

# WCA TIER ASSESSMENT

TIER 1

TIER 2

TIER 3

TIER 4

Program Management						
1. PLANNING		Conduct WCA planning with WCA Contact and Facilities dept		Get sign off from all stakeholders on WCA Plan (including Communications)	Engage Conservation Governance Committee (senior managers of the stakeholders, including HR) in planning	Present to Executive for feedback on WCA Program
2. PARTNERSHIPS		Develop partnerships to deliver program		Engage at least one Executive Champion who is active and visible	Establish program personnel and budget	Incorporate energy conservation goals into 3 department's business plans
3. REPORTING		Report quarterly on campaign results to Green Champions		Report quarterly on estimated energy savings to Green Champions and Executive Champion	Report quarterly on energy savings to Champions and Conservation Governance Committee	Make energy savings publicly available
4. AWARENESS		Demonstrate that 33% of the target audience is aware of the conservation campaigns (aided recall)		Demonstrate that 50% of the target audience is aware of the conservation brand (aided recall)	Demonstrate that 33% of all people at the organization are aware of the conservation brand (aided recall)	Demonstrate that 50% of all people at the organization are aware of the organization's energy conservation achievements (aided recall)
Engagement						
5. TARGET AUDIENCE		Identify and prioritize target audiences and include at least 25% of organization (by energy-use or people) in WCA		Include at least 50% of organization in WCA Plan	Ensure at least 75% of employees and/or sites are included in energy conservation	Ensure everyone and all departments are involved in energy conservation
6. CHAMPIONS		Establish a Green Champions network that meets 4 times per year		Develop formal guidelines for Green Champions	Develop policies to support employee efforts on energy conservation	Include conservation responsibilities in job descriptions in non-energy related positions
7. RECOGNITION		Communicate Green Champions' work and achievements to the organization		Communicate achievements to Green Champions' managers at least twice per year	Establish formal recognition (awards) for employee conservation efforts	Earn external sustainability award for employee engagement initiatives
Strategies						
8. CAMPAIGNS		Develop a calendar of conservation campaigns		Develop campaign toolkits, if applicable, and integrate lessons learned	Translate campaign actions into policies, training and standard operating practices	Develop/test new conservation campaign approaches and opportunities
9. RESULTS		Establish baselines for campaign targets + establish method for determining energy savings		Track campaign results	Demonstrate measurable energy savings from campaigns	Decrease energy use by at least 2% from behaviour changes
10. COMMUNICATIONS		Create campaign communication materials		Establish program branding for conservation	Develop a communications strategy to make everyone aware of WCA results	Publish article on conservation successes in external publication
11. FRESH IDEAS		Attend WCA workshops & connect with sector conservation groups (if applicable)		Solicit employee conservation ideas & best practice ideas	Establish resources to evaluate, prioritize and implement employee and best practice ideas	Present case studies of energy savings from employee engagement efforts to WCA network



## 8. CAMPAIGNS

### GOAL

Prioritize conservation actions to promote, and engage people broadly and effectively in saving energy.

# TIER 1

## 8. CAMPAIGNS

### Develop a calendar of conservation campaigns

#### WCA REQUIREMENT

Develop a two year plan of conservation campaigns that:

- Engage target audiences and specifies what percentage of the organization they represent
- Identify the key barriers for the behaviours and strategies for reducing those barriers
- Include SMART goals for behaviour change
- Establish behaviour baselines and methodology for measuring savings

#### DETERMINING CAMPAIGNS

- Ensure your campaign targets will ensure your energy savings targets (see 9. Targets Resource)
- Keep in mind that at Tier 1, you are probably aiming to have 25% of the organization included in the target audience. This can be either energy use or number of people (see 5. Target Audience Resource).
- Create a full list of conservation behaviours to prioritize that are relevant to your organization (see Appendix 1 for some sample behaviours)
- Consider which behaviours need to be linked (for instance asking occupants to dress for the weather needs to be linked with the building operators adjusting set points in order to have energy savings associated with the behaviour)
- Use a stakeholder group to rate and rank the behaviours. For suggestions about who to include in the stakeholder group, refer to the 1. Planning Resource. It is best to ask each person to rank and rate the behaviours independently to avoid others influencing their answers.

- Rate the behaviours based on high/medium/low on criteria including:
  - i. Impact on energy use – How much energy is saved from doing that behaviour?
  - ii. Reach – How many people could it involve?
  - iii. Potential – How many people are already doing it?
  - iv. Ease of adoption – How easy is it for someone to do?
- Prioritize the behaviours using a weighting based on the criteria developed (see Appendix 1).
- Usually you want to start with actions that are high energy impact, relatively easy adoption and lower reach in order to demonstrate results within a more manageable target audience. As you progress through the tiers, the higher reach behaviours will engage more people in energy management.
- Ensure you establish SMART (specific, measurable, achievable, relevant, time limited) goals for your campaign.
- Ensure your campaign targets align with your energy savings targets (see 9. Targets Resource).
- Use community-based social marketing techniques to:
  - Identify the barriers to a behaviour
  - Develop and pilot a program to overcome these barriers
  - Implement the program across an organization
  - Evaluate the effectiveness of the program
- Refer to Appendix 2 the steps to developing a social marketing campaign.
- Refer to Appendix 4 for resources on community-based social marketing.

# APPENDIX 2

## STEPS TO DEVELOPING A SOCIAL MARKETING CAMPAIGN

Refer to “Social Marketing: Influencing Behaviors for Good” by Philip Kotler and Nancy R. Lee for details on each of these steps.

### STEP 1: PROVIDE BACKGROUND, PURPOSE AND FOCUS FOR PLAN

- Summarize key background information leading to the development of this plan (e.g., increase in number of space heaters)
- What is the campaign purpose, the intended impact (benefit)? (e.g., energy efficiency)
- What is the campaign focus? (e.g., reduced number of space heaters or more energy efficient models)

### STEP 2: CONDUCT A SITUATION ANALYSIS

#### Internal Forces

- What internal strengths will your plan maximize? (e.g., resources, expertise, management support, internal publics, current alliances and partnerships, distribution channels)
- What internal weaknesses will your plan minimize? (e.g., resources, expertise, management support, internal publics, current alliances and partnerships, distribution channels)

#### External Forces

- What external opportunities will your plan take advantage of? (e.g., external publics and cultural, technological, demographic, natural, economic, and political/legal forces)
- What external threats will you plan prepare for? (e.g., external publics and cultural, technological, demographic, natural, economic, and political/legal forces)

#### Prior and Similar Efforts

- What findings from prior and similar efforts are noteworthy, those of yours or others?

### STEP 3: SELECT TARGET AUDIENCES

- Describe the primary target audiences for your program/campaign in terms of size, problem incidence and severity, and relevant variables, including demographics, psychographics, geographics, behaviors, and/or stages of change
- List if you have additional important target audiences that you will need to influence as well (building operators, facility managers)

#### STEP 4: SET OBJECTIVES & GOALS

- Behavior Objective -- what, very specifically, do you want to influence your target audience to do as a result of this campaign or project? (give up their personal space heater and exchange it for a more energy efficiency model)
- Knowledge Objective -- is there anything you need them to know, in order to act? (heating issues can be effectively addressed by facility managers, personal space heaters impact the HVAC system which impacts occupant comfort, there are more energy efficiency alternatives available)
- Belief Objective -- is there anything you need them to believe, in order to act?
- Goals -- what quantifiable, measurable goals are you targeting? Ideally, these are stated in terms of behavior change. Other potential targeted goals are ones for campaign awareness, recall and/or response, and changes in knowledge, belief, or behavior intent levels.

#### STEP 5: ANALYZE TARGET AUDIENCES & THE COMPETITION

##### Barriers

- Make a list of barriers your audience may have to adopting the desired behavior. These may be physical, psychological, skills, knowledge, awareness, attitudes (building managers are not able to make my workspace comfortable)

##### Benefits

- What are the key benefits your target audience will be motivated by? (it will be more comfortable and easier if heating issues are addressed by the HVAC system)

##### Competition

- What are the major competing alternative behaviors? (personal space heater, dress warmly)
- What benefits do your audiences associate with these behaviors? (personal control of heating needs)
- What costs do your audiences associate with these behaviors? (dressing for weather does not keep you warm enough to perform office tasks)

#### STEP 6: CRAFTING A DESIRED POSITIONING

##### Positioning Statement

- Write a statement similar to the following, filling in the blanks.

"We want [TARGET AUDIENCE] to see [DESIRED BEHAVIOR] as [DESCRIPTIVE PHRASE] and as more important and beneficial than [COMPETITION]."

## STEP 7: DEVELOP MARKETING STRATEGIES

### Product: Design the Product Platform

- What is the core product, the major perceived benefit, your target audience wants from performing the behavior that you will highlight? (Choose one or a few from those identified in Step 5)
- What is the actual product, the features/name for the desired behavior? (Refer back to your behavior objective in Step 3 and refine/finalize here)

### Relative to the augmented product (tangible objects and services)

- Are there any new tangible objects that will be included in program and campaign efforts?
- Are there any improvements that need to be made to existing tangible objects?
- Are there any new services that will be included in program and campaign efforts?
- Are there any improvements that need to be made to existing services?

### Price: Fees & Monetary Incentives & Disincentives

- If you will be including tangible objects and services in your campaign, what, if anything, will the target audience have to pay for them?
- Will there be any monetary incentives for target markets (e.g. prizes)?
- Will there be any monetary disincentives you will highlight (cost to buy new space heater)?
- Will you use any nonmonetary incentives (e.g., recognition, reward)?
- Will you use any nonmonetary disincentives (e.g., negative visibility)?

### Place: Making Access Convenient

As you determine each of the following, look for ways to make locations closer and more appealing, to extend hours, and to be there at the point of decision making.

- Where will you encourage and support your target audience to perform the desired behavior and when? (e.g., how does the personal space heater exchange happen, what is the process?)
- Where and when will the target market acquire any related tangible objects? e.g., when do they put in the request for increased heat with facility management, where do they get a more energy efficiency personal space heater?)
- Where and when will the target market acquire any associated services? (e.g., support from facility management)
- Are there any groups or individuals in the distribution channel that you will target to support efforts?



## **PROMOTION: WHAT WILL YOU SAY, WHO WILL SAY IT, HOW, AND WHERE?**

### Messages

- What key messages do you want your campaign to communicate to target audiences?

### Messengers

- Who will deliver the messages and/or be the perceived sponsor?

### Creative Strategy

- Summarize, describe, or highlight elements such as logo, taglines, copy, visuals, colors,
- Script, actors, scenes, and sounds in broadcast media

### Communication Channels

- What communication channels will you use?

## **STEP 8 DEVELOP A PLAN FOR EVALUATION AND MONITORING**

- What is the purpose of this evaluation? Why are you doing it?
- Who is the evaluation being conducted for? Who will you present it to?
- What goals from Step 4 will be measured?
- What techniques and methodologies will be used to conduct these measures?
- When will these measurements be taken?
- How will measurements be reported and to whom?

## **STEP 9 DETERMINE BUDGETS AND FIND FUNDING SOURCES**

- What costs will be associated with product-related strategies?
- What costs will be associated with price-related strategies?
- What costs will be associated with place-related strategies?
- What costs will be associated with promotion-related strategies?
- What costs will be associated with evaluation-related strategies?
- If costs exceed currently available funds, what potential additional funding sources can be explored?

## **STEP 10 COMPLETE AN IMPLEMENTATION PLAN**

- Will there be phases to the campaign? How will they be organized (i.e., by market, objectives, activities)?
- For each phase, what will be done, who will be responsible, when will it be done, and for how much?



# APPENDIX 3

## CAMPAIGN TOOL KIT

### LOW ENERGY TOOL

#### OBJECTIVE:

- To reduce our electricity use and CO2 emissions.
- To create a work culture where employees turn off the lights, personal and shared office equipment in their work spaces when they are not in use (i.e. weeknights and weekends or during any absences greater than 15 minutes).

NOTE: If your work place is large and has many separate work spaces you may only be able to focus on a limited number of them. That's fine: it's better to do something about half a floor than nothing about a building!

#### BARRIERS:

People may not be acting to meet the objective because we:

- Need more compelling information regarding the importance of electricity conservation
- Believe that our boss won't think we are working if our equipment or lights are off
- Feel it is inconvenient
- May not know where all the switches are
- Forget
- Do not feel responsible for the common areas
- Do not know if we are the last to leave

#### BACKGROUND:

In 2014 our organization spent over \$1 million on electricity - and we pay 40 percent less for electricity than residential customers do! Our buildings consume over 50 million kWh each year, enough electricity to meet the needs of 5,000 homes.

There are now 16,000 computers in our organization. Computer monitors use approximately 50 watts of power when they are on (even if their screen saver is operating) but only a few watts when they are in power save/sleep mode.

Lighting accounts for approximately 40 percent of the total electricity use in our buildings and represents about 25 percent of the total utility costs. How much energy can my unit potentially save?

In general all office equipment will use around 1/4 of normal electric consumption when on stand-by or asleep. Even when turned off, some equipment still draw a few watts of power to keep a clock, a timer or something else running. Since we are in the office less than one third of the year, leaving our equipment on means that we are wasting two thirds more energy than we need while pointlessly producing harmful CO2 emissions.

## **STEPS:**

### **STEP 1**

Ask all your colleagues to activate the power management settings of all the office's shared and personal equipment. When a device has this setting turned on, it automatically goes to standby mode after 5 minutes of inactivity. Speak to your IT support person or admin assistant for help on how to set the power management modes for all shared and personal equipment. This is a crucial step because currently most devices are capable of saving energy but we do not take advantage of this opportunity.

### **STEP 2**

Locate office light switches and shared equipment in your unit area. If your area of responsibility is large, divide it into smaller work spaces in a way that makes sense for you (i.e. by working group, floor, or by areas that share equipment). Ensure that these switches have Lights Out stickers on them. Computers need Power Out stickers. Stickers can be obtained from the Sustainability Office.

### **STEP 3**

Place Low Energy posters in a prominent location at all exits from all common spaces. Make sure that the posters are hard to miss. Posters can be obtained from the Energy Manager, call 604 211-4211.

### **STEP 4**

Have your manager/director send out EMAIL 1 asking people to take responsibility for their own space and the common areas.

- OR -

Send EMAIL 1 yourself.

**EMAIL 1** - Please cut and paste the text below into the appropriate spot on your email

To:

From: Department Head

Date:

Subject: Being LOW ENERGY is a good thing!

As conservation leader, our company has committed to significantly reducing electricity use. So please turn off all lights, shared and personal equipment when they're not in use. This means especially at the end of the day but even for shorter absences of more than 15 minutes. Shared and personal equipment includes computers, monitors, printers, copiers, speakers, A/V or kitchen equipment and even battery chargers--in a nutshell everything that is plugged into the wall!

Also, we have a number of “orphan” spaces in our unit that don’t belong to any one person. Please adopt these spaces. Make an effort to ensure lights and equipment are off and that windows are closed when you see these spaces are not in use ... especially at the end of the day and week. And, don’t be surprised to find the lights off in the coffee room and washroom during the day.

Let’s work together to meet our company’s electricity reduction target!

Thank you!

<Name>

<Position>

### **STEP 5**

Identify people who leave each unit area last at the end of the day.

- OR -

At your next staff meeting raise the question and help generate awareness of the electricity focus.



### **STEP 6**

Ask those who are likely to be the last to leave to turn off lights and shared equipment at the end of the day. Ask those individuals to remind someone else if they’re not going to be the last to leave on a particular day. Walk him/her around the area so that he/she is familiar with the location of the switches that operate the lights and equipment in the area.


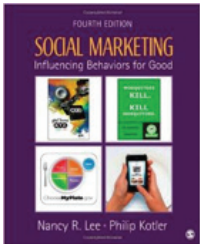

# APPENDIX 4

## SOCIAL MARKETING RESOURCES

### ON-LINE

	Fostering Community Based Social Marketing ( <a href="http://www.cbsm.com/public/world.lasso">http://www.cbsm.com/public/world.lasso</a> )
	Tools of Change website ( <a href="http://www.cullbridge.com/Projects/cbsm.htm">http://www.cullbridge.com/Projects/cbsm.htm</a> )

### BOOKS

	Fostering Sustainable Behavior: An Introduction to Community-Based Social Marketing Doug McKenzie-Mohr 2011
	Social Marketing: Influencing Behaviors for Good Philip Kotler and Nancy R. Lee SAGE 2008
	Social Marketing to Protect the Environment: What Works Doug McKenzie-Mohr, Nancy R. Lee, P. Wesley Schultz, Philip Kotler 2011