Developing and Implementing a Vision

Module 2 in the Energy CLASS Prize "Stakeholder Engagement" Course
March 19, 2024

Welcome

Warm Up and Housekeeping	10 mins
Lesson Plan • Review Engagement Session #1 • Setting a Vision: Healthy and Efficient Schools • Vision Activity • Moving from Vision to Implementation • Case Study: Canajoharie Central School District	1 hour 30 mins
Discussion	20 mins

Course Objective

Establish a baseline understanding of stakeholder engagement including stakeholder and champion identification, communicating to diverse stakeholder groups, and key message development.

1. Participants will be able to identify their key stakeholders and will understand key messages for communicating the importance of efficient and healthy schools.

2. Participants will understand how to lead a visioning process to refine messaging into a cohesive idea of where their organization wants to go.

3. Participants will learn from practitioners in the field, who are currently or have previously led engagement and visioning activities.

Today's Presenters

Reilly Loveland,
NBI

Fran D'ambrosio,
Canajoharie SD

Ada Rodriguez

ICF

Engagement Session #1 Review

Recap: Reasons You Have Heard No...

occupant dissatisfaction

no maintenance staff

is that really necessary

knowledge

responsibility

roi too long

political

capacity

ugly

lack of time

not a priority

silos

awareness

environmental

timeline

lack of understanding

we've already tried that

return on investment

roi doesn't meet criteria

Mentimeter Time

Share a positive experience related to energy efficiency or sustainability projects.

www.menti.com
code 5997 3809

Why Engagement in Schools is Important

- ✓ Internal stakeholders

- ✓ External stakeholders

- ✓ Educational performance/outcomes

- ✓ Regulatory or statutory requirements

- ✓ Safety & Security

- ✓ Deferred maintenance

- ✓ Staff pay, benefits, and retention

Discovery Elementary Solar Lab | Arlington, VA
Photo Credit: VMDO Architects
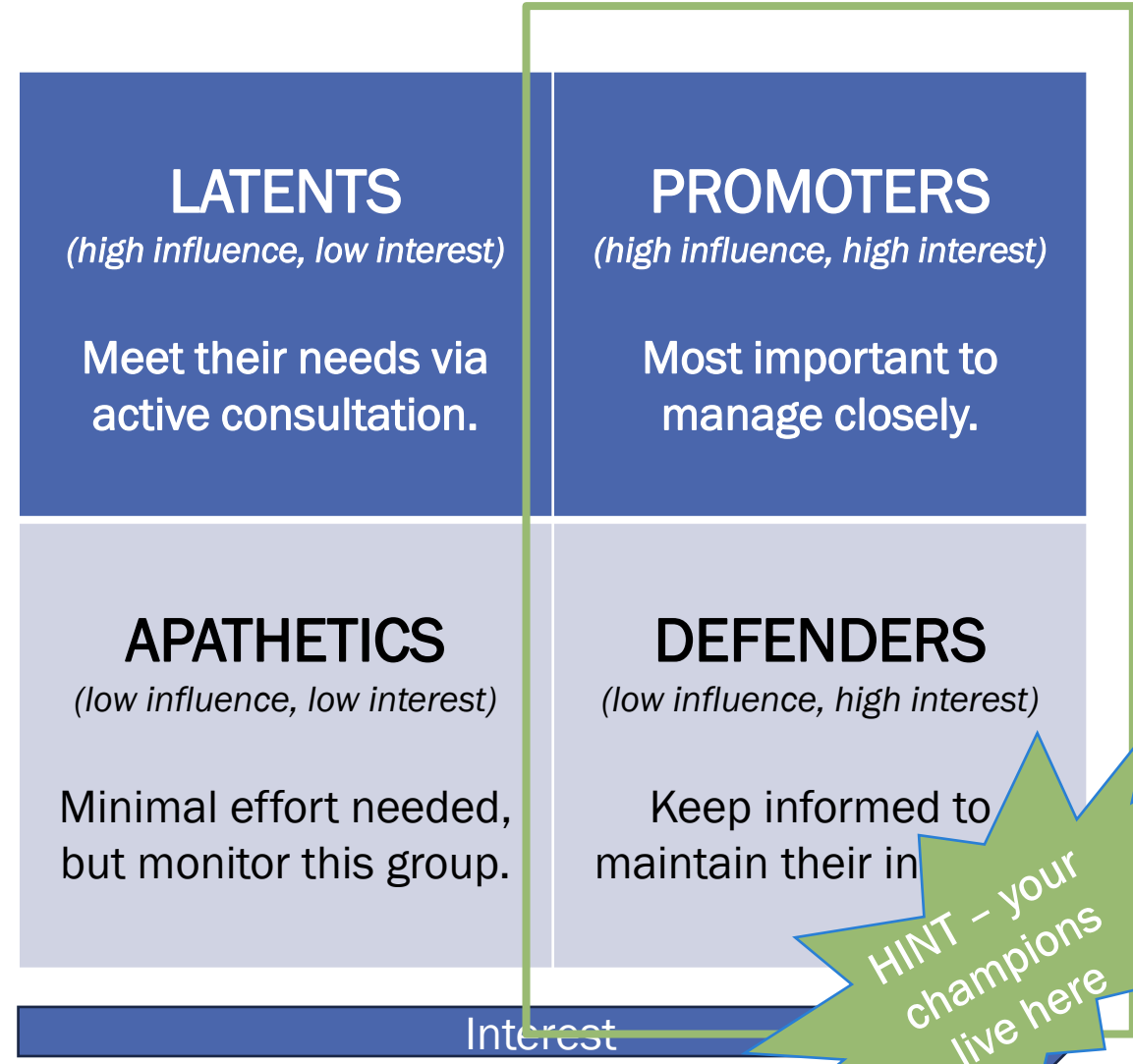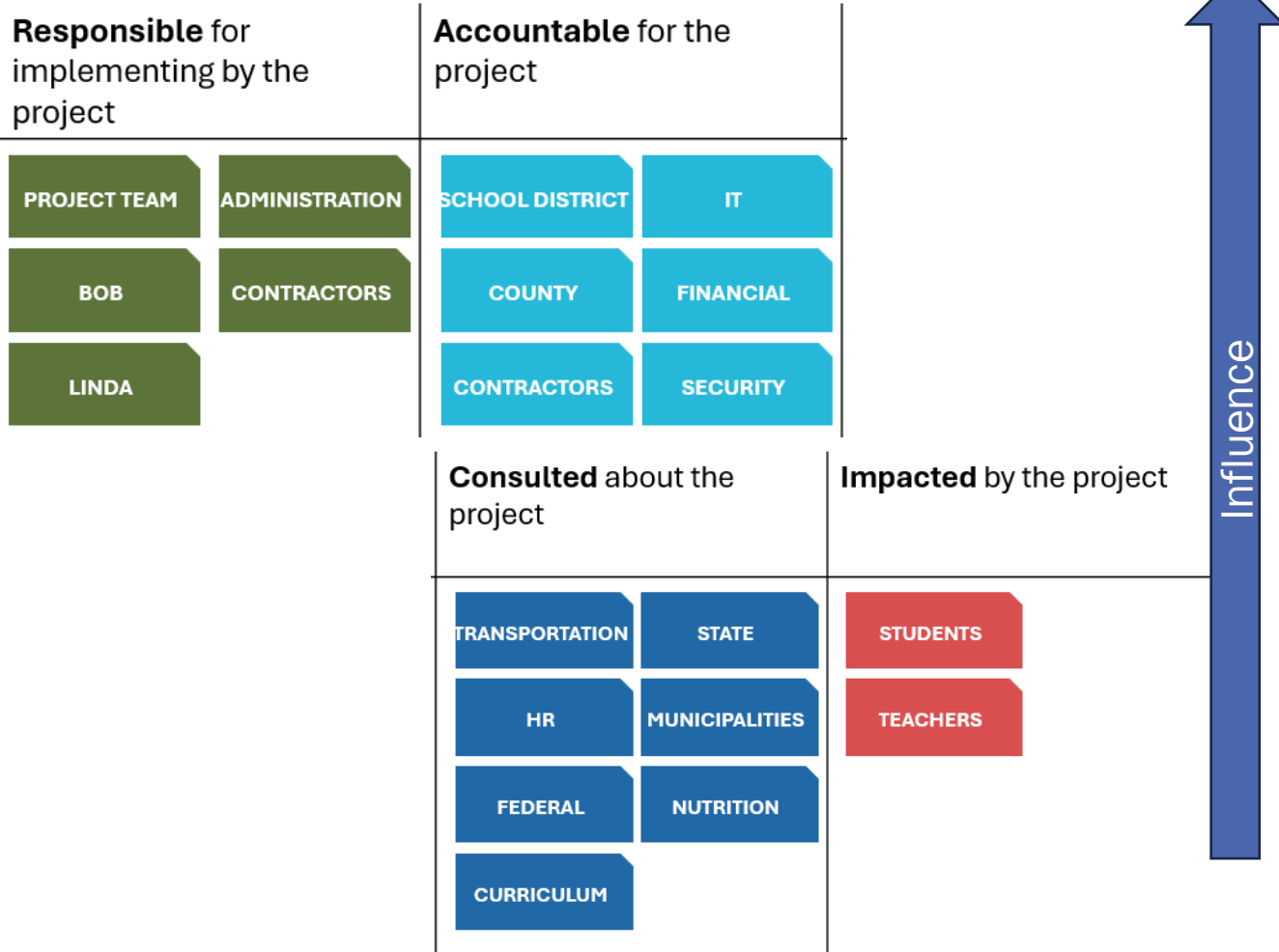
Engagement Process Recap

Baseline → Set Goals (*Plan*) → Implement → Follow-up → (loop back to Baseline)
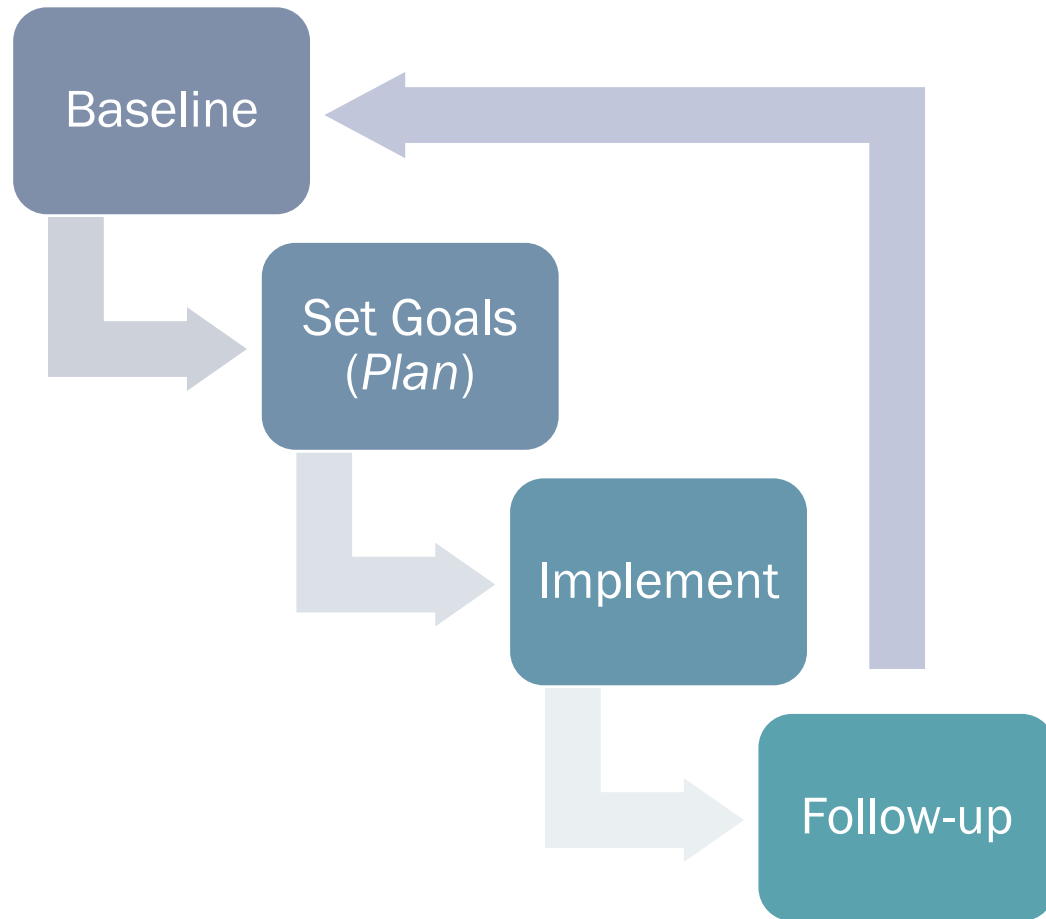
What it isn't:

- Engaging with the 'general public'
- Telling what is already planned or done
- A guarantee of what will be done

What it is:

- A structured project management process
- An opportunity to listen and collaborate

Build a Team of Stakeholders and Champions!

Responsible for implementing by the project

- PROJECT TEAM
- ADMINISTRATION
- BOB
- CONTRACTORS
- LINDA

Accountable for the project

- SCHOOL DISTRICT
- IT
- COUNTY
- FINANCIAL
- CONTRACTORS
- SECURITY

Consulted about the project

- TRANSPORTATION
- STATE
- HR
- MUNICIPALITIES
- FEDERAL
- NUTRITION
- CURRICULUM

Impacted by the project

- STUDENTS
- TEACHERS

Influence →

Interest →

LATENTS
(high influence, low interest)

Meet their needs via active consultation.

PROMOTERS
(high influence, high interest)

Most important to manage closely.

APATHETICS
(low influence, low interest)

Minimal effort needed, but monitor this group.

DEFENDERS
(low influence, high interest)

Keep informed to maintain their in

HINT – your champions live here

Include Students and Strive for Resolutions!

PROGRAM GOALS

CAPS

Empowering Students to Take Action

We aim to educate and inspire youth to make a difference in their communities

Expanding Work-Based Learning

We strive to help students step outside of the classroom and apply themselves to solve real world problems

Saving Money for Schools

We seek to maximize the financial benefits of our programs to improve the bottom line, especially for under-resourced school districts

Improving the Environment

We aim to reduce the greenhouse gas emissions from school districts by 80% by 2030.

Advancing Environmental Justice

We focus our efforts where our impact is most needed, in California's poorest and unhealthiest communities.

Development of a 10-year **Climate Action Plan** centered around school communities, including students, teachers, district leadership, local government leaders and business leaders. Our overarching goal is to **reduce GHG emissions by 80%** by 2030 (compared to a 1990 baseline), equating to **~10% reduction per year**.

APPROVED

Sacramento City Unified School District

SACRAMENTO CITY UNIFIED SCHOOL DISTRICT BOARD OF EDUCATION

Agenda Item# 9.4

Meeting Date: October 5, 2023

Subject: Approve Resolution No. 3348: Adopting Carbon Neutral Goals and Guidelines for SCUSD Buildings

- ☐ Information Item Only
- ☐ Approval on Consent Agenda
- ☐ Conference (for discussion only)
- ☐ Conference/First Reading (Action Anticipated: _____)
- ☐ Conference/Action
- ☒ Action
- ☐ Public Hearing

Division: Facility Support Services

Recommendation: Approve Resolution No. 3348: Adopting Carbon Neutral Goals and Guidelines for SCUSD buildings.

Background/Rationale: Resolution No. 3348 would adopt the Carbon Neutral Goals and Guidelines for SCUSD Buildings that was presented to the Board at the September 21, 2023 Board Meeting.

Sacramento City Unified School District (SCUSD) is embarking on a process to design, construct, and modernize school buildings and facilities to achieve carbon neutrality by 2045, which is set by California Executive Order B-55-18, 2018. As part of the ongoing work outlined by the Facilities Master Plan that was Board approved in October 21, 2021, the District partnered with the New Buildings Institute (NBI) and the Sacramento Municipal Utilities District (SMUD) to develop District guidelines for prioritizing efforts to achieve building portfolio carbon neutrality by 2045, if not sooner. This includes portfolio and project level energy targets and timelines, as well as project requirements for new construction, major modernizations, and facility upgrades. This was a major component of the Facilities Master Plan.

Setting a Vision

Healthy and Efficient Schools

Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world.

Joel Barker

What is Visioning?

Visioning is a process by which a community defines the future it wants. Through public involvement, communities identify their purpose, core values and vision of the future.

Visioning:

- Emphasizes community assets rather than needs.

- Assesses community options and opportunities on the basis of shared purposes and values.

- Acts a stand-alone process or part of a comprehensive planning process.

Boulder Valley School District Broomfield Heights Middle School
Photo Credit: Jade Cody

Steps in the Visioning Session

IMAGINE THE FUTURE

Encouraging participants to visualize the community's future.

SHARE VISIONS

Collecting and noting common aspects of individual visions.

DRAFT AND REFINE VISION

Creating a community vision statement based on consensus.
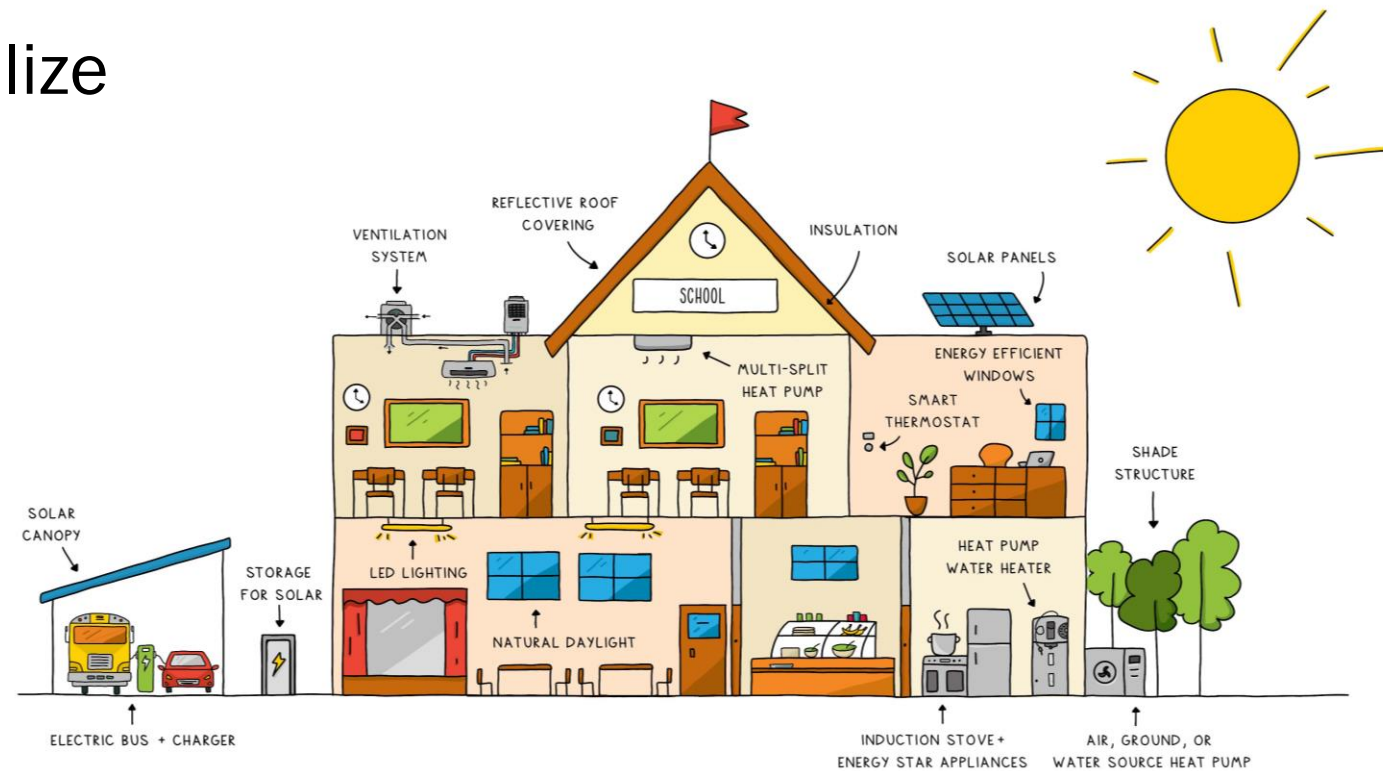
All-electric School
Credit: Nicole Kelner

Leverage an Existing Vision

- Utilize existing organizational vision

- Tie goals and priorities to vision through language

- Garner buy-in and expedite planning process

Org Vision Example

Every Learner, Together, World Ready

- *Canajoharie Schools*

Create a New Vision

- Allows for greater input from diverse departments/stakeholders
- Allow sufficient time for visioning process
- Don't ignore existing organizational vision(s)
- Can be more specific to desired outcome
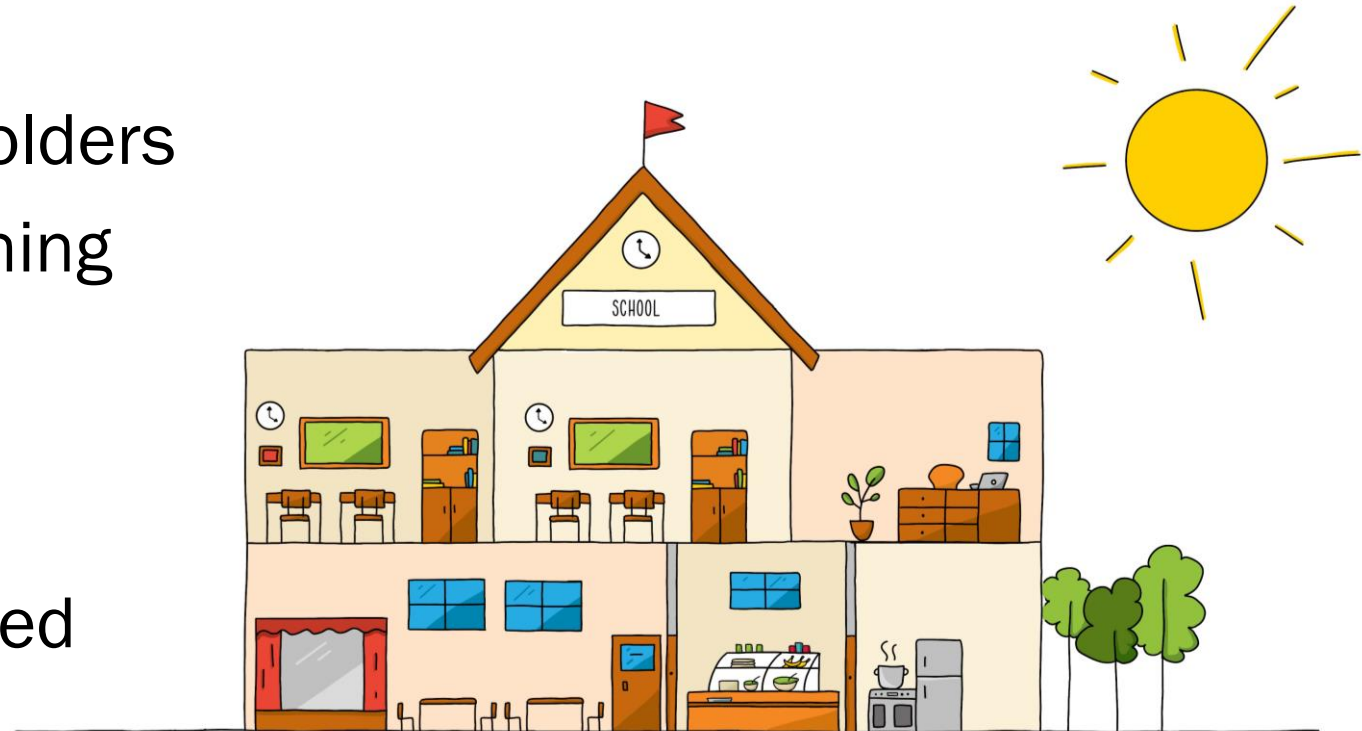
Credit: Nicole Kelner

Start with a Collaborative Mindset

- Words matter!
  - Establish common language through affinity grouping activity
- Not all will have the same priority
  - Level setting and identifying priorities early on are key to sustained engagement
- Keep goals clear and simple
  - Use existing or industry standard metrics when possible

Boulder Valley School District Eco-Charrette
Photo Credit: BVSD Sustainability

Level Setting for the Vision Process

- **Put bounds on what the project seeks to accomplish**
  - Are there departments, equipment, or processes that will be addressed at a later date?
  - Are there pre-defined funding mechanisms to highlight so team members don't dwell on the money?

- **Clarify who is in the room, and why.** Also clarify who isn't in the room and why.

- **Establish a realistic timeline**

<3yrs can be too short for making change and
>10yrs can be too far out to actually get things started

Sample Visioning Session Agreements

- Accept all the creative and wild ideas.
- Build on other participants' ideas – "Yes, and."
- Presume positive intentions and avoid criticism.
- Aim for quantity over quality.
- Establish a common language.
- Use existing or industry standard metrics when possible.
- Probe for specificity.
- What else?!

Photo Credit: James Taeler

Imagine it's 2030, what headlines do you see about your school district and community, in the news?

What do you see?

What do you hear?

What stands out to you?

| Affinity Mapping | Draft Statements | Review and Refine | Vision Statement |

Group Visioning Activity

What are the key groups or aspects you want to address to make your vision a reality?

Who is in the Room With You?

Create a Vision – to Miro!
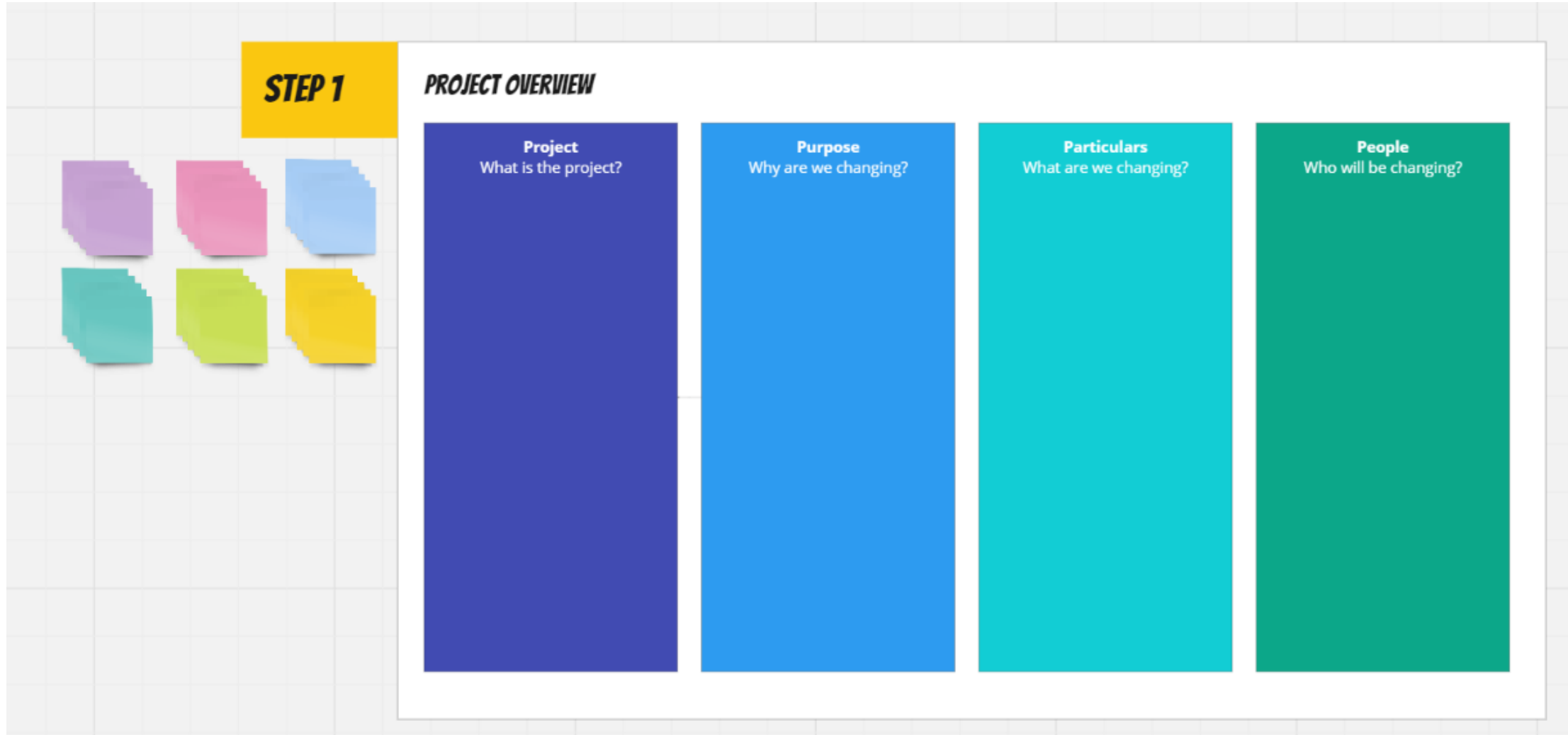
Create a Vision Part 2 – Miro

Aligning Support for the Vision
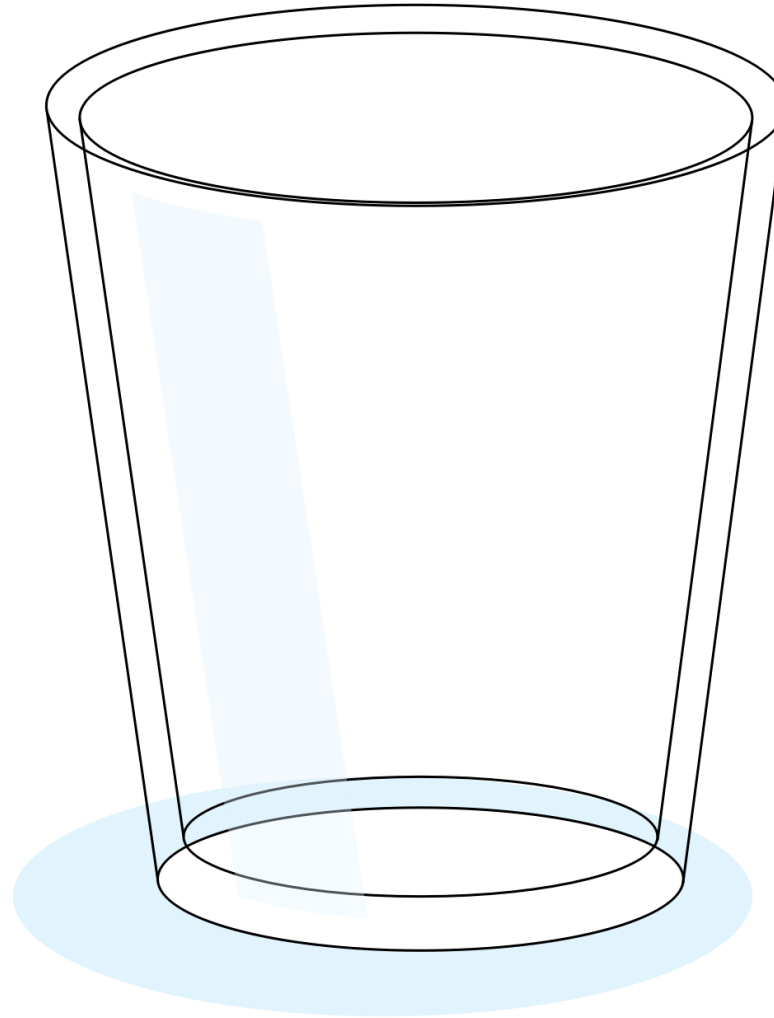
Glass Half Full Exercise

Visioning exercise: What are the existing resources in your community that can support your vision?

- Knowledge

- Resources

- Physical or natural spaces

- Community partners

- Culture

- Events

- Technology
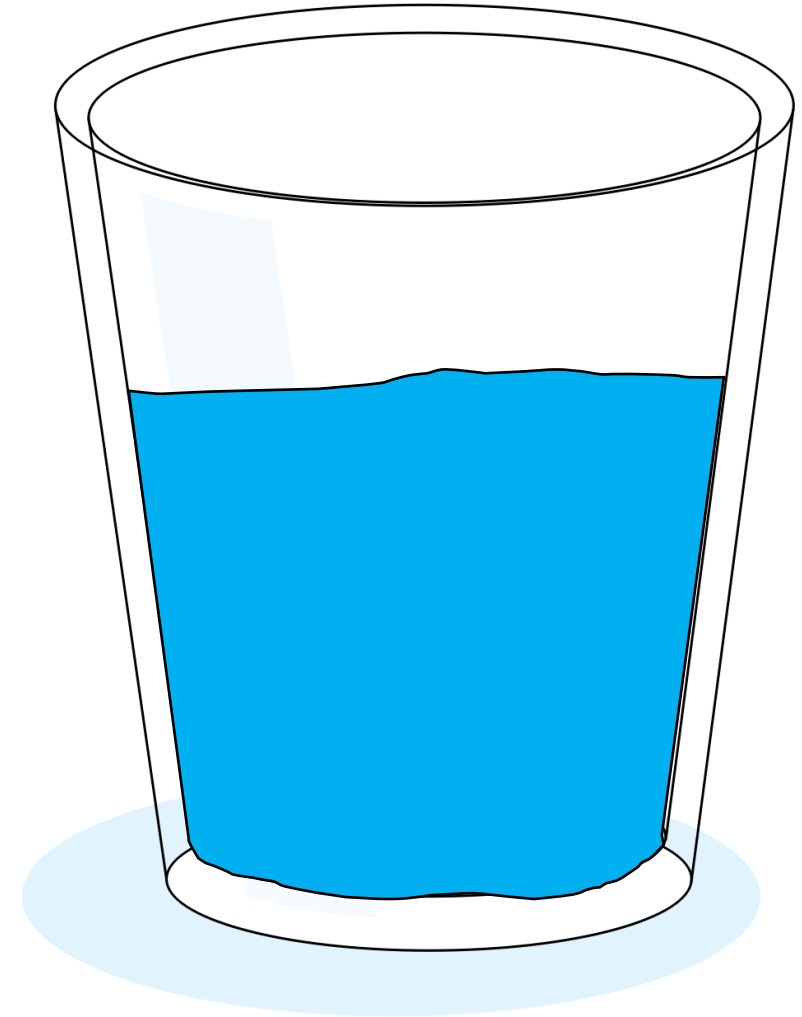
Writing a Vision Statement

- Use positive, present tense language.

- Highlight qualities that provide the reader with a feeling for the district's/project's uniqueness.

- Ensure inclusiveness for diverse populations.

- Depict the highest standards of excellence and achievement.

- Specify a time-period to ground the vision in a tangible timeline.

- Can be used in a policy or resolution!

Lane's School Climate Statement

- At Lane, we want school to be a place where you can have fun, make meaningful relationships, explore your identity, have a sense of belonging, and feel safe. We value accountability, safety, kindness, and the voices of all members of our community, including students, parents, and staff.

- As the equity and climate team, we are committed to taking the necessary steps to ensure a safe and welcoming environment for all of our students, which includes:
  - Creating activities that are grounded in diversity, inclusion, and cultural responsiveness
  - Providing incentives for our students to encourage, engage, and motivate them to reach their highest potential
  - Supporting the implementation of restorative practices in our classrooms
  - Facilitating peer mediation

Source: Lane Middle School | Portland Public Schools
https://www.pps.net/domain/1692

Checking Out

Close with appreciations and a celebration of the imagination, creativity and forward-thinking achievement of the visioning work.

1. Recognize that you have created a load of great ideas that can be taken forward when you do the visioning exercise with the wider community, as well what you could do now.

2. You can do a quick go around where you ask everyone to state one thing they have really appreciated about the session and one thing that they found challenging about the process.

Example: Marquette High School

VISION

"A healthy, efficient, and walkable campus for students to thrive."

Moving from Vision to Practical Goals and Objectives.

Example: Marquette High School

GOAL

"Improve walkability"

INEFFECTIVE OBJECTIVE

"Keep sidewalks safe and accessible."

Beyond the Vision

Leaders often struggle with a gap between what they envision and what gets accomplished, leading to frustration and stagnation.

Developing a Plan:

- Outline the movement from the current state towards the envisioned future with a strategy that serves as an actionable roadmap.

- Break down the vision into goals and objectives.

- Incorporate SMART Goals to ensure each objective is Specific, Measurable, Attainable, Relevant, and Time-bound (SMART).

SMART Statements

Specific

Measurable

Achievable

Relevant

Time-Based

- Ensure goals can be understood by a wide audience.

- Consider factors in your district or community that may impact goals.

- Employ a progressive approach to goal-setting, breaking down objectives into manageable, sequential steps.

SMART Statements

Specific	• Define clear objectives across different sectors (e.g., energy, water, education). • Use clear language, avoiding vague terms and industry-specific jargon. • Identify specific equipment, operations, or facilities as focus areas.
Measurable	• Employ metrics-based targets to track progress. • Favor percentage changes as indicators of progress over absolute numbers. • Clearly define units for all metrics, incorporating qualitative measures when necessary.
Achievable	• Assess available skills, resources, and capacity for goal attainment. • Identify and plan for potential obstacles. • Evaluate the feasibility of targeted outcomes within the given timeframe. • Secure or plan for necessary funding and stakeholder support.
Relevant	• Align goals with local and regional environmental, climate conditions. • Ensure compliance with relevant policies and regulations. • Align objectives with organizational vision and regional strategies.
Time-Based	• Set a clear deadline for goal achievement. • Establish baseline years for context and progress measurement. • Assess the timeline's relevance and practicality.

Sample SMART Statements

Opportunity: Green Teams

Goal: Active Green Teams at all CRCSD schools.

Strategies:
- Explore opportunities for supporting staff involvement with recognition and resources.
- Current Green Team leaders are encouraged to mentor and support new teams and leaders for successful implementation.
- Schools can consider various clubs and classes focused on science and the environment for Green Team recruitment.

Source: Cedar Rapids Community School District, https://crschools.us/about/initiatives/sustainability/sustainability-plan/

Goal 3: Educate the public about the importance of sustainability.

Each school has a Sustainable School Liaison (SSL) tasked with increasing sustainability awareness throughout the school division. Through their leadership, many of our elementary, middle and high schools have developed programs or clubs addressing the issue of sustainability.

Source: Virginia Beach City Public Schools, https://www.vbschools.com/about/sustainability

4. BVSD will develop a balanced water management plan to support local stormwater management and decrease water consumption by 5% Kgals. This management plan will include:
- a system to track monthly water consumption at each site;
- plumbing improvements based on design standards;
- use of independent meters for irrigation meters;
- landscape design and green school yards to optimize evapotranspiration irrigation systems; and
- use efficient and life-cycle costing to evaluate design choices and options.

Source: Boulder Valley School District, https://www.bvsd.org/departments/operational-services/sustainability

- Be a Carbon Positive District by 2040 – which means that 105% of the District's annual Scope 1 emissions (directly from combustion or from district vehicles), Scope 2 emissions (indirectly from purchased electricity, steam or heating and cooling), and optionally Scope 3 emissions (indirectly from consumptions of goods and materials) are first reduced, then offset on a net-annual basis with district-generate renewable energy (such as on-site or off-site solar or wind power), or through the purchase of Green E Certified carbon offsets. On-site energy storage is encouraged for annual fluctuations and added resilience during grid-disruptions. This likely requires building enclosure and systems upgrades to existing buildings - because building energy uses is often the largest impact category. It promotes the phase-out of natural gas use. It might require bus and maintenance vehicle upgrades to electric supplied by solar by 2040. It would be important to tie these potential strategies to a carbon footprint anayisis that reveals the areas of highest impact and priority. This policy should align with the WA Clean Buildign Act HR 1257, requiring conservation and carbon reduction.

Source: Seattle Public Schools, https://www.seattleschools.org/departments/resource-conservation/sustainability/

NORTH STAR GOALS

Environmental Protection
Reduce overall greenhouse gas emissions by at least 90% by 2050 (from a 2010 baseline).

Economic Prosperity
Reduce natural resources consumption and waste year-over-year.

Social Development
All students and staff are engaged in sustainability by 2050.

Source: Denver Public Schools, https://issuu.com/dpscommunications/docs/dps_climate_action_plan_pages

Example: Marquette High School

Vision: A healthy, efficient, and walkable campus for students to thrive.

Goal (Specific and Relevant): Implement infrastructure improvements and educational programs, to enhance sidewalks, crosswalks, and pedestrian zones, prioritizing safety and accessibility.

Objectives (Measurable, Achievable, Time-Based): The campus facilities department will:

- Complete a detailed walkability audit to identify areas for improvement by the end of Year 1.

- Integrate campus wide walkability concepts into redesign and maintenance projects by the end of Year 2.

Bringing Plans into Reality

Implementing a Project Plan

Implementing a project plan involves managing resources, executing initiatives, and adjusting as needed to achieve the project goals.

Tips for Success:

- Engage leaders, project sponsors, and champions fully and visibly in supporting strategic initiatives.

- Foster a culture of accountability and collaboration by ensuring all team members understand their roles.

- Track progress against goals, utilizing measurable criteria established during the planning phase.

- Create mechanisms for feedback from all stakeholders.

Introduction to RACI Matrix

- A RACI Matrix is a tool used to define roles and responsibilities within a project.

- Provides a visual representation of the relationships between roles and the tasks they are responsible for.

- A useful tool and technique for business analysis and program management.

- Ensures that all stakeholders are aware of their roles and responsibilities, and that tasks are completed in an organized and efficient manner.

What is RACI?

R is for Responsible

Person(s) working on the activity/task.

A is for Accountable

Person(s) with decision authority.

C is for Consulted

Key stakeholder(s) included on decisions or activity.

I is for Informed

Stakeholder or persons that need to know about decisions or actions.

Discovery Elementary | Arlington, VA
Credit: VMDO Architects

Creating a RACI

Identify Roles or Individuals

Determine all roles or individuals participating in the project. Using roles offers flexibility for reassignment if needed.

Identify Tasks

Outline the tasks and expected outcomes within the project. Avoid overly detailed subdivision to prevent the matrix from becoming too complex and confusing.

Assign Tasks

Allocate each task to a specific person or role. Assign the "Accountable" role to only one individual or role to prevent dilution of responsibility.

Discuss and Finalize Assignments

Engage the entire team to discuss and finalize decisions on task assignments.

Monitor and Evaluate

Refer to and update the RACI matrix as tasks and roles evolve. At the project's conclusion, assess everyone's performance and contributions.

Example RACI

	Luke	Han	Lea	Chewi	C3PO
Provide information					
Fight storm troopers					
Defeat Darth Vader					
Lead rebel army					

Retrieved from https://www.workpath.com/magazine/raci-matrix

When to use RACI?

Multiple stakeholders

Ambiguous responsibilities
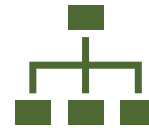
Complex projects

Lack of accountability

Benefits of RACI Matrices

- Clarify roles & responsibilities

- Improve accountability

- Facilitate communication

- Ensure effective collaboration

Credit: Rodney Tsuji

Next Steps to Implement

Logical Framework for Implementation

- Construct each SMART goal.
- Outline steps for progressing toward each goal.
- Identify necessary resources.
- Consider potential risks and assumptions.
- Leverage existing processes.
- Incorporate a feedback loop, utilizing metrics and methods for tracking progress against these metrics.
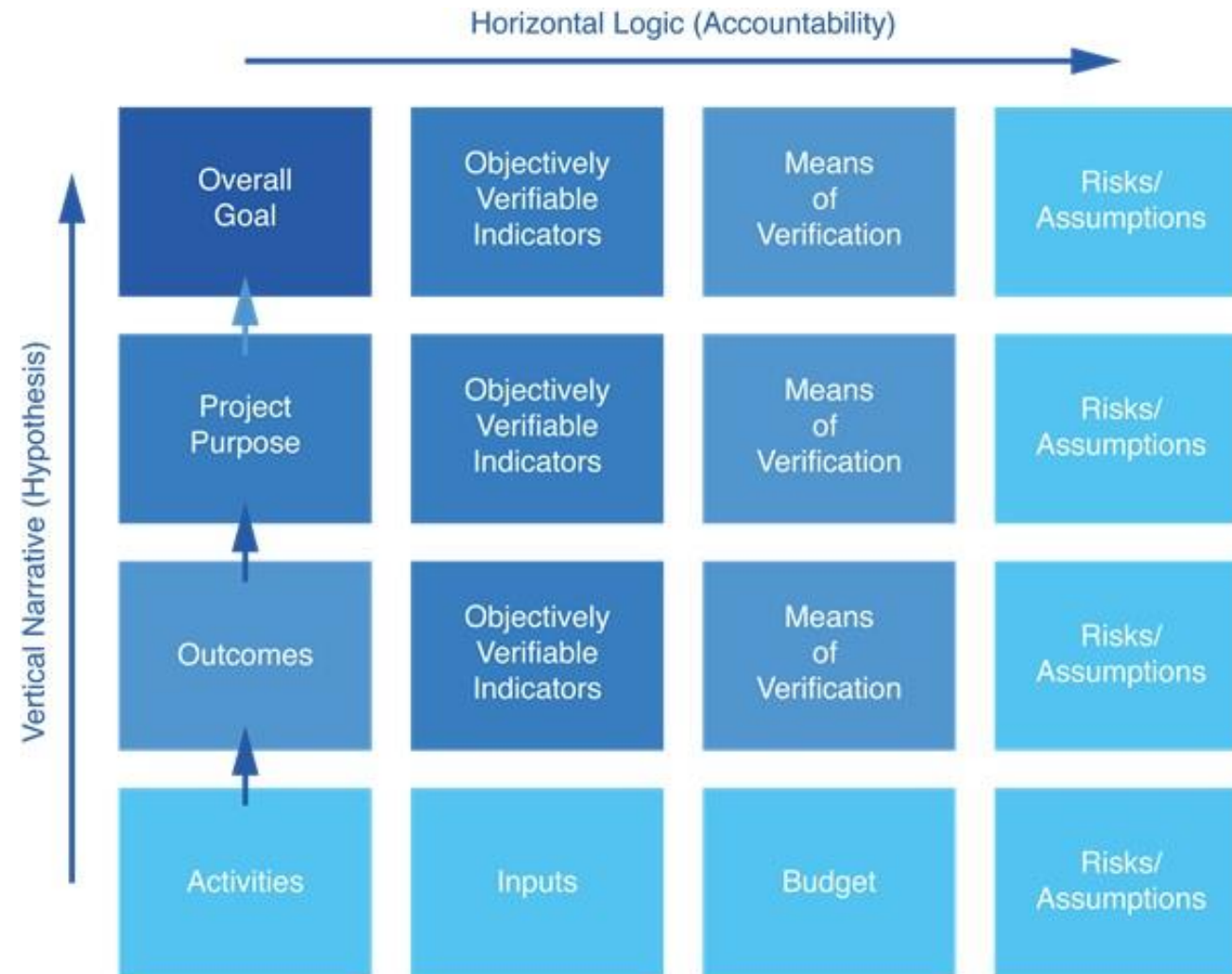
Report Out and Repeat!

- Iterative process
- Reporting out ensures stakeholders stay engaged and informed
- Track those metrics!
- Adjust as needed

Now, how do you take what you've learned here to your Phase 2 project?

- Identify stakeholders and champions and build a team!
- Develop key messages
- Define project goals
- Undergo a visioning exercise
- Create roles and responsibilities
- SMART goals
- Create a plan

- Implement!
- Report out and document lessons learned
- What else?! Add to chat!

Case Study – Canajoharie Central School District

Canajoharie Central School District
CLASS Prize

Stakeholder Engagement

Case Study

Organization Name	• Canajoharie Central School District
Location	• Canajoharie, New York
Business Type	• K-12 Public School District
Student Enrollment	• 900
Annual Energy Savings	• 8.7%

Overview

Services:

The District provides public educational services to 900 students and employs 190 staff.

Service Area:

100 square miles of Towns and Villages in Montgomery County, New York.

NCES Locale Code: Distant (32)

NYSED Designated Disadvantaged Community and High Needs District

Facilities:

Elementary School

Middle School

High School

Athletic Center with an indoor pool

Transportation Facility

Facilities
350,000 sq. ft.
Spanning 3/4 of a century in construction and systems technology

Identify and Prioritize the Stakeholders

The purpose of the school is to educate and prepare students for their future. Energy Transition is a part of that future making students the #1 stakeholder.

Administration sets the path for the faculty and staff to deliver on that responsibility so their support is essential as the #2 stakeholder.

Faculty is the mechanism by which the educational goals are met making their understanding and participation crucial as the #3 stakeholder.

Hidden Stakeholders

Maintenance staff implements the physical aspects of the initiatives requiring support and the sharing of knowledge and reasoning.

The community is not only the financial stakeholders for the schools, they provide the individual support to each student stakeholder. Sharing the district's plans, projects and progress with the community relates to what the students are learning.

Other Stakeholders such as local government and BOE can influence plan success, it is important to recognize them and start a dialog.

Educational Infusion

Elementary Practices, Middle School and High School STEM

- The Energy Curriculum involves the infusion of energy related practices, concepts and careers for Elementary, Middle and High School students. MS and HS Lessons are pushed into STEM sessions for 40 minutes once each month throughout the school year.
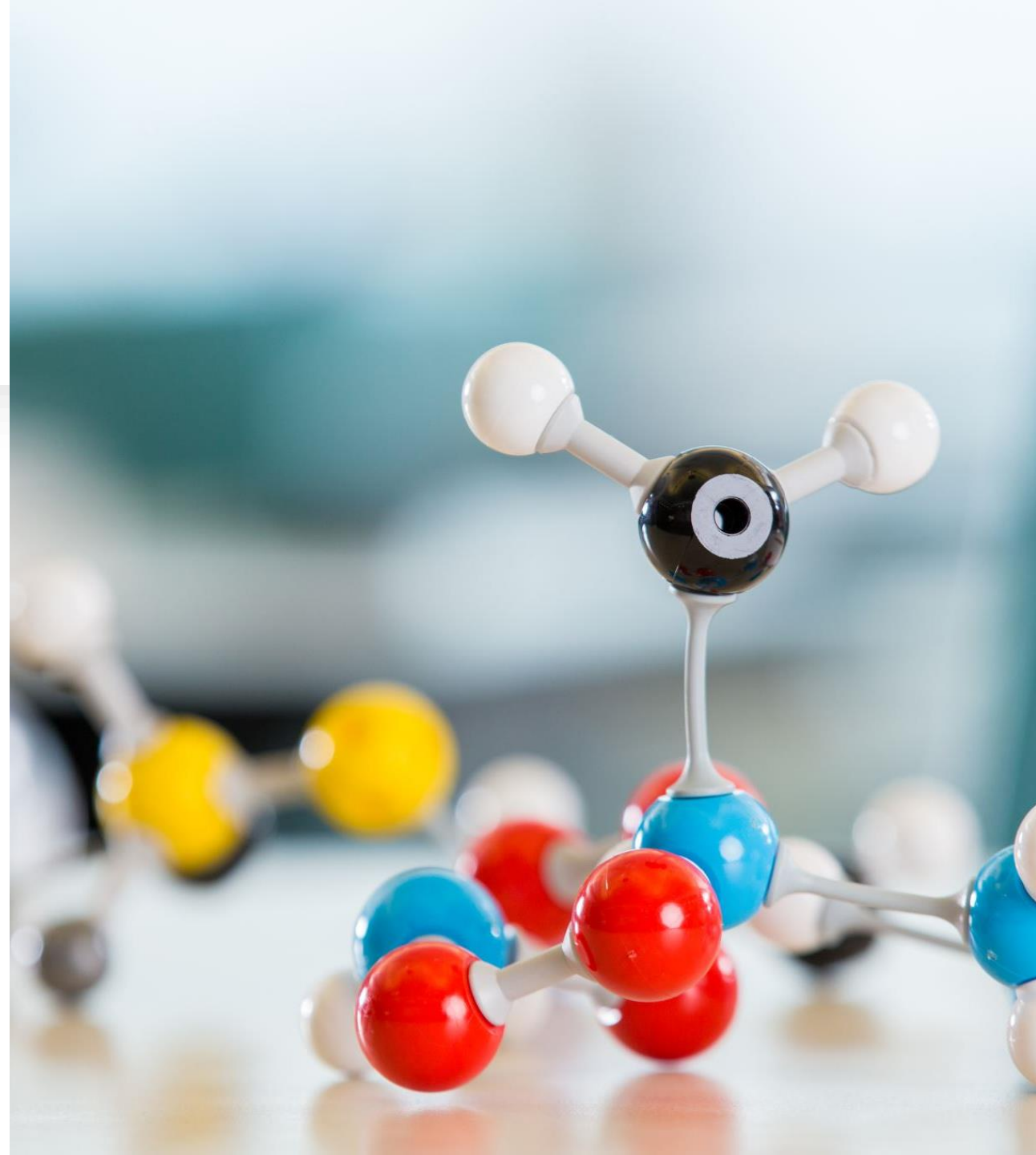
Engaging Early

Elementary Practices

Incentivized Conservation Habits

- A grade level competition to form the conservation practice first
- Winners get access to the "prize box"

Introduction to Energy in Middle School Technology

The Fundamentals of Energy and Management

- Understanding Energy (sources, uses and costs)
- Managing energy through Conservation and Efficiency
- Energy and the environment
- Field trip to the NY Energy Zone

High School STEM Engagement

Connecting High School Applied Physics to Clean Energy

Power Systems

Hydraulics

Aerodynamics

Biological

Buoyancy

Auto Racing
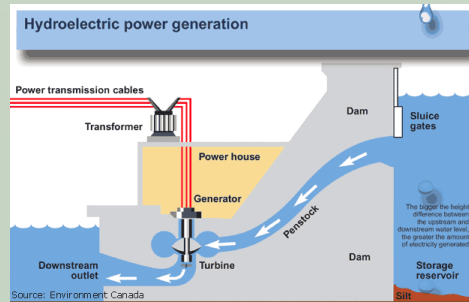
Exposure to careers and trades (developing the future workforce)

Introduction to Renewable Energy: Field trips to Fenner Renewable Energy Education Center wind farm and SUNY Morrisville's renewable/sustainable college programs

Hydroelectric Dams

Wind Turbines

Biomass and Biofuel

Wave and Tidal Energy

Solar, Batteries and EVs

Cross-Functional Team

- The Energy Manager is the link between the departments of the cross-functional energy team for development, communication and implementation of the Energy Management Plan.

  - Superintendent
  - Facilities Director
  - Curriculum Director
  - Principals
  - Support Staff

CANAJOHARIE CENTRAL SCHOOL DISTRICT

ENERGY MANAGEMENT PLAN

Revised February, 2024

Opening Conference Engagement

A 2 hour presentation to All Staff for returning/new employee orientation about the Efficient and Healthy Schools Initiative.

What we are doing
- Efforts and results

How you can help
- "Turn Off When You're Off"
- Lights, Appliances, T-stats, Windows

Acknowledgement of participation
- Special thanks: "when I asked, you helped"
- The Energy Manager is always listening
- Daily presence promotes ideas and solutions

A simple engagement to encourage participation

- Invite the staff to have a say in what changes are made and gain insight to unknown problems.

Room Use Schedule Survey

- Adjust HVAC
- Adjust Lighting
- Note Issues

# Maintenance Engagement

Moving from reactive to preventative.

The Energy Manager is based out of the Facilities Director's office encouraging awareness of the relationships between the goals of this plan and the equipment/conditions that drive the use of energy and Indoor Air Quality.
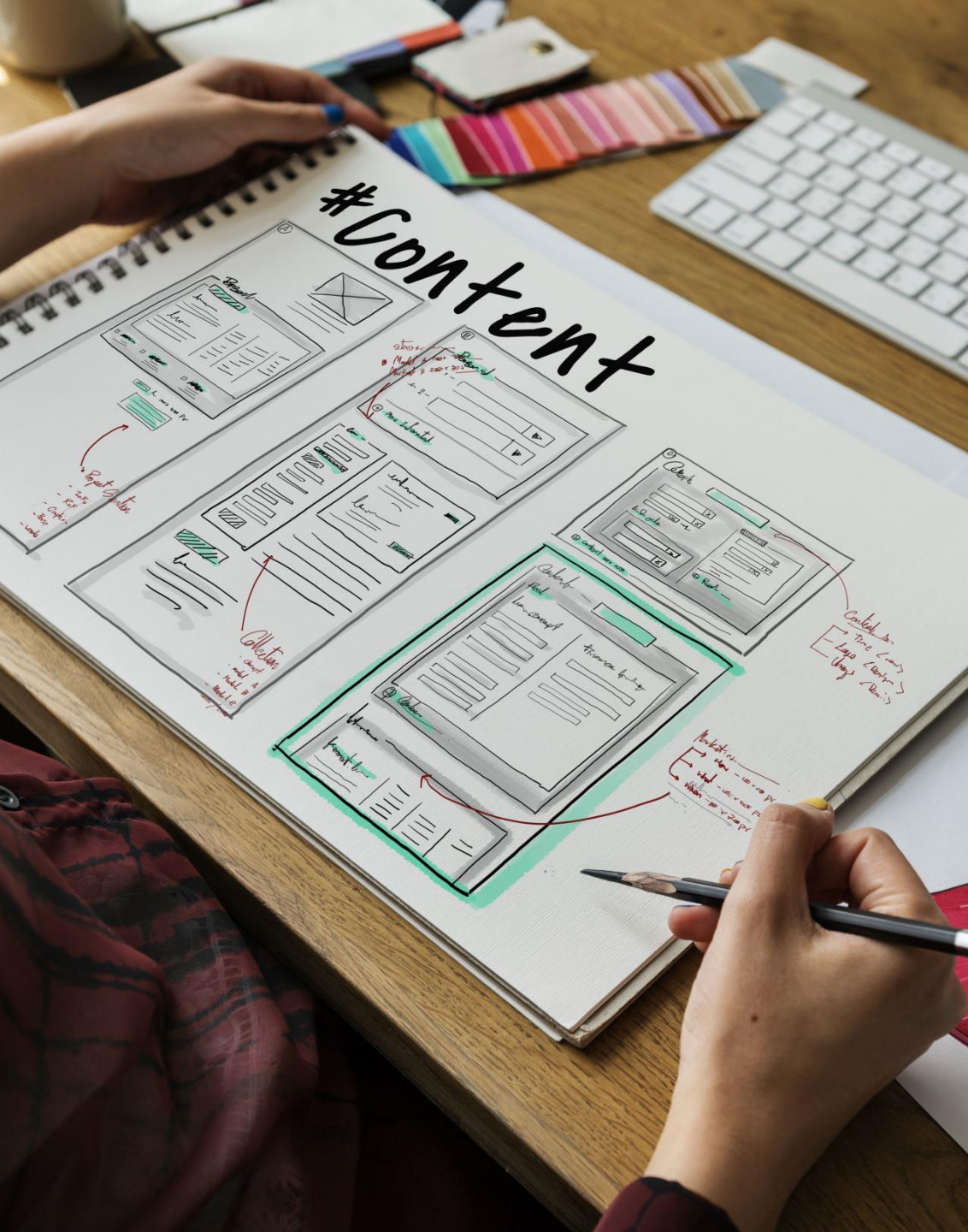
Frequent informal meetings with key personnel to provide the support, knowledge and reasoning for proper maintenance of buildings and equipment.

Project Relationships

- Maintaining communication and oversight throughout the process

- Involved in projects from concept to commissioning.
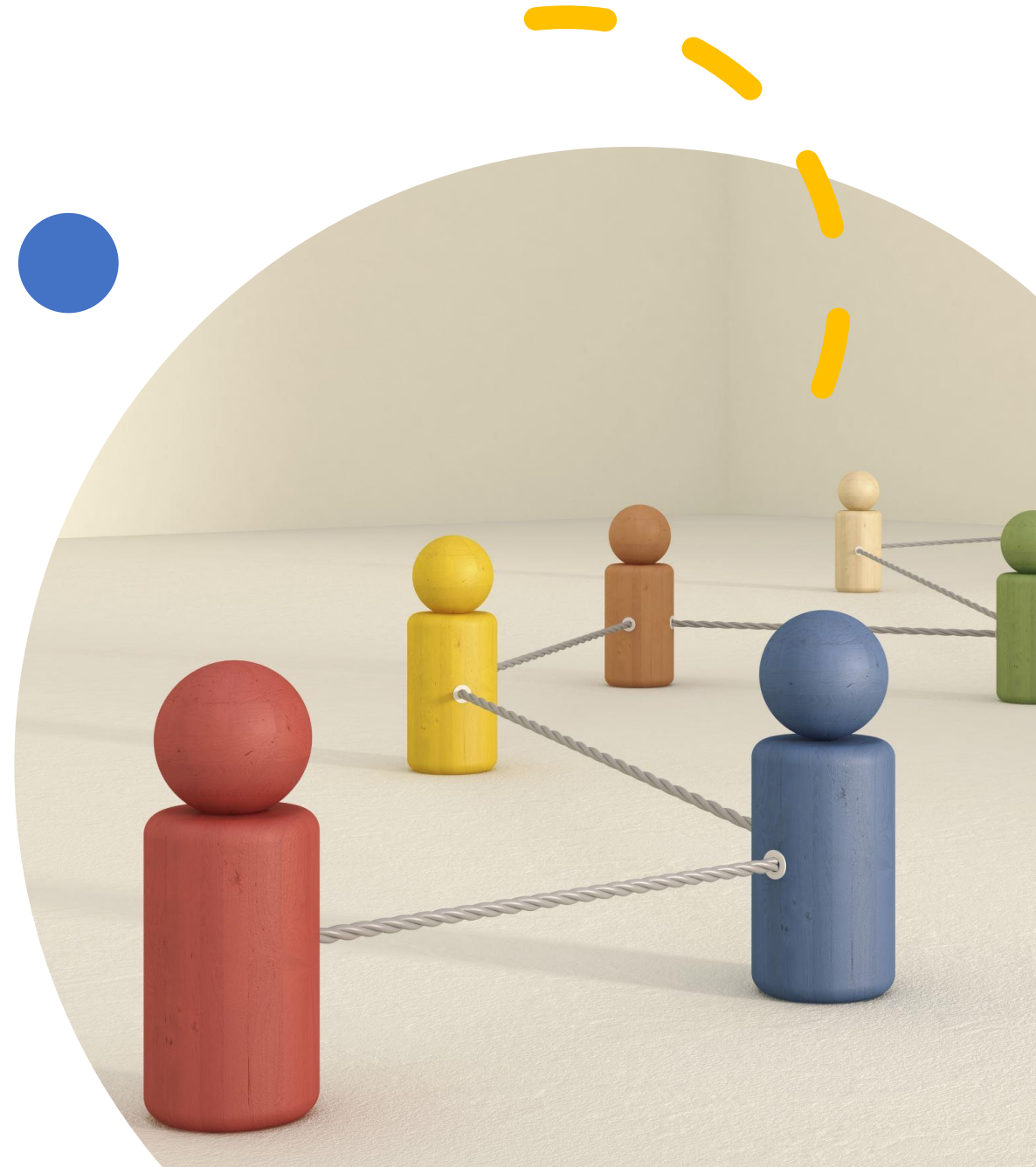
Community Engagement

- Quarterly Newsletter - updates published on the school website narrates the plans, projects and progress of the Efficient and Healthy school initiative.

- Positive content about the district's movement.
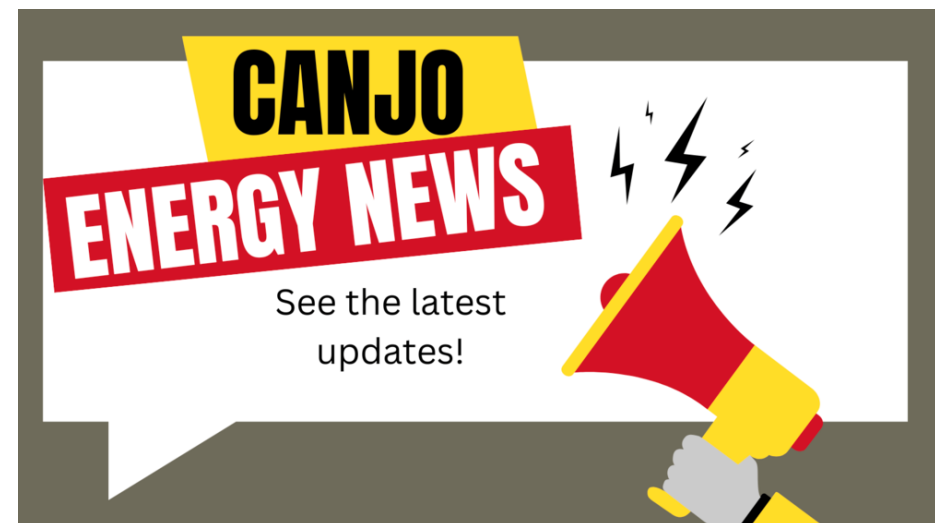
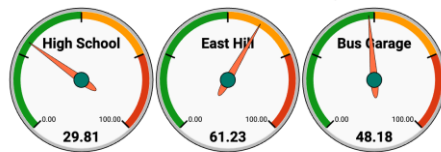# Board Of Education Engagement

QUARTERLY BOARD OF EDUCATION PRESENTATIONS (OPEN TO THE PUBLIC) PROVIDES DETAILS OF THE INITIATIVES.

PERFORMANCE

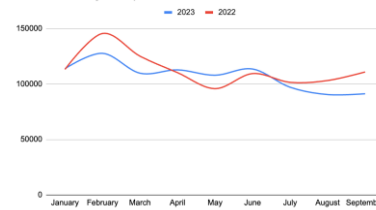2022 Median Energy Utilization Index For Total Site KBtu/Sq.ft.

High School — 42.49
East Hill — 76.46
Bus Garage — 70.90

2023 3rd Qtr. Median EUI For Total Site KBtu/Sq.ft.

High School — 29.81
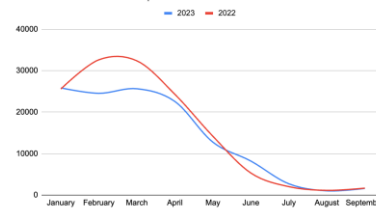East Hill — 61.23
Bus Garage — 48.18

RESULTS

YTD Electricity Comparison

YTD Natural Gas Comparison

CURRICULUM

FUTURE

Thank you

SPECIAL THANKS TO THE CLASS PRIZE FOR PROVIDING THE PROFESSIONAL DEVELOPMENT TO BRING US THIS FAR.

FRANCIS.DAMBROSIO@CANJO.ORG

Discussion

Putting together a district-level plan

1. What topics covered this week changed or was additive to your engagement plans?

2. Are you aware of organizational goals or strategic processes completed recently or currently underway? How can you align with those?

3. Are there any vision or goal setting tools you've used that are not covered here? Please describe!

Next Up in CLASS...

- **March 26th 1-2 PM ET:** Stakeholder Engagement Cohort
- **April 9th 1-3 PM ET:** Strategies for Communicating Key Messages for School Decisionmakers
- **April 18th 1-3 PM ET:** Incorporating Energy Efficiency into Business Approaches and Tools in Schools
- **Cohort!** The Winning Pitch! Delivering Effective Messaging for Stakeholders
- **May 17th:** Phase 2 Submission Deadline

Questions?

We look forward to working with you!