have launched a program, the Green Business Challenge requires dedicated resources to ensure effective implementation and long-term sustainability. Consider the resources your community is prepared to invest; specifically whether your community can commit resources in any of the following areas and at what amount or level of commitment:

- Human resources (dedicated staff for program implementation)
- Financial resources, including potential corporate sponsors
- Other resources (in-kind, interns, marketing, etc.)

## Program Resources

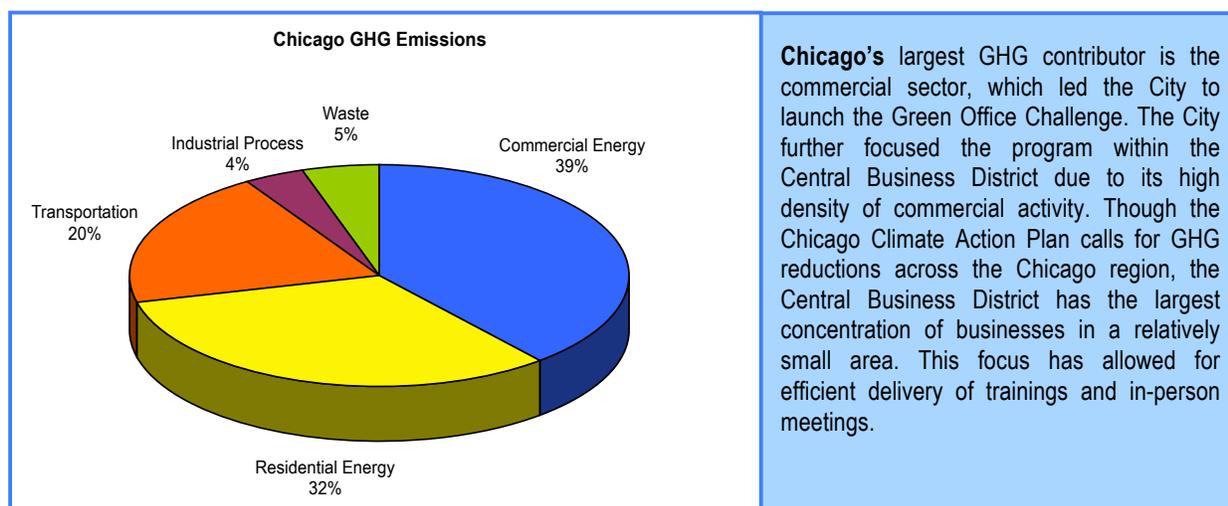
In ICLEI's experience, the Green Business Challenge requires the following resources. The program can be successful with fairly limited financial resources and can rely on a cadre of program partners. As shown, these costs vary greatly and will fluctuate based on the comprehensiveness of the program and program elements.

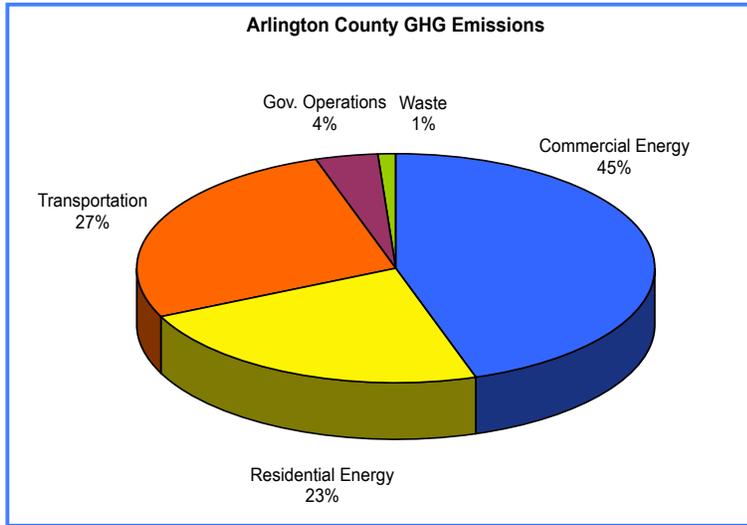
<b>Annual Budget Range</b>	\$50,000-\$150,000	
<b>FTE Requirements</b>	0.75 – 2 FTE, including interns	
<b>Funding Types</b>	Grants, Corporate sponsors, In-kind services, Participant donations or fees	
<b>Budget Items</b>	Staff time	\$40,000-\$100,000
	Events	\$5,000-\$25,000
	Collateral (awards, promotional items)	\$5,000-\$25,000
	Trainings	\$0-\$10,000
	Program Website	\$0-\$15,000

## Program Scope

The goal of the Green Business Challenge is to maximize the contribution by local business to your community's environmental goals, and to promote economic competitiveness within the commercial sector by improving environmental performance. ICLEI recommends you design your program in the way that is most likely to achieve the greatest impact towards your community's goals. Outlining your program's target audience, goals, and area will provide direction for program development and interested participants.

- Target Audience:** Chicago launched its program in response to the large concentration of office buildings and their large contribution to citywide GHG emissions. Other cities may choose to focus their programs more broadly in an effort to reach other businesses, such as retail and hospitality.
- Target Goals:** Align the overarching goals of your program with your Climate Action Plan or Sustainability Plan, and with external goals such as those set forth by LEED and ENERGY STAR.
- Target Area:** Participation may be limited the downtown area or a particular business district, or open to the entire city, county, or region. Consider staff capacity and desired program impact when establishing boundaries.





**Arlington County** also found that its commercial sector was the largest greenhouse gas contributor and hence their target audience. The goals of the program align with those of the Fresh AIRE-Arlington Initiative to Reduce Emissions, and the goals set forth by the Chicago Green Office Challenge. Part of the Fresh AIRE program is to recognize, assist, and encourage businesses to reduce emissions and energy needs. Their Arlington Green Games program helps facilitate that element of Fresh AIRE. Any commercial property and tenant office within Arlington County is eligible to participate.

## Program Tracks

Once you have determined what sectors you wish to target, you may also consider developing more than one program track in order to increase the relevance of the program to your target audiences. The Green Business Challenge includes two primary program tracks – one for businesses that lease their space (tenants), and one for property managers and building owners. Both audiences have different levels of influence when it comes to the environmental performance of their buildings and business operations.

### Tenant Track

Businesses that occupy space in buildings that they do not own may not have direct control over major building operations, but they do exercise plenty of influence over the type of paper they purchase, whether their computers are shut down at night, and the degree to which they provide opportunities for their employees to engage in environmental protection in the workplace. The Green Business Challenge tenant track promotes everything from green purchasing to behavioral changes across a variety of goal areas.

Tiers of Achievement	Points
Tier 1	76-100
Tier 2	51-75
Tier 3	26-50
Tier 4	15-25

- Goal Areas:** The tenant track includes several goal areas: Outreach, Energy, Waste, Transportation, and Property Manager Engagement. Some communities have modified these categories to include other goal areas, such as Materials and Purchasing, Water, Air, Community Stewardship, and Healthy Work Environment.
- Strategies:** Each category contains related behavioral strategies that allow participants to accrue points. Chicago’s program includes fifty strategies; each assigned a specific point value.
- Tiers of Achievement:** Participants are ranked in four tiers of achievement based on the number of points they score.

## Property Manager Track

In many cases, individual businesses do not have the ability or authority to improve the operating performance or undertake renovations to improve the energy efficiency of their buildings. For this reason, the Green Business Challenge includes a Property Manager track in order to reach commercial entities that not only have the ability to undertake high-impact building retrofits but also may have extensive property holdings throughout the community.

- **Goal Areas:** Building-wide goals include Energy Use Reduction, Waste Reduction, Water Use Reduction, and Tenant Engagement. Base and Stretch Goals were created to encourage property managers of all aptitude levels to participate in the program.
- **Strategies:** While the program does not explicitly prescribe which strategies should be employed within a given building, property managers are rated based upon actual achievements as demonstrated through energy, water, waste, and tenant participation data.
- **Tiers of Achievement:** Property managers achieve success based on the number of base and stretch goals they reach.

Goal Area	Base Goal	Stretch Goal	Award	Option 1	Option 2
Energy Use Reduction	10%	30%*	Tier 1	3-4 Stretch Goals	
Waste Diversion	30%	50%	Tier 2	2 Stretch Goals	4 Base Goals
Water Use Reduction	10%	20%	Tier 3	1 Stretch + 1 Base Goals	3 Base Goals
Tenant Engagement	25%	50%	Tier 4	1 Stretch Goal	2 Base Goals

\*Or ENERGY STAR score of 75 or higher

## Single Program Track

In some cases, there may not be a need to create separate tracks for participants.

A combined track may be appropriate for predominantly mixed use business districts, where large commercial property management companies do not play a significant role. The benefit of a property manager track is the ability to calculate program metrics. If tenants (businesses) have the ability to provide program metrics (energy, water, and waste data) a single program track provides that platform in addition to measuring behavioral actions.

**The Port of San Diego**, in addition to cargo and cruise ship terminals, is comprised of marinas, hotels, retail shops, restaurants, and industrial businesses. With such a wide variety of businesses in operation, the Port chose a combined track using the tenant survey tool in addition to collecting energy and water data in Portfolio Manager. While all strategies in the survey may not be applicable to every business type, the menu of strategies and tier-based scoring system allows all participants to achieve the highest tier of achievement, no matter the type of business.

**The City of Charleston** used a combined program with tenant focus to appeal to the variety of businesses, organizations and institutions within the Charleston community. The Charleston Green Business Challenge was designed to include and consider retail, office, restaurant, hospitality, schools, healthcare and institutions throughout their tri-county metropolitan area. To ensure their program was able to capture and report participant data; energy, waste, and water metrics are collected in their tenant scorecard.

## Engaging Stakeholders

It is best to engage a variety of stakeholders and partners to assist with the customization and implementation of your program. Engaging stakeholders is a critical first step in deploying the program.

- **Benefits to Stakeholders:** Stakeholders should be invested in the program's success and should be allowed to spearhead aspects of this initiative in your community. They may receive or create their own press about their assistance in the development of the program. Consider allowing your stakeholders to assist in or lead participant training sessions, networking socials, or other events. This will present an opportunity to showcase their organization, while providing a tangible benefit to the program. For example they may provide useful information to participants, provide space for such an event, and so on.
- **Benefits to Program:** Stakeholders can provide feedback on program design, recommend their colleagues, members, or clients for participation in the program, assist with program activities, and even participate in the program themselves; in fact, stakeholder groups that participate are often among the top performers in a Challenge. Some businesses may assist with resource development or serve as a testing ground for the program. Request the use of your stakeholders' communication channels to spread the word about the program, and utilize your network of stakeholders in mutually beneficial ways. For example, collaborate with stakeholders' event schedules to create bigger, better events or arrange tours of exemplary properties or businesses.



Program partners can gain exposure for their support of your program, and should be showcased in program resources.

## Types of Stakeholders

- **Internal Local Government Stakeholders:** In addition to the support of your highest elected official, in order to encourage the private community to participate, local governments must show that they too are adopting their own programs and adhering to the same targets. For the Challenge, your local government can lead by example by having several departments and divisions participate.
- **Local Businesses:** While your program is in development, components of the program design may be strengthened by feedback from strong potential participants or partners. Send tools, such as the scorecard and program goals, to interested businesses to receive their feedback. Stakeholder feedback helps tailor the program to your community's needs. Having businesses engaged prior to the launch of the program will also assist with recruitment efforts. From a participant's perspective, it is encouraging to see other businesses that have already made commitments to the program. Early adopters are traditionally more invested and familiar with the program, and they are more likely to spread the word about the program to fellow colleagues or associates.

- **Local Partners:** Local partners – such as nonprofit organizations, educators or service providers, may provide research, conduct audits, lead or host trainings, or otherwise assist in delivering program content or marketing. If your program is short on staffing resources, a partner may provide pro-bono services or assist in other aspects of the program. Partners can also assist the program through collaborative communication. The more partners your program has, the more communication channels will be available for recruitment and program messaging.
- **US Environmental Protection Agency:** As the Green Business Challenge program relies on ENERGY STAR’s Portfolio Manager as a data collection tool, the US EPA is available to assist in energy and water data tracking and trainings. EPA offers regular webinars at no cost on using Portfolio Manager, energy efficiency, and other topics of interest, and has also provided in-person training sessions through their regional offices. Contact your regional ENERGY STAR representative or your regional ICLEI office to arrange for in-person trainings, if desired.
- **The US Green Building Council (USGBC):** USGBC and its local chapters offer many trainings that may directly assist participants in achieving their environmental performance goals. Because many participants of your program may be interested in pursuing LEED certification for their building or commercial space, it is advantageous to align the Green Business Challenge closely with LEED. USGBC may be able to assist in incorporating LEED criteria into the participants’ program goals.
- **Local Utilities:** Local utility providers can be of great assistance as a stakeholder group in your program. Many utilities provide incentives to their customers to assist with energy or water efficiency projects and also have resources to share with the public at large. Utility companies are often able to provide trainings on available incentives or other cost saving measures to participants, and may be able to deliver aggregated data useful for tracking performance or calculating target goals.
- **Sponsors:** Sponsors help the program to grow in scope and impact through contributions to the program budget. While some organizations may participate in a sponsorship capacity only, any of the above groups may also wish to provide financial or significant in-kind support in addition to other contributions. Examples of major in-kind support include covering costs for awards, events, food, printing, or product giveaways. Recognize these contributions by featuring sponsor logos at major events, include logos in communication mediums such as a program website, and invite sponsors to speak at press conferences or major ceremonies with other high-profile speakers.

**The City of Chicago** has a talented group of Stakeholders including:

- US EPA Region 5: Provided trainings and resources
- Smart Energy Design Assistance Center: Provided energy training and free audits
- Building Owners and Managers Association (BOMA): Provided feedback and encouraged members to join
- Chicago Architectural Foundation: Provided no-cost meeting space for public recruitment events
- Chicago Chamber of Commerce: Assisted with outreach

**St. Louis’s** Regional Chamber and Growth Association (RCGA) funds and manages the St. Louis Green Business Challenge.

- An advisory committee comprised of RCGA members provided guidance on program design, and suggested Chamber members pay a fee to participate in the program and demonstrate their commitment.
- Earthway Center, a division of the Missouri Botanical Garden, was a key partner and provided two employees to act as advisers for the Challenge.
- The advisers were paid and conducted site visits and audits.

## Program Timeline

Solidifying the Challenge timeframe as much as possible prior to launch will help in many aspects of managing the program. The more information and certainty that potential participants are given about the program, the more likely they are to register. Also, a solid timeline will aid staff in planning the program budget and major activities of the program. The timeline below can be tailored to suit your needs.

Milestone	Description	Timeline
<b>Program Design &amp; Ramp Up</b>	The program design phase should begin by determining the program goals and scope. Start engaging stakeholders. Provide them and early adopters the opportunity to review and provide feedback on modified or new program resources. Make the program's presence in the community known through promotional efforts. The ramp-up should also include attracting sponsors, creating a program website, and crafting the training schedule and resources.	3 to 6 months
<b>Soft Launch</b>	Hosting an event prior to a full launch or kick-off event will help your program gain momentum while increasing its visibility to the public and potential participants. A soft launch (or pre-launch) event can be used to build momentum or serve as a venue for early adopters to receive recognition. A soft launch may include an official announcement of the program with an invitation for interested parties to pre-register, an announcement of the program's website or pre-registration page, or a public announcement to share a new or exciting program development.	Single event
<b>Registration Period</b>	ICLEI recommends opening program registration to participants several weeks or months before the full program launch. Determine how long participants will be able to register before the program officially launches; it is important to allow enough time for word to get out before closing registration so as not to exclude interested businesses. You may determine that the program should have a rolling registration period instead of closing it after a set date, allowing businesses to join the Challenge throughout the year. However, it is important that your capacity to serve participants is not outstripped by allowing too many businesses into the program.	1 to 3 months
<b>Official Launch</b>	This event should lay the groundwork for the fundamentals of your program. The event can be as formal or informal as you choose, but it is ideal to have your highest-ranking public official announce the launch and speak at the event. This is also a key opportunity to set expectations and provide a framework for participants.	Single event or series of events
<b>Challenge Period</b>	ICLEI recommends a yearlong program to ensure that participants have adequate time to make improvements to their buildings and business operations. Engaging participants over a year's time may be less burdensome than over a shorter, more intense period. In addition, it can be more meaningful to compare key program metrics such as energy and water use over a full 12 month period in order to account for seasonal variations in resource use.	12 months
<b>Award Ceremony</b>	Schedule the awards ceremony at a time that allows for adequate evaluation of participant achievements while maintaining participant interest in the program.	Single event
<b>Re-launch of Program</b>	Assuming you intend to repeat the program in future years, consider having the program begin and end at the same time each year to provide consistency for current and future participants. However, you may wish to schedule enough time to evaluate and improve the program – and recruit new participants – between cycles.	0-2 months

## Messaging & Marketing

Before you begin communicating with the public about your program, it is important to create a consistent program message. Whether that message is one of banding together and making a difference by reducing greenhouse gas emissions, one of achieving cost-savings and an edge on the market through improvements to business operations, a hybrid of the two, or a completely different message of your creation, your message should be crafted in a way that will best resonate with your local business community. Use the Messaging Checklist below as a starting point in crafting a message specific to your program.

### Messaging Checklist

- Purpose of the Challenge:** What are the goals of the Challenge?
- Program Benefits:** Why should businesses participate? What are the benefits of participating?
- Program Structure:** How does the program work?
- How to Participate:** What are the ways companies can become involved? How should they contact the program team?

After you have assembled a program design, stakeholders, and a message, use as many channels as possible to broadcast that message to your stakeholder and business community. Consider each of the communications strategies below for generating participant interest. Also, don't be afraid to try something new! Brainstorming and implementing innovative ideas such as unique event venues or outreach methods is part of the fun of designing (and participating in) this program.

### Marketing Checklist

- Preliminary Program Announcement:** Your preliminary message can be relatively brief but should include most of the items in the Messaging Checklist such as the goals of the program, target audience, benefits of participation, and a reference for additional information. The tone of this message should be exciting, fun, inspiring, and inviting. This message is best communicated through a press release, press conference, email blast, local government webpage, and social media.
- Press Releases:** Press releases should communicate important information and milestones such as the announcement or launch of the program, Challenge winners, and overall program results. Press releases should be designed to attract external media coverage for the program, and having local media as partners beforehand will make it even easier to broadcast well.
- Press Conferences:** To make a big splash, consider arranging a press conference. At such an event, your highest-ranking official and other keynote speakers can deliver the program message directly to major media outlets, attracting widespread attention. Consider how to get the most out of such an event such by adding other activities such as a networking reception or luncheon.



Local media can help broadcast your program message. Invite key media contacts to important program events.



Arlington County developed a series of promotional materials to match their Olympics-themed program

- ❑ **Partner Communications:** Leveraging your partners’ communications channels is an excellent way to build support for your program. Communications of this nature imply existing community support and will help to spread your message to your partners’ allies. Partners could provide program information to their email lists, website, events calendars, and social media pages.
- ❑ **Social Media:** If your community already has accounts with Facebook, Twitter, YouTube, or other social media sites, you can utilize those accounts to broadcast and archive messages about the Challenge. You can also create pages that are specific to the Challenge. Social media can be used to solicit registrations, recognize participant achievements, feature sponsors, or share news, ideas, and best practices with the general public.
- ❑ **Program Website:** A website dedicated to the Challenge is a handy resource. Much like the social media sites, the program website is excellent for storing and distributing information about the program. It is common for partners or participants to assume that program registration, for example, will be facilitated through a dedicated website.
- ❑ **Presentations:** Presentations are a useful marketing strategy for generating stakeholder interest or buy-in early on and communicating your message directly to an important group. Presentation opportunities could include property management company quarterly meetings, “Green Drinks” events, Chamber of Commerce meetings, and business expos. Prioritize your participation at such events based on how directly they connect you to your target audience.
- ❑ **Print media:** You may consider using mailers, flyers, or other printed materials to get the word out. If you choose to go this route, be sure to walk the walk: use recycled content paper or other sustainable processes, and don’t print more than you will use.

## Program Tools

Several tools have been used by Green Business Challenge programs to date. As each Challenge evolved to fit local circumstances, several tools were created, upgraded, or replaced while others remain in use. ICLEI recommends engaging your business stakeholders and early adopters in a review process before finalizing the tools you intend to use for the program. They should provide insight into the ability of participants to complete the suggested strategies and manage data throughout the program. (A complete list of tools and resources are available to members to supplement this Guidebook.)

The following tools will assist participants in successful completion of the Challenge.

### Tools Checklist

- ❑ **Program Website:** A dedicated website is an important tool for the Green Business Challenge. The best place to start is by building a landing page that provides basic program information. This basic information may include but is not limited to program goals, program tracks, program timeline, expected launch date, eligible participants, sponsors, partners, and a registration page.
- ❑ **Tenant Scorecard:** The scorecard is a tool for tenants to rate the sustainability actions taken in their offices. The scorecard was created as an Excel based spreadsheet presenting 50 strategies in five different categories with a highest possible score of 100 points. Each strategy is assigned a point allocation based on impact and difficulty level. The scorecard is designed to allow participants to select from a menu of strategies, and it is rarely possible for all strategies to apply to all businesses. Achievement is recognized in four tiers, with the highest being Tier 1 at 76-100 points. Tiers were created to demonstrate that a participant doesn't need to achieve every point in order to be successful. Tenants submit a baseline scorecard when they begin the Challenge, update the scorecard throughout the year, and submit a final version of the scorecard at the end of the Challenge. It is important to note that though tenants rate themselves, the scorecards are still reviewed and approved by program staff. Comments are required for each strategy as validation for the completed actions.
- ❑ **Portfolio Manager:** EPA's Portfolio Manager tool was selected as a primary data collection instrument for the program because of its simplicity and familiarity by users in tracking energy and water usage. Many property managers already use the tool to track usage and attain ENERGY STAR ratings. Users input energy and water data into the program to track usage. The program determines a baseline once 12 consecutive months of data have been input and reports energy usage changes and greenhouse gas emissions.

**NOTE:** A master account will need to be created to provide access to participating properties' accounts. It is important to note that the baseline year in Portfolio Manager may differ from the baseline year you select for your program. For example, if a property has been using Portfolio Manager since 1999, 1999 will be displayed as the base year. In each Challenge launched to date, a property's baseline year must be either one to two years prior to joining the Challenge. This is an important distinction because Portfolio Manager reports baseline energy change, which may not be accurate if their baseline isn't the same as the program baseline.

**Arlington County** utilized many channels to market their program and disseminate information.

- A series of postcards were sent to businesses in the area
- Facebook and Twitter accounts were created to brand and market the program
- Staff provided stakeholders information to share with their contacts
- You Tube Videos were created and uploaded to the Arlington County, VA channel
- To broaden the reach of the program some trainings and events are open to the community, but only certain businesses are eligible for the "competition" and awards.

- ❑ **Property Manager Waste Collection and Tenant Engagement Tool:** Although energy and water data are collected in Portfolio Manager, there is still a need to collect remaining data from participating properties. ICLEI created a simple Excel spreadsheet (referred to as the Property Manager Data Form) for collecting waste data, recycling data, and data on tenant engagement.

- ❑ **Green Business Challenge Web App:** To streamline the participant data collection and management process for the Green Business Challenge, ICLEI has developed an online Green Business Challenge Web App. This tool allows participants to register for the program and input and update data online, eliminating the Excel-based Scorecard and Property Manager Data Form. This highly customizable app allows city administrators to create and organize separate surveys aimed at different types of businesses and to manage participant contact information and results in a secure online database. The app also allows staff to easily report on program progress and outcomes, and monitor key metrics such as number and type of participants and their program achievement. Visit the ICLEI website for more information about this tool.

	Green Business Scorecard	EPA Portfolio Manager	Green Business Challenge Web App
Tracks participant energy usage		■	■
Tracks participant waste diversion rate			■
Tracks participant water usage		■	■
Tracks participant behavioral actions	■		■
Aggregates participant data		■	■

## Participant Milestones

Once the program officially begins, there are five primary participant milestones. As a member of ICLEI, your local government may be following a similar framework to guide its climate protection or sustainability efforts; this framework may also be applied within the commercial context.

- 1) Conduct Baseline Assessment:** Now that the program is underway, the first milestone of the program is to collect participants’ baseline data. Submission of baseline data signals a participant’s intent to participate, and it also allows for an initial projection of the program’s expected outcomes. You will need to determine the length of time you want to allow participants to collect and report this data.

**The City of Charleston** awarded participants a bonus point if their baseline scorecards were submitted within the first month of the program.

- **Tenants** will complete the baseline scorecard based on current practices – not on actions that they plan to undertake during the program period.
  - **Property managers** already using Portfolio Manager will have a jump start on this milestone. One can simply grant read-only access to your Portfolio Manager master account, in addition to submitting a years worth of waste/recycling bills. Program staff may collect tenant engagement information directly from registration records or request it from property managers. If a property does not currently use Portfolio Manager, they will need to create an account and upload twelve previous months of data, along with the separate waste and recycling requirement to complete the baseline.
- 2) Establish Goals:** Once baselines have been submitted, the next milestone is for participants to set goals for achievement overall and in each category. The goals provide guidance and motivation for participant action, and they can be used to refine expected program results.

- **Tenants** will decide which Tier they hope to achieve by the end of the Challenge.
  - **Property Managers** will determine if they expect to achieve the base or stretch goals in each of the four categories.
- 3) **Develop Plan:** Participants should identify the strategies and goal areas on which they intend to focus their efforts. This may include specific scorecard actions or projects designed to achieve reduction goals. Training sessions and events will be the primary resources aiding participants in choosing specific strategies, but one on one communication and site visits will also help shape their plans.
  - 4) **Implement Plan:** Once participants have established their goals and created plans to achieve them, the next step is the implementation of their plans. Participants are encouraged to share their plans with their green teams, and also with their respective companies. By engaging others in the company, implementation plans are more likely to come to fruition. During this time, participants may create a timeline populated with achievable action items, identify resources needed to achieve strategies, create and adapt policies, and attend program trainings for additional resources.
  - 5) **Evaluate & Report Results:** After successfully collecting participants' baseline data and engaging them throughout the Challenge period with trainings and communications, it is now time to collect their final data. Encourage tenants and property managers to update their respective tools monthly or quarterly to ease the time commitment for final data submission. Once all of the data is gathered, program staff should analyze and report on program results.

## Participant Communications

**The City of Chicago** found that one-on-one site visits were one of the most effective communication tools (conducted after midpoint of program). Staff was able to review participant goals, provide recommendations for achieving strategies, and verify participants' practices. Those participants who received site visits maintained or increased their level of engagement for the majority of the program.

Communication and trainings are important in maintaining participant engagement throughout the program. A communication calendar may assist in the development and delivery of the program's communication strategy. Monthly newsletters, phone calls, social media, website updates, and site visits can all be included in a communications calendar. Below is a sample communications calendar; of course, this should be customized to reflect local events of interest. Invitations to upcoming events and training sessions should be included in all communications.

Month	Communication Type	Topic
January	Email	Welcome / description of participant milestones
February	Phone call	Inquire whether assistance with establishing baseline is needed
March	Email	Invitation to participate in Earth Hour
April	Email	Invitation to participate in Earth Day and call for innovative Earth Day practices
May	Phone call	Request for company goals and inquire whether assistance in plan development is needed
June	Email	Invitation to participate in Bike to Work Week

<b>July</b>	Email	Promotion of local farmer's markets and how to incorporate local and/or organic food at the workplace
<b>August</b>	Email	Invitation to request site visits
<b>September</b>	Phone call	Schedule site visits
<b>October</b>	Email	Promote Energy Awareness Month / inquire whether company is on track to meet goals
<b>November</b>	Email	Promote National Recycling Week / reminder to submit final data
<b>December</b>	Email	Promote Green Holiday tips / reminder to submit final data
<b>January</b>	Email + phone call	Invitation to awards event

## Participant Trainings

Training sessions are designed to educate and assist participants in their quest to reach their program and sustainability goals, and to engage participants together in a way that inspires peer-to-peer learning and friendly competition. Participant training sessions should align directly with program criteria and strategies. Review the training schedule after baselines are submitted in order to identify areas that may need the most amount of training. Consider the following issues when developing a training series for your program.

- 1) Schedule:** To continually engage participants throughout the year, it is recommended to offer at least one training session a month, either early morning, at lunchtime, or after work. Typically, lunch sessions provide the opportunity for the highest attendance. You may increase attendance if a sponsor is able to donate breakfast or lunch; however, brownbag events are also workable. It may be difficult to draw people to an after hours event unless you offer food and drink.
- 2) Location:** Rather than spending money to rent a conference space for training sessions, consider asking program participants to host an event. Whether they wish to show off their newly designated LEED building, or to bring attention to a unique green feature of their office space, participants are often eager to host events.
- 3) Delivery method:** Depending on the program boundaries, you may select to have in-person trainings in various locations throughout the area as well as webinars for those who are unable to travel or leave the workplace during the day.
- 4) Target audience:** Participants are more likely to attend and engage in training sessions if the topics are crafted in a way that directly targets their interest. If your program has multiple audiences (e.g., property managers and tenants), offer unique training opportunities for both audiences. Consider offering separate sessions for “novice” and “advanced” audiences as well.
- 5) Presenters and training partners:** Rather than reinvent the wheel, it is highly recommended that you utilize pre-existing training opportunities and leverage the expertise of program partners and local resources.

**Arlington County** created a robust training schedule, with three events each month:

“**Mingling Mondays**” are held early in the morning and provide an opportunity for participants to meet and learn about each others sustainability initiatives.

“**Timeout Tuesdays**” is a monthly brown bag series that invites both property managers and tenants to learn in-depth about a particular topic.

“**Webinar Wednesdays**” are either led by program staff or participants are directed to a partner’s webinar.

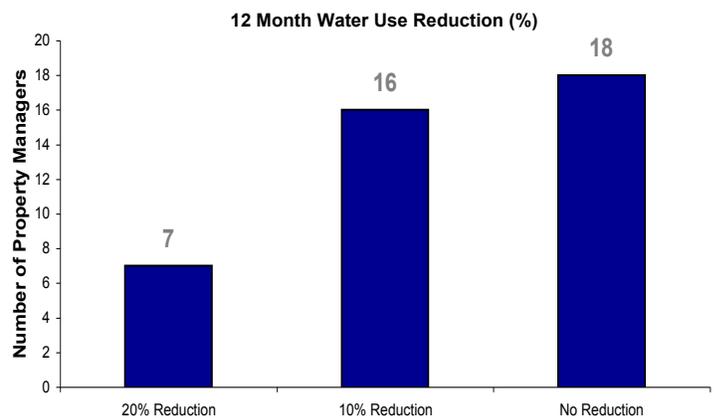
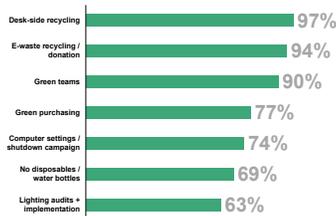
- **Program partners:** If your partners already provide training through other programs they are involved in, consider directing participants to the training sessions that best align with your program's efforts. Whether you engage with your local chapter of the Building Owners and Managers Association to connect participants to their Building Energy Efficiency Program training series, or invite your local utility to craft a presentation specifically geared to your audience, program partners may significantly lighten the load in designing and delivering content.
- **Sponsors:** Program participants are an ideal audience for sponsors interested in demonstrating how their products or services can assist participants in reaching their goals. Sponsor presentations should not be a blatant sales pitch, but instead should provide education about a particular program strategy, and, secondarily, how their product or service may assist. If participants are interested, they can contact the sponsor for more information afterwards about their products.
- **Participant roundtables:** Invite program participants to showcase their efforts and share best practices with their peers at roundtable events. Roundtables allow participants to interact with fellow participants, and since they are responsible for creating content, these events are easy to put together.

## Collecting and Evaluating Data

Over the course of the program, ICLEI recommends that you regularly review data submitted by your participants, not only to ensure that participants have submitted the required information but also to gain an understanding of the overall achievements of participants. At any given point during the program, you may wish to report the progress of participants towards the larger program goals. Consider delivering a progress report to elected officials, program stakeholders and participants that includes the following information:

- Number of participants registered
- Types of businesses represented
- Aggregate baseline energy and water usage
- Overall baseline recycling rate
- Summary of participant goals

Once you have collected final data from participants, there is a range of ways to report the impacts of the program. Such reports can illustrate trends, define major outcomes, and demonstrate shortfalls in participant achievements.



The data you collect can be displayed to convey program results, participant trends, and can demonstrate where there is room for improvement.

## Participant Recognition

Once you have collected a full set of data from all participants, it is time to tabulate the results and prepare for the awards event. This is one of the most important milestones in the program, as it is the primary way participants receive recognition for their achievements. Depending on the scale of the event, the awards event may require a significant financial investment that can easily be offset by bringing a sponsor or partner on board to assist in the delivery. Make this a fun way to recognize real results!

- 1) **Data Collection:** To determine tenant awards, calculate the number of participants that placed in each tier. For property managers, determine participants' achievement of the base and stretch goals and in which award category that places them.
- 2) **Awards:** In order to estimate the number of awards needed, use participants' goals and site visit updates as a guide.
  - **Types of Awards:** Though participants receive recognition from the highest elected official in addition to local media, consider providing awards of some kind, particularly to top achievers. An award could be a physical award or something intangible, or both. Trophies, certificates, and window clings are all additional physical elements that may be considered. Awards may be provided by a sponsor or partner, or selected through an RFP process. If your local government provides tax incentives or expedited permitting for green buildings, consider offering these incentives as awards.
  - **Special Recognition:** Consider recognizing "Most Improved," "Biggest [Energy, Waste & Water] Reduction," "Most Innovative," or other achievements.

**The City of Chicago** issued an RFP to local artists requesting awards be created from recycled or reclaimed materials three months prior to final data collection.

**Awards** were created for Tier 1 tenants, and the top two property manager achievement levels. These award recipients received their awards onstage from Chicago Mayor Richard M. Daley, while the other participants received framed certificates after the ceremony.

**Venue:** The event was held at a banquet hall in a top achieving property manager's building. Two guests from each participating company were invited to attend.

**Speakers:** The Commissioner of the Chicago Department of Environment was the program's emcee, and Mayor Daley announced the program results. The underwriting sponsor also spoke at the event.

- 3) **Venue:** If the top award recipients are known beforehand, gauge their interest in hosting the event as a way to showcase their success in the program. Look for a space that will accommodate an appropriate sized audience, and the proceedings you plan for the event.
- 4) **Speakers:** If partners and sponsors supported your program, invite them to speak at the awards event. Local government officials and successful participants are also potential speakers.
- 5) **Award Presentation:** As a recognition program, the awards event is one of the biggest reasons your participants have worked to achieve their goals. Ensure that they feel acknowledged and recognized for their contributions to the program to encourage them to continue their actions and participation in future rounds of the program.



Chicago's awards were constructed from reclaimed building insulation



Proud employees display their awards at Chicago's recognition event

## Program Evaluation and Modification

Prior to the launch of the next round, set aside time to review the program's strengths and weaknesses. This review period will provide an opportunity to improve the next phase of the program. Include time to reflect on how to continually engage those that reached the highest level of achievement in the first year of the program.

### Marketing and Outreach Strategies

- **Enlist additional participants:** Did you have as many participants as initially expected? If not, why? How can you encourage more businesses to register? Did participants reach the program goals?
- **Communication Techniques:** Did you communicate too often, or not enough with participants? Which method did you find they preferred or responded to most: email, phone, posters, mailers, site visits, social media, etc? Was the media sufficiently engaged? How could you engage them further?
- **Trainings:** How well were trainings attended? Did the day, time of day, or time of year affect the attendance? Did webinars, after work events, lunch events, or others sessions have more success? Did participants provide any meaningful feedback about the training events?

### Programmatic Capacity

Review the current budget to determine if there was a shortfall or overage in expected expenditures, and if elements will be removed or added to the next program phase.

- **Staff:** If more participants join in the next phase, do you have enough staff time to expand the program?
- **Programmatic Resources:** If data collection and analysis was a barrier, have you considered using ICLEI's Green Business Challenge Web App?

### Program Expansion

In order to reach your community's rigorous long-term goals, determine how you will expand the program to achieve greater results.

- **Increase Number of Participants:** Do you want to increase the program's impact simply by increasing the number of participants?
- **Expand Participant Scope:** Can you achieve greater results by taking existing relationships with engaged participants to the next level? Can you encourage them to make deeper reductions and go beyond the no cost measures and low-hanging fruit? Is it possible to add additional goals and strategies, or a new track?

### Green Business Scorecard

- Were strategies too difficult to achieve? Were they too easy?
- Was there a financial barrier to overcome?
- Were any strategies bypassed altogether, and should they be replaced or removed?
- Should there always be "low hanging fruit" strategies to encourage companies just beginning to practice sustainable behavior, or should the program become increasingly focused on high-impact strategies?
- Should any additional actions be included?

### Property Manager Base and Stretch Goals

- Were the goals too difficult or too easy?
- Which category had the most success, and should any of the goals be revised?
- Which category was the most difficult to achieve, and should the goals be revised?

### Overall Impact

- Did a majority of participants place in the same tier of achievement? Should the levels of achievement be revised?
- Should participants be required to meet any minimum requirements in order to receive an award?

## Troubleshooting Guide

Challenge	Solutions
<p><b>1) Participant Attrition:</b> Your program started off with a bang, but participants have lost interest along the way.</p>	<ul style="list-style-type: none"> <li>■ Clearly defined participant expectations displayed on the website, registration page, and on a welcome email may help alleviate attrition.</li> <li>■ Offer introductory trainings on the use of program tools to prevent participants from quitting due to lack of proficiency.</li> <li>■ Try to request two contacts to reduce the instance of losing a participant because of turnover within a company. With high employee attrition rates due to the economic downturn, maintaining only one point of contact at a company is challenging.</li> <li>■ Another method to reduce loss of participants is to require a commitment from each company. A commitment may come in the form of a pledge, letter signed by a CEO or Executive, or monetary requirement to participate.</li> <li>■ Site visits can reduce attrition and provide an opportunity for participants to discuss their plans to continue with, or leave the program.</li> <li>■ Finally, to understand attrition in your program, consider an “Exit Survey.”</li> </ul>
<p><b>2) Data Collection:</b> This is one of the most time-consuming parts of the process. How can it be streamlined?</p>	<ul style="list-style-type: none"> <li>■ Request that stakeholders and early adopters review the program data requirements to provide insights into potential data collection barriers prior to the launch of the program.</li> <li>■ The simpler the data entry process, the easier it is to gather the necessary data. Determine who inputs the data and request that person be listed as a contact for the company. Determine the baseline submission period before or shortly after program launch. Make sure participants are aware of the deadline, and trainings are offered to provide baseline assistance.</li> <li>■ Data collection can also be simplified by setting proper expectations initially. These expectations should include that data submission is a requirement for program participation. Trainings offered at the beginning of the program should provide an overview of what data is expected and how to submit it.</li> <li>■ Offer bonus points for submitting data within a specified period of time.</li> <li>■ Hold competition or drawing to encourage early submission of data.</li> <li>■ Inform participants of any utility-sponsored programs that input usage information directly into an account (i.e. Automated Benchmarking in Portfolio Manager).</li> <li>■ The ICLEI Green Business Challenge Web App was created to simplify and expedite and streamline the data collection process. The tool also allows local government staff to easily report on program progress and outcomes, and monitor key metrics such as number and type of participants.</li> </ul>
<p><b>3) Partners and Sponsor Engagement:</b> To ensure the continued success of the program, it must attract and retain program partners and sponsors.</p>	<ul style="list-style-type: none"> <li>■ Garner broad community support for the program to attract attention.</li> <li>■ Determine associations or important meetings where it would be ideal for program staff to give a brief presentation about the program. Facility managers associations, USGBC meetings, BOMA (Building Owners and Managers Association), Green Drinks (if provided in your area), property management companies’ quarterly meetings, and so on. This will also help with participation recruitment.</li> <li>■ Start by considering companies that assisted with local initiatives and programs in the past.</li> <li>■ Reach out to companies whose products or services align best with the goals of the program. The program offers an engaged audience interested in reducing their waste, water, and energy use among other initiatives. As a new program that can have exciting results, early partners and sponsors have the opportunity to take part in a program that can help grow the market for green services or products.</li> </ul>

<p><b>4) Participant Recruitment:</b> You want your program to be a success, but are uneasy about the low level of participants registered for the program.</p>	<ul style="list-style-type: none"> <li>■ Early and strong recruitment will help overcome low participation numbers.</li> <li>■ Begin by having your stakeholders, early adopters, and partners tout the benefits of the program and reasons why they decided to participate in the program.</li> <li>■ Use social media and media partners to provide additional channels to move the message.</li> <li>■ Show the scorecard strategies or the scorecard itself on your website so interested participants can determine their required time commitment.</li> </ul>
<p><b>5) Greenwashing:</b> As sustainability issues continue to receive public attention, greenwashing has become a major concern as it misleads customers and the public in an effort to promote a business. It is plausible that your staff will be asked how greenwashing is avoided, or if the program is causing it.</p>	<ul style="list-style-type: none"> <li>■ Though the tenant scorecard is a self-evaluation tool, you should require comments, verification documents, or deduct points if a criterion isn't met.</li> <li>■ Set program pre-requisites or requirements.</li> <li>■ Limit the amount of participants and require more from them. This may dissuade companies from joining if they're not fully committed to sustainability initiatives.</li> <li>■ Make the highest level of achievement difficult to attain, even for the most advanced businesses, and consider allowing the lowest level of achievement to include low-hanging fruit to encourage participants that are just getting started.</li> </ul>
<p><b>6) Program Message:</b> The implications of greenhouse gas emissions and their impact on the environment are not fully understood by everyone. The wrong message could discourage participation.</p>	<ul style="list-style-type: none"> <li>■ The solution to this problem is simple: know your audience. If climate change does not resonate within your business community, consider alternate messages to reducing greenhouse gas emissions and the local carbon footprint. Instead, message the program to focus on the cost savings participants may realize. The goal of the program is to make and measure progress toward healthier and more environmentally friendly work places; determine which message will drive your program results.</li> </ul>
<p><b>7) Freedom of Information Act:</b> Data submitted by participants may be subject to a Freedom of Information Act request.</p>	<ul style="list-style-type: none"> <li>■ Check with your state's Freedom of Information Act or other public record guidelines. Research if a third party or third party program (i.e. Portfolio Manager) is susceptible to this Act.</li> <li>■ Ask stakeholders if this is a concern.</li> <li>■ Many utility companies provide usage data to an interested party when a space is for sale, so ask participants their specific concern. Can their concern be designed into the program?</li> <li>■ If a company's concerns persist, this program may not be the best match to their sustainability goals.</li> </ul>
<p><b>8) Boosts in Business:</b> A participant has a successful business year and used more energy because of the increase in business.</p>	<ul style="list-style-type: none"> <li>■ Adjust the data to account for changes in business characteristics, such as occupied square footage, tables served, rooms booked, and so forth.</li> <li>■ Ensure participants at the outset that this is accounted for and will not prevent them from successfully participating in the program.</li> </ul>

## Acknowledgements

ICLEI would like to acknowledge the following organizations and individuals for their support of the Green Business Challenge:

- **The Energy Foundation:** Sue Anderbois and John Wilson
- **Arlington County:** County Board Chairman Jay Fisette, Sarah O’Connell, and Kelly Zonderwyk
- **City of Bellevue:** Mayor Donald Davidson, DDS, and Paul Andersson
- **City of Charleston:** Mayor Joseph P. Riley, Brian Sheehan, and Carolee Williams
- **City of Chicago:** Mayor Richard M. Daley, Commissioner Suzanne Malec-McKenna, and Joyce Coffee
- **City of Houston:** Mayor Annise D. Parker, Susan Bono, and Laura Spanjian
- **Port of San Diego:** Board of Port Commissioners, Cody Hooven, and Michelle White
- **St. Louis County:** Regional Commerce and Growth Association; Eric Schneider
- **Westchester County:** Business Council of Westchester and Westchester County; Scott Ferqvist