

Task 1 | Governance and Administration Initial Research

Task 1 Research Scope Summary

The scope of work for each task of the Regional Green Business Program Design Phase includes: 1) researching issues, 2) presenting options, 3) facilitating the group to make decisions, and 4) documenting the issues and decisions.

Task 1 of the design phase addresses the need for the group to determine how the program will be governed and administered. Key governance issues include how decisions will be made and how money is collected and distributed. A key administration issue is how program details will be kept current in the web platform. In support of this need, Cascadia generated a list of key governance and administration issues to be addressed and researched options for potential governance structures, decision-making processes, and administrative systems.

How to Use This Document

This document presents findings from the Task 1 research, organized into the following sections:

- **Programs and Governance Models Included in Task 1 Research**—use this list as a reference to review the mix of local, regional, national, and international programs that were included in the research on potential governance and administrative structures for the Regional Green Business Program.
- **Leading Governance Models**—refer to the three models—1) Board of Directors with Elected Executive Committee, 2) High level Executive Committee with Advisory Steering Committee, and 3) Consortium identified during research and from program management and facilitation experience to consider models that could be deployed for the Regional Green Business Program.
- **Primary Decision-Making Processes**— consider which of the three primary decision-making processes 1) absolute consensus 2) modified consensus and 3) voting will work best to help the group efficiently and effectively make the decisions associated with Tasks 2-7 of the design phase and into the implementation phase, independent of the overall governance model.
- **Primary Types of Decisions**— in addition to selecting the primary decision-making body and primary decision-making process, it is helpful to consider the different types of decisions that need to be made— 1) strategic/policy, 2) tactical, and 3) administrative and consider how these different types of decisions might be handled differently and by different groups or individuals within the governance structure.
- **Governance and Administrative Action Items and Decision Points**—review this comprehensive list of action items needed to design, implement, and manage a Regional Green Business Program. In reviewing this list, keep in mind which governance model and decision-making processes might be needed to make efficient and informed decisions, and how you might categorize each one as strategic/policy, tactical, and administrative.
- **Existing Program Highlights**—Review additional details from each program included in Task 1 research, including a summary program description, overview of the program governance model and decision-making process if known, and selected highlights that are relevant to the design of the regional program.

Programs and Governance Models Included in Task 1 Research

Local/Regional

Energy Northwest

EnviroStars

King County-Cities Climate Collaboration (K4C)

NW Product Stewardship Council

Take Winter by Storm

The Water Supply Forum

WSNLA's ecoPRO Certification

National/International

B Corporations

California Green Business Program

Energy Star

Global Reporting Initiative

National Restaurant Association's Conserve

Leading Governance Models

In choosing the appropriate governance model, it is helpful to begin by defining the criteria with which to evaluate the options. The following list is offered as the initial basis for this evaluation.

The Regional Green Business Program seeks a governance model that:

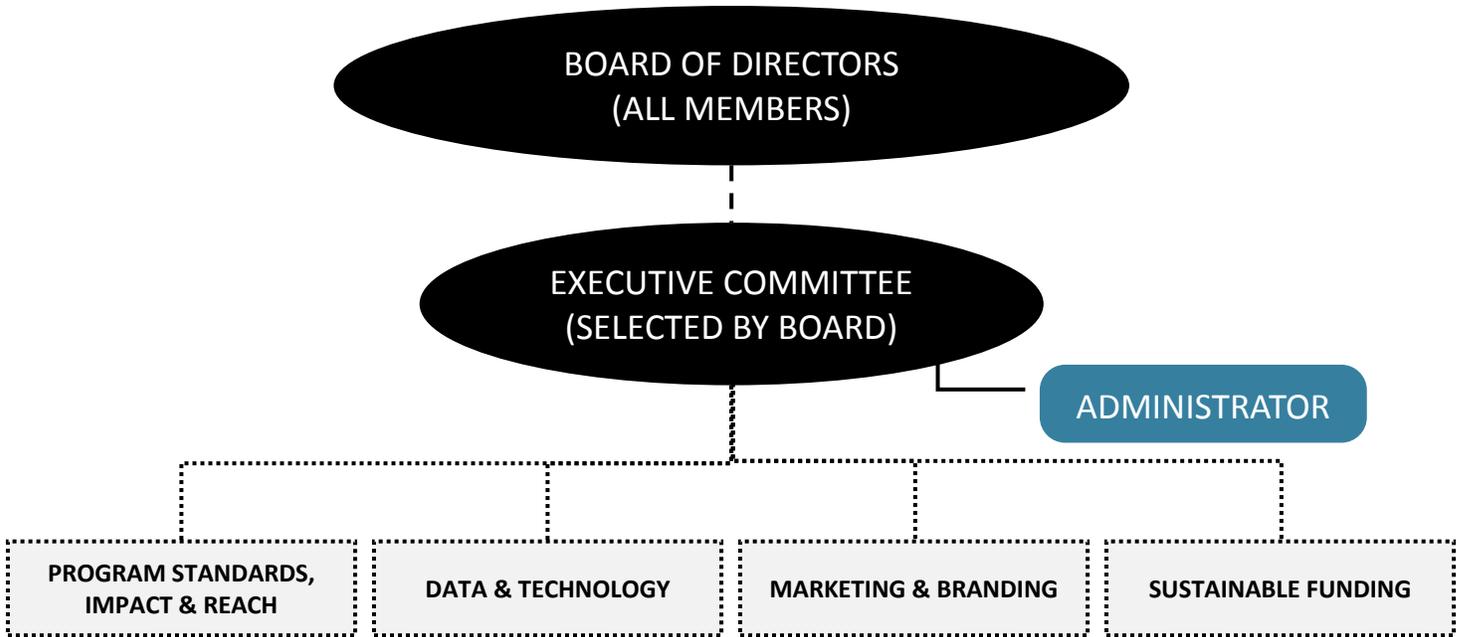
- **Achieves results** by effectively designing and implementing a program that works with businesses to implement green actions.
- **Demonstrates accountability** through clear, reliable, and timely reporting and access to program data.
- **Efficiently shares and leverages resources** to achieve greater outcomes.
- **Facilitates timely, clear decision making.**
- **Maintains local control** of individual green business programs by each participating agency.
- **Recognizes and equitably addresses the need for governance roles and decision making that is proportionate** to the relative size of the financial or in-kind contribution from each member agency and/or the relative number of business participants in each member agency's territory.
- Creates, implements, and **maintains a sustainable source of funding.**

Cascadia researched the governance structure of the programs and organizations listed in the previous section to identify models that could be deployed for the Regional Green Business Program. Most of the programs reviewed through this task fall under one of three primary structures, distinguished by the entity that has primary responsibility for decision making, 1) Board of Directors with Elected Executive Committee, 2) High level Executive Committee with Advisory Steering Committee, and 3) Consortium. Each of these models is described in more detail in the next section.

Regardless of the primary model chosen, most models also use advisory subcommittees. Below is a short list of possible subcommittees that may be formed to address core issues in the design and implementation phase of the Regional Green Business Program.

- Program Standards, Impact, and Reach
- Data and Technology
- Marketing and Branding
- Sustainable Funding
- Ad hoc committees as needed

Governance Model 1 – Board of Directors with Elected Executive Committee



DESCRIPTION

Roles

1. Board of Directors | Large group, one member per department/agency that is contributing funding
2. Executive Committee | Smaller group, appointed by the board
 - a. Possible advisory subcommittees, determined by and not necessarily made up of members of the Executive Committee; examples included in the graphic above
3. Administrator | Program implementer; agency or individual

Lead for decision making: Executive Committee

Key elements of this model

In this model, the Board of Directors includes one member from each department or agency that is directly contributing funding. This group could include representatives from smaller sub departments within larger agencies, such as line of business leads within Seattle Public Utilities. Members do not need to be ultimate decision makers within their organizations. The Board of Directors would elect members to an Executive Committee, a smaller committee made up of a select group that is given primary decision-making authority. The Board would set the agenda for strategic decisions to be made. The Executive Committee would include no more than one member per agency, for example selecting one member to represent Seattle Public Utilities, or even one representative from just one City of Seattle department, such as the Office of Economic Development to represent the whole City. The Executive Committee would be responsible for making and researching the decisions.

Within this structure, there may be subcommittees that are part of or report to the Executive Committee. The Executive Committee may also select a Chief Executive. The Executive Committee would give direction to and develop the rules and procedures for the Program Administrator partner, meet more frequently than the Board, and maintain the bulk of the workload.

PROS AND CONS

Pros

- The smaller Executive Committee gets input from the broader Board about what to focus on, but can be more nimble with decision making.

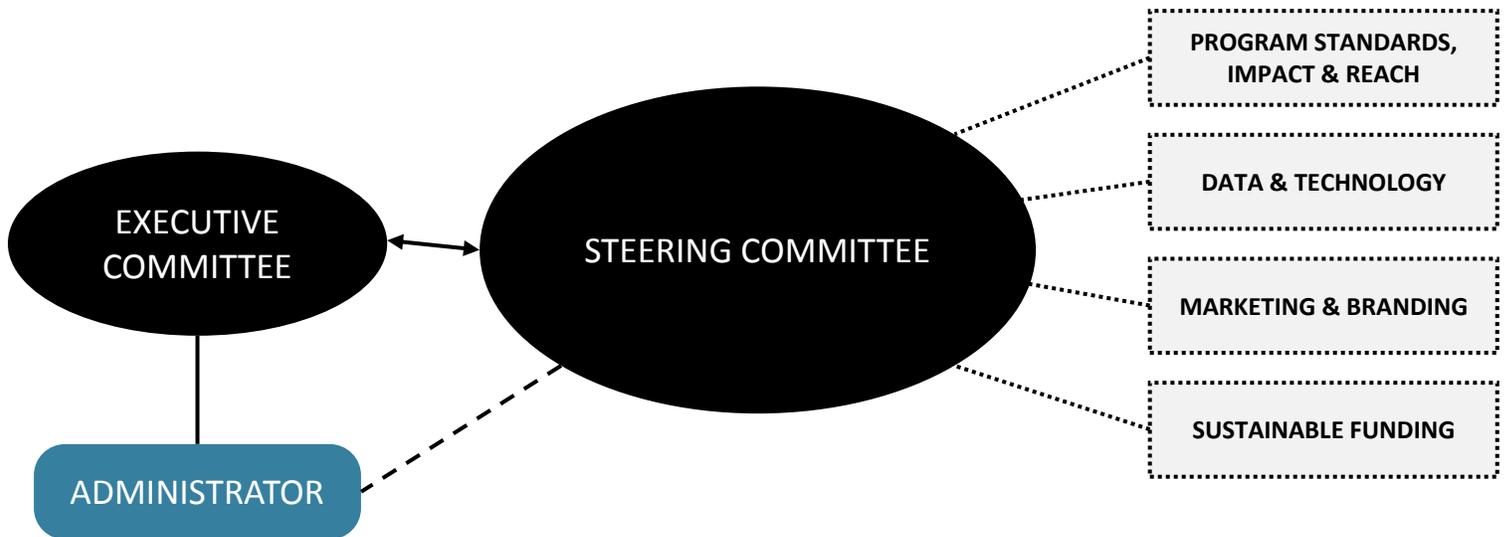
Cons

- Not all individual departments within each municipality or utility will be represented on the Executive Committee, which has ultimate decision-making authority.

EXISTING PROGRAMS WITH THIS MODEL

- Energy Northwest
- GRI

Governance Model 2 – High Level Executive Committee with Advisory Steering Committee



DESCRIPTION

Roles

1. Executive Committee | Made up of one higher level/executive staff member from each agency; makes decisions
2. Steering Committee | One or two non-executive members from each agency, queues up and informs decisions
 - a. Possible advisory subcommittees
3. Administrator | Gets direction from the Executive Committee

Lead for decision making: Executive Committee

Key elements of this model

In this model, the Executive Committee is made up of one higher level staff member from each agency and is the lead for decision making. The Steering Committee is made up of all interested members and queues up the decisions that need to be made by the Executive Committee. The Steering Committee would likely have separate advisory subcommittees that would research particular issues. This group may include multiple people from each agency, and would carry out most of the workload. In this model, the Program Administrator would receive direction from the Executive Committee, but would also coordinate with the Steering Committee.

PROS AND CONS

Pros

- The Executive Committee, made up of higher-level, executive members of each agency provides immediate authority and accountability as the lead for decision making.

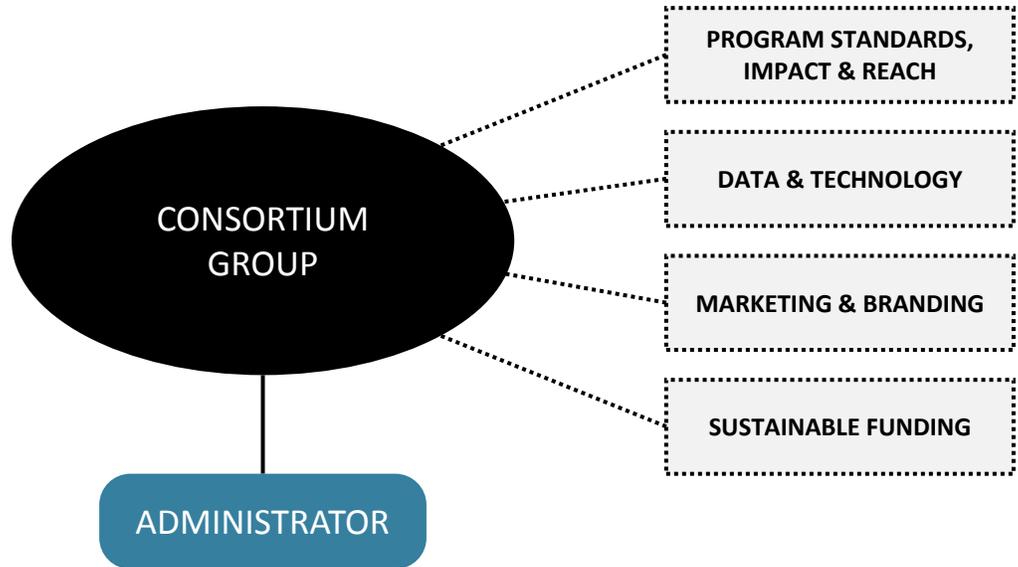
Cons

- The Executive Committee may not have context on all the specific decisions that need to be made. The Steering Committee, made up of program managers and with topic-specific subcommittees, will have to provide context and research to support clear decision making.

EXISTING PROGRAMS WITH THIS MODEL

- B Corporations
- California Green Business Program
- Energy Star
- National Restaurant Association's Conserve
- WSNLA's ecoPRO Certification

Governance Model 3 - Consortium



DESCRIPTION

Roles:

1. Consortium | Group with equal input by all interested members; communicates informally with respective agency management; provides direct input to Program Administrator
 - a. Possible advisory subcommittees
2. Administrator | Takes direction from Consortium

Lead for decision making: Consortium

Key elements of this model

This model is most similar to the model the group currently operates under. The consortium is made up of all interested parties from each agency, with at least one representative from each funding agency. The group collectively sets the decision-making agenda and makes decisions. The Consortium may utilize subcommittees to allow for some members to focus or specialize in different aspects of program implementation and management. The Consortium would provide direction and develop rules and regulations for the Program Administrator.

PROS AND CONS

Pros

- All agencies, programs, and interests are represented at all levels of decision making.

Cons

- All members are involved in all types of decisions, from strategic to administrative, which can be cumbersome and slow down the process. Subcommittees, specialization, or some dividing of roles may be needed to get everyone on a level playing field for decision making.

EXISTING PROGRAMS WITH THIS MODEL

- EnviroStars
- NW Product Stewardship Council
- The Water Supply Forum
- Take Winter by Storm
- King County-Cities Climate Collaboration (K4C)

Steps to Select and Implement a Governance Model

The group should take the following steps to determine and implement the preferred governance model:

1. Review initial research outlining leading program governance models.
2. Facilitate a meeting to determine preferred governance model.
3. Outline a transition plan from the current to the selected governance model. This plan will need to include a process for selecting officers and other members of the governance team.

Primary Decision-Making Processes

Independent of selecting the primary governance model, another key process issue is how **decisions are made** on key strategic, policy, tactical, and administrative issues, especially when there are divergent points of view. Selecting a decision making method is essential at this stage so that the group can efficiently and effectively move through the design phase and decide on the many options associated with Tasks 2-7.

From existing program research and Cascadia’s extensive experience facilitating stakeholder panels and workgroups, we have identified three options for the group’s consideration: 1) absolute consensus 2) modified consensus and 3) voting. Each of these models is described in more detail below. In some cases, the group may choose to select different models for different types of decisions.

Absolute Consensus

DESCRIPTION

“Absolute consensus requires that all group members not only can live with a decision but that they actively support the decision and are convinced that the decision is superior to the status quo. Absolute consensus is thus synonymous with unanimous agreement.”¹

Achieving absolute consensus can be time consuming, requiring extensive analysis and discussion. Typically this type of decision making is reserved for issues where the risk of a wrong decision is high and where groups want to make sure that all group members are truly and fully on board.

Absolute consensus is typically used when groups are small – from 5-9 members.

¹ From The Facilitator’s Handbook, Thomas Justice, David Jamieson, Ph.D. 1999. Page 212.

PROS AND CONS

Pros

- All members are heard and have full input into a decision.
- No one feels like they are in the minority.
- When agreement is reached, the group can move forward.
- Everyone is in full agreement with the decision.

Cons

- Decision making can be long and laborious.
- The group sometimes ends up with the lowest common denominator and/or a watered down outcome or compromise decision.
- A person with a minority point of view can end up with inordinate influence over the deliberations of the group.

Modified Consensus

DESCRIPTION

“Modified group consensus is a decision procedure that enables a group to achieve a type of consensus that ensures that each member of the group is willing to support the decision.”²

Modified consensus decision making typically requires a facilitator to manage the process of identifying and discussing options and settling on an outcome that ‘everyone can live with’. The facilitator’s job is to test the group and see if anyone has serious concerns with an impending decision. If no one has such a concern, the decision is adopted and members can even initial the flip chart with their decision. If a concern is voiced, the facilitator’s job is to help find an acceptable outcome, even if some members of the group are not fully or 100% on board.

Modified consensus works best when there is a chair or leader of the group who can validate when a decision has been actually reached.

PROS AND CONS

Pros

- Allows decisions to be made more quickly and efficiently than with absolute consensus.
- Ensures that all group members are heard, have their concerns addressed, and accept the final decision.

Cons

- Can still be time-consuming.

² Ibid. page 223.

- Can require skilled facilitation and strong leadership in the group to avoid getting stuck.
- Is better with a smaller group; can become tedious with a large group.

Voting

DESCRIPTION

The Voting method works best when a group does not have to reach absolute consensus, when there is difficulty achieving consensus, and/or when there are many decisions to be made in a short period of time. Voting can be by majority rule or greater (60%, 2/3rd). There needs to be agreement in advance on when to use voting and what level of support is required.

Voting techniques can vary widely. A version that can work well is using thumb gestures, thumbs up indicates “yes”, thumbs sideways indicates a neutral position or not yet on board, and thumbs down indicates “no”.

PROS AND CONS

Pros

- Efficient.
- Decisive.
- Allows forward movement.

Cons

- Can undermine the effectiveness of the group.
- Can be divisive.
- Can cause members to leave the group or later subvert a decision if they are not on board and feel very strongly that the wrong decision has been made.

Combination

Some programs included in the research for this task use a combination approach. EnviroStars and the California Green Business Network (CAGBN) are examples that use this approach. For the CAGBN, they first strive to reach consensus or modified consensus on strategic decisions. If they cannot reach consensus, each jurisdiction gets one vote and they require a 2/3 or 67% majority to pass the resolution.

Primary Types of Decisions

In addition to selecting a primary governance model and a primary process for high-level decision making, the group will need to determine the specific decisions that will need to be made in the design and implementation phases of the program. These decisions fall under three main categories: 1) strategic/policy, 2) tactical, and 3) administrative. These categories are outlined below. These different types of decisions might be handled differently and by different groups or individuals within the governance structure. A comprehensive list of governance and administrative action items and decision points is provided in the next section. These will be categorized into these three decision types to facilitate the decision making process at future design team meetings.

Strategic and Policy Decisions

This category of decision points includes those broad, system-wide decisions that impact long-term strategy including partner operating agreements, budget, overall program structure, and future direction and growth. These decisions will be made by the highest level of authority in the chosen governance model.

EXAMPLES

- Developing overall program brand
- Creating participant fee structure
- Deciding between certification/recognition
- Selecting a web platform provider

Tactical Decisions

This category of decisions includes those that need to be made to launch and manage the program and meet program objectives. These decisions are those associated with implementing a given strategy or policy – they involve the tactics needed to achieve an end goal, as opposed to the strategies or administrative details.

EXAMPLES

- Determining location/host of website
- Developing operating guidelines for participating agencies
- Developing green action checklists and categories

Administrative or Operational Decisions

Administrative or operational decisions are shorter term decisions needed to administer the program. These decisions will typically be made by the program administrator.

EXAMPLES

- Selecting specific industry/recognition events to attend
- Selecting meeting locations and times

Governance and Administrative Action Items and Decision Points

Below is a list of action items and decision points in the initial design phase and implementation phase of the Regional Green Business Program. These types of decisions and actions span the three primary types of decisions

1) strategic/policy, 2) tactical, and 3) administrative. The decisions will be made by various members of the governance and administrative team, based on the primary governance structure selected and in accordance with the chosen primary decision-making process. Many of these will be decided in the design phase, and some address ongoing implementation issues. This list is currently organized into the following categories 1) Program Standards, Impact, and Reach, 2) Sustainable Funding, 3) Web Platform, 4) Marketing and Branding, and 5) Meetings and Communications. Alternative organization structures would include by type of decision (strategic, tactical) or by phase (design, implementation).

Program Standards, Impact, and Reach | Possible Subcommittee: Program Standards, Impact, and Reach; address in Task 7

- Define roles and responsibilities for committee members; nominate committee candidates; ensure the size, leadership, and composition of the committee meets the stated requirements and goals of the program; review the composition of the committee as a whole periodically, including the balance of independence, industry specialization, technical skills, diversity, geographic representation and other desired qualities.
- Determine process for recognition, certification, and re-certification (address in Task 2).
- Create initial green action categories and checklists, process for updating checklists, and identifying need for new checklists.
- Develop criteria and process for adding and removing funding agencies and partners.
- Develop process for amending rules and procedures; meet annually or biannually to review program standards and policies as proposed; provide recommendations for standards revisions.
- Develop training process and materials for program administration staff and partners to qualify and assist potential business participants.
- Collaborate with other local, national, and international green business certification programs.
- Outline business participant types or sectors and set annual goals for number or type of business participants.
- Determine goals and tactics for recruiting new participating agencies and new business participants.
- Determine how to measure success for business participants and program funders; plan for program updates that reflect long-term and short-term benchmarks that indicate successful performance.
- Conduct and/or contract out program evaluation.
- Outline the process for reporting to all participants.
- Help obtain strategic input and buy-in from a larger set of stakeholders; support the program administrator to ensure partnerships and linkages to other stakeholders and key relevant processes.
- Ensure legal, ethical, and financial integrity and accountability.
- Recruit and orient new governance team members.
- Regularly assess governance board or committee performance.

- Determine a process for dispute resolution for internal and external conflicts that may arise.

Sustainable Funding | Possible Subcommittee: Sustainable Funding; address in Task 6

- Identify potential funding sources and write grants.
- Develop budgets for specific initiatives.
- Collect, organize, manage, track, allocate, and report on program funding and expenditures—including any specific outcome reporting needed for grants or other funding sources.

Web platform | Possible Subcommittee: Data and Technology; address in Task 3

- Determine database ownership, administration, access, and user management protocols.
- Secure database hosting.
- Organize data gathering from participating agencies (GIS layers for service territories, account data, etc.) and data import/export plan.
- Manage database users and troubleshoot issues.
- Plan and manage regular database updates.

Marketing and branding | Possible subcommittee: Marketing and Branding; address in Tasks 4 and 5

- Create guidelines for use of logo and promotional materials.
- Create joint program marketing plan; organize and track marketing initiatives regionally or statewide.
- Produce marketing and collateral materials and update as needed.
- Organize recognition events or workshops.
- Participate in industry trade shows and events.
- Establish and maintain partnerships to help ensure broad marketing of the program.

Meetings and Communication | Possible subcommittee: Executive/Steering; address in task 7

- Select and communicate the specific location and time for recurring and individual meetings.
- Prepare meeting agendas so that meetings are productive and accomplish the goals of the group.
- Take meeting notes; prepare and distribute meeting summaries and action item lists.
- Prepare background materials and arrange presentations on relevant subject matter to inform committee deliberations.
- Communicate with committee members between meetings to discuss issues to be addressed.

Existing Program Highlights

Below is a summary of programs included in the research for Task 1 of the Regional Green Business Program Design Phase. This research includes information that is readily available and in some cases replicated from program web pages or through existing program management contacts. These programs include a mix of local, regional, national, and international programs. Each program summary includes a program description, overview of the program governance model and decision-making process, and selected highlights that are relevant to the design of the regional program.

Local/regional

TAKE WINTER BY STORM

Description

Take Winter By Storm began in 1998 as a one day media event and has expanded to a multi-media, public awareness and safety engagement program. This collaborative partnership effort has one goal in mind: to help Western Washington citizens and businesses stay safe and get prepared before bad weather strikes.

Governance Model

The program is a collaborative, public-private effort between King, Pierce, Snohomish and Kitsap Counties, the City of Seattle, Puget Sound Energy, State Farm, National Weather Service/NOAA, and American Red Cross. Various local retailers also represent Washington State's largest counties and city emergency management offices and energy utilities, the leading insurer of homes and automobiles, weather forecasters, first responders during disaster occurrences and local businesses.

Highlights

These organizations have joined forces in this major multi-media public awareness program to raise community awareness of hazardous weather and help protect lives and property. The program's website is meant as a one-stop emergency preparedness center that includes safety tips and regional resources for information about the weather, power outages, heavy rains and flooding, freezing temperatures, roads and transit during winter weather, and assistance agencies.

ENVIROSTARS

Description

The EnviroStars Program was created in 1995 in King County, Washington, as a service of the Local Hazardous Waste Management Program. It has since been adopted across the region in Jefferson, Kitsap, Pierce, Skagit, Spokane, and Whatcom Counties.

The mission of EnviroStars is to provide assistance and incentives for smaller businesses to reduce hazardous materials and waste in order to protect public health, municipal systems, and the environment. The EnviroStars logo gives consumers a way to find and support environmentally responsible businesses. Third-party evaluation and recognition helps EnviroStars members attract new customers, reinforce repeat customers, boost employee pride in their workplace, and compare their efforts with that of other businesses. The two- to five-star rating scale and a renewal process builds in the element of continuous improvement.

Governance Model

EnviroStars is led by a consortium of government agencies and partnership organizations which have been licensed to provide EnviroStars certification.

Each participating county signs a Memorandum of Agreement which outlines roles, responsibilities, and expectations as they relate to the EnviroStars program. They also sign a legal Licensing Agreement in order to be able to use the EnviroStars brand, logo, and materials, which hold a Registered Servicemark.

The Cooperative convenes quarterly to address ways to leverage resources, compare activities and progress, develop shared marketing strategies, resolve implementation issues, and create policies and procedures as needed.

Decision making: The group manages by consensus decision-making, unless a vote is called for (one vote per county). King County maintains final decision-making authority in the event that members of the cooperative cannot come to a consensus-based agreement. King County may call for a majority decision based on one vote per county or simply consider relevant discussion points on which to base a final decision.

Highlights

The Cooperative includes a team of business technical assistance consultants who leverage resources and share expertise. The program offers objective, third-party certification, local government consultants to do on-site business assessments, and an on-going renewal process which assures standards are maintained over time. There are currently over 850 participating businesses.

NW PRODUCT STEWARDSHIP COUNCIL

Description

The Northwest Product Stewardship Council (NWPSC) is a coalition of government organizations in Washington and Oregon working with the waste and recycling industry, consumers, manufacturers, and others in order to provide incentives for reducing waste, increasing recyclability, and reducing the toxicity of manufacturers' products. NWPSC ultimately works to connect producers with the costs associated with the end-of-life management of their products.

Governance Model

The NWPSC operates as an unincorporated association of members and is comprised of a Steering Committee, Associates, and Subcommittees. Work is conducted via subcommittees comprised of Steering Committee Members, Associates, and other stakeholders. There are nine active subcommittees, as well as an Oregon-specific policy subcommittee. The NWPSC currently does not have a formal legal organizational structure.

Highlights

The NWPSC works specifically with products that meet specific criteria, including the cost to local governments for the handling and disposal of the products; the quantity of the products entering the waste stream; the toxicity of the product throughout the lifecycle of the product; and the potential for private sector participation in voluntary product stewardship programs and activities.

KING COUNTY-CITIES CLIMATE COLLABORATION (K4C)

Description

The King County-Cities Climate Collaboration (K4C) is a collaboration of King County and eleven cities — Bellevue, Burien, Issaquah, Kirkland, Mercer Island, Redmond, Renton, Seattle, Shoreline, Snoqualmie, and Tukwila — to coordinate and enhance the effectiveness of local government action on climate and sustainability.

Through the King County-Cities Climate Collaboration (K4C), county and city staff partner on:

- Outreach – to develop, refine, and utilize messaging and tools for climate change outreach to engage decision makers, other cities, and the general public.
- Coordination – to adopt consistent standards, benchmarks, strategies, and overall goals related to responding to climate change.
- Solutions – to share local success stories, challenges, data, and products that support and enhance climate mitigation efforts by all partners.
- Funding and resources – to secure grant funding and other shared resource opportunities to support climate-related projects and programs.

Governance Model

Cities that sign the pledge are also required to sign a Technical Service Agreement that includes a detailed Scope of Work for this effort.

Decision making: The Collaboration’s Scope of Work will be voted on annually by participating Cities and King County and requires a majority vote by three quarters of participants.

Highlights

All King County cities are encouraged to join into this effort, which is supporting and enhancing projects and programs in focus areas such as green building, using and producing renewable energy, sustainability outreach and education, and alternative transportation.

When pledged city funding levels are sufficient, the Collaboration will hire a staff member to provide support for Pledge priorities. In future years, the Collaboration may also host an annual symposium, or annual symposium session track, addressing local climate solutions.

The Pledge tiers for Collaboration members are based on signatory cities’ population sizes. The original tiers were derived from a sample budget to operate the Collaboration including staff needs, events funding, and expanding the Sustainable Cities Roundtable. Three variations of pledge tier levels were developed to meet the projected budget. The variations were evaluated by a steering committee based on their fairness to each city, what budgets could realistically incorporate, and what would be sustainable for annual pledging over time. The tiers selected were those least expensive for larger cities, and were agreed upon by a wide range of city types, including rural cities and cities of different sizes and different locations across King County.

WSNLA’S ECOPRO CERTIFICATION

Description



The Washington State Nursery & Landscape Association (WSNLA) ecoPRO Certified Sustainable Landscape Professional program aims to satisfy the growing professional and consumer interest in sustainable landscaping services. This training and certification program for landscape professionals is intended to achieve four primary outcomes: 1) provide credentials to individuals with expertise in sustainable landscaping practices, thereby giving them an advantage in the marketplace; 2) provide consumers with a verifiable means of judging qualifications; 3) impart practical knowledge to landscape professionals to use in the field; and 4) achieve widespread adoption by professionals of sustainable landscaping practices across Washington State. Over the long term, the vision is for trained, certified professionals to help establish sustainable landscaping as the norm for homes, institutions, and public spaces, thus contributing to the restoration and protection of watersheds, groundwater, and public health throughout Washington.

Governance Model

Beginning in July 2014, the ecoPRO program has been jointly administered by the Washington State Nursery & Landscape Association (WSNLA) and Washington Association of Landscape Professionals (WALP), and governed by a Program Steering Committee. The Program Planning Committee recommended the creation of leadership and technical committees to ensure broad stakeholder engagement in defining and approving acceptable standards, best practices, and the expertise needed to get certified. Committees work alongside and support the Program Administrator. Other entities involved in the ecoPRO program include: Program Steering Committee; Technical Committee; and Education Partners. The figure below shows a graphic representation of each of the entities involved in the program, the role of each, and how each entity will work together to help ensure a successful, statewide sustainable landscape professional certification program.

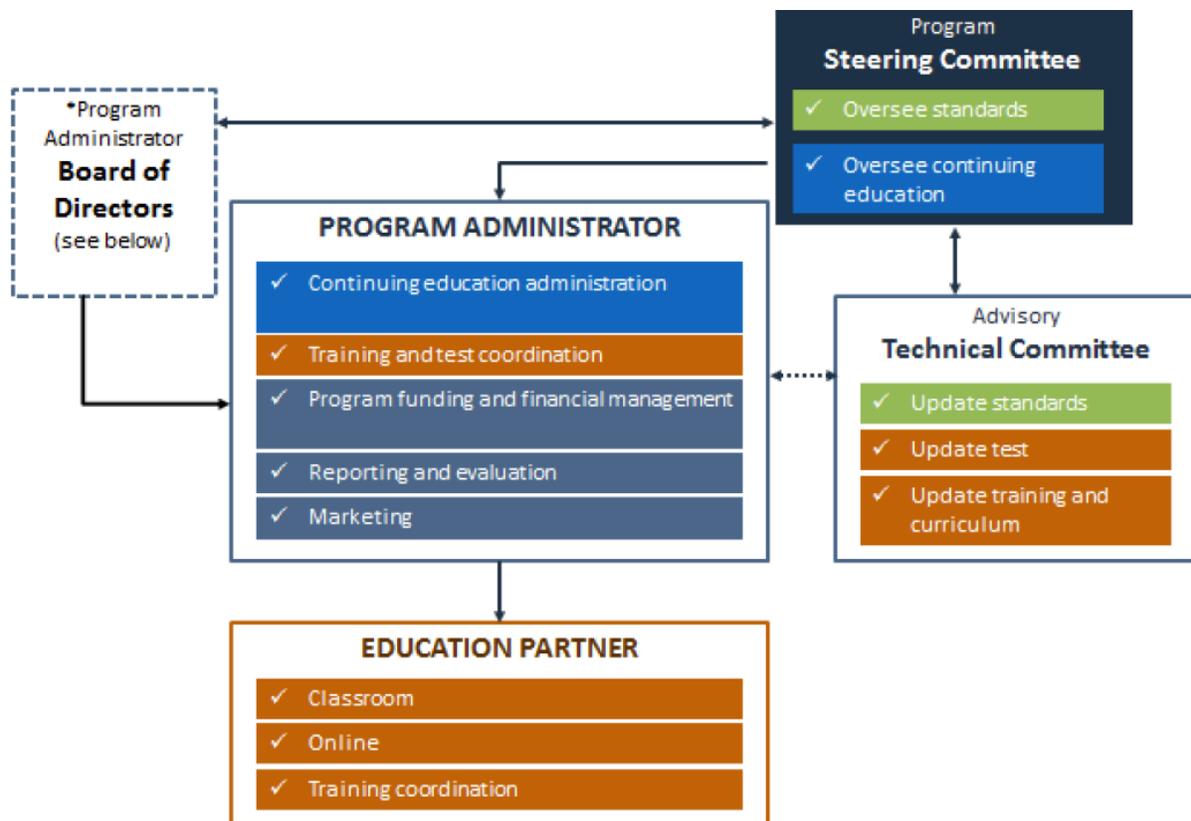


Figure 1. Organizational Chart for the ecoPRO program

*"Program Administrator Board of Directors" refers to the Program Administrator entity's existing Board of Directors, if applicable. The Program Administrator Board of Directors has the right to ratify Program Steering Committee decisions if they do not conform to the entity's mission.

Program Administrator

The Program Administrator is responsible for managing the program, including: administering the overall program, the training(s), and exam(s); conducting program planning and adaptively managing the program; and marketing the program. The Program Administrator holds a seat on the Program Steering Committee and coordinates with the Technical Committee and the Education Partner(s). The Program Administrator reports to its existing Board of Directors, if one exists. In order to support the body of work described below, the Program Administrator will hire a 0.5 FTE position, with potential to grow to 1.0 or 1.5 as the program expands.

The Program Administrator ensures that the benchmarks listed in their scope of work (both long-term and near-term) that indicate successful performance are achieved. If performance goals are not being met, the Program Administrator, with assistance from the Program Steering Committee, will adaptively manage the program to meet the desired performance goals for the program.

Program Steering Committee

The Program Steering Committee is responsible for providing third-party program oversight on program standards and continuing education credits. This committee is also responsible for providing the Program Administrator with assistance in defining and reevaluating short and long-term strategy. The Program Steering Committee ensures that the program acts in accordance with the mission and in a way that assures integrity and effective management, but without involvement in the Program Administrator's day-to-day activities.

The recommended size for the Program Steering Committee is 7-12 members representing a cross-section of key stakeholder and partner entities, including the following: statewide environmental public agency (such as Department of Ecology or Puget Sound Partnership), environmental NGO (such as National Wildlife Federation or Audubon Society); partner certification program (such as EnviroStars, Salmon Safe, Oregon Tilth Organic Land Care Program, Society of Organic Urban Landscaping, or Sustainable SITES); 1-2 landscape industry practitioners; one member representing consumer interests; one member each representing the Program Administrator, Program Administrator Board of Directors, Technical Committee, and Education Partner entities.

The Program Steering Committee helps to ensure that Program Administrator fulfills its mission to the Sustainable Landscape Professional Certification Program and that there is an independent process to keep the program up-to-date, rigorous, and relevant. Committee members adhere to committee roles and responsibilities outlined in the *Program Steering Committee Charter*.

Technical Committee

The Technical Committee is responsible for updating standards, updating the Program exam, updating the training and associated curricula, and identifying instructors. The Committee consists of 7-12 members representing a cross-section of key stakeholder entities within the landscape community including the following: landscape designer; residential landscape construction and maintenance; commercial landscape construction and maintenance; municipal landscape management; research/academia; regulatory/permitting/licensing; irrigation

specialist; arborist; compost/soil amendment specialist; representative from another certifying entity; and horticulture specialist. The Technical Committee meets annually or biannually (although it may require more meetings in the first year) to ensure standards, exam, and training/curriculum reflect the most up-to-date science and policy as it relates to the Sustainable Landscape Certification Program.

The Technical Committee provides the expertise needed to ensure that the program is up-to-date, rigorous, relevant, and practical, while simultaneously having relevancy and demand from professionals and consumers in residential, commercial, and institutional settings. Committee members adhere to committee roles and responsibilities outlined in the *Technical Committee Charter*.

Education Partners

Education Partners work in collaboration with the Program Administrator to offer a dispersed model whereby any provider (community colleges, universities, trade associations, and NGOs) can apply to have their classes qualify for continuing education credits. These trainings will be in addition to the trainings that will be offered by the Program Administrator. In addition, these entities will eventually offer the Sustainable Landscape Certification Program training/curriculum in-person and online in order to increase capacity and reach across the state. Education Partners will have a Memorandum of Agreement (MOA) with the Program Administrator.

Education Partners will help to ensure that the Sustainable Landscape Certification Program is marketed and offered to their students. This will help ensure a steady growth in the number of landscape professionals around the state, help the program build brand awareness, and provide multiple opportunities for education on sustainable land care across Washington State. Education Partners adhere to roles and responsibilities outlined in an Education Partner Memorandum of Agreement.

Highlights

EcoPRO has positioned itself to be a leading certification program for landscape professionals across the state. The Business Plan for the program was created in June 2014 and includes helpful and recent information for the development of the Regional Green Business Program. This document also includes a Marketing Plan, Governance and Administration Plan, Performance Measurement Plan, and a Financial Plan.

ENERGY NORTHWEST

Description

Energy Northwest aims to produce reliable, affordable, and environmentally responsible electric power and delivers it to northwest public power utilities at the cost of production. The group was formed as a joint operating agency in 1957, to serve the needs of public power by producing reliable, low-cost electricity while promoting public power activities in the region. The joint operating agency membership now includes nearly every public power utility district in the state and several municipalities. The agency owns and operates four electricity generating facilities: White Bluffs Solar Station, Packwood Lake Hydroelectric Project, Nine Canyon Wind Project, and Columbia Generating Station (a nuclear energy facility). Energy Northwest also provides operations and maintenance services for generating facilities owned by other utilities, and develops new power generation facilities to meet growing demand. The agency's vision is to be the region's leader in energy generation and public power solutions through sustained excellence in performance.

Governance Model

Oversight of Energy Northwest operations is provided by an 11-member executive board and a board of directors comprising one representative from each member utility.

Executive Board

Energy Northwest operations are overseen by an 11-member executive board comprising five member utility representatives, three gubernatorial appointees, and three public sector representatives selected by the board of directors. The CEO is selected by and reports to the executive board. The executive board meets monthly.

Board of Directors

Energy Northwest's Board of Directors currently has 27 members representing the 22 public utility districts and five municipal utilities that make up Energy Northwest. The board of directors has the authority to authorize new generation projects and terminate existing ones. It elects five members from its own membership and appoints three outside directors to the Energy Northwest Executive Board.

Participants Review Board

The Participants Review Board (PRB) represents the 92 utilities participating in Columbia Generating Station. This nine-member board reviews all Columbia purchases over \$500,000, nuclear construction and Columbia annual budgets, fuel management plans, and plans for refinancing.

Senior Management

Energy Northwest's senior management team provides executive leadership. The team is led by a Chief Executive Officer and also includes four vice presidents responsible for corporate services and financial/risk, engineering, nuclear generation, and operations.

Highlights

The program produced a recent [Strategic Plan](#) document that may be a helpful reference for Regional Green Business Program Development.

THE WATER SUPPLY FORUM

Description

The Water Supply Forum, formed in July 1998, is a cooperative effort of representatives of water systems and local governments in the central Puget Sound region of Washington State to address current and future water supply issues, including water supply planning, environmental stewardship, and other issues currently facing the region with regard to providing water for fish and people. The Forum's mission is to provide a venue for policy discussions on critical issues and share utility perspectives and insights with the public and key leaders throughout the region.

Governance Model

Forum members include City of Seattle, City of Tacoma, City of Everett, Cascade Water Alliance, East King County Regional Water Association, Pierce County Regional Water Association, South King County Regional Water Association, Everett Water Utility Committee, Snohomish River Regional Water Authority, and King County.

The Forum is led by a Steering Committee, with a designated Chair. The Forum also has subcommittees, including a Source Issues Committee and a Communications and Conservation Committee.

Highlights

The Forum creates comprehensive assessments of municipal water demand and supply in the Forum planning area of King, Pierce and Snohomish Counties in the form of Regional Water Supply Outlooks. In addition to the regional municipal water planning, each local water system is required to complete a Water System Plan and update the plan on a regular basis.

National/International

NATIONAL RESTAURANT ASSOCIATION'S CONSERVE

Description

The National Restaurant Association partners with organizations to expand the restaurant industry's knowledge base, develop resources to support members, and bring more sustainability-related products to the restaurant industry. The Conserve program aims to show businesses how to operate in more efficient and environmentally beneficial ways and provides online best practices and training tools for incorporating sustainability into the restaurant business.

Governance Model

The conserve team is made up of a Conserve Program Director, a Director of Sustainability Policy and Government Affairs, and an Executive Vice President of Policy and Government Affairs.

In addition, the National Restaurant Association's Conserve Sustainability Advisory Council (CSAC) is comprised of environmental leaders from 15 restaurant and food service businesses spanning the value chain.

Members of CSAC focus their knowledge and skills to improve our nation's food service industry by making restaurateurs more environmentally aware and resource efficient. CSAC members hold quarterly webinars as well as meet in person to share lessons learned, review good sustainability practices, and discuss issues of common concern.

Highlights

The following organizations contributed time, information, and resources to the National Restaurant Association's Conserve program: Turner Foundation, Energy Star, Food Service Technology Center, Kendall College, and the University of Washington. Other partners include the Foodservice Packaging Institute, Food Waste Reduction Alliance, LeanPath Inc., Omega-9 Oils, and the US Composting Council.

GLOBAL REPORTING INITIATIVE

Description

The Global Reporting Initiative (GRI) promotes the use of sustainability reporting as a way for organizations to become more sustainable and contribute to sustainable development. The GRI Sustainability Reporting Guidelines offer Reporting Principles, Standard Disclosures, and an Implementation Manual for the preparation of sustainability reports by organizations, regardless of their size, sector or location. The Guidelines also offer an international reference for all those interested in the disclosure of governance approach and of the environmental, social, and economic performance and impacts of organizations.

The Guidelines are developed through a global multi-stakeholder process involving representatives from business, labor, civil society, and financial markets, as well as auditors and experts in various fields; and in close dialogue with regulators and governmental agencies in several countries. The Guidelines are developed in alignment with internationally recognized reporting related documents, which are referenced throughout the Guidelines.

Governance Model

GRI is an international, multi-stakeholder, network-based organization, and has three governance bodies – the Board of Directors, Stakeholder Council, and Technical Advisory Committee. GRI's governance structure is designed to maintain multi-stakeholder representation. The Technical Advisory Committee (TAC) oversees the development of GRI's Reporting Framework content. The Stakeholder Council (SC) provides advice on strategic and policy issues, and debates proposed changes to the Framework content. As representatives of GRI's wider network, they provide a balanced, expert view that lends credibility to GRI's guidance. Following recommendations from the TAC and SC, the Board of Directors makes the final decision about the release of Framework material. A document of detailed rules and procedures for each of these three governance bodies outlines key responsibilities for members. A sample of responsibilities for the Stakeholder Council and the Board of Directors is provided below for reference.

Key responsibilities for the GRI **Stakeholder Council** include:

- Appoint all the Board members except the Chief Executive, based on a slate of nominations received from the GRI Nominating Committee
- Appoint two (2) of the members of the standing GRI Nominating Committee
- Appoint forty percent (40%) of the total number of members of the Stakeholder Council in accordance with 2.2.1. These SC positions are selected with a focus on maintaining geographic and constituency balance on the Council
- Make recommendations on the GRI Guidelines revisions, in the form of a concur or non-concur recommendation
- Make broad strategic recommendations to the Board
- Support the mission of GRI

Key responsibilities for the **Board of Directors** include:

- Determine the GRI's mission and purpose
- Select the Chief Executive
- Support the Chief Executive and review his or her performance
- Ensure effective organizational planning and succession planning of key positions

- Ensure adequate financial resources to run the organization
- Manage resources prudently and effectively
- Determine, monitor and strengthen GRI's programs and services
- Be an advocate for the GRI and enhance its public standing
- Ensure legal, ethical, and financial integrity and accountability
- Recruit and orient new Board members
- Regularly assess Board performance
- Oversee internal controls and audit – internal and external

Highlights

The GRI's three governance bodies unite senior people with diverse skills, education, and cultural backgrounds, and typically include representatives from up to 30 countries at any one time. The GRI Secretariat, led by the Chief Executive, implements the technical work plan set out by GRI's governance bodies, while the Governmental Advisory Group is a high-level advisory body that provides GRI's Board and Executive Management with a direct source of advice from governments, but remains an informal body with no constitutional role.

CALIFORNIA GREEN BUSINESS PROGRAM

Description

The California Green Business Program Network (Network) is a network of Green Business Programs (GBPs) located throughout the state. GBPs are voluntary business assistance programs operated by local government agencies that proactively assist businesses to attain full compliance with applicable environmental laws and provide businesses further assistance on pollution prevention, energy efficiency, water conservation, and solid waste reduction and recycling. GBPs provide environmentally preferred options to businesses and help them develop solutions to reduce environmental impacts. GBPs are independently managed, operated, and implemented by local agencies or entities.

The California Green Business Program Network was formed to provide a forum for GBPs to share program information, encourage a level of consistency among GBPs throughout the state, and promote new and existing GBPs as a way to conserve resources and prevent pollution, enhance community health, and promote business economic vitality.

Governance Model

The Green Business Program is either run by or formally approved by a local government or special district jurisdiction. A GBP may designate another entity to manage its program, provided that the local jurisdiction oversees the entity's work to ensure it remains consistent with Network criteria.

Members of the GBP Network must agree to abide by the definition of the Green Business Program. Network membership may include those entities actively participating in the implementation of a GBP. Recommendations on new membership shall be made by the Network Administration Committee to the Chair, with the Local Jurisdictions deciding on recommendations by consensus. New jurisdictions wishing to become members will submit answers to questions to the Network Chair, so that the group may have information about their program

prior to reaching a decision. All other Network members will ensure that operating guidelines will be shared with and explained to prospective new members early on in the process.

Types of Network members include:

1. **Local Jurisdictions:** A GBP operated by a county, city, special district, or Joint Powers Authority that has been accepted as a member of the Network. Each local jurisdiction gets to vote once on Network decisions that require a vote.
2. **Partners:** Local, regional, state and federal agencies or NGOs that assist the network in activities such as implementing, planning, or marketing the program. These members do not vote.
3. **Affiliates:** Local government-operated environmental recognition programs that do not meet all the conditions to be considered a GBP. Those local jurisdictions whose GBPs have been determined to no longer qualify can become Affiliates. Affiliates will not be able to use the Database, to market themselves as a California Green Business Program, vote on Network matters, or be able to use the same program logo. However, they are welcome to participate in CAGBN Network meetings and discussions.
4. **Contractors:** Commercial contractors are not involved in the decision-making process for the Network, nor are they able to participate in these meetings.

Decision making: Decisions are made by consensus. Consensus means that everyone agrees with the decision or is willing to live with the results. If consensus cannot be achieved, then the decision will be made by at least 67% of all members. For decision-making purposes, each Local Jurisdiction shall have one vote. At the call of the Chair, votes are taken among Local Jurisdictions present at Network meetings, including those joining by web or teleconference. Those that do not attend meetings shall concede their vote to those in attendance.

Committees: Committees shall be formed as needed and shall be in effect for the duration of the intended task for which they were established. These committees will report back to the CAGBN on actionable items and timelines for implementation of Green Business enhancements at regularly scheduled meetings. Standing Committees shall include CAGBN Chair and Vice-Chair and volunteers from members and partners. Ad hoc committees may be formed on an as-needed basis. New committees shall be formed for the purposes of managing a project, research, tasks or other on-going needs of the Network. The Steering and Policy Committee will oversee these groups.

Highlights

From the start-up 1996 program in the San Francisco Bay Area, the CAGBP has grown to include 21 active programs, and has certified over 2,700 businesses to date.

B CORPORATIONS

Description

B Lab is a 501(c)3 nonprofit that serves entrepreneurs interested in using the power of business to solve social and environmental problems. B Lab serves these entrepreneurs through three interrelated initiatives that provide them the legal infrastructure and help them attract the customers, talent, and capital to scale.

Governance Model

B Lab is governed by a process of broad, transparent, multi-stakeholder engagement. The Board of Directors oversee strategy, budget, and operations, play a leadership role in forming Advisory Councils, and assist in cultivating potential donors and investors. The Board of Directors is in the process of establishing several Advisory Councils to ensure continuous incorporation of best thinking and practices into B Lab's mission and activities. The Standards Advisory Council, an independent committee of 20-22 members, oversees the B Impact Assessment, and is divided into two subgroups, one to oversee content and weightings for companies in developed market and the other for the version that is appropriate for companies and funds in emerging markets.

Decision making: The Board has the ultimate decision-making authority on recommendations coming from the Advisory Councils.

Highlights

The Standards Advisory council includes committees dealing with developed markets and emerging markets, as well as additional advisors and a Large Company Standards Working Group. The B Corp Community also works to pass laws that create a new type of corporation to meet the needs of entrepreneurs and investors wanting to use business as a force for good.

ENERGY STAR

Description

ENERGY STAR is a U.S. Environmental Protection Agency (EPA) voluntary program that helps businesses and individuals save money and protect our climate through superior energy efficiency. It was established by the EPA in 1992, and is based on the 2005 Energy Policy Act, which called for a voluntary program to “identify and promote energy-efficient products and buildings in order to reduce energy consumption, improve energy security, and reduce pollution through voluntary labeling of or other forms of communication about products and buildings that meet the highest energy efficiency standards.”

Governance Model

The ENERGY STAR program is run by the EPA, with input from a broad range of 18,000 partners across every sector of the economy who represent products in more than 65 different categories. To maintain consumer trust and improve the oversight of ENERGY STAR certified products, homes, and commercial facilities, the EPA has implemented third-party certification requirements and testing.

Highlights

Now in its 20th year, the ENERGY STAR program has boosted the adoption of energy-efficient products, practices, and services through valuable partnerships, measurement tools, and consumer education. The ENERGY STAR program serves as a national platform and a catalyst to deliver real energy efficiency by addressing market barriers.

Task 2 | Scope of “Recognition” Initial Research

Task 2 Research Scope Summary

The scope of work for each task of the Regional Green Business Program Design Phase includes: 1) researching issues, 2) presenting options, 3) facilitating the group to make decisions, and 4) documenting the issues and decisions.

Task 2: Scope of “Recognition”

Task 2 of the design phase addresses the need to identify the scope of the recognition component of the regional green business program, including whether it will be recognition-only or if it will include a certification component. Key questions to consider include the attractiveness of various types of recognition to participating businesses, applicability to businesses of different sizes and sectors, and the budget and time implications of certification and other engagement strategies. In support of this need, Cascadia generated a list of successful recognition and certification programs both locally/regionally and nationally. Cascadia also analyzed potential types of recognition programs, including recognition only, recognition with a verification component, and recognition with certification layers. Finally, Cascadia listed considerations for additional program elements, such as having a tiered recognition or certification structure, utilizing varied participant engagement strategies, and having a recertification schedule, that can be added to enhance program participation and participant satisfaction regardless of the scope of recognition.

How to Use This Document

This document presents findings from the Task 2 research, organized into the following sections:

- **Existing Recognition and Certification Programs**—use this list as a reference of local, regional, national, and international programs and to see how various programs mix recognition, verification, and certification components into their programs.
- **Recognition vs. Certification Models**—refer to the three models—1) Recognition Only, 2) Recognition with Verification, and 3) Recognition with Certification to consider models that could be deployed for the Regional Green Business Program.
- **Business Feedback**—refer to this short list of statistics pulled from business surveys regarding motivators and barriers for green business program participation that relate to program recognition.
- **Additional Program Elements to Consider**— in addition to selecting the primary recognition model, it is important to consider additional program elements that can impact the attractiveness, applicability, and budget implications of the recognition model chosen —1) offering a tiered recognition/certification structure, 2) employing engagement strategies and activities, 3) defining a recertification schedule, and 4) considering the technical level of program actions.

Existing Recognition and Certification Programs

Below is a summary of programs included in the research for Task 2 of the Regional Green Business Program Design Phase. This research includes information that is readily available and in some cases replicated from program web pages or through existing program management contacts. These programs include a mix of local, regional, national, and international programs. Each program summary includes a program description, overview of the program's recognition model, selected highlights, including recognition levels and recertification timelines, and participant costs that are relevant to the design of the regional program.

Local/Regional

[California Green Business Program](#)

[Chinook Book](#)

[EnviroStars](#)

[King County Best Workplace for Waste Reduction and Recycling](#)

[Seattle Get on the Map Program](#)

National/International

[B Corporations](#)

[Energy Star](#)

[Green Seal](#)

[Green C Certification](#)

Local/Regional Programs

CALIFORNIA GREEN BUSINESS PROGRAM

Description

The California Green Business Program (CAGBP) is a voluntary program for businesses to gain recognition for operational changes that prevent pollution, conserve resources and greatly reduce emissions of greenhouse gases. The program is run by a network of government, non-profit, utilities, and for-profit agencies that serve businesses locally while working together to oversee the program statewide. It works with local agencies to recognize and assist businesses that operate in an environmentally friendly manner. Since the program launched in 1996 in the San Francisco Bay Area, the CAGBP has grown to include 21 active programs, and has certified over 2,700 businesses to date.

Recognition Model

Recognition with certification. The CAGBN is a third-party verification program; it verifies that all checklist measures are completed and all green businesses must complete a minimum set of measures.

Highlights

Actions items consist of certain requirements for all businesses, a minimum number of optional items chosen from the list, and other write-in items, subject to approval. These items are then verified through several onsite assessments. Verification visits are tracked using a web-based database available to all program partners.

Costs

Currently, there is no fee for businesses to apply for certification in most jurisdictions, but there may be soon. Many jurisdictions will likely start charging a nominal fee to cover the costs of running the program, and a few jurisdictions have already started doing this.

CHINOOK BOOK

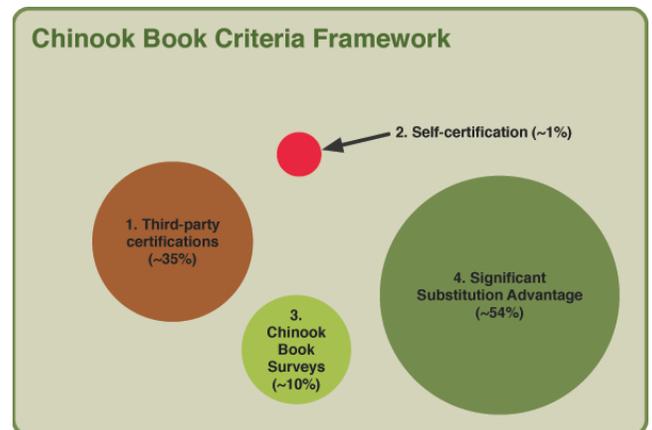
Description

The Chinook Book is an annual print and mobile coupon book featuring local businesses and organizations whose products and services promote sustainable living and are designed to help grow the local sustainable economy. It is currently being published in Portland, Seattle, the San Francisco Bay Area, Denver, and Minneapolis, and the publications are localized by staff in each market. Since 1999, over 250 million green and local coupons have been distributed. Businesses are selected for inclusion in the Chinook Book in several different ways which are outlined below.

Recognition Model

Recognition and varying levels of verification and certification. Businesses interested in being included in the Chinook book are evaluated in four ways¹:

- About 35% are certified with independent third-party certification, such as Salmon Safe, Fair Trade Certified, Green Seal Certified, and Energy Star.
- About 1% are included based on self-certification, including any claims a business makes about aspects of its operations.
- Approximately 10% are included based on Chinook Book Surveys. Restaurants and hotels are required to complete a Chinook Book survey regarding their sourcing of produce, dairy, meat and seafood products. This does not appear to have a verification component.
- About 54% of products and services in the Chinook Book are allowed based on their “significant substitution advantage”: this is where using one type of product or service is better than another in terms of their impact, such as transportation, gardening, used goods, energy-conserving devices or material, and non-motorized outdoor recreation and fitness.



Highlights

¹ <http://chinookbook.net/about-us/criteria>

There is a clear economic benefit to participation in the program- In 2012, 4,700 businesses were listed in various cities' Chinook Books, and 918,000 offers were redeemed, steering \$19.7 million toward the local sustainable economy through transactions involving Chinook book coupons.

Costs

Businesses must pay for inclusion of their offers in the Chinook Book.

ENVIROSTARS

Description

The EnviroStars program was created in King County, Washington in 1995, and has since been adopted across the region in Jefferson, Kitsap, Pierce, Skagit, Spokane, and Whatcom Counties. The mission of EnviroStars is to provide assistance and incentives for smaller businesses to reduce hazardous materials and waste, in order to protect public health, municipal systems, and the environment.

Recognition Model

Recognition with certification. The EnviroStars program uses third-party certification to help build consumer trust for the brand. Local government consultants do on-site business assessments, and potential EnviroStars are reviewed by WA Department of Ecology. An on-going renewal process assures standards are maintained over time.

Highlights

Businesses certified by EnviroStars are given a 2- to 5-Star rating based on their demonstrated commitment to reducing hazardous materials and wastes, and implementing environmentally beneficial practices. The higher the star rating, the more proactive and comprehensive the business has been, and the more recognition you will receive. Participating businesses receive a new member packet and get members-only access to the "Promote Your Business" toolkit section of the website.

Costs

There is no cost for businesses to get certified through the program, and on-site consultations and verifications are free.

KING COUNTY BEST WORKPLACES FOR WASTE PREVENTION AND RECYCLING

Description

Each spring, businesses in King County outside of the City of Seattle are invited to apply for recognition as a Best Workplace for Waste Prevention and Recycling. In 2014, King County's Solid Waste Division named 98 local businesses to its eighth annual list of Best Workplaces, the highest number listed since the program began in 2007. Each of the 2014 Best Workplace businesses showed a commitment to recycling and reducing the amount of waste their company sends to the landfill. Honor roll businesses are businesses that have made the list for five or more years.

Recognition Model

Recognition only. Businesses submit a profile with recycling actions that are not verified on-site or certified by a third-party.

Highlights

The program's business profiles are organized by business categories. There are no recognition program levels, except for the "Honor Roll" designation. Winners are listed on King County's website with a profile and an external link to their website.

Costs

There is no cost for businesses to get recognition through the program.

SEATTLE GET ON THE MAP GREEN BUSINESS RECOGNITION PROGRAM

Description

Seattle's Get on the Map Program uses an online map of Seattle's neighborhoods to publicly recognize businesses taking actions to cut waste, save water and energy, and reduce pollution. The program was launched in 2011 and now has 395 businesses on the map.

Recognition Model

Recognition with verification. The Get on the Map program provides verification of green actions mostly through onsite visits to participating businesses and occasionally through phone or email follow up.

Highlights

Businesses "get on the map" with a "Green" designation by completing five of the top ten required green actions. Depending on how many green actions the business takes, they can deepen their shade of green from Green to Greener or Greenest. Participants are given a promotional toolkit including logos to use on their web and social media pages, a window cling and poster touting their shade of green, and a certificate signed by the mayor.

Costs

There is no cost for businesses to participate in the program and on-site consultations and verifications are free.

National/International Programs

B CORPORATIONS

Description

B Lab is a 501(c)3 nonprofit that serves entrepreneurs interested in using the power of business to solve social and environmental problems. B Lab serves these entrepreneurs through three interrelated initiatives that provide them the legal infrastructure and help them attract the customers, talent, and capital to scale. Inc. has called B Corp Certification "the highest standard for socially responsible businesses."

Recognition Model

Recognition with certification. Businesses must complete the B Impact Assessment and earn a reviewed minimum score of 80 out of 200 points, meet the legal requirements, sign the B Corp Declaration of Interdependence and Term Sheet, and provide supporting documentation and a disclosure questionnaire. 10% of Certified B Corporations are randomly selected each year for an on-site review, which maintains the authenticity of the Certified B Corp Seal. The goal for the review is to verify the accuracy of all affirmative responses (not just the top 8-12 responses) in the company's B Impact Assessment. An on-site review typically takes between 6-10 hours depending on the size and scope of business.

Highlights

A “Pending” status allows companies to use the Certification Pending logo to communicate to stakeholders that a business is on the path to full B Corp Certification. A business must meet the legal requirement for full certification and be committed to meeting the performance requirement in the next 12 months.

In order to maintain B Corporation Certification, a company must re-certify every two years and achieve at least 80 out of 200 available points. This process ensures that companies who become certified B Corporations continue to engage in a high level of impact with their stakeholders, even as the business grows or changes. The B Impact Assessment is updated every two years, so recertification also gives companies the opportunity to set improvement goals against the most-up-to-date standard and benchmark their performance over time.²

Costs

Annual certification fees range from \$500 to \$25,000 depending on annual sales.³

ENERGY STAR

Description

ENERGY STAR is a U.S. Environmental Protection Agency (EPA) voluntary program that helps businesses and individuals save money and protect our climate through energy efficiency. It was established by the EPA in 1992, and is based on the 2005 Energy Policy Act, which called for a voluntary program to “identify and promote energy-efficient products and buildings in order to reduce energy consumption, improve energy security, and reduce pollution through voluntary labeling of or other forms of communication about products and buildings that meet the highest energy efficiency standards.”

Recognition Model

Recognition with certification. Products can earn the ENERGY STAR label by meeting the energy efficiency requirements set forth in ENERGY STAR product specifications. Product categories must contribute significant energy savings nationwide, and qualified products must deliver the features and performance demanded by consumers, in addition to increased energy efficiency. Labeling of ENERGY STAR must effectively differentiate products and be visible for purchasers. The ENERGY STAR label also certifies new homes, commercial buildings, and industrial plants.

² <http://www.bcorporation.net/become-a-b-corp/how-to-become-a-b-corp/performance-requirements>

³ <http://www.bcorporation.net/become-a-b-corp/how-to-become-a-b-corp/make-it-official>

Highlights

In order to earn the label, ENERGY STAR products must be third-party certified based on testing in EPA-recognized laboratories. In addition to up-front testing, a percentage of all ENERGY STAR products are subject to "off-the-shelf" verification testing each year. The goal of this testing is to ensure that changes or variations in the manufacturing process do not undermine a product's qualification with ENERGY STAR requirements.

Verification of a home's energy efficiency by a third-party organization is mandatory for earning the ENERGY STAR label. Buildings achieving a score of 75 or higher using Portfolio Manager must be verified by a Licensed Professional (Professional Engineer or Registered Architect) to be eligible to apply for the ENERGY STAR. Industrial plants must also have a Professional Engineer certify that the information used to calculate the plant's 75 or higher energy performance score is correct.

Costs

There is no cost to apply for certification of buildings. However, the cost of third-party certification of products varies from one EPA-recognized certification body to the next.

GREEN SEAL

Description

Green Seal developed life cycle-based sustainability standards for products, services and companies and offers third-party certification for those that meet the criteria in the standard. Green Seal has been actively identifying and promoting sustainability in the marketplace, and helping organizations green their operations since 1989.

Recognition Model

Recognition with certification. GreenSeal only certifies products and services that fall under the scope of their standards. Businesses must then complete a Preliminary Certification Request and an Application for Certification. Project managers guide businesses through the evaluation and data submission process, and when the evaluation is near completion, an auditor will conduct the on-site audit of the manufacturing facility or service location. Once a business meets the requirements of the Green Seal standard, certification is awarded and the business is granted license to use the Green Seal certification mark on pre-approved materials.

Highlights

GreenSeal focuses on ensuring the credibility of its brand by having its procedures reviewed by third parties and meeting standards and guidelines such as ISO 14020/14024. Periodic compliance monitoring is conducted to ensure products and services continue to meet the requirements of certification. The monitoring process involves a review similar to the initial certification evaluation.

Costs

Certification fees consist of an initial evaluation fee as well as an annual compliance monitoring fee. Monitoring fees are due every twelve months, no later than the anniversary of certification.

GREEN C CERTIFICATION

Description

The Green C Certification program is run by the American Consumer Council, and recognizes businesses, government agencies, and non-profit organizations that operate in an environmentally sensitive manner, and encourages American Consumer Council members to do business with certified companies.

Recognition Model

Recognition with certification. Green C Certification levels are as follows: Lime recognition, for businesses who receive scores of 26%-40% on their assessment; Jade recognition, for businesses receiving assessment scores of 41%-60%, and Emerald recognition, for businesses with scores above 60%. Assessments scores are also based on businesses designing and deploying a green initiative in their organization. Businesses reaching Emerald designation must be visited by an assessment team to verify and validate criteria compliance before Emerald certification is awarded. Certification is valid for three years.⁴

Highlights

ACC also created the Green C Self-Certification program to enable businesses of all types and sizes to take the first step toward certification through a self-assessment and response to a series of questions based on the actual Green C Certification program. Once a business completes the Self-Certification application, it is recognized with the Self-Certification designation for one year.

Costs

Application fees range from \$500 to \$1,500 depending on the applicant sector.

⁴ <http://americanconsumercouncil.org/green/FullCriteriaAndForms.pdf>

Recognition vs. Certification Models

In choosing the appropriate recognition model, it is helpful to begin by defining the criteria with which to evaluate the options. The following list is offered as the initial basis for evaluation.

The Regional Green Business Program seeks a recognition model that:

- **Motivates businesses to participate in the program** and implement green actions by offering recognition incentives that promote the participant’s green business actions to customers and competitors.
- **Is consumer-facing and is understood, recognized, and trusted by consumers.**
- **Attracts businesses of all types, sectors, and sizes**, and provides a path to participation for smaller businesses and adequate challenge and interest for larger or more established “green” businesses to be part of the program.
- **Encourages participants** to take additional environmental actions beyond what they are doing when they first engage with the program.
- **Is scalable** based on the budget and time requirements of the recognition model chosen.

Cascadia researched the recognition models of the programs and organizations listed in the previous section to identify models that could be deployed for the Regional Green Business Program. The programs reviewed through this task fall under one of three primary recognition models: 1) Recognition Only, 2) Recognition with Verification, and 3) Recognition with Certification. Each of these models is described in more detail in the next section.

Model 1 – Recognition Only

DESCRIPTION

The Recognition Only model allows participants to self-report on green actions taken and receive recognition when minimum participant criteria are met. With this model, program administrators do not provide verification that the actions have been completed.

KEY ELEMENTS OF THIS MODEL

Attractiveness

- This model may be more attractive to businesses that are just starting to green their operations or implement new sustainability initiatives or do not know how they compare to other businesses.
- Depending on the types of recognition activities offered by the program and the ultimate brand recognition from consumers, a recognition only program may not be attractive to larger businesses or businesses with more established green programs that are seeking a more robust or rigorous evaluation of green practices.

Applicability

- Depending on the minimum requirements for recognition, this model easily applies to a wide range of organizations including small and large businesses, government agencies, schools, and non-profit organizations.

Budget and Time Implications

- This model is the most cost-effective for the participant and program administrator.
- The time requirement for participants is limited to the time it takes to complete the application for recognition. Recognition only programs usually do not require fees for participation.
- The time requirement for program administrators is less than the other two models and is limited to processing and reviewing applications and notifying and recognizing participants.

PROS AND CONS

Pros

- This model is accessible to a range of organizations, including small businesses and/or non-profit organizations that do not have time and resources to research certification programs and requirements and provide supporting documentation or other information to verify actions have been taken.
- Program administration costs are lower because program administrators do not verify green activities through onsite visits or phone calls.
- This model allows program administrators to give credit for actions that are difficult to verify, such as behavior-based actions.

Cons

- Without verifying actions, the program may be recognizing businesses for actions they are not taking or have misrepresented.
- Consumers may find a program that does not provide verification less credible.
- Many recognition only programs provide recognition for a relatively short timeframe and do not sustain long-term engagement with participants over time.
- Depending on whether recognition tiers are added to the program, participants may have less incentive to take additional actions, beyond what they initially report.

EXISTING PROGRAMS WITH THIS MODEL

- King County Best Workplace for Waste Prevention and Recycling

Model 2 – Recognition with Verification

DESCRIPTION

In the Recognition with Verification model, participants self-report on green actions taken and receive recognition when minimum participant criteria are met and verified by program administrators. Verification can be done onsite or through phone, email, or another survey mechanism.

KEY ELEMENTS OF THIS MODEL

Attractiveness

- This model but may seem restrictive to businesses that perceive the verification process as burdensome, but more attractive than a program with a certification component which may seem less attainable.

Applicability

- This model is easily applicable to organizations of varying size and sector.

Budget and Time Implications

- This model requires more time for both the participant and the program administrator than the Recognition Only model.
- The administrator may consider charging fees to cover the cost of verification.

PROS AND CONS

Pros

- This model gives the administrator the chance to verify actions and ensure they are not publicly recognizing businesses for actions they may not be taking.
- Advertising that the program includes verification will likely increase accuracy in applicant information reported to the program and may increase credibility with consumers.

Cons

- Adding a verification component may dissuade small businesses from participation if they perceive the verification process to be time-consuming or intrusive.
- The verification process increases program administration costs.

EXISTING PROGRAMS WITH THIS MODEL

- Chinook Book
- Seattle Public Utilities Get On The Map Green Business Recognition Program

Model 3 – Recognition with Certification

DESCRIPTION

In the Recognition with Certification model, participants may self-report on green actions taken and receive a certification label when established criteria are met and verified by program administrators. Certification programs typically require onsite verification by program administrators or another credible third-party.

KEY ELEMENTS OF THIS MODEL

Attractiveness

- Certification programs tend to attract participants that are confident they meet minimum certification criteria, that have established green programs at their facilities, and that have the ability to provide verification of actions.
- Certification programs may be less attractive for organizations that may have new or less established green programs or that do not see themselves as already green. These organizations could be included with the right program marketing and engagement strategies.

Applicability

- While a certification program can be designed to accommodate a range of participant types, certification programs typically have different green action checklists or criteria for different participant sizes or sectors to account for the fact that it may be challenging to establish universal criteria that apply to all participant types and sizes.

Budget and Time Implications

- This model requires the most time for both the participant and administrator. However, there are local examples of green business certification programs like the Kirkland Green Business Program and EnviroStars that maintain relatively low program administration costs compared to other Recognition with Verification models like the Seattle Get on the Map Program.
- Many certification programs charge fees for participants to cover the increased costs of administering the program.
- The certification process may take multiple site visits by program administrators or professional auditors.
- This model may include periodic recertification.

PROS AND CONS

Pros

- A green certification label may lead to more consumer credibility and marketability of participants.
- The perceived standardization and rigor of a certification model may attract more high-profile and established green businesses to the program.
- The program may include a recertification process that encourages participants to take additional green actions to remain certified.

Cons

- Certification programs with onsite verification typically have higher program administration costs and require more time for the participant and program administrator.

- Additional marketing and direct business engagement may be needed to engage smaller businesses that may not think they qualify for participation in the program.

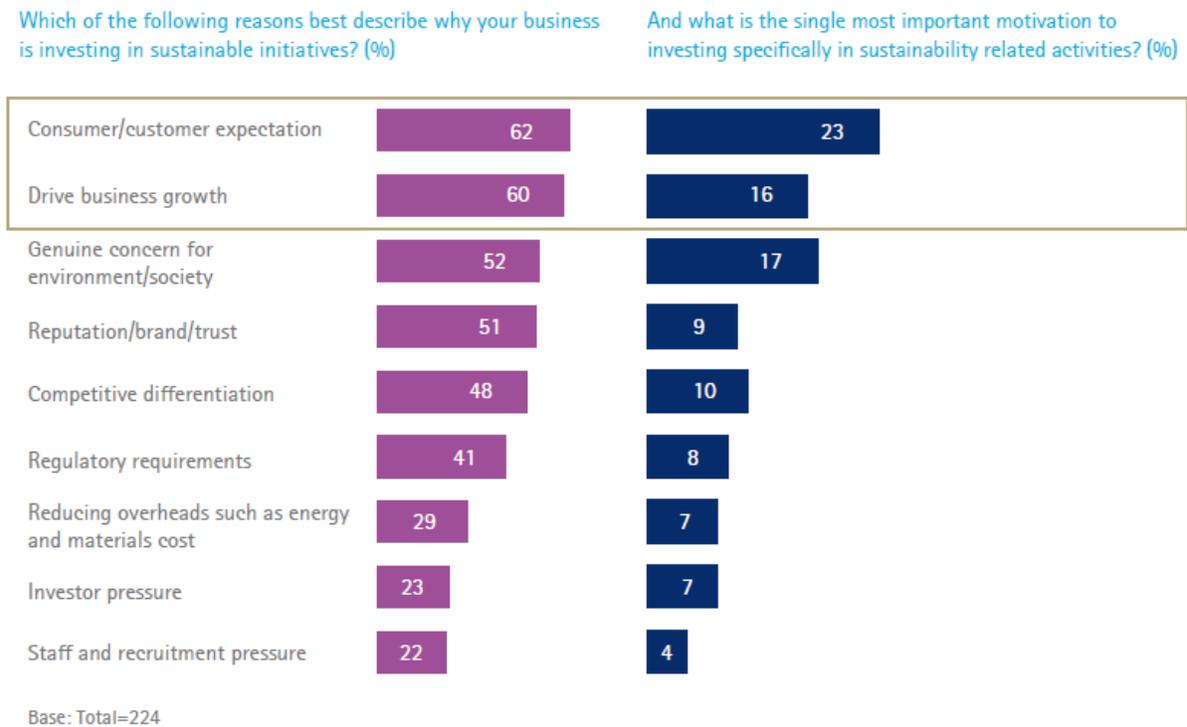
EXISTING PROGRAMS WITH THIS MODEL

- B Corporations
- California Green Business Program
- Energy Star
- EnviroStars
- Green C Certification
- Green Seal

Business Feedback

In addition to researching the types of recognition models found in various green business programs, Cascadia conducted limited research on the motivators for green business program participation. According to a 2012 global survey of business executives conducted by Accenture, the primary driver for businesses to invest in sustainability initiatives is consumer demand and customer expectation⁵. In previous, similar surveys, compliance with regulations and overhead and utility cost considerations were given as primary motivators. Today’s businesses seek out channels to communicate their green actions and commitment to their customers. Consumer-facing participant recognition opportunities will be an important component to help attract business participants.

Figure 1. Primary drivers for businesses to invest in sustainability initiatives



⁵ <http://www.accenture.com/SiteCollectionDocuments/PDF/Accenture-Long-Term-Growth-Short-Term-Differentiation-and-Profits-from-Sustainable-Products-and-Services.pdf>

In the business survey mentioned above, 78 percent of respondents agreed with the statement that sustainability is critical to the growth of their business, and driving business growth was the second most common driver listed for investing in sustainability initiatives.

Additional web-based research conducted for this task confirmed that businesses who achieve well-known environmental certification, such as Leadership in Energy and Environmental Design (LEED), have been able to demonstrate positive impacts on their business. A recent study by the Cornell University School of Hotel Administration found that hotels that achieved LEED certification had significant increases in average revenue per room and average daily occupancy⁶. LEED certified hotels were compared with a competitive set of non-certified hotels. “The hotel industry has embraced environmental sustainability and several hotels have registered for or earned ‘green’ certification under the LEED program,” said Rohit Verma, professor at Cornell’s School of Hotel Administration. “The question was whether there is also a revenue benefit from LEED. We found that the answer is, absolutely yes.”⁷

The scope of work for this task did not include new surveys of business attitudes towards different certification models or barriers and benefits to green business program participation. However, Cascadia did reference recent surveys of regional businesses conducted at three local business events, the GoGreen Seattle Green Business Conference in April 2014, the 2014 City of Seattle Reverse Vendor Trade Show in July 2014, and the Food Services of America Show in October 2014 which included questions on preferred models and benefits and barriers to participation.

The majority of survey respondents (63%) listed lack of awareness of existing programs as the top barrier to participation in green business programs. A successful green business program needs to invest in recognition activities aimed at potential participants to increase program awareness.

When asked whether their business or organization would be interested in a new integrated regional or statewide green business recognition program, a certification program, a program with both recognition and certification or neither, the majority (58%) chose a program with both recognition and certification.

⁶ <https://www.hotelschool.cornell.edu/research/chr/pubs/reports/abstract-18084.html>

⁷ <http://www.lodgingmagazine.com/green-hotels-lower-environmental-impact-increases-profits/>

Additional Program Elements to Consider

In addition to selecting a recognition model and deciding between varying levels of recognition, verification, and certification, the group will need to decide what other program elements should be included in the program, regardless of the certification component.

Program decisions will need to be made regarding the program's 1) recognition or certification levels, 2) engagement strategies and activities, 3) recertification schedule, and 4) technical level of green actions. These elements can have a significant impact on the overall success, accessibility, applicability, and scalability of the program as a whole.

Recognition or Certification Levels

Some programs offer a single level of recognition or certification. For example, a business is either certified or not. Many programs offer a tiered structure. A tiered program structure is one that includes several levels of recognition or certification, including a base level as well as further levels that require more action from the business to meet requirements. Typically, these levels reflect the extent to which a business is "green" or involved in the program, with the base level requiring the least commitment and involvement. The base level may not require any third-party verification, or it may involve a more scaled-back verification process.

CONSIDERATIONS

- **Accessibility for all business types and sectors.** A tiered structure creates an "entry point" for interested businesses, including small businesses, to begin working with the program without feeling like they need to have already accomplished all of the green actions. Tiers also create value for large businesses who are already taking significant steps to reduce their environmental impact and are interested in gaining recognition for and marketing their achievements.
- **Motivation to take actions.** Large, well-known businesses and community organizations may be more motivated to reach the maximum level possible when there are multiple program tiers. Meanwhile, smaller businesses who have reached minimum recognition or certification may discover the business value of continuing to take additional actions.
- **Greater likelihood of ongoing engagement.** Businesses may be more likely to continue actively participating in the program when there are several tiers and further actions that they can take. The opportunity to gain more credibility and recognition by advancing to higher levels of the program can keep businesses engaged after they have signed up.
- **Opportunity for challenge and gamification.** Program tiers can complement a program-wide call-to-action for participating businesses to take more green actions. The program could challenge participating cities, regions, or neighborhoods to increase the number of participants at the base level, or to raise participants to the next green level.

PROGRAM EXAMPLES

- "Green, Greener, Greenest" business designations of the Seattle Get on the Map program

- “Lime, Jade, Emerald” certification of the Green C Certification program
- 2-5 star rating system for EnviroStars

Engagement Strategies

Engagement strategies are critical for a recognition program to grow in size, maintain businesses participation, build its brand awareness and credibility, and create desired environmental outcomes. Potential engagement strategies include:

- Awards, such as public and media recognition, for businesses that participate in a specific way or take certain actions.
- Challenges centered on the number of participants, certain industry sectors, particular neighborhoods or cities, the green level or tier that participants have reached, certain green action categories, or the specific actions that businesses can take.
- Gamification tactics such as pinning participants within a specific sector against one another, developing a scorecard that tells businesses how they are doing compared to their neighbors, or issuing a contest for businesses to promote their achievements to customers.

CONSIDERATIONS

- **Gamification may work better for established programs.** Programs typically need to have enough participants and brand recognition for the challenges, awards, and tactics to be effective.
- **Most successful programs and campaigns invest significant resources into engagement strategies.** It is not enough to create a great program; in order to sustain participation and build consumer awareness, some sort of additional engagement is necessary. Successful programs use today’s technologies, such as apps and social media, to challenge participants against their peers.
- **Gamification and other engagement strategies may not necessarily produce direct business outcomes.** While tactics may increase brand awareness and participant satisfaction with the program, results are not guaranteed and may be difficult to quantify.
- **Engagement strategies can be costly.** Media buys, public brand awareness campaigns, and development of apps and other technologies for engagement are usually resource-intensive activities and take time and money away from program administration, business recruitment, and assistance to participants.

PROGRAM EXAMPLES

- The Eastside Green Business Challenge encourages local organizations and seven eastside cities to benchmark their performance, engage with the program’s resources, and report improvements.
- The Get on the Map program’s 2013 Chinook Book partnership was an awards-based engagement strategy that focused on increasing consumer awareness and patronage of Get on the Map businesses.

Recertification Schedule

Programs can require businesses to reconfirm their participation by providing proof of ongoing actions taken, taking further program actions, or by conducting additional site visits or third-party verification to participants. This can be done annually, biennial, triennial, or after a business has been part of the program for a certain number of years.

CONSIDERATIONS

- **A recertification component offers more program credibility and integrity.** Adding a recertification requirement holds participants accountable, and encourages them to continue taking actions and improving upon their environmental commitment.
- **Annual recertification may be too costly or time-consuming for the business.** It may also be costly to conduct recertification site-visits every year. Many programs with recertification use a biennial or triennial recertification cycle.
- **Recertification helps maintain participant engagement in the program** by requiring businesses to continue to commit to the program, reminding them that the program and its resources exist, and offering assistance at all stages of a business's growth.

PROGRAM EXAMPLES

- The Get on the Map Program currently does not have a recertification component; participants may cease taking the green actions they have been recognized for and business information can become outdated.
- Green C Certification is valid for three years. Businesses must re-apply every three years to continue to be certified.

Technical Level of Program Actions

The extent to which the program's actions are technical in nature can have a significant impact on program accessibility and participation, as well as verification and/or third-party certification costs. Actions that are less technical in nature may be ones that are self-reported without the use of data or utility records, for instance, having a recycling program in place, or training employees on water-saving best management practices. Actions that are more technical may involve detailed building science knowledge or reporting on procurement practices, utility data, or waste diversion calculations.

CONSIDERATIONS

- **Increasing the technical level of actions may limit the program's accessibility to businesses.** Actions that require performing calculations or collecting data may not be accessible to small businesses that lack the capacity and resources. The program, especially any base level, should offer actions that are straight-forward enough for small businesses to begin working with the program, yet challenging enough to build the program's credibility as a recognizer/certifier of green businesses.

- **Technical requirements offer credibility.** Generally, the more technical and in-depth the program's requirements and required actions, the higher the level of credibility among both participants and consumers. It is perceived to be more rigorous and prestigious when a business receives recognition, and consumers feel more confident about the business's claims. Larger businesses may also perceive a program to be more "legitimate" if it has technical requirements and requests participants to provide data and proof of actions.
- **Programs with technical requirements can be more resource-intensive.** Adding more technical requirements to the program's actions will likely increase the cost of third-party verification, if that is a program aspect.

PROGRAM EXAMPLES

- LEED certification requirements are challenging, time-consuming, and not accessible to most businesses without a significant investment of time and resources.

Task 3 | Web Platform Selection Initial Research

Task 3 Research Scope Summary

The scope of work for each task of the Regional Green Business Program Design Phase includes: 1) researching issues, 2) presenting options, 3) facilitating the group to make decisions, and 4) documenting the issues and decisions.

Task 3: Web Platform Selection

Task 3 of the design phase addresses the need to identify a web platform for the regional green business program. The web platform will serve as a one-stop-shop web portal for businesses to find programs and for individual organizations to market their programs, act as a conduit for referrals, and include elements of recognition for businesses achieving results. The options for web platforms include purchasing an existing platform or hiring a company to develop a new platform. Key platform attributes to consider include the ability to support the program's recognition elements and the purchasing costs for the platform, any subsequent customization, and ongoing costs.

In support of this need, Cascadia researched various web platforms that are likely to meet the desired attributes. Cascadia also researched the feasibility and cost for developing a custom web-based database or application for the program based on requested features. This involved contacting several web developers to outline requested features and functionality, determine feasibility and timeline, and prepare a cost estimate.

How to Use This Document

This document presents findings from the Task 3 research, organized into the following sections:

- **Criteria and Desired Platform Attributes**—use this list as a reference of the overall, administrative, and program user features that we are looking for in a web platform, such as customizability, a large number of user accounts, compatibility with other systems, and ability to measure performance and track various metrics.
- **Platform Research**—refer to the three platform options—1) new custom Salesforce platform, 2) new custom HTML platform, and 3) modified existing platform, to learn more about the features and benefits of the various platforms that could be deployed for the Regional Green Business Program. See page 14 for a platform comparison summary chart including attributes and customization costs.
- **Customization Costs**— it is important to consider the upfront and ongoing costs of the various web platforms, which vary from one web developer to the next. See the estimated development and maintenance costs of 1) a new custom Salesforce platform, 2) new custom HTML platform, and 3) a modified existing platform here.

Criteria and Desired Platform Attributes

In choosing an appropriate web platform, it is helpful to begin by defining the criteria with which to evaluate the options. The Regional Green Business Program seeks a web platform that, among other things, meets the following criteria:

- the ability to support the type of “recognition” decided in Task 2,
- the ability to search for programs based on business location or type,
- the ability to provide desired tracking metrics,
- the ability to allow co-branding if desired,
- sustainable costs, including development and ongoing maintenance costs,
- flexible and dynamic features that can be expanded and modified over time, and
- compatibility with the needs/constraints of partners’ IT staff.

In addition, the group identified other desired attributes related to the general functionality of the platform and the user experience for program participants and administrators. These are outlined below.

General Platform Attributes

The following general platform attributes are necessary for the program to have a platform that is easily customizable and accessible for all types of organizations involved.

- **Customizability and flexibility, including an easy-to-use, dynamic user interface.** A custom user interface (usually built on HTML) allows for maximum customization as the program grows and develops, and will allow the program to update green actions and categories.
- **Large number of business accounts and administrative users and profiles.** It is essential to have the ability to create profiles for program administrators, city contacts, utility and hauler service providers, and other orgs who may need to follow up on referrals. At least ten thousand user logins are needed for business participants and program managers, administrators, and implementation partners.
- **Tracking interactions with businesses and outcomes associated with activities.** Being able to track interactions and outcomes is one of the primary functions of the platform, and is central to an effective program that delivers environmental change.
- **Ability to refer leads to service providers and send businesses to partners for follow-up.** Streamlined and automated referral of businesses to service providers, city departments, and other resources will be essential for delivering on outcomes.
- **Recognition component that attracts and excites participants.** The platform needs to have an attractive, interactive recognition and certification component that will motivate businesses to participate, while being simple enough for businesses to easily report on environmental actions they have taken.
- **Timely development schedule.** The program would like to have a platform that has been developed, customized, tested, and ready to roll-out within a reasonable timeframe.

- **Scalable to other cities, counties, and the state.** A well-designed database will be able to expand capacity to include additional program providers and participants.
- **Costs that are sustainable for launching and maintaining the platform.** Development and maintenance costs for the platform need to be feasible and sustainable over time.

Participant (Business/Organization/Consumer) Attributes

It is also important to have the following participant-specific platform attributes to ensure that the platform is accessible to a variety of businesses, and is tailored to their location and business needs.

- **Landing page that allows users to either sign up to be a green business or search for green businesses.** The platform will need to have a map of participating businesses, the ability to search by sector, location, and/or zip code, as well as a sign-up portal for businesses that want to participate.
- **Ability for participants to search for available programs and resources from participating agencies** based on business or organization location and sector.
- **Tailored user experience based on business information.** The available green actions, available rebates, incentives, and other support resources should be based on information collected in the application process, including business size, sector, zip code, previous actions, and other qualifying questions.
- **Ability to create an account** both as a business or building and to link to related business accounts. This will ensure that the platform's interface is accessible to both businesses of all sectors and their property managers, who are critical for helping to make environmental changes.
- **Highlight successful participants** with case studies, videos, and testimonials. These resources can help provide encouragement and education to implement similar actions at their facilities.

Administrator Attributes

The following attributes will be critical for the administrator of the platform, who will need to efficiently facilitate referrals, tracking, and reporting.

- **Ability to provide desired tracking metrics.** This would require building in calculations for certain actions like changing out lighting fixtures or toilets or adding compost service.
- **Ability to allow co-branding if desired.** This would allow different regional programs to have their branding and logos on the program's platform, helping businesses identify their local utility, service provider, or business organization.
- **Track interactions with businesses and follow-up assignments** to program administration and implementation partners within the platform.
- **Ability for program administrators to update certain components** that will change regularly like specific actions, rebate amounts, etc.
- **Possible integration with other utility/performance tracking software** such as Portfolio Manager, the ability to pull information from Energy Star and LEED, or the ability to batch upload account or utility data.

In addition, the platform will need to address the following IT concerns:

- **ADA and accessibility**, including having the platform be operable in screen readers, usable in all browsers, and support mobile access.
- **Usability testing** to ensure the user interface is accessible to alternately abled users.
- Color and **design for color-blind and low vision** readers.
- Language that is **written for people with low-literacy**.
- **Section 508 compliance** for ADA accessibility if the platform is funded through a federal grant.
- **Records retention** and privacy.

Platform Research

Cascadia researched three possible web platform options to identify which option could be the best fit for the Regional Green Business Program. The platform options reviewed through this task were: 1) a custom Salesforce platform, 2) a custom HTML platform, and 3) existing platforms including the California Green Business Network (CAGBN) and GreenPSF. Each of these platform options is described in more detail in the next section.

Custom Salesforce Platform

DESCRIPTION

A custom Salesforce platform is a customer relationship management (CRM) database that allows administrators to track specific information about businesses, assign businesses to partners as referrals, and create custom reports about metrics. The allows external developers to create add-on applications that integrate into the main database using Apex (a proprietary Java-like programming language for Force.com) and Visualforce (an XML-like syntax for building user interfaces in HTML or Flex). The platform can be customized to facilitate data-gathering with custom dashboards and data fields, and it is also possible to upload information from existing databases, spreadsheets, or platforms into Salesforce.

Salesforce can also be modified to create a custom-facing business and customer portal, called a Community, which provides a customized user interface while syncing information with the Salesforce database. This is where businesses can make their own profile, receive certification or recognition-related prompts, participate in conversations and ask questions, see customized resources, and receive badges, endorsements, and scoring. It can be easily customized to reflect the brand and create a cohesive online customer experience. It can also customize the information a user sees, including customized resources and groups.

General Attributes

	Attribute
✓	Easy-to-use custom user interface
✓	Large number of business accounts, and administrative users and profiles
✓	Tracking interactions with businesses and outcomes associated with activities
✓	Ability to refer leads to service providers and send businesses to partners for follow-up
✓	Recognition component that attracts and excites participants
✓	Timely development schedule
✓	Scalable to other cities, counties, and the state
Limited	Costs that are sustainable for launching and maintaining the platform

Participant Attributes

	Attribute
✓	Landing page that allows users to either sign up or search for green businesses
✓	Ability for participants to search for available programs and resources
✓	Tailored user experience based on business information
✓	Ability to create an account both as a business or building business accounts
✓	Highlight successful participants with case studies, videos, and testimonials

Administrator Attributes

	Attribute
✓	Ability to provide desired tracking metrics
✓	Ability to allow co-branding if desired
✓	Track interactions with businesses and follow-up assignments
✓	Ability for program administrators to update certain components
✓	Possible integration with other utility/performance tracking software

PROS AND CONS

Pros

- Salesforce is the most robust and widespread customer relationship management (CRM) platform available.** As a result, there are a large number of Salesforce-certified developers and a significant subset of local developers focused on implementing Salesforce databases for government, NGO, and other non-profit organizations.

- **Salesforce is cloud-based and not built on a proprietary system**, which means that it can be easily transferred from one developer to another and from one managing organization to the next.
- **Salesforce is designed to facilitate referrals and communication.** Its strengths are in data collection and administrative action, including sending business and automating communication.
- **Constant platform and innovation.** Because Salesforce.com is a large organization that is constantly innovating its service offerings, additional features, apps, partners, and functionality will be available to the base platform over time, at no cost.
- **Customizability.** Both the administrative back-end platform and the business-facing and public-facing “Community” can be extensively customized to reflect user interface and data collection needs.
- **Readily-available mobile app.** The Salesforce platform and “Community” portal can be easily accessed in mobile formats, and can be packaged into a customizable mobile application that both administrators and users could easily use.
- **Discounts for licenses costs if the platform is managed by a non-profit entity.** Salesforce offers heavily-discounted pricing and promotions for non-profits managing the database.
- **Administrative users can have unique log-ins, functionality, and profiles.** Administrative bodies can have access to the platform and its information that is customized to their entity, so that they only see businesses in their jurisdiction or businesses that they need to follow-up with.
- **Salesforce “Community” portals have built-in social interaction components.** Functionality such as “Chatter”, a social-media-like communication network between participants, can be effective at facilitating ongoing business engagement.
- **Salesforce facilitates easy integration with other Salesforce-based platforms.** One of the Salesforce developers included in the research for this task created the platform for the international B Corporation framework. This allows for easy data integration for businesses already participating in that program.

Cons

- **Layout may not be intuitive to learn for administrators.** Administrators may need training on how to add data fields, calculate metrics, update reports, or facilitate referrals.
- **Changes to the “Community” interface may be restricted to developers.** If changes to the “Community” portal were required, this would most likely need to be done by the developer, rather than by administrators.
- **Potentially higher development costs.** Database development and “Community” portal development, as well as license fees, may be more expensive than the alternative custom HTML platforms.
- **Higher licensing costs depending on needs.** The “Community” interface offers two types of log-ins, a “customer” log-in and a “partner” log-in, with varying levels of integration with the database.

EXISTING PROGRAMS INCLUDED IN PREVIOUS RESEARCH TASKS WITH THIS PLATFORM

- Seattle Public Utilities Green Business Program
- B Corporation

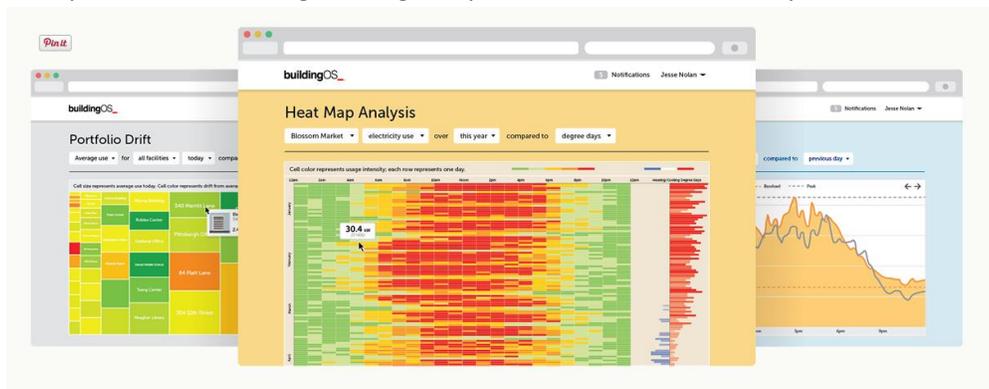
Custom HTML Platform

DESCRIPTION

A custom HTML platform can be built to include all of the criteria and functionality desired, including a user-facing portal as well as back-end administrative data management. However, in most cases custom platforms are built around an existing web structure or database that may or may not fit program needs. It may take significant modifications to the platform's existing structure to create the desired platform.

The custom HTML platforms that were looked at included ones by the following developers:

- **Scope5**- a data management software tool for organizations to track their sustainability metrics. It is primarily used by large organizations for sustainability reporting and planning.
 - This platform heavily relies on business data, usage information, and metrics to track progress over time, with an emphasis on quantitative versus qualitative metrics. Businesses would need to provide substantial quantitative data.
 - Currently, there is no small business component, as the platform is designed and used by large organizations that have access to metrics and the time to engage with the platform.
 - There is also no existing emphasis on behavioral modifications- the platform is only used to identify outliers in aggregated building information.
- **Lucid**- a building design and performance management system that incorporates facility data.
 - The platform's primary function is to integrate building and utility data in real-time. Again, there is a strong focus on quantitative data that would be pulled from other sources, such as circuit-level electricity monitoring. Manual data entry was described as cumbersome and not ideally suited to the platform.
 - Includes a public platform for displaying business information to the public, as well as an administrative management portal with reporting and analytics capabilities.
 - The platform does not currently include the ability for businesses to take additional green actions- it only includes the data gathering component on what has already been done.



General Attributes

	Attribute
✓	Easy-to-use custom user interface
Limited	Large number of business accounts, and administrative users and profiles
Limited	Tracking interactions with businesses and outcomes associated with activities
✓	Ability to refer leads to service providers and send businesses to partners for follow-up
✓	Recognition component that attracts and excites participants
✓	Timely development schedule
✓	Scalable to other cities, counties, and the state
Limited	Costs that are sustainable for launching and maintaining the platform

Participant Attributes

	Attribute
✓	Landing page that allows users to either sign up or search for green businesses
✓	Ability for participants to search for available programs and resources
✓	Tailored user experience based on business information
✓	Ability to create an account both as a business or building business accounts
✓	Highlight successful participants with case studies, videos, and testimonials

Administrator Attributes

	Attribute
Limited	Ability to provide desired tracking metrics
✓	Ability to allow co-branding if desired
Limited	Track interactions with businesses and follow-up assignments
✓	Ability for program administrators to update certain components
✓	Possible integration with other utility/performance tracking software

PROS AND CONS

Pros

- Existing environmental focus.** Many of these platforms are already designed to track environmental data such as energy and water usage and waste data.

- **Customizability of front-end user interface.** Custom HTML platforms can be designed to have virtually any look and feel, and could be modified to include the features we want.
Fewer to no additional costs for additional users. Unlike Salesforce, custom HTML platforms usually offer an unlimited number of users, log-ins, or overall data in the database; they just have to be initially designed to support this volume.

Cons

- **Development and maintenance costs can be high.** Most platforms that are fully customized typically have high development costs, especially if the existing database needs significant modifications to fit program needs.
- **It may be difficult to transition the platform from one developer to the next, if needed.** Custom web-based platforms can be built using proprietary systems or code that future developers may not be familiar with.
- **Administrative control of the platform may be limited.** Developers typically create an administrative portal for making simple content changes; slightly more complex functionality (such as moving data or deleting records) may not be available.
- **Limited CRM functionality.** Custom HTML platforms are typically weaker in their ability to offer administrative services such as data tracking and referrals.
- **Many custom HTML platforms prefer automatic, rather than manual, data entry.** Both custom platforms that we looked at mentioned that manual data entry would be cumbersome and that they prefer to create platforms that require robust data fed in from other performance tracking software.

EXISTING PROGRAMS INCLUDED IN PREVIOUS RESEARCH TASKS WITH THIS PLATFORM

- Seattle Public Utilities Get On The Map Green Business Recognition Program
- SnoPUD Stanwood Energy Challenge

Existing Platforms (GreenPSF and CAGBN)

GREENPSF DESCRIPTION

GreenPSF is an online platform that connects building owners, managers, and users with solutions providers, including product manufacturers, installers, lenders, and utilities. Users profile their buildings, discover savings opportunities, and list projects for solutions providers to compete and win.

The GreenPSF platform includes goals and strategies for businesses, using a baseline survey or scorecard with green activities where business can earn points as its recognition component. The platform allows for gamification with a leaderboard that ranks participants by points achieved and shows other business's activities. It also provides resources for businesses to take further actions, creates custom activities for users based on their profile and utility information, and allows both tenants and property managers to manage accounts.

The GreenPSF platform includes built-in information on utility rebates and other incentives, and is customized to the type of business selected. The partner network can be customized with specific "solutions providers", and can also include a process of sending referrals to contractors.

The screenshot displays the GreenPSF user interface. At the top, a green banner states: "We found 69 Ways to Save recommendations. To improve accuracy, update your Property Overview and Property Assessment". Below this, several energy-saving recommendations are listed:

- Replace weather stripping around doors** (Energy > Building Envelope > Doors & Windows) - Low / No Cost. Description: "Change your worn out weather stripping on your exterior doors to reduce cold air infiltration and reduce HVAC system load." Includes a "Select" dropdown, a date field (MM/DD/YYYY), and an "Update Status" button.
- Reduce building envelope leakage** (Energy > Building Envelope > Doors & Windows) - Low / No Cost. Description: "Identify and repair building envelope leaks to increase energy savings and reduce your HVAC system workload." Includes a "Select" dropdown, a date field (MM/DD/YYYY), and an "Update Status" button.
- Adjust zone temperature deadband** (Energy > HVAC > HVAC Controls) - Controls. Description: "Adjust your HVAC zone temperature deadband and lower your heating and cooling costs." Includes a "Select" dropdown, a date field (MM/DD/YYYY), and an "Update Status" button.
- Retrofit inefficient lighting systems** (Energy > Lighting > Light Fixtures). Description: "Install more efficient fixtures, lamps and ballasts to reduce electric..." Includes a "Select" dropdown, a date field (MM/DD/YYYY), and an "Update Status" button.

Overlaid on the bottom right is a "List a Project" form for the "Seattle Municipal Tower". The form includes a progress bar with steps: 1. Background, 2. Prepare Data, 3. Choose Bidders, 4. Issue RFP, 5. Get Proposals, 6. Award Contact. The "First: Submit Background" section contains:

- Project Type:** Available Options (Building Information Modeling, Chillers, Combined Heat & Power, Compressed Air) and Selected Options (Caulking/Weather Stripping).
- Project Scope:** Materials, Labor, Financing.
- Project Status:** Planning (dropdown).
- Project Timeframe:** 90 Days (dropdown).
- Project Budget:** Less than \$25,000 (dropdown).
- Project Description:** (text area).

On the right side of the form, there is a "The Boxing Ring" section with an illustration of three people in a boxing ring. Text below it reads: "Informally, we refer to listing a project as The Boxing Ring. You sit in the front row as solutions providers compete to win your business. GreenPSF referees to maintain a structured process and level playing field." Below this is a "Benefits" section with three items:

- Lower cost:** When solutions providers compete, you pay less.
- Greater transparency:** Multiple proposals provide a clear picture of your options.
- Better choices:** You have direct access to thousands of qualified solutions providers.

CAGBN DESCRIPTION

The California Green Business Network (CAGBN) platform allows local environmental agency staff to use the tool to customize sector-specific checklists for their region to track a business through the process of application, verification, technical assistance, and recognition. Businesses are provided with certification and an environmental scorecard that graphically shows the benefits of solid waste diverted and energy and water saved.

Data collected as part of the tool provides easy-to-understand aggregated environmental outcome data that both governments and businesses can use to report on actions. It includes metrics that estimate savings, such as kilowatt hours per year or greenhouse gas reductions, with built-in assumptions, conversions, and calculations. Customers use the database to find and patronize green businesses, and businesses can be referred to other providers for help implementing additional green actions.

The screenshot displays the 'California Green Business Program' interface. At the top, it shows the application number (6414), registration date (11-15-2011), and recognition status (NA). The main navigation bar includes Dashboard, Reports, Program Profile, Measures, Global Variables, Create Sector, Checklist Setup, and Green Notes. The 'Application Details' section is active, showing a progress bar for GENERAL (60%), WASTE (100%), ENERGY (72%), WATER (86%), POLLUTION (78%), and WASTEWATER (100%). The 'BUSINESS INFO' section lists Santa Cruz Bicycles at 104 Bronson #22, Santa Cruz, California 95062, with phone 831-459-7560 and website Office/Retail. The 'CONTACT INFO' section includes contact name Will Dixon, phone 831-459-7560, and email wdixon@santacruz bicycles.com. The 'APPLICATION' section shows a passed audit on 02-21-2012 with a status of 'NOTE TO BUSINESS'. The 'PHONE CONSULT' section shows a passed audit on 11-15-2011. The 'COMPLIANCE CHECKS' section shows a passed audit on 04-24-2012. The 'SITE VISIT' section shows a passed audit on 02-21-2012. The 'AUDITS' section shows a passed audit on 02-21-2012. The 'RECOGNITION TASKS' section shows a pending task. The 'GENERAL PROGRAM NOTES' section contains a list of audit items and their completion dates.

Solid Waste Diverted From Landfills

Green businesses have saved **720,428** lbs of waste with a total savings of **TBD**. That's the equivalent of:

45 Garbage Trucks Worth of Diverted Waste

(The number of icons in this visualization has been capped to not overload the scorecard)



General Attributes

	Attribute
✓	Easy-to-use custom user interface
✓	Large number of business accounts, and administrative users and profiles
✓	Tracking interactions with businesses and outcomes associated with activities
✓	Ability to refer leads to service providers and send businesses to partners for follow-up
✓	Recognition component that attracts and excites participants
✓	Timely development schedule
✓	Scalable to other cities, counties, and the state
✓	Costs that are sustainable for launching and maintaining the platform

Participant Attributes

	Attribute
✓	Landing page that allows users to either sign up or search for green businesses
✓	Ability for participants to search for available programs and resources
✓	Tailored user experience based on business information
✓	Ability to create an account both as a business or building business accounts
✓	Highlight successful participants with case studies, videos, and testimonials

Administrator Attributes

	Attribute
✓	Ability to provide desired tracking metrics
Limited	Ability to allow co-branding if desired
✓	Track interactions with businesses and follow-up assignments
✓	Ability for program administrators to update certain components
✓	Possible integration with other utility/performance tracking software

PROS AND CONS

Pros

- **These are existing and proven databases** in use for successful programs in other cities and states.

- **The time and cost to customize them for use for this program would be significantly less** than custom options. If the CAGBN team is awarded a federal grant, the cost to the regional group may be fully covered by the grant.
- **Costs for future updates or new functionality could be shared with other existing users.**
- Using the same or a similar database as other green business programs throughout the nation may help **better facilitate sharing of best practices and other program data.**
- **Simple user interfaces are already customized to environmental sectors** represented by existing partner programs related to water, waste, and energy.
- **Both have existing green actions** and other content to draw from.
- **Both platforms would require very little customization** to meet the basic criteria and top attributes the group is looking for.

Cons

- **The CAGBN tool is dated and will need updates** before it can be packaged and used by the regional team. The current version does not have all the attributes the group is looking for including an interactive map of current participants or any element of gamification.
- **Both the CAGBN and GreenPSF systems are proprietary and have a limited number of web developers who can work on the current platform.** The CAGBN administrators are currently exploring other alternatives and may move to a new platform.
- **GreenPSF may have limited co-branding opportunities,** and as well as an overly-prominent platform brand.
- **GreenPSF does not currently have a robust business communication component** or a CRM to track referrals to participating agencies for follow up. The cost to add this functionality would still be significantly lower than developing a new custom database.

EXISTING PROGRAMS WITH THIS MODEL

- California Green Business Program
- ICLEI Green Business Challenge

Platform Comparison

Attributes	Salesforce	HTML	GreenPSF	CAGBN
General Program Attributes				
Easy-to-use custom user interface*	✓	✓	✓	✓
Large number of business accounts and administrative users	✓	Limited	✓	✓
Tracking interactions with businesses and outcomes/activities	✓	Limited	✓	✓
Ability to refer leads to service providers and send businesses to partners for follow-up	✓	✓	✓	✓
Recognition component that attracts and excites participants*	✓	✓	✓	✓
Timely development schedule	✓	✓	✓	✓
Scalable to other cities, counties, and the state	✓	✓	✓	✓
Costs that are sustainable for launching and maintaining the platform*	Limited	TBD	✓	✓
Participant Attributes				
Landing page that allows users to either sign up or search for green businesses*	✓	✓	Add-on	✓
Ability for participants to search for available programs and resources*	✓	✓	✓	Add-on
Tailored user experience based on business information	✓	✓	✓	
Ability to create an account both as a business or building business accounts	✓	✓	✓	
Highlight successful participants with case studies, videos, and testimonials	✓	✓	✓	✓
Administrator Attributes				
Ability to provide desired tracking metrics*	✓	Limited	Add-on	✓
Ability to allow co-branding if desired*	✓	✓	Limited	✓
Track interactions with businesses and follow-up assignments	✓	Limited	Add-on	✓
Ability for program administrators to update certain	✓	✓	✓	✓
Possible integration with other utility/performance tracking software	✓	✓	✓	✓
TOTAL ATTRIBUTES MET	17/18	13/18	14/18	15/18
INITIAL YEAR 1 CUSTOMIZATION COSTS	\$300,000	\$125,000	\$50,000	\$100,000
ONGOING ANNUAL COSTS	\$90,000	\$60,000	Unknown	\$40,000

*Denotes key criteria for platform

Customization Costs

Cascadia conducted limited research on customization, licensing, development, and ongoing maintenance costs for the database platform options discussed in the previous sections. Getting accurate price quotes for platform development is highly dependent on the developer partner chosen, as well as the specific development criteria. As such, the information gathered is meant to be an estimate for general planning purposes only and is subject to change.

Custom Salesforce platform

Cascadia researched development feasibility and costs by consulting three certified Salesforce developers. Two of these developers, Swiftriver Consulting and Bigger Boat Consulting, are local, non-profit focused Salesforce developers. These firms were not able to provide a cost quote for the project, stating that the scope was beyond the abilities of their firm. However, they were able to confirm that all requested database attributes were feasible to develop on the Salesforce platform.

A third developer, Exponent Partners, is a West Coast firm with six local developers, specializing in Salesforce consulting for non-profits. Exponent Partners created the Salesforce-based business survey aspect of B Corporation’s business certification process, and felt that this project was appropriate for Salesforce and for their firm. The developer we spoke with felt that a development schedule of six months would produce a pilot platform, while ten months would be sufficient to fully roll out the platform and its features.

The following estimated costs were provided by Exponent Partners:

	Initial Development	Annual Licensing	Annual Tech and Admin Support
Year 1	\$250,000-\$300,000	\$16,000	Included in development costs
Year 2, 3, etc.	N/A	\$16,000	\$74,000, time and materials basis

Custom HTML platform

Cascadia contacted two custom HTML platform developers, Scope 5 and Lucid, via in-person meetings and phone calls. Scope 5 provided a cost estimate of \$125,000 for customization.

Lucid declined to provide a customization quote stating that their structure did not readily support manual customer data entry and CRM functionality and they did not feel their expertise was the right fit for the program.

Modified existing platform (CAGBN, GreenPSF)

Cascadia gathered previously-received quotes from the developers of the CAGBN and GreenPSF platforms. See below for an estimate of customization costs.

The quoted price for changes made to the existing GreenPSF platform are included in the table below.

Customization Request	Description	Estimated Cost
A) Develop an engaging front-end website geared toward local businesses	<ul style="list-style-type: none"> ▪ Use appropriate visual imagery ▪ Move the login box to a separate page ▪ Add an interactive map of designated businesses ▪ Allow users to publicly browse/search designated businesses ▪ Add events calendar ▪ Add news / updates ▪ Add case studies of successful businesses 	\$5,000 one-time
B) Segment/sort the challenge leaderboard	<ul style="list-style-type: none"> ▪ By location (e.g., city, zip code, etc.) ▪ By industry sector (business) ▪ By property type (building) 	\$0 no cost
C) Create designation/levels based on points scored in various categories	<ul style="list-style-type: none"> ▪ When point thresholds are reached within categories, designate or certify a business or property ▪ Further scoping discussion needed to determine the review/acceptance process 	\$TBD: additional scoping information needed
D) Create a terms of use notification for sharing data with program managers	<ul style="list-style-type: none"> ▪ Upon first time login, display a terms of use modal window that notifies users with properties and spaces in Greater Seattle that their data will by default be shared with program managers ▪ Track the acceptance clicks and provide the data in a standardized report 	\$2,500 one-time
E) Track and report user traffic to Ways to Save, Incentives, Offers, and Challenge activities within Greater Seattle	<ul style="list-style-type: none"> ▪ Track click-thrus to each “actionable” portion of the core application ▪ Provide activity reports to Seattle program managers 	\$10,000 one-time
F) Route procurement leads to various small business programs	<ul style="list-style-type: none"> ▪ Modify the List a Project tool to route specific project leads directly to program managers 	\$10,000 one-time
G) Create system metrics and reports for program managers	<ul style="list-style-type: none"> ▪ Based on input from SDG&E, create a series of metrics and usage reports ▪ Provide the data in a web interface, as well as Excel/CSV 	\$10,000 one-time
H) Create system reports for users	<ul style="list-style-type: none"> ▪ Create a series of reports for users to track their progress vis-a-vis data reporting and Challenge activity completion ▪ Include automated savings calculations / visualizations based on established formulas 	\$10,000 one-time
I) Data export	<ul style="list-style-type: none"> ▪ Provide a periodic download of property, business, user, and challenge activity data in a structured format, suitable for import into a third-party CRM system (e.g., Salesforce.com or similar) 	\$2,500 one-time
ESTIMATED TOTAL:		\$50,000

CALIFORNIA GREEN BUSINESS PROGRAM

The CAGBN is currently pursuing a grant to cover the costs of database customization for other green business program administrators. If they receive the grant, the costs of customization would be covered and there would be no charge to the regional group. Costs for licensing and administrative support with the grant are unknown at this time.

CAGBN provided the following cost estimate for customization if they do not receive the grant, or if the regional group would like to utilize the database before the grant is received. This cost estimate does not include adding additional features or functionality not currently found in the database. Adding additional features and importing existing data would be an additional cost.

	Initial Development	Annual Licensing	Annual Tech and Admin Support
Year 1	\$100,000	Included in development costs	Included in development costs
Year 2, 3, etc.	N/A	\$15,500	\$25,000

Task 3 | Web Platform Selection Initial Research

The initial Task 3 Web Platform Selection group meeting was held on December 2, 2014 to review initial research on four platform options:

1. Custom Salesforce Platform
2. Custom HTML platform
3. GreenPSF existing platform
4. CAGBN existing platform

Key outcomes of this initial meeting included:

- Eliminating the custom HTML platform option.
- Developing a list of additional questions and concerns for each of the remaining platform options.

To address these questions and concerns, group representatives scheduled follow up phone conference meetings with developers representing each of the three remaining platform options. Below is a list of questions provided by the group and the responses provided by the platform developers. An updated platform comparison chart is provided on page 4.

RESPONSES TO ADDITIONAL QUESTIONS AND CONCERNS SUBMITTED BY THE TEAM

Salesforce (Exponent Partners)

Question: What does the annual “tech & admin support” (\$133,000) cover and is that really fixed regardless of how much we need/use?

Answer: The tech and administrative support costs include providing database training for all administrative users and responding to questions and issues raised by administrative and business participant users. This also includes a base estimate for minor enhancements to features and functionality requested by the group. These costs are not fixed and will be billed on a time and materials basis, at an hourly rate of \$125 per hour. Exponent provided an updated estimate of \$74,000 for ongoing annual administrative support costs, and \$5,000-\$16,000 annually for licensing costs, bringing the total annual ongoing costs down to \$90,000 for a custom Salesforce platform.

Concern: Can we afford this (would partners be willing to pay and/or could we get grants)?

Response: Budget information will be compiled and presented in Task 6. The group will make a final determination of available budget for web platform updates and other program design and implementation tasks in the RFP creation process. The total annual ongoing cost for a custom Salesforce platform is \$90,000. The initial customization cost is \$300,000.

GreenPSF

Question: Can we eliminate the contractor referral component (& would that raise the customization price since GreenPSF would not be getting referral fees)?

Answer: GreenPSF strongly urged not to remove the referral component, but did say it was a possibility. GreenPSF would increase customization costs to \$200,000 if the referral component is removed. GreenPSF will only route certain larger projects (over \$20,000) through the contractor referral process. Smaller or no-cost projects would be routed through existing participating agency protocols.

Question: What would the annual costs be?

Answer: After requesting additional clarification, GreenPSF quoted \$3,000/month or \$36,000/year for ongoing administration and tech support. They also recommended setting aside \$40,000 per year for new feature/function development, to be billed on a time and materials basis at \$125/hour.

Concern: Would the \$50,000 customization cost really get us what we want (e.g., how basic are the “add ons”)?

Response: No. After further discussion, GreenPSF increased the customization quote to \$100,000 with the referral component, and \$200,000 without it. GreenPSF noted that this does not include building in metrics to track outcomes associated with implementing green actions, and that the platform does not include CRM functionality to track customer interactions.

Concern: Do we trust them? They haven’t been forthright about the contract referral fees and they won’t disclose the ongoing costs.

Response: The updated cost estimates are significantly higher than the original quote. They did disclose that they would require a 3-5% commission on all projects routed through the contractor referral portal. They estimate this to be just 10% or less of customers and projects.

CAGBN

Question: The current customization cost of \$100,000 is based on using their current platform. What would be the cost if they do get the grant and convert to Salesforce? That conversion would likely not be free to us because the grant amount would likely not cover the entire cost of converting to Salesforce.

Answer: CAGBN has not yet received their own quote for Salesforce customization. They did connect with Exponent and Exponent will be preparing an estimate for designing a custom Salesforce platform for use in other states as well as Washington. They will work with all interested states to develop the budget for each participant with and without the grant and with and without upgrading the platform.

Question: Clarify what the annual “tech & admin support” (\$25,000) covers and is that really fixed regardless of how much we need/use? And is this the same regardless of whether they get the grant and convert the platform or not?

Answer: This includes the time to train all administrative users and provide ongoing technical support to administrative and business participant users. The cost would be fixed and support would be “unlimited”. The costs would change if they do not get the grant, because this may impact the overall number of users and support needed.

Concern: Ideally don’t want this choice if they don’t get the grant and convert the platform.

Response: The CAGBN team has just done a refresh of the current website and platform. They will provide access to a training on 1/7. CAGBN compiles a list of all desired updates and requested features and functionality from each member agency and prioritizes updates as a group, depending on available funding. CAGBN is willing to make requested updates to the existing platform if the regional group can fund them.

Concern: If they do get the grant, but convert to HTML, does that mean we would eliminate this choice, just like we eliminated the stand-alone choice of an HTML platform? Or is this different?

Response: If they do decide to convert to a new platform, they will issue a RFP and anyone can respond. If the regional group moves forward with a partnership with CAGBN, they would be able to provide input into the vendor selection process.

Concern: If they do get the grant and convert to Salesforce (& we can afford the likely extra cost to us), our needs will be weighed against the needs of the other states.

Response: Yes, this is true. CAGBN currently has a process of gathering ongoing requests for updates through the web platform and meets to prioritize and plan updates each year. The regional group will have at least one representative on the CAGBN team to participate in these meetings.

General

Question: Will customer identifiable information (address, account #, usage) be entered or live on this server?

Answer: Yes. Desired and required security protocols can be included in the RFP.

Question: Are there RSJI, HUB/WMBE, equity issues for the City of Seattle with regards to contractor referrals?

Answer: If the GreenPSF platform is chosen and the group uses the contractor referral function, the group can determine how the contractors are added to the platform. The contractor selection process will be between the business and the contractor and none of the government agencies will be directly facilitating this. If the regional group chooses, they could place emphasis on or highlight contractors with WMBE status.

Question: What is the business benefit of using the site?

Answer: Access to conservation and sustainability information and resources across city, county, and regional agencies in one place.

Question: What is the business benefit to City Light for businesses using the site?

Answer: Potential for referrals to programs, services, and rebates through other agency programs.

Question: Who will manage the site? (CMS, maintenance, database management, etc.)

Answer: A third-party agency selected through a RFP process.

Question: What will success look like? How many businesses do we hope to participate? What kWh savings do we expect?

Answer: This is to be determined by each participating agency independently and by the group as a whole. The program should be designed with these goals in mind.

Question: How will leads be managed?

Answer: Leads will be funneled to an appropriate party within each participating agency as determined and requested by each agency. The exact process for referral tracking and follow up will be determined during the web platform selection and development phase.

Question: What do we know about the demand for/interest in a site like this?

Answer: The group has anecdotal information from current customers and a small sample of business surveys. The group is interested in getting additional feedback from the business community before completing the design phase.

Updated Platform Comparison

Attributes	Salesforce	HTML	GreenPSF	CAGBN
General Program Attributes				
Easy-to-use custom user interface*	✓	✓	✓	✓
Large number of business accounts and administrative users	✓	Limited	✓	✓
Tracking interactions with businesses and outcomes/activities	✓	Limited	Limited	✓
Ability to refer leads to service providers and send businesses to partners for follow-up	✓	✓	✓	✓
Recognition component that attracts and excites participants*	✓	✓	✓	✓
Timely development schedule	✓	✓	✓	✓
Scalable to other cities, counties, and the state	✓	✓	✓	✓
Costs that are sustainable for launching and maintaining the platform*	Limited	✓	✓	✓
Participant Attributes				
Landing page that allows users to either sign up or search for green businesses*	✓	✓	Add-on	✓
Ability for participants to search for available programs and resources*	✓	✓	✓	✓
Tailored user experience based on business information	✓	✓	✓	✓
Ability to create an account both as a business or building business accounts	✓	✓	✓	
Highlight successful participants with case studies, videos, and testimonials	✓	✓	✓	✓
Administrator Attributes				
Ability to provide desired tracking metrics*	✓	Limited	Limited	✓
Ability to allow co-branding if desired*	✓	✓	✓	✓
Track interactions with businesses and follow-up assignments	✓	Limited	Limited	✓
Ability for program administrators to update certain components*	✓	✓	✓	✓
Possible integration with other utility/performance tracking software	✓	✓	✓	✓
TOTAL ATTRIBUTES MET	17/18	14/18	14/18	17/18
INITIAL YEAR 1 CUSTOMIZATION COSTS	\$300,000	\$125,000	\$100,000**	\$100,000***
ONGOING ANNUAL COSTS	\$90,000	\$60,000	\$76,000	\$40,000

*Denotes key criteria for platform

** This estimate is with the contractor referral portal included. The cost without the portal would be \$200,000.

***This is the cost if CAGBN does not get a grant. The initial and ongoing costs would be covered if CAGBN receives a grant.

Customization Costs

The information below is an estimate for general planning purposes only and is subject to change.

Custom Salesforce platform

The following estimated costs were provided by Exponent Partners.

	Initial Development	Annual Licensing	Annual Tech and Admin Support
Year 1	\$250,000-\$300,000	\$16,000	Included in development costs
Year 2, 3, etc.	N/A	\$16,000	\$74,000, time and materials basis

GreenPSF

GreenPSF provided the following updated quotes for initial customization and ongoing support costs.

	Initial Development	Annual Tech and Admin Support, Minor Enhancements
Year 1	\$50,000-\$100,000 w/referral portal \$200,000 without	Included in development costs
Year 2, 3, etc.	N/A	\$76,000, time and materials basis; \$36,000 for support and \$40,000 for enhancements

California Green Business Program

CAGBN provided the following cost estimate for customization if they do not receive the grant, or if the regional group would like to utilize the database before the grant is received.

	Initial Development	Annual Licensing	Annual Tech and Admin Support
Year 1	\$100,000	Included in development costs	Included in development costs
Year 2, 3, etc.	N/A	\$15,000	\$25,000

Task 4 | Branding Strategy Initial Research

Task 4 Research Scope Summary

The scope of work for each task of the Regional Green Business Program Design Phase includes: 1) researching issues, 2) presenting options, 3) facilitating the group to make decisions, and 4) documenting the issues and decisions.

Task 4: Branding Strategy

Task 4 of the design phase addresses the need to decide whether the program branding will be EnviroStars or a new brand. The concept paper proposed using EnviroStars (which currently focuses on reduction of hazardous waste) because it is well-recognized, well-respected, exists in seven counties, and would lower initial program start-up costs. However, it is unclear whether King County, which owns the EnviroStars trademark, will allow its expansion to other environmental topics or if that approval could be made in a timeframe that works for this effort. Regardless of the overall brand name, the group needs to decide whether co-branding with the organizations' name is feasible in order to provide visibility for each partner. For example, if the overall brand were EnviroStars, perhaps Seattle would market the program locally as Seattle EnviroStars and Kirkland would market it locally as Kirkland EnviroStars.

In support of this need, Cascadia determined what the partners want out of the brand, determined the viability of using the EnviroStars brand for the regional program, scheduled meetings with King County and EnviroStars staff and decision makers to determine the process and decision making timetable for expanding the EnviroStars brand to encompass the regional green business program, generated alternative brand names, and presented three options for how co-branding with partners might work.

How to Use This Document

This document presents findings from the Task 4 research, organized into the following sections:

- **Existing program names**—use this list as a reference of the names of other environmental and sustainability engagement and certification programs that have been included in research for this task.
- **Brand considerations**—use this list as a reference of the overall attributes the group wants out of a brand.
- **EnviroStars brand**—consider the pros and cons to adopting the existing EnviroStars brand for the regional program.
- **Developing a new brand**—consider the pros and cons to creating a new brand for the regional program.
- **Brand name ideas**—reference this list of initial ideas for alternate brand names to consider.
- **Cobranding Strategies**—explore different options for cobranding the chosen brand name and logo with the existing names and logos of partner organizations.

Existing Program Names

Global Reporting Initiative (GRI)	Get on the Map
B Corporations	Green Seal
California Green Business Program	Green C Certification
National Restaurant Association's Conserve	Leadership in Energy and Environmental Design (LEED)
WSNLA's ecoPRO Certification	ICLEI Green Business Challenge
Energy Star	Certiably Green Denver
EnviroStars	Sustainability at Work (Portland, OR)
NW Product Stewardship Council	New York Environmental Leaders
The Water Supply Forum	Small Business Environmental Assistance Program (SBEAP, a program of EPA)
Take Winter by Storm	Vermont Business Environmental Partnership
King County-Cities Climate Collaboration (K4C)	Texas Green Network
King County Best Workplaces for Waste Prevention and Recycling	Thurston Green Business
Austin Green Business Leaders	BetterBricks
Hawaii Green Business Program	Green America's Green Business Network

Brand Considerations

In choosing the right brand, it is helpful to begin by defining the criteria with which to evaluate the options. A brand communicates program benefits and value, it should be meaningful and relevant to the user—in this case, the business community, and it should differentiate your program from competing programs. The brand itself should help the program generate leads for program partners. The Regional Green Business Program seeks a brand that will eventually become the business community's most trusted, prestigious, and comprehensive resource for greening their operations in Washington State.

Using a common green business program brand across all jurisdictions and service territories will help partners leverage a combined communications investment. The brand will link what are now discrete programs together and provide a consistent vision, messaging, and standards across the region or state. It is also important that the brand can be easily translated and understood by the multicultural/multilingual business audience. The selected brand should:

- Be memorable to differentiate it from the myriad of existing programs
- Evoke a professional tone that will resonate with large and small businesses alike
- Be differentiated from other green certification programs that reach or target the same community
- Be vetted to ensure it does not have any cross-culture translation issues
- Communicate the intent of the program and audience (environmental focus for businesses)

The group might consider adding a tagline to the overall brand that explains the mission to all businesses and can be easily translated into multiple languages. The group has two specific options for choosing a brand name for the new regional green business program 1) use the existing EnviroStars brand or 2) create a new brand.

EnviroStars Brand

The concept paper developed by the regional partnership proposed using the EnviroStars brand name because it is well-recognized, well-respected, exists in seven counties, and would lower initial program start-up costs. However, it is unclear whether King County, which owns the EnviroStars trademark, will allow its expansion to other environmental topics, beyond the current hazardous waste focus, or if that approval could be made in a timeframe that works for this effort.

Below is a summary of the pros and cons to using the existing EnviroStars brand for the new regional program.

PROS AND CONS

Pros

- It is a well-respected and known green business program across seven counties in Washington State with more than 700 certified businesses; celebrating its 20th anniversary in 2015.
- It encompasses a wide range of green business behaviors already.
- It has strong brand equity among consumers and the business community.
- It is well respected among the founding partners.
- This represents the most cost-effective approach. It will take some resources to educate consumers and businesses about how the EnviroStars program is changing and evolving into this new integrated, statewide program, but far less resources than would be required for launching an entirely new brand.
- It could prove difficult to agree on a new brand name with all parties, whereas EnviroStars already has moderate support.

Cons

- There is some internal resistance from King County on using the existing name for a broader effort.
- It is most well-known as a hazardous waste program and it will take some effort and resources to explain the new scope of the program.
- There may be some existing brand misconceptions or history with businesses that may hinder building this more inclusive brand.

Developing a New Brand

Another option the group has is to develop a new brand name, with a new logo and brand platform. Below is a summary of the pros and cons to developing a new brand for the new regional program.

PROS AND CONS

Pros

- The group would have full creative control on what the new brand name, logo, and strategy should include.

- This would eliminate the need to reframe the existing EnviroStars brand or to address misconceptions.

Cons

- It could prove difficult to agree on a new brand name with all parties, whereas EnviroStars already has moderate support.
- The costs and effort to establish brand equity would be significantly higher than using an existing brand.

Brand Name Ideas

The consultant team held a creative brainstorming session to identify potential alternative brand names that would explain the program, excite participants, and encourage participation. The brainstorming session included identifying key attributes of the brand name, such as a focus on sustainability, a group component, and a local or regional element.

Below is a list of initial ideas for new regional program brand names.

Evergreen Eco Leaders	Washington Green Enterprise
Green Leaders Partnership	Green Business United
Sustainable Action Partnership	GreenLeaders/EarthLeaders
Evergreen Action Network	Planet Business
Green Pin Partnership	NW Green Biz
Evergreen State EcoHub	EverGreen Biz
Washington Green Stewards	Green Business Advantage
Washington Green Business Program	3BL Business Network (3BL=Triple Bottom Line)
EverGreen Business Network	

Cobranding Strategies

The new integrated regional green business program would also develop a cobranding strategy for local jurisdictions and partners so they can promote the program to their businesses and customers while maintaining their identity. This strategy will include simple guidelines on how to pair the EnviroStars or new logo and brand with a partner brand. It is not recommended that the overall program brand name or logo change in any way depending on the sponsoring partner or jurisdiction. Instead, a cobranding strategy will allow the partner or jurisdiction to let the participant know who is bringing them the program, without making the overall program brand itself complicated and less recognizable. Some examples of how a cobranding strategy could look are included below, using the existing EnviroStars logo.

Option 1: Brought to you by/powerd by



This option implies that the partner organization has some ownership of the program and may be involved in implementation or administration.

Option 2: Sponsored by



This option also implies program ownership, similar to using the term “brought to you by”, but program sponsors are viewed as an organization paying a fee to be a part of the program. In this case, where the funding organizations have more of a stake and involvement in the program development and operation, sponsorship may not adequately convey the role for each organization.

Option 3: In partnership with



With this option, it could be interpreted that EnviroStars is a discrete program that has partnered with the organization, rather than a program that is essentially co-owned by that organization.

Task 5 | Joint Marketing Initial Research

Task 5 Research Scope Summary

The scope of work for each task of the Regional Green Business Program (RGBP) Design Phase includes: 1) researching issues, 2) presenting options, 3) facilitating the group to make decisions, and 4) documenting the issues and decisions. This document includes a summary of the research for Task 5, Joint Marketing.

Task 5: Joint Marketing

The umbrella RGBP aims to reduce business confusion and to more efficiently and effectively reach more businesses through joint branding of local agency green business programs. In Task 4 of the RGBP Design Phase, the regional working group addressed brand strategy and achieved absolute consensus to use and update the existing EnviroStars program brand for the new regional program. The regional working group will work closely with the administrators of the current EnviroStars brand, the King County Local Hazardous Waste Management Program (LHWMP) to update the brand and create a new tagline to tie in the regional partnership. In addition, regional program participants will have the option to use a defined co-branding strategy—the use of the term *In partnership with*, to pair their individual logos and brands with the new EnviroStars brand.

With the new program brand strategy defined, Task 5, Joint Marketing, of the design phase addresses the need to decide what joint marketing of that brand will be conducted collectively by the group. Currently, each program partner markets their own program in various ways. For example, Seattle Public Utilities (SPU) has consultants that conduct door-to-door outreach to businesses across the City, telling them about SPU programs, and in some cases signing them up for services during an onsite visit. King County currently pays for bus ads to market the EnviroStars program. The working group will also need to decide what budget is available for joint marketing.

In support of the need to identify potential joint marketing strategies, Cascadia and C+C generated a list of 10 effective marketing strategies for consideration by the regional group. Each of these strategies is scalable to different budget levels. Cascadia and C+C also included a list of potential business participant recognition materials that can be developed by the group.

How to Use This Document

This document presents findings from Task 5 research, organized into the following sections:

- **Business recognition materials**—use this list as a reference of potential materials the regional group could create to help recognize and promote participating businesses to the public.
- **Joint marketing strategies**—use this list as a reference of potential marketing strategies the regional program could take to promote the program, solicit referrals, and recognize participants.

Business Recognition Materials

Below is a list of materials the regional group could create with the EnviroStars brand and logo to feature participating businesses and promote their participation to peers and customers. A combination of materials should be considered to ensure materials meet the needs of varying business participant sizes and sectors.

- Window cling
- Certificate or other item such as a plaque signed by participating city mayors or a county executive
- Poster
- Electronic logo file to add to business web and social media sites and existing promotional materials
- Call-out on participating agency social media sites and potentially with paid social media sponsorship
- Case studies that highlight green actions taken by business participants and associated cost and resource savings achieved and are featured on participating agency program web and social media sites or through traditional media outreach
- Tabletop signs, table tents, or customer bill insert for restaurants
- Pair or earned media stories featuring specific businesses
- Mentions in program advertising

Joint Marketing Strategies

Below is a list of marketing strategies and tactics the regional group could consider to promote the program, solicit referrals, and recognize participants. The level of effort and budget for each of these strategies can be adjusted based on the available joint marketing budget.

1. Create Outreach Material Templates

The regional group could create branded outreach materials for direct, one-to-one outreach to businesses and when offering technical assistance. This would include a toolkit of template materials created from joint funds that program partners could co-brand with their own identity and produce on their own in the quantities they need.

Examples include:

- Informational fact sheets and flyers
- Getting started guide for the program
- Employee training materials
- Infographic that shows savings and environmental outcomes from taking desired actions
- Business cards
- Prompts for specific behaviors, such as to remind kitchen staff to turn off equipment or to not put fats, oils, and grease down the drains
- Short case studies for each business sector
- Booth materials and displays for events
- Videos — how to take part in the program or specific behavior how-tos
- Transcreated materials for each language demographic

- Program newsletter
- LinkedIn group for program participants and partners

2. Coordinate Business Meet-Ups and Tours

In target neighborhoods in each participating agency service territory, program staff would work with industry, neighborhood, and/or community-based organizations to co-sponsor meet-ups of neighborhood or industry-specific businesses. A participating EnviroStars business would host each meet-up to give tours of the sustainable practices they have implemented, focusing on one topic per meet up (e.g., energy conservation). The meet-up could include drinks and food as added enticement. Another option is for several businesses to join together and host a progressive tour of each business' sustainable practices. The host business or businesses would share and demonstrate equipment and systems they have in place to save resources and explain the benefits, including cost savings and resource savings.

The program could also consider virtual meet-ups or regular webinars on sustainability topics by sector or by topic for business owners and managers. These would always have actual local businesses talking about their experiences and success stories in addition to a program representative.

3. Participate in Events and Sponsorships

The program can participate in and/or sponsor existing trade shows, business events and workshops, webinars, and other sector-specific events to raise awareness for and recruit for the program. Some booth promotional materials including a program tablecloth and stand-up displays could be jointly funded by the group and then shared among partners as needed for other events. The group should include participation in events that span the regional service territory and that reach and engage a variety of business sizes and sectors.

4. Leverage Community and Industry Partnerships

The program should leverage all the communication channels of its partners but also partner with other community-based organizations and trade and business groups to help promote the program and recognize business. Communication channels that could be leveraged include websites, social media, electronic mailing lists, newsletters, member meetings, webinars, workshops, and events. Down the line, the program could consider awarding mini-grants or stipends to small non-profit community and neighborhood groups to assist the program in program promotion, business recruitment and green business recognition. Example organizations include neighborhood-based, ethnic, and faith-based organizations, business chambers, rotaries, the Building Owners and Managers Association (BOMA), the Washington Lodging Association, and the Washington Restaurant Association.

5. Coordinate Earned Media

The program could launch using media relations. Because it is a brand-new, regional program, there is news and media will be interested. One way to plan this launch is to get a handful of businesses to sign on to the program—some small but also some big name companies who can share in promotion of the launch and help the program then build consumer awareness through their own marketing means and networks. The group could plan a launch event at a local business or campus and give media a tour of green aspects of the operations and the opportunity to interview local dignitaries who are supporting the program.

The program can also use ongoing media relations to announce program milestones, such as the number of green businesses city-wide or in a particular community. The program can pitch neighborhood blogs, social media, and

community papers about what businesses in their area are doing to help the environment. This could be funded by each individual partner on their own or as a group.

Case studies that demonstrate outstanding results from one or more businesses could be pitched to business publications like the Puget Sound Business Journal and to trade-specific publications and newsletters.

6. Purchase Media /Advertising

Partners could consider pooling funds to promote the program and participating businesses through ongoing advertising. This will not only help boost program awareness among businesses and consumers, but will act as an incentive to getting businesses to participate.

Advertising could be split between overall program awareness ads, and ads that recognize specific businesses or sectors. These ad opportunities could be tied into the challenge or competitions strategy outline below, where businesses compete to have themselves highlighted in the ad campaign.

Advertising could include:

- Ads in business publications (e.g., Puget Sound Business Journal, 425 Business, Seattle Business, etc.)
- Online ads (local news sites, social ads, Google Ad Network, Google Search advertising, business or trade-oriented sites)
- Online Radio (Pandora) and Traditional Radio
- Transit ads (bus exteriors, bus and rail tunnels)
- Billboards in areas with high green business penetration
- Business-oriented publications or trade group publications
- Sponsored Facebook posts and LinkedIn ads
- Ad Social—build a community on LinkedIn for the program that allows for open sharing of ideas and promotes upcoming events and assistance across partners
- Direct mail to specific neighborhoods that recognizes participating businesses and could even promote coupons to select businesses for consumers
- Chinook Book—offer a community-based coupon pack for program businesses; the program partners could pool money to purchase a set number of coupon packs in certain areas and Chinook Book does the business recruitment and assists with promotion to consumers; program partners promote the coupon pack through their communication channels
- Yelp—explore ways of partnering with Yelp on a localized promotion; Yelp does have a local office and conducts local promotions and events in partnership with businesses; for example, Yelp users could unlock a coupon or discount offer when they “check-in” at participating program businesses; Yelp allows for this functionality via their mobile app

7. Host Challenges and Competitions

The program could create mini challenges or competitions within various sectors or communities where similarly-sized businesses compete to see how many green actions they can take or how much improvement they can make over a set period of time. For example, the group could monitor 10 urban hotel buildings for water or energy use over a three-month period and provide incentives for making strides to reduce water or energy use.

The group could devise a way to publicly track progress using the central web platform and show how they stack up against their competitors. This will allow for more program engagement and gives the program overall more ongoing opportunities to create media stories/attention.

8. Provide Performance Report Cards

The group could consider providing quarterly or annual “report” cards to participating businesses showing how they are doing within the program or towards program certification and highlighting strides they made that year. This is one way to keep frequent touches with the businesses and help motivate them to stay engaged with the program and continue to do more green actions.

9. Host or Partner on Existing Celebratory “Awards” Event

The regional group could create a recognition event or partner on an existing event for program businesses that recognizes their achievements and allows for networking. This event could be sponsored by program participants in order to lessen the financial burden on program partners. Several business and industry organizations, including the Washington State Recycling Association, the Washington Lodging Association, and the Puget Sound Business Journal, already offer awards events that the group could partner with or help promote to participating businesses.

10. Maintain a Consumer-facing Website

Consumers need a place online to go where they can see a list or map of all the businesses taking green actions—this is also added recognition for the business community. This feature should be built into the coordinated web platform. This map should be mobile-friendly and searchable by sector, neighborhood, or other attribute. In the future, it could have descriptions of businesses as well, or they could help sponsor filling out their profile for the consumer audience.

Task 7 | Branding Strategy Initial Research

Task 7 Research Scope Summary

The scope of work for each task of the Regional Green Business Program Design Phase includes: 1) researching issues, 2) presenting options, 3) facilitating the group to make decisions, and 4) documenting the issues and decisions.

Task 7: Participation and Funding Strategy

Task 7 of the design phase addresses the need to create a basic framework defining what services will be available to founding and future members of the program and the funding support each will be expected to contribute.

In support of this need, Cascadia identified different participants, or user types, that may access the regional platform and program services, researched potential metrics to determine overall financial contribution for each funding member, and outlined a package of resources and services that would be available to each participant type.

How to Use This Document

This document presents findings from the Task 7 research, organized into the following sections:

- **Who you are (aka Participant types)**—use this list as a reference of the different participants, or user types, that may access the regional platform and program services.
 - Potential participants fall into four main categories 1) member agencies that help fund and shape the program, 2) partner agencies that help promote the program to their network, 3) business participants that access the shared web platform and member agency resources, and 4) consumers.
- **What you get (aka Resources and services package)**—use the summary charts as an outline of the potential package of resources and services that would be available to each participant type.
- **What you put in (aka Financial contribution metrics)** —use this section as a reference of the potential metrics to determine overall financial contribution for each funding member.
 - These metrics could include 1) population of a City or utility service area or 2) number of business licenses in a city or active commercial customers in a utility area.

Participant Types

There are a variety of organizations that may access and benefit from the new Regional Green Business Program. These program participant types fall into four main categories 1) member agencies that help fund and shape the program, 2) partner agencies that help promote the program to their network, 3) business participants that access the shared web platform and member agency resources, and 4) consumers.

More detail on each of these primary user types is provided below.

Members

Member agencies may include cities or towns, counties, and utilities. Members help to finance the program and may select from one of three membership levels:

- **Charter members** | Current Green Business Program Working Group agencies who are recognized into the future as founding members.
- **Steering and Executive Committee members** | Agencies who pledge a certain dollar amount and also get a seat on the Steering Committee and one vote on the Executive Committee.
- **Funders** | Agencies or organizations that want to help fund the program but do not want to be involved in decision-making.

Partners

Partner agencies are those that do not contribute funding but want to be involved in marketing the program and platform and engaging businesses in their network. These may include neighborhood chambers of commerce, business associations, and other non-profit or non-governmental agencies. The Regional Program may wish to set a target business participant recruitment number or some other performance metric for partner agencies. This will help ensure the resources needed to train the partner agency on promoting and accessing the program result in direct business recruitment.

Business Participants

Business participants include those whom access program services. This will include businesses who create a basic profile on the shared web platform, those that take and report on certain green actions, and those that seek program certification.

Consumers

Consumers will access the shared web platform to search for business participants that meet certain criteria, as determined by the program Steering Committee.

Resources and Services Package

The key benefits of the Regional Green Business Program are outlined below.

Benefits to Members and Partners

- Allows program staff to cost-effectively recruit, assist, and recognize businesses with the power of a regional program brand and a dynamic web portal.
- Addresses all environmental areas—including waste, water, energy, transportation, pollution, toxics reduction, and green building—through one interface.
- Increases accessibility of services for businesses and building owners of all sizes and types.
- Tracks business actions and incentives to monitor progress towards environmental goals.
- Engages more effectively with property owners and managers, in addition to individual businesses.

Benefits to Business Participants

- Streamlines access to self-help tools, services, and technical assistance.
- Streamlines connection with qualified solutions providers — including partner service providers and utilities, and potentially to product suppliers and installers and financial assistance providers.
- Reduces operating and utility bill costs.
- Enhances recognition and rewards for environmental accomplishments.
- Tracks performance over time, allows for benchmarking, and enables comparisons with competitors.
- Ability to create profiles for buildings or individual businesses, which are linked, so tenants and owners can monitor each other's progress.

Benefits to Consumers

- Trusted source of information on local business environmental efforts.
- Ability to search for green businesses by industry type or location.
- Connects with information on climate change and sustainability progress in their communities.

The proposed Regional Green Business Program delivers on the above benefits by offering the following key resources and services:

- Regional program coordination, administration, evaluation, action verification, and reporting.
- Developing and maintaining a one-stop-shop web portal for businesses to find programs and for individual organizations to market their programs and receive direct referrals.
- Regional marketing of existing programs under one “umbrella” brand.
- Ongoing business participant engagement and recognition opportunities.

Below is a table summarizing key program resources, services, and benefits for each participant type.

Table 1. Summary Resource and Service Package

Who you are	What you get	Why you want it	What you put in
Participant type	Resources/Services	Benefits	Commitment
Members and Partners			
Partners	Access to one-stop-shop business support platform with green action tools, resources, rebates, assistance, and opportunities for business recognition	Value add for customers Access to business support tools	Target number of new business participant referrals Link to program and platform on website
Funders	Above list plus: Sponsorship recognition on website and key outreach materials Ability to add staff contacts to receive direct leads Ability to feature select member businesses in regional recognition Access to annual report on business participation and resource savings	Program marketing Lead generation Customer satisfaction	Base fee of \$5,000 with multiplier based on number of commercial accounts Link to program and platform on website
Steering Committee Members	Above list plus: Seat on the Steering and Executive Committees to drive program design Ability to add green action categories and specific actions to web platform Role in determining and implementing action verification and program certification Access to regular reports on business actions, communication, and program resource savings	Program marketing Lead generation Interdepartmental referral management Customer satisfaction Aggregate reporting to stakeholders	Base fee of \$5,000 with multiplier based on number of commercial accounts + 25% SCM fee 0.20 FTE minimum
Charter Members	Above list plus: Recognition as a charter member for the life of the program	Program marketing Lead generation Interdepartmental referral management Customer satisfaction Aggregate reporting to stakeholders	Base fee of \$5,000 with multiplier based on number of commercial accounts + 25% SCM fee 0.20 FTE minimum

Business and Consumer Participants

Business Participants	Access to one-stop-shop business support platform with green action tools, resources, rebates, assistance, and opportunities for recognition	Access to tools, services, and technical assistance Connection with qualified solutions providers Reduced operating and utility bill costs Recognition opportunities to attract new customers Performance tracking	Time to create profile and update actions
Consumers	Access to green business search feature through web platform	Trusted source of information on local green businesses	Use of the web platform

Financial contribution metrics

The two primary metrics used by other regional or statewide green business programs to determine the financial contribution for each member agency include 1) population of a City or utility service area or 2) number of business licenses in a city or active commercial customers in a utility area.

See Figure 1 below for an example financial contribution matrix from the King County-Cities Climate Collaboration that is based solely on city population. While these metrics are used as a benchmark for member funding contribution, many programs implement a flexible system for securing and allocating program funding. For example, the California Green Business Program sets a minimum base contribution amount for each member jurisdiction, and then adds an additional fee based on business population. See Table 2 below for an example financial contribution matrix from the California Green Business Program. For ease of communication to potential funders, the Regional Program should consider having a base support fee with a clearly defined population or business license multiplier. This multiplier could be a set number, based on the business license count, or could be a range.

For the programs listed above, these metrics are meant to outline expected contribution for new member agencies once the program is established. In many cases the initial startup costs are covered by a smaller subset of member agencies and are based more on available funding than on established metrics.

Figure 1. King County-Cities Climate Collaboration Member Financial Contribution Matrix

<u>Population Categories</u>	<u>Jurisdiction</u>	<u>Population</u>
Under 5,000	\$500	Level 1
	Skykomish	198
	Beaux Arts Village	299
	Hunts Point	394
	Milton	831
	Yarrow Point	1001
	Carnation	1,786
	Medina	2,969
	Clyde Hill	2,984
	Algona	3,014
	Black Diamond	4,151
5,000 - 19,999	\$700	Level 2
	North Bend	5,731
	Normandy Park	6,335
	Pacific	6,514
	Duvall	6,695
	Newcastle	10,380
	Enumclaw	10,669
	Snoqualmie	10,670
	Woodinville	10,938
	Lake Forest Park	12,598
	Bothell	17,090
	Covington	17,575
	Tukwila	19,107

<u>Population Categories</u>	<u>Jurisdiction</u>	<u>Population</u>
20- 39,999	\$1,200	Level 3
	Kenmore	20,460
	Maple Valley	22,684
	Mercer Island	22,699
	SeaTac	26,909
	Des Moines	29,673
	Issaquah	30,434
	Burien	33,313
40- 65,000	\$2,000	Level 4
	Sammamish	45,780
	Kirkland	48,787
	Shoreline	53,007
	Redmond	54,144
	Auburn	62,761
Over 65,000	\$2,500	Level 5
	Federal Way	89,306
	Renton	90,927
	Kent	92,411
	Bellevue	122,363
Over 250,000	\$5,000	Level 6
	Seattle	608,660
King County	\$10,000	Level 7

Note: Population data from the Puget

Sound Regional Council's download of 2010 census data

Table 2. California Green Business Program Member Financial Contribution Matrix

City/County	Base Fee	Number of Businesses	Fees Based on Business Population	Total Fee
Alameda County	\$3,200	36,036	\$7,260	\$10,460
Contra Costa County	\$3,200	21,901	\$4,413	\$7,613
Humboldt County	\$3,200	3,336	\$672	\$3,872
City of Mission Viejo	\$3,200	11,703	\$2,358	\$10,200
City of Los Angeles	\$3,200	95,334	\$19,208	\$22,408
City of Manhattan Beach	\$3,200	875	\$176	\$3,376
Marin County	\$3,200	9,528	\$1,920	\$5,120
Monterey County	\$3,200	8,336	\$1,680	\$4,880
Napa County	\$3,200	3,945	\$795	\$3,995
San Benito County	\$3,200	912	\$184	\$3,384
San Francisco County	\$3,200	30,589	\$6,163	\$9,363
San Mateo County	\$3,200	19,669	\$3,963	\$7,163
City of Santa Monica	\$3,200	2,234	\$450	\$3,650
Santa Barbara County	\$3,200	11,207	\$2,258	\$5,458
Santa Clara County	\$3,200	44,120	\$8,889	\$12,089
Santa Cruz County	\$3,200	6,781	\$1,366	\$4,566
City of Santa Cruz	\$3,200	1,548	\$312	\$3,512
Solano County	\$3,200	6,744	\$1,359	\$4,559
Sonoma County	\$3,200	13,186	\$2,657	\$5,857
City of Thousand Oaks	\$3,200	3,017	\$608	\$3,808
City of Ventura	\$3,200	2,534	\$511	\$3,711