2013

Summary of the National Summit on Green Business Engagement Programs

Hosted by:

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National Summit on Green Business Engagement Programs
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Summit Summary

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1. Executive Summary

The first National Summit on Green Business Engagement Programs drew over forty leaders from across the United States to Boston on May 9 and 10, 2013. The Summit provided a forum for leaders to share achievements, discuss challenges, and exchange best practices for engaging the business community, partnering with local governments, collaborating with utility districts, and delivering program services. The summit was highly successful in identifying the critical factors for green business programs to support economically vibrant and sustainable cities where current and future generations will want to live, work, and play. The summit was organized by A Better City and facilitated by the Consensus Building Institute.

Participants were welcomed by Rick Dimino (President and CEO, A Better City), Brian Swett (Chief of Environment and Energy for the City of Boston) and Mariella Puerto (Senior Program Officer, Barr Foundation). These leaders stressed the importance of efforts to encourage businesses to reduce their environmental impact voluntarily through education and a little healthy competition. Throughout the event, participants told stories about their programs and shared lessons learned.

Program Funding

Based on a survey participants completed in advance of the summit, such programs have a variety of funding structures including utility funding, membership fees, public financial support, and foundation or sponsorship support. In seeking to get funding support from the private sector at a national level, participants heard a recommendation that they coordinate across programs for more consistency and a national approach. Participants then reviewed different funding mechanisms and explored ways to address funding barriers that limit the scope of what engagement programs are able to accomplish.

Performance Metrics

Participants stressed the importance of tracking performance metrics and the challenge of both gathering and managing that information successfully. They discussed the different approaches they use for tracking metrics and the benefits of benchmarking. People discussed the opportunity to aggregate data across programs in order to understand progress toward regional and national goals for reducing resource use and understanding regional differences.

Program Evaluation

Participants said they evaluate programs to identify business needs, to identify return on investments, to identify program impact, to use data as a marketing tool to increase participation, to promote compliance and to learn if the program is attaining its goals. Participants discussed the pros and cons of absolute and relative metrics, as well as the idea of some standard metrics across programs.

Utility Engagement

Participants explored and discussed their experiences working with utilities, the benefits programs provide to utilities, and the benefits and challenges of collaboration. As with discussions on many other topics, this was one in which the great variety in types and process of evolution of programs has led to a wide range of experiences, successes and challenges. One theme of discussion was that business engagement programs have the capacity to reach out to small and medium sized businesses to draw them into efforts to reduce resource use, whereas utilities sometimes focus on the largest businesses and don't have the capacity to look at a smaller or more local scale. Positive collaborations included utilities providing rebates, partnering on technical assistance, funding the business engagement

program, sharing data, and managing outreach to large energy consumers. Challenges to collaboration include cultural inertia in large utilities that are hierarchical and slow to implement change, incentive structures that work against collaboration, a tension for who gets to claim credit for action, and the different scales of reduction sought.

Programming

Participants discussed the programming and resources they provide to their member businesses including a range of different opportunities to engage with other people (at educational events, peer-to-peer learning opportunities, recognition opportunities and other networking options) and to access great information (including data support services, dissemination of best practices and lessons learned, marketing opportunities, and other newsletter and information services).

Behavior Change & Recognition

Programs with a focus on encouraging individual behavior change presented their approaches to working on that type of activity. Many talked about the essential component of an internal champion within a business who pushes for behavior change, leading to program success. They also discussed awards, recognition and marketing and some of the ways they acknowledge success (and which are most appreciated by businesses and easiest to accomplish).

Next Steps

Finally, participants spent some time thinking about how they would like to work together. ICLEI has received funding from Office Depot to help set up some sort of resource or home for green business engagement programs, and ICLEI staff invited input and suggestions on how to proceed. In parallel to that offer, as there was a real feeling of camaraderie at the event, and any of these topics could have been a full day discussion itself—people wanted to keep working together. People generated ideas of next steps, then indicated which next steps they thought were most essential and which they were interested in leading or participating in. See Appendix C for next steps information. Over the summer, a team of people will start tackling the first of these items, which is to think together about how to collaborate in coming months and years.

2. Background on the National Summit on Green Business Engagement Programs

The first National Summit on Green Business Engagement Programs drew over forty leaders of green business engagement programs from across the United States to Boston on May 9 and 10, 2013. The Summit created a forum for leaders to share achievements, discuss challenges, and exchange best practices for engaging the business community, collaborating with utility districts, and delivering program services. The summit was highly successful in identifying the critical factors for Green business programs to support economically vibrant and sustainable cities where current and future generations will want to live, work, and play. The summit was organized by A Better City with and facilitated by the Consensus Building Institute.

The Summit Planning Team's vision for the Summit was to provide participants with the opportunity to network and learn from each other through both large and small group discussions.[1] See Appendix A for the list of participants and Appendix B for the Summit Agenda.

[1] The Summit Planning Team included Megan Ramey, David Straus, Michael Steinhoff, Ona Ferguson and Eric J. Roberts.

Prior to the Summit, A Better City surveyed approximately 40 green business engagement programs. The survey results are contained in the 2013 Directory of Green Business Engagement Programs. The directory also includes survey participants' contact information, information about funding approaches and utility partnerships, and services provided by individual programs. This directory can be found at: 2013 Directory of Green Business Engagement Programs (linked).

The summit summary is intended to capture the main themes from the summit and is organized by the general topics discussed.[2] All presentation materials shown during the summit can be found at http://www.abettercity.org/environment/event_National_Summit_Green_Business_Engagement_Programs.html

3. Summit Overview and Introductions

Rick Dimino, President and CEO of A Better City, welcomed the Summit participants and recognized them as the vanguard of a national movement unfolding primarily at the local level. Mr. Dimino emphasized the importance of collaboration between local government officials and green business engagement programs in the absence of federal mandates and highlighted the leadership role that local civic leadership can play in addressing climate change, energy efficiency, and sustainability. He described how Boston Mayor Thomas Menino's inclusion of A Better City on the Climate Change Task Force led to a collaborative effort to develop strategies to achieve greenhouse gas reduction and energy efficiency targets. Mr. Dimino also stated that Mayor Menino's leadership and the partnerships he forged between the city, the private sector, non-profit organizations, neighborhood associations were a catalyst that enabled A Better City to help businesses and building owners to save money while reducing overall greenhouse gas emissions by increasing energy efficiency, reducing resource consumption, and decreasing solid waste.

Brian Swett, Chief of Environment and Energy at the City of Boston, proposed three critical elements of successful environmental engagement: civic leadership, private sector leadership, and philanthropic leadership. Mr. Swett emphasized the need for civic, private, and philanthropic leaders to share both lessons learned and best practices as they establish sustainability programs since environmental policy will continue to advance at the local level given the absence of clear federal mandates.

Mr. Swett described the key role the private sector played in the development and implementation of Boston's climate action plans. In 2009, the City of Boston convened a Climate Action Leadership Task Force to develop a climate action plan. The private sector was a key player in the Committee because the City would not be able to achieve the city's previously established greenhouse gas emissions reductions targets without private sector support and participation. Formed in 2010, the Green Ribbon Commission is a collaborative effort between private, public, and civic sectors to support the outcomes of the City's Climate Action Plan. The Commission advises the city on implementation, engages sector leadership, and promotes best practices within and across sectors to advance the Climate Action Plan goals. A Better City staffs the Commercial Real Estate Working Group of the Green Ribbon Commission.

[2] Ona Ferguson, Senior Associate, and Eric J. Roberts, Associate, of the Consensus Building Institute facilitated the event and composed this summary.

Mariella Puerto, Senior Program Officer at the Barr Foundation, explained why the foundation supports activities and projects focused on climate change and sustainability. Reviewing the scientific findings of climate change research, Ms. Puerto pointed out that determining the specific degree increase likely to occur in average global temperatures may no longer be that important since the impacts of climate change are already evident, especially for the poorest and most vulnerable people in the world. Given this observation, the Barr Foundation identified climate change as an existential threat to society and determined that addressing climate change should permeate all that the Barr Foundation does and supports. In particular, the Barr Foundation strives to create networks of dedicated leaders who have both the innovative capacity and fortitude to address climate change now and into the future. To conclude, Ms. Puerto encouraged Summit participants to maintain hope and continue to have fun as they form learning and action networks that foster healthy forms of competition to help the private sector reduce their carbon emissions and environmental footprints.

Participants began the summit by describing their motivation for working on green business engagement programs. The themes included:

- The positive impact the work has on peoples' lives and the environment
- The possibility of creating large scale impact through the private sector
- Passion and interest in sustainability
- Opportunity to work on environmental, economic, and social issues

4. Organizational Stories: Successes and Lessons Learned

To build a common understanding of the various types of programs in operation across the country, the challenges they face, and their achievements, three participants provided an overview of their programs. For more information on all the green business engagement programs, see the 2013 Directory of Green Business Engagement Programs.

<u>Sustain Dane</u>

Jessie Lerner, Program Manager at Sustain Dane, manages a one-year voluntary program called Empower Champions and the Sustainable Business Network in Madison, Wisconsin. Established as a pilot project in 2009, the Empower Champions program grew out of a partnership between the City of Madison, the local utility MGE Energy, the University of Wisconsin, and several other non-profits to launch and engage the private sector in a carbon reduction campaign. Over 70 businesses ranging in size from four employees to 4,000 employees have enrolled. As part of the Empower Champions program, Sustain Dane organizes monthly educational meetings and helps businesses to establish Green Teams, champions of sustainability who can work across department lines to develop and implement sustainability projects. All Green Teams have a designated team lead, an executive decision maker, and if the company is large enough, representatives from the following departments: accounting, information technology, facilities management, and human resources. At a minimum, Sustain Dane provides the teams with two, one-hour meetings to support the development of the business case for sustainability projects, collect baseline data, and implement long-term data collection and analysis. Most teams also receive approximately 10 hours of follow up assistance via telephone. Monthly educational meetings provide expert-to-peer and peer-to-peer learning opportunities.

To extend the impact of the Empower Champions program and reach more businesses, Sustain Dane organized the Sustainable Business Network to convene quarterly educational and networking meetings

for interested companies, many of which participated in the Empower Champions program. After only six meetings, the Sustainable Business Network has grown to over 100 business leaders and approximately 60 paying members. Looking to the future, Sustain Dane expects to implement a fee-for-service approach. Sustain Dane, the City of Madison, and MGE Energy are brainstorming how to offer quality programs at rates business are willing and able to pay, which could include offering sustainability trainings, coaching, and tools to augment strategic thinking within the Green Teams.

Seattle 2030 District

Brian Geller, Founder and Executive Director of Seattle 2030 District (the District), described some of the successes, challenges and lessons learned while managing the District. Seattle 2030 District is a non-profit organization partnering with King County, the City of Seattle, and building owners and managers to achieve environmental performance targets in a high performance district of Seattle's dense, city center neighborhoods. The District has 36 million square feet of the 95 million square feet of the district enrolled. Participants collect and share data on energy use, water use, and carbon dioxide emissions from transportation. They commit to undertaking major audits or retrofits to achieve the 2030 targets. Participants strive to achieve a 10 percent reduction in energy, water, and transportation emissions by 2015 and a fifty percent reduction by 2030.

The District's successful 'Assess, Target, Deliver' program element enables building owners to compare how their buildings' efficiency rates against their competitors and peers; however, data privacy issues can challenge transmission of the data to other programs such as the Better Buildings Program. Case studies are used to demonstrate to new and prospective members how other members are achieving the targets. The District also maintains an online public dashboard where community members and participants can view progress toward the overarching district targets.

Initially funded by grants, the District has successfully diversified their funding sources. For example, the City of Seattle, Microsoft, and Accenture recognized the value of the District's business network and contracted Seattle 2030 to coordinate a smart buildings pilot project to help building owners and managers improve efficiency through advanced building analytics. The Department of Energy also contracted the District to manage and distribute incentive funding for commercial building energy retrofits from a Community Block Grant. Managing these funds helps the District to achieve their efficiency targets while also conducting outreach for the City. In the coming year, the District is partnering with Architecture 2030 to launch projects in Pittsburg, Cleveland, and Los Angeles using the framework of the Seattle 2030 District as a template.

Presenter: Lorenzo Macaluso, Director of Green Business Services, Center for Ecotechnology

Founded as a non-profit in Western Massachusetts in 1976, the Center for Ecotechnology (CET) helps residents and businesses implement practical and affordable waste and energy efficiency projects to save fiscal resources while reducing environmental impacts. To achieve reductions in energy and waste, CET staff conduct walk-through energy efficiency assessments and provide building owners with a set of potential actions to implement. The building owners then decide which projects to undertake (often based on the return on investment), and CET guides them through project implementation by linking them to vendor and service providers; helping clients, especially the small to medium businesses without dedicated sustainability officers, to navigate enrollment in utility incentive programs. CET also conducts program cost analysis, assists businesses to negotiate and coordinate service contracts, and trains client staff to implement the projects. Frequently, clients will initially request an energy efficiency

assessment or a waste reduction assessment, but since the waste and energy are linked, they often implement both types of projects to enhance cost savings. CET is paid for their waste services through contracts with the State of Massachusetts Department of Environmental Protection, partnerships with utility districts, and fee for service projects. CET also receives some grant funding. CET overcomes the split incentive barrier present when tenants are not the building owners by building relationships between tenants and property owners or tenants and property managers.

5. Program Funding

David Straus, Director of Transportation Demand Management and Sustainability at A Better City, introduced the program funding session by asking how many Summit participants were responsible for funding their programs and their positions—most participants raised their hands. Mr. Straus invited participants to share their approaches to funding their programs, identifying funding sources, attracting funding, and increasing funding opportunities. Referencing the funding information in the Summit Directory, Mr. Straus said the survey participants reported a variety of funding structures including utility funding, membership fees, public financial support, and foundations or sponsorship support. Mr. Straus said A Better City funds the Challenge for Sustainability primarily through private foundation support from the Boston Foundation and the Barr Foundation, with some contributions from membership dues and program fees. Pointing out that the program budgets of those who completed the survey are approximately $100,000 to $200,000 per year, he hypothesized that most programs probably have one main funding source, which could present a challenge should the funder cease to support a program.

Presenter: Yalmaaz Siddqui, Senior Director, Environmental Strategy, Office Depot

Mr. Yalmaaz Siddqui, Senior Director, Environmental Strategy at Office Depot, presented a view of funding from the funders perspective. Mr. Siddqui said Office Depot originally participated in a few select green business engagement programs after soliciting applications from programs nationwide and deciding to participate in a program based on likelihood it would be successful and whether or not the program included three engagement opportunities: a launch event, an awards event, and involvement in delivery of training programs.

He pointed out four contrasts between historical environmental advocacy and green business engagement, which make green business engagement programs enticing to large corporations:

- “Codification” - The first contrast that green business challenge programs offer is a shift from a focus on problem to clarity on the solution, or codification of the solution.
- “Gamification” - The second contrast provided by green business engagement is a transition from guilt as a primary motivator to competition as a primary motivator.
- “Badgification” - Describing how until the recent past the good deeds of businesses often went unrecognized, Mr. Siddqui called the third contrast created by green businesses as badgification, since businesses are now publicly recognized for their good deeds.
- “Economification” - The fourth contrast is “economification” of environmental issues, or a shift from a focus on the cost or burden presented by environmentally friendly actions to focus on the financial savings of environmentally friendly actions.

Mr. Siddqui also described the types and sources of funding available from the private sector, why they might fund green business engagement programs, and how Summit participants might connect with them. Private sector funding stems from three main sources:

1. Program managers of company owned foundations,
2. Chief marketing officers or segment officers of internal sales and marketing teams, and
3. Internal environmental teams.

Although foundations and sales and marketing teams may have significant resources to fund programs, Mr. Siddqui suggested searching for funding from the internal change agents, the company environmental teams, which might have annual budgets in the hundreds of thousands of dollars to a few million dollars. In terms of return on investment, environmental teams are a hybrid of the foundations and the marketing teams—they may not require as great of a return on investment as marketing team, but they want to identify measurable impacts like a foundation. Internally, environmental teams strive to stay relevant to a company by advocating for sustainability measures that produce positive return on investment, by showing relevance through market differentiation that elevates brand name, and by demonstrating the customer base is interested in supporting sustainability measures.

Mr. Siddqui suggested connecting with corporate environmental teams at the State of Green Business conferences in San Francisco, Chicago and New York, the Sustainable Brands conference, and the Opportunity Green conference, and learning about their needs and the challenges they face, then collaborating with them to achieve common goals.

To conclude, Mr. Siddqui posed the following challenges to the Summit participants:

1) Be more open to the private sector
2) Work towards consistency across programs to create a national approach
3) Replicate the US Green Building Council's framework for engagement with the private sector
4) Connect people who want to change their organizations with products, services, and providers who want to help realize the change.

Summit participants then discussed program funding. The facilitator asked about the pros and cons of the various funding mechanisms and opportunities to enhance viable funding in the future. Their comments are grouped by theme:

Funding Mechanisms
Summit participants identified several different funding mechanisms. Most challenge programs are funded through a combination of funding arrangements:

- *Corporate Sponsorship* – Some participants said corporate sponsorship is a good avenue for funding, but it may require redesigning programs so that sponsors become part of the program implementation team or to create opportunities for the sponsors to share their experiences and expertise with businesses in the program. Two challenges presented by corporate sponsorship are identifying the value add that a program provides to a sponsor and overcoming the fear of commercialization by incorporating sponsors into program design and implementation.

- *Utility Support* – Utilities fully or partially sponsor some challenge programs. Funding challenge programs benefits utilities because the challenge programs direct businesses to the utility's efficiency programs. Additionally, challenge programs provide utilities with community engagement opportunities and help to develop customer relations.
    - Programs funded primarily or in part by utilities: Chula Vista Green Business Challenge (CA), Kilowatt Crackdown (MN), Westchester Green Business Challenge (NY).

- *Fee for Service* – Programs may offer energy assessments, waste assessments, training programs, or other technical services on a fee for service basis. The amount of funding a program receives from fee for service arrangements varies greatly.
    - Programs funded primarily or in part by fee-for-service: Illinois Green Business Association, A Better City (MA)

- *Programs designed, supported, and managed by municipalities or counties* – In some locations the city or county created the challenge programs. Funding for these programs may come directly from the city or county or formalized partnerships may be formed with utilities to provide funding.
    - Programs funded primarily or in part by municipalities or counties include the Chula Vista Green Business Challenge (CA), Loudoun Green Business Challenge (VA)

- *Business Improvement District Support* – Some challenges are supported by business improvement districts, which might raise funds through a tax property owners voluntarily impose on themselves. The program is an active ownership model where property owners assist in the design and coordination of programs and goals. Challenge programs and cities could partner with business improvement districts to increase their impact.
    - Programs funded primarily or in part by business improvement districts' support: The Downtown DC Business Improvement District (DC).

Enhancing Funding Opportunities

Participants suggested the following strategies to enhance funding options:

- Forging partnerships among challenge programs at the regional or national level.
- Forging partnerships with communities or universities with sustainability plans, and partnerships with local or regional Building Owners and Management Associations.
- Engaging accountants to focus funding applications on the positive financial impact of the challenge program instead of the environmental impact.

Addressing Funding Barriers

Participants discussed the opportunities and challenges of seeking funding from large companies given the place-based and local nature of most challenge programs. One challenge is:

Creating consistency throughout individual challenge programs: Describing it as a "LEED-Lite" program, one participant suggested the challenge programs create an overarching brand with each program collecting 80% of the same metrics while the remaining 20% could vary based on regional priorities. The participant said standardization of programs would reduce the barrier for large nationwide companies to enter challenge programs and help them to implement nearly identical projects in all of their facilities across the nation. Another participant suggested a potential partnership with the Building Owners and Managers Association to help create a standardized, national program.

Another participant commented that a current debate within her organization is about the risk of whether or not permitting large corporations to use their overall corporate footprint might result in awarding a stamp of green approval to businesses that are not actually that sustainable. In response, a participant suggested regionalized green business challenge program for the corporations. If a regional model was successful, then the model could be implemented on a regional basis across the nation.

6. Benchmarking Business Practices

To introduce the benchmarking business practices session, two attendees provided an overview of commonly collected metrics and the tools used to collect them. Summit participants then discussed how they collect data and use benchmarking tools in small groups.

ICLEI

Michael Steinhoff, Senior Program Officer at ICLEI, presented some of the types of data many challenge programs are collecting, the systems used to collect it, and the difficulties faced when collecting and analyzing the data. Mr. Steinhoff said performance data for energy are fairly easy to collect and manage because of tools like EPA's Portfolio Manager. Water data is also easily collected, but development of data management tools for water data is lagging behind that of energy. Data such as employee commute and waste reduction are challenging to collect because companies either do not want to involve all of their employees in data collection or because the exact quantity and type of waste is not easily calculated.

As an alternative to performance data, some municipal programs collect and report practice data. Municipal programs collect practice data because they do not have a mechanism for collecting performance data since the program engages building tenants and not building operators or managers. Municipalities use the practice data to drive competition and identify areas of potential improvement that the city could target through selective program development. Cities can also use the scorecard data they collect to identify and connect tenants who are likely to implement sustainability measures with program managers or service providers who will help the tenant assess and implement the measures. Challenges of practice data include collecting accurate information through carefully framed survey questions and determining the data for the baseline year.

Other challenges for both performance data and practice data include data management and determining causal impact. Data management can be difficult for some organizations due to the quantity of data to manage. This is especially true if only one person is assigned to manage data for multiple facilities. Linking data to building performance and ultimately identifying the causal mechanism is crucial to setting strategies to drive performance, but identifying the causal mechanism is sometimes challenging given the number of potential variables driving changes in performance.

A Better City

Mihir Parikh, Sustainability Program Coordinator at A Better City, briefly presented A Better City's data collection tools and methodology. A Better City uses a customized online tool to help program participants manage data. Participants can access data for multiple facilities in their portfolio from one home page. Participants enter utility data, water, steam, and solid waste data into scorecard for each

facility, which serves as the foundation of the benchmarking process. Scorecard questions are formulated as yes/no response or 'greater than/less than fifty percent' to help participants enter the information accurately and independently. After the data is entered, A Better City reviews the data, the participant goals, and potential recommended actions. Participants set their own goals and chose their own strategies in the online program, which links the goals and strategies to a sustainability toolkit that includes an action plan to help achieve the goals.

Discussion

After the introductory presentations, Summit participants divided into four small groups to discuss the benchmarking approaches they use, the data they collect and the product of their benchmarking. They also discussed the benefits and challenges of various approaches, what tools they would ideally use, and whether aggregating data across programs would be a good idea and/or possible. Participants captured the key themes of their discussions, which are grouped by focus question here:

1. *What benchmarking approach do you use? What data is or is not collected? What is the product or outcome?*
    - Approaches used: Excel spreadsheets, databases, and web-based tools such as Energy Star and Portfolio Manager; measure/installation estimates; best practices; utility data direct; utility data self report.
    - Data collected includes energy/emissions, cost savings, water, waste, job creation, hours allocated, return on investment; try to collect everything possible.
    - Outcomes include identification of the 'Most Valuable Tenant' (behavioral change).

2. *What are the benefits or challenges of each benchmarking approach?*
    - Benefits include providing the public a transparent view of a company; verification, automatic; return on investment reporting. Scorecards have a better response rate. Metrics can help quantify reductions.
    - Challenges include: participant fear of government, the level of engagement, scope of data to collect, ease of tool use, variability due to weather, time, cost of software, growth/shrinkage; gaining access to data, data reliability, and lack of an online platform; developing/finding a platform that works, making it a competition, level of numerical data collected. There is less evidence of impact from scorecard completion. Metrics set a higher barrier to entry.

3. *Ideally, what sort of tool would you use to benchmark and why?*
    - Web platform with recommendations
    - In-person data collection
    - Ultra user-friendly tool that is both flexible and scalable and able to collect basic and in-depth data
    - Automated population of utility data, or grant permission to the utility to populate Portfolio Manager data fields
    - WARM for waste data

4. *Would it be possible and/or valuable to aggregate data across programs?*
    - Yes, it would be valuable at regional and national levels
    - At the regional level, data on water and energy could be aggregated

- At the national level, data on purchasing and waste could be aggregated
- Aggregating data across programs would identify common data points/interfaces and create standardized analytics. New tools are not necessary.
- Understand why businesses in multiple locations have different participation rates and share participation rates.
- Understand regional differences.

5. *Other Comments*
    - There is confusion due to multiple benchmarking systems (local, state, national, trade)
    - Helping businesses in one system might lead them to achievements in another.
    - Some programs focus more on tracking project impacts instead of or in addition to benchmarks/scorecards.

7. Data Analysis and Evaluating Program Effectiveness

Naomi Mermin and Kirsten Liske spoke about how programs can measure success through evaluation and benchmarking.

Why Evaluate?

Naomi Mermin, Energy and Environmental Consultant, Naomi Mermin Consulting, said program evaluation provides the best evidence for why a program is taking action and why funders should support the program or not. Stressing the importance of measuring what matters, Ms. Mermin suggested program managers understand both the overall goal of the program and how it relates to funders and the program elements that drive participation in the program. Understanding the ultimate goal and identifying the correct metrics to measure impact can help program staff articulate to funders the importance of the program. Similarly, identifying and measuring the drivers of program participation will help program managers to better understand what motivates businesses to participate and it may help identify if change in a data set is due to the challenge program or another action the business undertook independently.

Program managers often do not conduct evaluations because they fear negative results. But, Ms. Mermin pointed out that negative results are sometimes the best findings because failures are sources of opportunity and growth. Ms. Mermin said program managers should view evaluation not as an end, but as a tool to understand the in-between steps and an opportunity to challenge assumptions and develop stronger strategies for achieving success. Ultimately, drilling deeper into the data will help program managers understand how to build the program better.

Example: Ecology Action

Kirsten Liske, Collaborative Team Leader, Ecology Action, described the California Green Business Network (CAGBN)'s funding sources and approach. Ecology Action, a non-profit, administers the California Association of Green Business Programs, among other things. The California Green Business Network (CAGBN) evolved initially as a group of disparate Green Business Certifications programs operated independently by local governments. In 2006, these programs innovated by coming together as a statewide Network. They overcame barriers to collaboration so they could share resources, achieve

statewide reach, ensure consistent high performance standards in their criteria, and measure significant environmental outcomes they knew they were achieving. One of the key projects the group successfully funded and developed is a centralized statewide database that serves the multiple functions of managing the certification process, promoting certified businesses and automatically generating program outcome measurement data (www.greenbusinessca.org).

The Network has grown exponentially since its formation and now includes 21 California jurisdictions representing almost 40% of the state. More than 2,700 small to medium-sized businesses are certified statewide. Each of these businesses receives an onsite audit and specific practice changes are entered into the database. A portion of those measures have metric outcomes associated with them so the business, the local program, and the state can measure achievement and progress. In 2012 the certified businesses achieved the following outcomes:

- GHG emissions reduction - 343,353,462 tons
- Energy saved - 38,254,747 kWh
- Solid waste diverted from landfill - 212,616,001 tons
- Water saved - 30,362,771 gallons
- Hazardous waste reduced - 6,245 gallons

Discussion

Why should programs be evaluated? What types of variables can be measured to determine program, business or regional success? How does data collected feed into broader progress on community sustainability or climate action goals?

Participants said they evaluate programs for the following reasons:

- To satisfy funder requirements
- To identify business needs and build and hone plans to meet those needs
- To demonstrate return on investment
- To use data from program evaluation as a marketing tool to increase participation
- To identify the program's impact
- To show rate of adoption of specific practices
- To clearly identify goals and learn if the program is attaining the goals
- To create comparable metrics
- To promote compliance
- To use challenge program resources wisely

While listing why to conduct program evaluations, the group discussed measurement of absolute and relative metrics. One participant suggested that relative metrics are valuable for the competition aspect of the programs, but absolute metrics are important to encourage leading businesses to continue the push for even greater improvements. The Seattle 2030 District measures absolute metrics for each building type as they strive to achieve targets based on relative metrics for the building type—this structure encourages high performers to participate and enables them to share their success stories. Similarly, one participant said they have high performers who topped out the scorecard and instead of making the scored more challenging, these high performers will be given mentor status and continue in the program by providing guidance to other businesses. One participant suggested the development of standard metrics for energy, water, waste based on business type might encourage both high and low performers to participate and shift emphasis from year after year improvement of the high performers.

Program participants collect and analyze many variables to evaluate the success of their programs, success of the businesses, and advancement towards regional goals. Some of the variables collected by Summit participants include:

- Baseline data, improvement over baseline, and the actions or measures implemented to make the largest difference
- Number of businesses served by the program
- Yearly average energy use per square foot and total energy use per square foot (weather normalized)
- Kilowatt hours, therms, tonnage of waste, water usage, transportation data
- Cost savings per measure aggregated at community or program level
- The value or benefits program participants derive from participating
- Baseline energy management practices
- Key barriers to implementing recommended sustainability measures
- Best practices of businesses who have implemented sustainability measures
- Trackable URLs to assess how frequently newsletters are viewed
- Date Stamped activity tracking to identify the activity's impact

Although most programs track baseline data for energy use, water use, etc., actions and measures implemented, and improvement over baseline data, the specific variables measured by the group can be driven by the organizations mission or goal. For example, the Illinois Green Business Association's originally tracked number of businesses served through their programs since their goal is to help businesses.

The group discussed how to measure and show the impact of the behavior changes such as whether or not sustainability is a core value or mission of a participating business and if it causes businesses to implement more sustainability measures. Ms. Mermin suggested using caution with this type of a metric because the impact could be incorrectly attributed to something that isn't actually causing the impact. She hypothesized that including sustainability as part of a mission statement bears no relationship to an organization's ability to implement sustainability measures. The key to evaluation is to connect an activity to output and ultimately to its impact.

Several participants stated that although cost savings initially attracted businesses to participate in the program, evaluation surveys indicate businesses highly value the free technical assistance, branding and marketing assistance, and networking provided by programs. Several programs measure cost savings, which participants can use to underscore the value add of active participation in the program, but fluctuations in the cost of water or the cost of energy create challenges for implementing cost savings metrics. Ms. Mermin suggested carefully framing survey questions designed to identify the value add to avoid false positives responses on surveys—for example, everyone believes they should save money, so a question framed as 'did you join the program to save money?' will elicit a strong false positive response. Finally, Ms. Mermin suggested taking time to identify the real metric of value that a program wants to measure and how to measure it because the result could be that the energy dollar savings of a measure is very low, but the money making dollar is very high (because, for example, in small businesses time is valuable and the more a program can help the small business save time, the more money a business can make and the greater value add they derive from participation).

Challenge program data collection and sharing helps municipalities evaluate current and proposed legislation and progress on city or regional goals. For example, the Downtown DC Business Improvement District provides data to the District of Columbia to help evaluate if city resources are being used and whether or not legislative actions should be pursued. ICLEI also works with municipalities to define sustainability goals. Chula Vista Green Business Challenge (CA) and the Illinois Green Business Association submit energy and water data to community partners and help them understand how it fits into the community goals.

The data collection efforts of challenge programs also help break down silos between divisions within a department or agency or create links between city and county governments. By breaking out energy use by building type, the Seattle 2030 District enables the City of Seattle and King County to compare their building management operations and to share best practices and lessons learned.

8. Working with Utilities and Energy Efficiency Programs

Summit attendees discussed how their programs work with utilities and other energy efficiency programs in three small groups. Representatives of the Challenge for Sustainability (MA) and the California Green Business Challenge described their experience working with utilities to begin the small group discussions. Participants then discussed how programs are linked to utilities, the benefits programs provide to utilities, where collaboration is working well, as well as the challenges of collaboration, and how program managers can use this information to improve the link or relationship between their program and their local utility.

Given the wide variety of experiences and perspectives on this topic, the relationships or linkages between utilities, energy efficiency programs, and challenge programs vary greatly. Variation in some, but not all, relationships may result from the structure of the utility's business model or different regulatory environments. For example, if the utility's business model decouples revenue from energy consumption, then the utility has an incentive to promote energy efficiency. However, some green businesses have no engagement with or incentives from utilities. In California, utilities fund challenge programs because of regulations that created formal partnerships between utilities, local governments, and challenge programs. A few common links or relationships identified between some challenge programs and utilities include the sharing of data, funding, technical expertise or assistance, and partnerships for program delivery.

Although not inherent in every relationship between challenge programs and utilities, challenge programs can provide utilities with the following benefits:

- Challenge programs can provide trusted outreach and engagement: Challenge programs are often viewed as an independent third party that can provide unbiased validation of the benefits provided by energy efficiency programs. The perception of neutrality creates unique outreach opportunity that enables them to build trust with program participants and to help participants better understand the utility's programs and goals at a deeper level than can be achieved through the utility's outreach programs.

- Outreach by challenge program staff tends to enroll more participants in the utility's energy efficiency programs: In addition to informing participants about incentive or energy efficiency programs, challenge program staff often help participants navigate the process of enrolling and

participating in the utility's programs. Increased enrollment in the utility's programs improves the utility's ability to manage energy demand. Utility districts that fund challenge-based education programs may reach more small business owners than they would otherwise be able to reach because of this additional outreach support.

- Challenge programs offer new technologies and resources to a greater number of energy users: While utilities have traditionally only provided energy audits or assessments to large energy consumers, challenge programs provide these services to any participant regardless of the amount of energy they consume. Additionally, utilities in many areas have already engaged the largest energy consumers or implemented many of the easy actions to reduce overall energy demand, but the next focus area for energy demand reduction will be behavior change programs, which challenge programs are uniquely poised to provide since they already offer customized support to help participants change their behaviors.

- Challenge programs can recommend vendors and service providers to implement energy efficiency measures: Utilities are frequently not in a position to recommend vendors or service providers to their clients, but challenge programs can serve as a direct link to connect program participants to vendors or service providers who could help participants achieve their energy efficiency goals.

- Other: Participants said challenge programs provide or could also provide employment opportunities in energy management and, a national network of challenge programs could provide a strong set of case studies for energy efficiency best practices.

Participants also discussed the positive and challenging aspects of collaboration between utilities and challenge programs:

Positive Collaboration

- Rebates – Some utilities provide rebates to challenge program participants for installing energy saving measures.
- Technical assistance – Some utilities and challenge programs collaborate to provide technical assistance to utility customers and program participants.
- Funding – One participant reported the utility pays the challenge program based on therm/kWh reductions in energy.
- Outreach to large energy consumers – Utilities are usually willing to work with and provide rebates to major energy users for implementing energy efficiency measures.
- Sharing data – data can be shared between utilities and challenge programs.

Challenge of Collaboration

- Cultural inertia – Many utilities are large, hierarchical organizations that are slow to implement change.
- Incentive Structures - Some utilities that earn profit based on the amount of energy sold lack incentive to collaborate with challenge programs that reduce energy consumption.
- Lack of Access to Data – Challenge programs find situations in which utilities do not share data difficult.
- Recognition for expertise – Some utility staff who work in energy efficiency departments want to be recognized as energy efficiency experts and the sole provider of energy efficiency

information and resources. This dynamic can create tension between the utility and the challenge program

- Scale of Reductions – Some utilities do not want to invest resources to engage small businesses in energy efficiency programs because they seek large energy reductions, which aren't found through engagement with small businesses. Similarly, in some cases, utilities are unwilling to work with building tenants to implement energy efficiency measures because the building owner, not the tenant, is the actual customer.

9. Developing Effective Programming and Resources

Two participants introduced the subject of developing effective programming and resources. They both described how their organizations provide services to members, opportunities for peer-to-peer engagement, and toolkits or resources to help participants participate in their programs.

Environmental Defense Fund's Climate Corps Program

Scott Wood, Project Manager at the Environmental Defense Fund (EDF), presented information about EDF's Climate Corps program, which recruits and trains MBA candidate students to develop, implement and manage energy efficiency programs with commercial sector clients. The success of the Climate Corps program can be attributed in part to the process of matching company needs to fellows with specific skill sets, the rigorous one-week energy efficiency training for fellows and a strong support network throughout the fellowship, and host organization access to press releases, case studies, and blog posts. Additionally, EDF organizes an annual networking event to maintain an active and growing network of Climate Corps fellows.

Chicago Green Office Challenge

Kevin Dick, Project Manager at the Delta Institute, described how the Delta Institute re-designed their program into a game/competition after several of the early adopters in the program achieved the highest rank possible and were left with no upward mobility. As part of the redesign, the program retired the scorecard approach and began to use an activity approach. The new game based challenge program is based on sharing stories and creating competition between four types of common gamer personalities:

- Achievers – Since achievers are motivated by prestige, aspects of the game are designed to award and recognize achievers for implementing measures that increase their organizations efficiency.
- Explorers – Explorers are motivated by acquiring or creating new knowledge. The game is designed to engage Explorers by recognizing them for creating knowledge articles such as blog posts that share best practices or other tips.
- Socializers – Socializers are motivated by building relationships. Socializers can earn points by retweeting Delta Institute tweets or by sharing business acumen on LinkedIn.
- Killers – Competition motivates killers and the new program design allows companies to compete directly with other program participants.

Discussion

Summit participants brainstormed the programs and resources they provide to their business members. These include both opportunities to engage with other people (listed first) and resources and information (listed second).

Opportunities to engage with other people:

- Educational Events – Education was a cross-cutting component of many program offerings. Program offerings include school room activities such as presentations by the 'Energy Hog,' electronic game shows, life-sized energy board games, informal educational lunch sessions, online webinar events (Webinar Wednesdays), formal training events, and other regularly scheduled events which bring a panel of experts to present and discuss a specific topics.
- Networking and Peer-to-Peer Learning Opportunities – Networking and peer-to-peer events are designed to link program participants to other participants or to elected officials. Some are designed to raise greater awareness through the community as well. Examples of networking and peer-to-peer learning opportunities included monthly mixers with the chamber of commerce, breakfast events either with program participants or with elected officials (Mingling Mondays, Mayor's Breakfast), brown bag lunches (Soup and Sustainability, Time-out Tuesdays), yearly peer exchange events, speed networking, and forums on climate change and energy topics to which any interested individual is invited.
- Recognition Opportunities – Examples of recognition opportunities included formal awards ceremonies, quarterly public recognitions of businesses at city council meetings, invite-only recognition events with other program participants; video case studies of award winners.
- Other – One participant said they provide participants with 'Ally Network" to provide participants with discounts on energy audits, waste audits, etc. One participant said her challenge invites the water and utility districts to give presentations on water efficiency measures or energy efficiency measures, respectively.

Program offerings focused on information:

- Data Support Services – Many programs provide energy audits, assessments, or evaluations; carbon footprint calculators; comparative analysis services; 'state of resource performance' analysis to inform participants how far they have to go to achieve their goals; utility data download services; set-up and training on programs like Waste Wise or Portfolio Manager;
- Best Practices – Programs offer a variety of methods of disseminating best practices and lessons learned. Some information distribution methods include case studies, searchable 'green notes' that describe measures and how to implement them; project worksheets to help businesses define success in absence of return on investment and to help them understand the business case for implementing measures; market specific information tools including operations strategies, occupant behavior change strategies, and awareness raising campaign strategies for health care, schools, and general office settings;
- Marketing Opportunities – Some programs provide marketing materials, the license to use their program logo, window clings or stickers to identify members of a challenge program, or advertisements in print and electronic media, even pre-scripted messages for social media or letters for building owners or tenants. These, plus email reminders of opportunities for local

and national opportunities for media recognition and pre-scripted talking points are provided for use by members.

- Other information services – Some programs send newsletters to inform program participants of government and utility incentive programs and deadlines.

10. Leveraging Participants to Change Behavior

One participant spoke about her experience coordinating technical outreach and behavior change strategies to reduce energy consumption.

Class 5 Energy

Amy Harker, Specialist at Class 5 Energy, described how Class 5 Energy fosters behavior change to reduce energy consumption within the health care sector, municipalities, and faith groups. The foundation of Class 5 Energy's program is organizational change management, the combination of a technical approach designed to improve business systems and processes and a human approach designed to manage the people side of change. The five key components of the program include:

1) Education – Explaining how a specific measure is implemented, what the goal of the measure is, and why it is important to achieve it.
2) Identifying Opportunities – Identifying long term and short-term goals, as well as strategies for achieving the outcomes simultaneously.
3) Engaging People – Class 5 Energy engages many or all of a company's employees to make one or two small changes rather than work with one or two employees to make all the changes.
4) Measuring Progress – Prior to program commencement, Class 5 Energy gathers 12-14 months of the business's utility bills to establish a baseline. Thereafter, newly collected data is compared to the baseline on a quarterly basis to track progress toward the goals.
5) Communication – The final component is celebrating, rewarding and recognizing the companies and their employees for achieving their goals.

Class 5 Energy implements this model through programs designed according to the participants' capacity to implement efficiency measures. Some school programs are implemented over five years while others are implemented over one year. In each program model, participants designate efficiency champions to help motivate employees to complete the measures.

Discussion

Summit participants discussed the approaches they use to implement behavior change as well as the challenges they have encountered and the approaches used to overcome them:

Several summit participants said behavior change should be part of a challenge program's goals or said their programs include behavior change components. Some challenge programs partner with consultants to implement behavior change program elements, while other programs foster behavior change by presenting awareness trainings or by instructing business leaders how to teach their employees the behaviors required to reduce energy or material consumption.

Participants stressed the importance of linking the implementation of a measure and building awareness of the program's efforts within the workforce. If this link is not established and employees do not learn why a measure is implemented or how it will help the organization, then employees are unlikely to change their behaviors. One participant mentioned that successful behavior change is also linked to empowering employees to cause change instead of mandating employees to change behavior through a company policy.

While recognizing the difficulty of changing any type of behavior, participants said internal champions who push for behavior change within an organization are critical for program success. Some programs, like Class 5 Energy, designate specific employees or teams of employees to motivate behavior change throughout a company. One participant noted that larger businesses try to change organizational behavior by hiring an employee whose responsibility is to ensure efficiency measures are implemented and monitored. Another participant said energy efficiency must be embedded throughout the entire organization because the energy efficiency program could be eliminated if the one employee responsible for the program leaves the company.

11. Awards, Recognition and Marketing

The awards, recognition and marketing session focused on best practices for recognizing and announcing the achievements of challenge program participants. One participant presented her program's approach to illuminating the achievements of the program through a variety of avenues.

<u>Chula Vista Green Business Challenge</u>

Michelle Castagnola, Environmental Resource Specialist at Chula Vista Green Business Challenge, described a few key ideas for creating an outreach strategy and the benefits of working with media partners to raise awareness and marketing opportunities. Outreach strategies should:

1) Define program goals
2) Define the audience
3) Identify the preferred methods of communication, and
4) Create a plan based on what currently exists and what worked well.

She described how the Port of San Diego's Green Business Network, which started as a green business challenge program before becoming primarily a network, consistently receives positive press coverage. Part of the reason for the press coverage is because the Network pays a media partner to film and televise interviews with successful program participants, create blog posts, and release press releases. Other successful recognition opportunities launched by the Port of San Diego include a speed networking, a Top Green Chef event, and an elaborate awards ceremony.

The Chula Vista Green Business Challenge also worked with a media partner, but on a smaller scale than the Port of San Diego. Instead of using media partner to interview challenge participants, high school students interviewed the challenge program participants. The interviews were televised on the local media station, including on 60 Minutes, and are posted on You Tube. They also launched low cost Facebook competitions to drive business to the members of the Chula Vista Green Business Challenge.

Discussion

Participants listed their most effective awards and recognition programs:

Awards programs and networking events:
Several participants listed peer-to-peer networking events as the most effective recognition element of their programs. Some of these events are formal award ceremonies and provide members the opportunity to describe the projects they are implementing and provide testimonial for positive outcomes. Other networking events are more informal meet and greet opportunities. One participant said they invite program participants to invite representatives of other companies to attend the award ceremony with them as a way to engage more companies. Several participants suggested inviting the mayor or other high-profile public figures to present the awards or participate in the award ceremonies and networking events. Specific awards recognized included innovation awards, 'dirty sock' award for tailpipe emissions, green champion award, educator award, peer award (selected by all program participants), and the volunteer award.

Media Outreach on behalf of participants:
Many participants listed media outreach on behalf of participants as the most beneficial aspect of their recognition programs. Some of the media outreach examples included:

- Consistent branding and messaging
- Co-branded communications (including press releases)
- Social Media announcements
- Direct connections to media contacts

Other effective elements for generating recognition opportunities:

- Sharing event attendee lists before the event occurs
- Nominating members for other awards at the state or federal level
- Gala where each participant provided some of their goods (mostly food) as part of the event
- Linking a program's event to a larger, high profile event or to events held by the chamber of commerce.

12. Working Together and Moving Forward

Participants were pleased for the opportunity to be together for a day and a half, and wished for more time to share ideas and approaches. The final session in the summit was dedicated to identifying opportunities to work together moving forward, whether in another in-person summit or through other initiatives. The group brainstormed topics they felt would benefit from joint work, then ranked these topics by importance and indicated their individual interest in either leading or participating in each initiative. See Appendix C for the full list of brainstormed ideas.

The most highly ranked ideas were:

A. Explore the formation of a National Association of Green Business Engagement Programs: Regrouping via conference call or webinar to further explore the idea of creating a formalized national association of green business programs or an informal national network received 24 votes of support and thirteen people volunteered to move it forward.

Brian Holland announced that ICLEI and Office Depot are exploring how to form a national green business engagement challenge program and would like Summit Attendees to participate in the discussion as an advisory committee. The goal of the network would be to scale up the work ICLEI is currently doing with its challenge programs, establishing both a formal network and consistency in program contents at the national scale.

Participants discussed several pros and cons of forming a national association and/or the formation of a national program:

Pros:

- A dedicated staff person to oversee the coordination of a national group could move the green business competition initiative forward
- A national program and/or association could reach more communities and create a broader impact
- A national program and/or association would form powerful voice to jointly solicit funding
- This could increase collaboration among challenge programs

Cons:

- A national program focused on large national companies could diminish the focus currently given to small and medium businesses
- Existing differences in self reporting and audits
- Current challenge programs might view a national program as competition with their efforts rather than a collaborative effort
- Existing green business engagement programs may not be interested in re-branding their programs to fit in to a national program
- Some local governments have chosen to not be affiliated with ICLEI and so may be unwilling to join an ICLEI initiated program

Participants articulated the following key questions and concerns regarding how a national program or association would be organized, barriers to entry, and how it would work with currently operating programs:

- What is the larger vision for the program? What are the ultimate goals?
- Would participants in a network be required to pay a fee to participate?
- Would some currently operating challenge programs, which are working closely with local businesses and branches of national companies, lose membership to a national program as the national companies decide to join a national program?
- Will joining a structured national program diminish the local flavor of challenge programs?
- How would a national program coordinate or collaborate with the local programs?
- Would ICLEI be the 'brand' of the national program? Would local programs be required to commit to ICLEI to be part of the program?
- How can the program be designed to ensure large national companies are not using it as a form of green washing?

In addition to the need to work through the above questions, people suggested the following:

- Before creating a new national association, identify whether or not there are other organizations or associations that could house an association of green business engagement programs to save time and effort.
- Convene a focus group to explore the issues and concerns that were raised.
- To achieve broad connectivity and participation, do not brand it as an ICLEI program.
- Clearly define who would participate in the program and how.

B. Discuss the establishment of consistent metrics or standards to be used across all programs:
The second most highly supported future action item, with 12 votes of support and ten volunteers to move it forward, was to discuss the establishment of consistent metrics for all programs. Consistent metrics and standards of data collection methodologies would enable challenge programs to compare data across programs and demonstrate their impact on a national level. Combined with a national program or association, consistent metrics and data collection methods might also entice large national companies to join challenge programs, since the same program could be implemented in each business facility regardless of its location.

However, similar to the establishment of a national program, several concerns and questions were raised in regards to consistent metrics and standard data collection methodologies. Some of the concerns and questions to address and explore include:

- Finding agreement on common standards could be challenging
- How would compliance with a standard be defined? How would it be measured?

C. Plan and organize the next Summit:
Planning and organizing the next summit received seven votes of support and ten volunteers expressed interest in helping to move it forward. People want to meet again, to continue talking and building relationships and learning from each other.

D. Create an online forum for connecting and sharing information:
Three votes of support were given to the creation of an online forum for information sharing. Twelve people volunteered to help create and to participate in this type of forum. Ideally, the online forum would provide a platform for people to share resources and best practices, and hold 'advice clinics' where people can post challenges they face and other group members can comment on ways to over come the challenge. Similarly, participants could offer to provide guidance on specific program elements, and participants could contact the individual with specific questions to discuss. Suggested online forums included: LinkedIn, Google Groups, CBSM.com, Yammer and National Field.

E. Engage utilities to learn how programs could help them:
Three votes of support were given to the suggested action item of engaging utilities to learn how programs could best help them. Seven volunteers indicated their interest in moving this action item forward. This would entail some sort of meeting or discussion with utilities to understand better their interests and seek opportunities to work together for mutual gain.

A Better City agreed to ensure this summary was produced and to share the list of ideas with participants, convening a discussion among people about what should happen next.

Appendix A: Participants

First Name	Last Name	Title	Affiliation	City	State
Andrew	Belden	Consultant	Meister Consultants Group	Boston	MA
Janet	Burgesser	Program Manager	Denver Energy Challenge	Denver	CO
Cassandra	Carroll	Executive Director	Illinois Green Business Assn.	Champaign	IL
Michelle	Castagnola	Environmental Resource Specialist	Chula Vista Green Business Challenge	Chula Vista	CA
Neil	Cutler	Program Co-Organizer	Westchester Green Business Challenge	Westchester County	NY
Rick	Dimino	President & CEO	Challenge for Sustainability	Boston	MA
Ona	Ferguson	Senior Associate (facilitator)	Consensus Building Institute	Cambridge	MA
Josephine	Fleming	Green Business Program Database Manager and Coordinator	California Green Business Challenge	Scotts Valley	CA
Warren	Gaskill	Managing Partner	Rapid Improvement Associates, LLC	Madison	WI
Brian	Geller	Founder & Executive Director	Seattle 2030	Seattle	WA
Sue	Goldstein	Key Account Manager	Xcel Energy	Minneapolis	MN
Amy	Harker	Specialist	Class 5 Energy	White Bear Lake	MN
Brian	Holland	Director of Climate Programs	ICLEI USA	San Diego	CA
Becky	Holt	Assistant Director	Green Alliance	Portsmouth	NH
Lynne	Kaye	Co-Chair	Loudoun Green Business Challenge	Loudoun County	VA
Katrina	Kazda	SBN Managing Director	Sustainable Business Network of Massachusetts	Cambridge	MA
Mark	LeBel	Energy Fellow	Connecticut Fund for the Environment	New Haven	CT
Jessie	Lerner	Director, Sustainable Business Initiative	Sustain Dane	Madison	WI
Kirsten	Liske	Vice President Pollution Prevention and Zero Waste	California Green Business Challenge	Santa Cruz	CA
Lorenzo	Macaluso	Director, Green Business Services	Center for EcoTechnology	Pioneer Valley	MA
Naomi	Mermin	Principal	Naomi Mermin Consulting	Portland	ME
Sheila	Miller	Member Services Director	BOMA Greater Minneapolis	Minneapolis	MN
Mihir	Parikh	Sustainability Programs Coordinator	Challenge for Sustainability	Boston	MA
Scott	Pomeroy	Sustainability Manager	Downtown DC Business Improvement District	Washington DC	DC
Eloisa	Portillo-Morales	Sustainability Program Engineer	El Paso Green Office Challenge	El Paso	TX
Megan	Ramey	Sustainability Programs Coordinator	Challenge for Sustainability	Boston	MA
Vanessa	Roanhorse	Project Manager	Chicago Green Office Challenge	Chicago	IL
Eric	Roberts	Associate (facilitator)	Consensus Building Institute	Cambridge	MA
Yalmaz	Siddiqui	Senior Director, Environmental Strategy	Office Depot	Boca Raton	FL
Mike	Steinhoff	Senior Program Officer	ICLEI-USA	Boston	MA
David	Straus	Director of TDM & Sustainability	Challenge for Sustainability	Boston	MA

Bradford	Swing	Director of Energy Policy, Renew Boston	Office of the Mayor, Environment and Energy	Boston	MA
Scott	Wood	Project Manager	Environmental Defense Fund	Boston	MA
Sarah	Zaleski	Policy Advisor	U.S. Department of Energy	Washington	DC
Kelly	Zonderwyk		Arlington Green Games	Arlington	VA

Appendix B: Summit Agenda

Thursday May 9, 2013

8:30 Registration and Breakfast
9:00 Welcome, Introductions and Overview of Summit
Rick Dimino, President & CEO, A Better City
Brian Swett, Chief of Environment & Energy, City of Boston
Mariella Puerto, Senior Program Officer, Barr Foundation
Ona Ferguson, facilitator, Consensus Building Institute
9:45 Organizational Stories: Successes & Lessons Learned
Jessie Lerner, Program Manager, Sustain Dane
Brian Geller, Founder & Executive Director, Seattle 2030 District
Lorenzo Macaluso, Director of Green Business Services, Center for Ecotechnology
10:30 Break
10:45 Program Funding
David Straus, Director of TDM & Sustainability, A Better City
Yalmaaz Siddqui, Senior Director, Environmental Strategy, Office Depot
11:30 Benchmarking Business Practices
Mihir Parikh, Sustainability Program Coordinators, A Better City
Michael Steinhoff, Senior Program Officer, ICLEI

12:30 Lunch
1:15 Data Analysis and Evaluating Your Program
Naomi Mermin, Energy and Environmental Consultant, Naomi Mermin Consulting
Kirsten Liske, Collaborative Team Leader, Ecology Action
2:15 Small Group Discussions on Working with Utilities and Energy Efficiency Programs
3:15 Break
3:30 Developing Effective Programming & Resources
Vanessa Roanhorse, Project Manager, Chicago Green Office Challenge
Scott Wood, Project Manager, Environmental Defense Fund
4:45 Wrap Up
5:00 Adjourn & Local Beer and Wine Reception
7:00 Optional Dinner at Taranta, 210 Hanover Street, Boston

Friday May 10, 2013

9:00 Welcome and Observations from Day 1
9:15 Leveraging Participants to Change Behavior
Amy Harker, Specialist, Class 5 Energy
10:30 Break
10:45 Awards, Recognition & Marketing
Michelle Castagnola, Env. Resource Specialist, Chula Vista Green Business Challenge
Noon Working Together & Moving Forward
12:30 Adjourn
12:45 Optional Lunch and Film Screening of “So Right, So Smart” with Challenge members

Appendix C: Ideas for Moving Forward

The following ideas for how people would like to work with colleagues from other challenge program were developed by the group. People then indicated how important they thought each idea was (indicated by a number in brackets showing how many check marks each item received), whether they would volunteer to lead such an effort, and whether the would be interested in participating.

1. Explore National Association of Green Biz Programs / Informal National Network / Should this be started as a unique group or should it join another group as a subcommittee? [24]
    - Volunteered to lead: ABC, ICLEI
    - Interested in participating: Michelle Castagnola, Lynne Kaye, Mihir Parikh, Kirstin Liske, Jessie Lerner, Brian Geller, Josephine Fleming, Cassandra Carroll, Scott Pomeroy, David Straus, Eloisa Portillo-Morales
2. Consistent Metrics to show progress across programs, survey or whitepaper to renew the 75% similarities [12]
    - Volunteered to lead: ICLEI
    - Interested in participating: Megan Ramey, Lynne Kaye, Michelle Castagnola, Sarah Zaleski, Mihir Parikh, David Straus, Jessie Lerner, Brian Geller, Cassandra Carroll
3. Organize next Summit [7]
    - Volunteered to lead: Kirsten Liske, Cassie Carroll, ICLEI
    - Interested in participating: Michelle Castagnola, Sarah Zaleski, Megan Ramey, Yalmaz Siddiqui, Eloisa Portillo-Morales, Cassandra Carroll, Josephine Fleming
4. Online information sharing platform to post needs and offers to help each other: LinkedIn, Google Group, CBSM.com, National Field, etc. [3]
    - Volunteered to lead: Mihir Parikh, ICLEI
    - Interested in participating: Megan Ramey, Michelle Castagnola, Sarah Zaleski, Kirstin Liske, Scott Wood, Eloisa Portillo-Morales, Jessie Lerner, Cassandra Carroll, Amy Harker, and the Center for EcoTechnology
5. Learn from utilities how programs might help them [3]
    - Volunteered to lead: Michelle Castognola, ICLEI
    - Interested in participating: Sue Goldstein, David Straus, Eloisa Portillo-Morales, Brian Geller, Cassandra Carroll
6. Partnering for funding [2]
    - Volunteered to lead: ICLEI
    - Interested in participating: Kirstin Liske, Amy Harker, David Straus, the Center for EcoTechnology, Scott Pomeroy, Brian Geller, Josephine Fleming, Mihir Parikh, Cassandra Carroll
7. Create speakers group to share joint interests on behalf of all of us [2]
    - Volunteered to lead: 0
    - Interested in participating: the Center for EcoTechnology, Amy Harker, Scott Wood, Megan Ramey, Scott Pomeroy, Lynn Kaye, Michelle Castagnola
8. Quarterly Webinars or conference calls (prep w/ surveys) showcase our strengths to learn from each other [1]
    - Volunteered to lead: ICLEI
    - Interested in participating: Megan Ramey, Lynne Kaye, Kirstin Liske, Sarah Zaleski, Eloisa Portillo-Morales, Cassandra Carroll, Josephine Fleming
9. Move forward with consistency idea – standards, best practices [1]
    - Volunteered to lead: ICLEI

- Interested in participating: Michelle Castagnola, Kirstin Liske, Brian Geller, Jessie Lerner, Scott Pomeroy, Michelle Castagnola

10. Compile and share member business lists across programs [1]
    - Volunteered to lead: ICLEI
    - Number interested in participating: the Center for EcoTechnology, Kirstin Liske, Megan Ramey, Lynne Kaye, Michelle Castagnola, Sarah Zaleski, Scott Wood, Scott Pomeroy, Jessie Lerner, Cassandra Carroll
11. Project Database [0]
    - Volunteered to lead: 0
    - Interested in participating: Megan Ramey, Michelle Castagnola
12. Resource Library for collateral [0]
    - Volunteered to lead: ICLEI
    - Interested in participating: Josephine Fleming
13. Get program book more complete - missing groups, software, and circulate [0]
    - Volunteered to lead: Megan Ramey, Mihir Parikh
    - Interested in participating: ICLEI
14. Find out software everyone is using and share dummy log-in [0]
    - Volunteered to lead: Megan Ramey
    - Interested in participating: Cassandra Carroll, Mihir Parikh, Josephine Fleming, ICLEI