



1. Planning

Goal

Create an engagement program plan by engaging key stakeholders in the planning process to leverage their expertise, influence and commitment.

Planning

The planning process is an opportunity to engage key stakeholders and leverage their expertise, influence and commitment through to implementation. This reference guide is intended to provide an overview of engagement program planning. More details about the seven steps of the campaign planning process can be found in the Campaign Tier Reference as well as the Energy Wise Network toolkit series found on SharePoint.

The Energy Wise Network Tier Assessment Tool is designed as an assessment tool that indicates areas of strength and areas where there are opportunities to improve your engagement program and energy conservation campaigns. Use the following table to help guide your “Planning” self-assessment using the Tier Assessment Tool.

TIER 1 – Conduct Energy Wise Network planning with BC Hydro contact & facilities department.	No	You have not yet done any engagement program planning with either your BC Hydro contact or facilities department.
	In Progress	Some engagement program planning with either your BC Hydro contact and/or facilities’ department has happened.
	Yes	You have conducted comprehensive planning sessions with a variety of stakeholders including the facilities’ department to help develop your engagement program.
TIER 2 – Get sign off from all stakeholders on engagement plan (including communications)	No	Your stakeholders have not been made aware of your overall engagement plan.
	In Progress	Stakeholders know about your engagement plan but have not had to opportunity to provide input or formally give their approval.
	Yes	All stakeholders, including communications, know about and have approved your overall engagement plan.
TIER 3 – Engage Conservation Governance Committee (senior managers of the stakeholders, including HR) in planning.	No	You have not engaged senior managers of stakeholder departments in the development of your program plan.
	In Progress	Some engagement with senior managers of stakeholder departments has occurred in the development of your program plan.
	Yes	Senior managers of stakeholder departments, including HR, have been fully engaged during the development of your program plan.
TIER 4 – Present to Executive for feedback on Energy Wise Network program.	No	You have not yet shared your engagement program plan to any representative from the executive level.
	In Progress	Some executives are aware of your engagement program plan and have given some feedback.
	Yes	You have presented your engagement program plan to executive(s) and sought feedback for improvements.

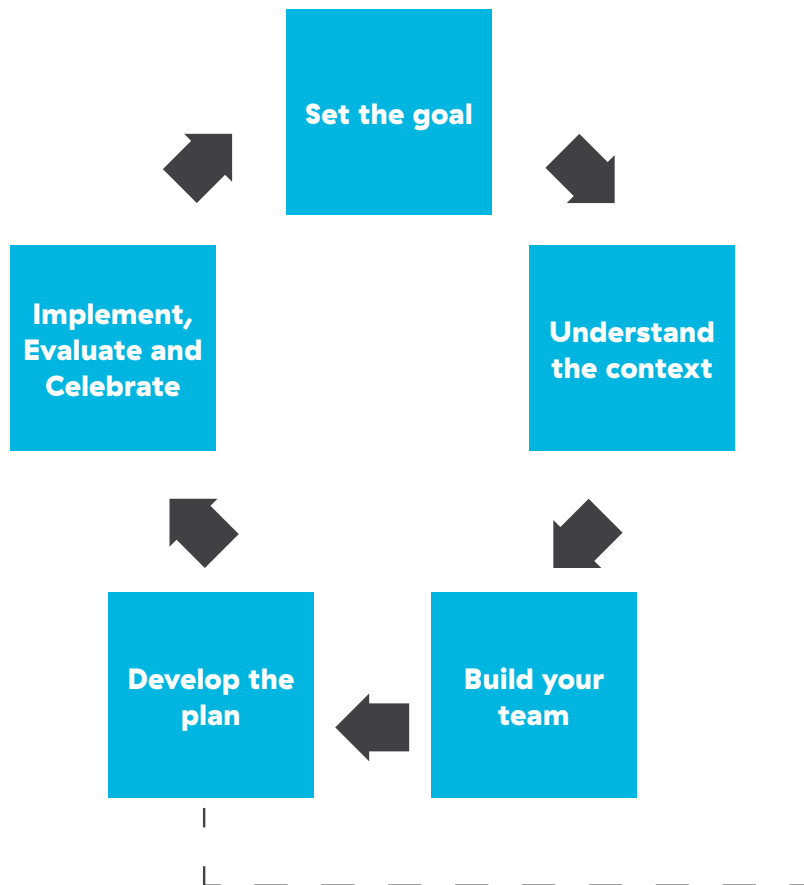
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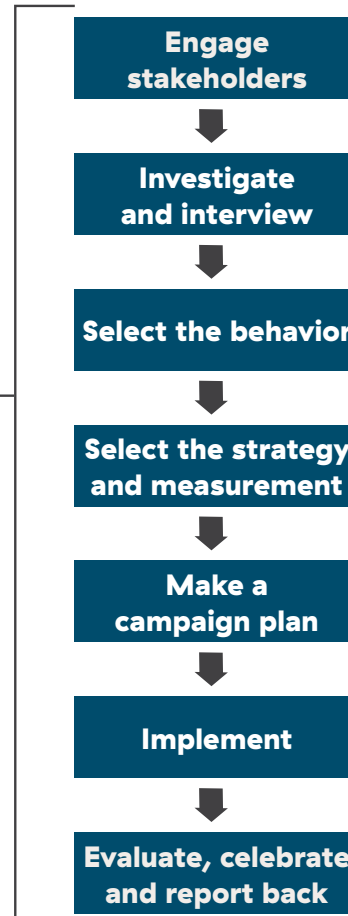
Overview

The Energy Wise Network planning framework has two distinct process models. The program-level process provides the big picture of what's happening in overall conservation engagement in your organization, usually on an annual basis, while the campaign process captures the details of what's involved in the delivery of each discrete campaign. The program-level process is circular and continual, while the campaign process is more linear, with a clear start and end. Both process models are illustrated below. Read more about the campaign planning process in the Campaign Tier Reference.

Program-level process for engagement



Campaign process



Helpful hint

An engagement program has a lot of moving parts and delivering it is not something you can do on your own. With that in mind, development of an engagement program should involve a variety of stakeholders others within the organization.

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Below is an outline of each of the steps in the engagement program–level process:

1. Set the goal

Before you begin your investigation or involve other people in your engagement planning, it's important to identify what it is that you are looking to achieve. Some effective goals for your program might be to increase staff awareness of the energy management program and to organize two campaigns focused on energy conservation in the next year.

2. Understand the context

Once you've identified goals for your program, gather background knowledge on your organization. Read policy documents, review strategic plans and talk to people in your organization to get a better understanding of how engaged they are and their understanding of how conservation fits into your organization's operations and culture.

3. Build your team

After developing your background knowledge, you'll want to start looking for people to help you with planning. Sometimes, this means building a green team, or network of champions, but often a first step is simply identifying supporters and beginning to form new relationships within the organization.

4. Develop the plan

Developing an engagement program plan will likely involve consultation with a number of key stakeholders and outlining a strategy for how you will accomplish your program goals. The plan should include a strategy for accomplishing your engagement program goals and a detailed calendar of events and activities (see page 5).

5. Implement, evaluate and celebrate

As you roll out your engagement program plan, you'll likely need to make small adjustments and course corrections throughout, consulting your plan frequently. Once the campaign is complete, you and your planning team can reconvene to evaluate how things went and celebrate successes achieved.

Engagement program calendar

As part of your overall engagement program planning, it's helpful to create a calendar of events to keep you and your team on track. The calendar is typically included in the "Develop the Plan" stage of the program-level process. See below for an example of what your Engagement Program Calendar might look like.

	April	May	June	July
Campaigns			Summer Shutdown campaign	Summer Shutdown campaign
Communications		Team recruitment communications and quarterly newsletter	Summer Shutdown communications	Summer Shutdown communications
Committee/team	Planning meeting – finalize program calendar	Team recruitment and campaign planning		
	August	September	October	November
Campaigns	Summer Shutdown campaign wrap up		Building Operators Ideas campaign	Building Operators Ideas campaign
Communications	Summer Shutdown campaign-reporting back	Quarterly newsletter	Building Operators Ideas campaign communications	Building Operators Ideas campaign communications
Committee/team		Campaign debrief and planning		
	December	January	February	March
Campaigns	Building Operators Ideas campaign wrap up		Sweater Day and measurement	
Communications	Building Operators Ideas campaign report back and quarterly newsletter		Sweater Day communications + report back	Quarterly newsletter
Committee/team	Campaign debrief		Volunteers for sweater day activities	Present to executive for feedback and begin planning for next year

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Purpose of planning

Developing a comprehensive plan with stakeholder input and putting it in writing will help you and your team stay on track and meet your targets. Incorporating the following activities into your planning will help you navigate your team through a successful energy conservation program or campaign:

- **Create a road map to keep you on track**

Planning on an annual basis with your core group of stakeholders gives you the opportunity to be strategic with your resources, identify the best opportunities for energy conservation and take a step back to evaluate past activities. Creating a roadmap helps keep you and your team on track as you implement activities throughout the year.

- **Identify the best opportunities and manage barriers**

A thorough planning process should reveal some of the best opportunities for campaigns or process changes as well as potential challenges ahead and allow you to prepare for them adequately.

- **Get buy-in from all levels**

You can use your plan to pitch your program within your organization. A detailed plan will help boost the credibility of the work that you're doing and help get people interested in your program.

- **Ensure continuity**

Sometimes things can change quickly in an organization; a green team may suddenly have a host of new members or the campaign leader may change roles. A program plan can help to ensure that all the work done is not lost or forgotten.

- **Check the toolkit**

In Naomi's Energy Challenge campaign (see the Energy Challenge campaign toolkit on the Energy Wise Network SharePoint site), during the planning process, she fills out the stakeholder analysis to understand each stakeholder's motives and how best to engage with them. Naomi also takes the time to do some independent research and speaks to green teams at different schools. This work done in the planning process will help her develop a more comprehensive and resilient campaign plan.

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Tier 1—Planning

CONDUCT ENERGY WISE NETWORK PLANNING WITH BC HYDRO CONTACT & FACILITIES DEPARTMENT

Bringing others into the engagement planning process will help you develop more comprehensive campaign plans and overall engagement program, as well as help secure support for implementation.

It's important to include your organization's facilities department in your planning sessions. As building operations experts, they are often a key group you will need to work with during implementation of your campaigns and programs. Download tier assessment tool from Energy Wise Network share point site, and complete it with your BC Hydro account manager with your other team members.

Check the toolkit

In Rebecca's space heater campaign, Mark from the facilities team is involved from the planning stage because his skills will be needed to help with implementation of the campaign. In completing her stakeholder analysis, Rebecca considers how best to partner with the facilities department and get them on board to ensure that her campaign is successful in reducing the number of space heaters used without negatively affecting building occupant comfort.

See the Heating and Space Heater campaign toolkit, found on the Energy Wise Network SharePoint site



Mark

Facilities Operator
for the pilot building

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Tier 2—Planning

GET SIGN OFF FROM ALL STAKEHOLDERS ON YOUR ENGAGEMENT AND CAMPAIGN PLANS (INCLUDING COMMUNICATIONS)

Understanding your stakeholders and having their support for your engagement program will help you create campaigns and activities that reflect the group whose actions you are trying to change and will reduce the chances of your plans being derailed by unexpected challenges. Sometimes you'll need to meet with stakeholders more than once to secure their buy-in.

Communications can be a key ally in planning and implementation, because they will have information about all of the internal communications channels and can support the development and distribution of your campaign materials.

Check the toolkit

In Terri's Energy Awareness campaign she includes Ethan from Communications in her stakeholder group because she will need his help developing communications materials for the campaign and assisting with implementation – something she identifies early on in the Stakeholder Analysis of the campaign plan.

See the Energy Awareness campaign toolkit, found on the Energy Wise Network SharePoint site.



Ethan

Communications and Engagement Coordinator

TASK LIST AND TIMELINE

Task	Resource	Deadline
Review last year's annual sustainability survey	Terri	January 12th
Campaign promotion	Terri and Ethan	January 23rd – February 3rd
Sweater Week photo contest and quiz	Terri and Ethan	February 6th – 10th *
Sweater Day temperature setback	Alex	February 9th
Sweater Day booth	Terri and Ethan	February 9th
Calculate savings	Terri, Jim and Dylan	February 15th
Prize draw and celebration	Terri and all stakeholders	February 17th
Review next year's annual survey	Terri	January 15th

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Tier 3—Planning

ENGAGE CONSERVATION GOVERNANCE COMMITTEE (SENIOR MANAGERS OF THE STAKEHOLDERS, INCLUDING HR) IN PLANNING

Whether or not your organization has a designated conservation governance committee comprised of senior managers who advise on energy conservation plans, it's a good idea to consider how to engage with senior managers as part of your planning process. Use the Stakeholder Analysis toolkit (see the Campaign Toolkits found on the Energy Wise Network SharePoint site) to help you map out how to engage with senior managers.

Including the Human Resources department's management in your planning process can help support the transition of your campaigns and engagement program into standard operating procedures, new employee training or secure buy-in for employees to use staff time to participate in your campaigns and programs.

See the table below for an example of how to plan your senior management engagement.

SENIOR MANAGEMENT ENGAGEMENT

Name	Position	Sign off on engagement plan?	Sign off on campaign plans?	Strategy for engagement
Savik	Senior manager, Human Resources	Yes	Yes	Involve in planning process
Sandy	Senior manager, Operations	No	Yes	Present at managers' meeting
Vincent	Senior manager, Communications	Yes	Yes	Involve in planning process
Marilyn	Senior manager, Sustainability	No	Yes	Involve in planning process
Kelly	Senior manager, Finance and Business Development	No	No	Present at managers' meeting

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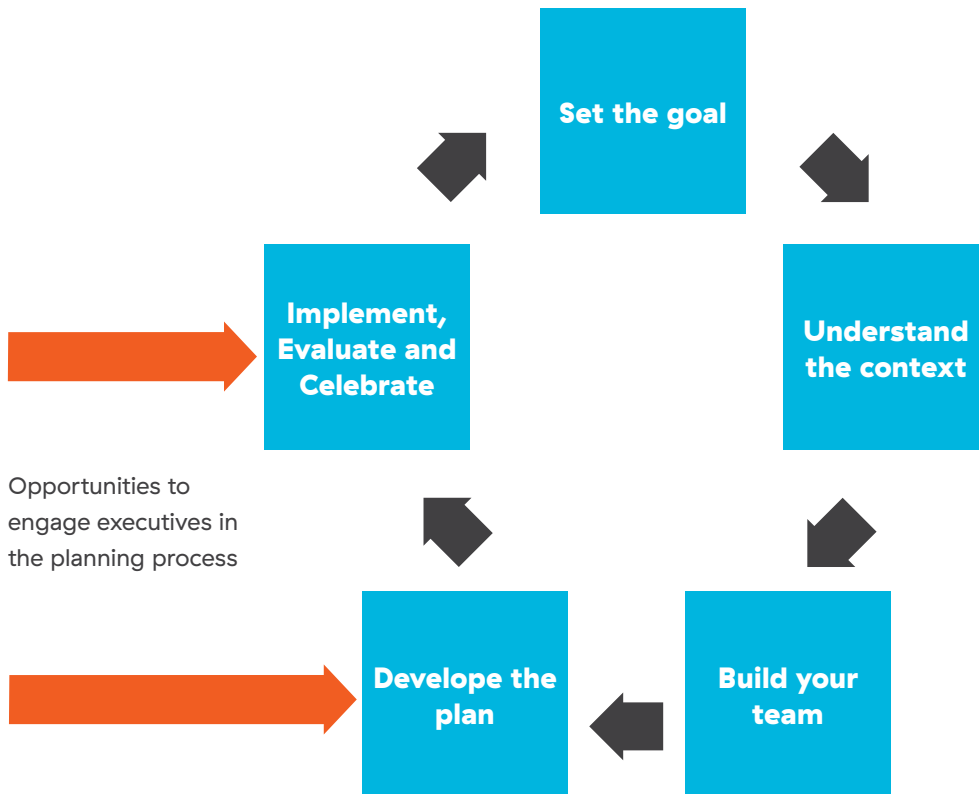


Tier 4—Planning

PRESENT TO EXECUTIVE FOR FEEDBACK ON YOUR ENGAGEMENT PROGRAM

In addition to incorporating feedback from your stakeholders group and your conservation governance committee (or senior managers) into your planning, it can be helpful to provide an opportunity for the executive team to offer input on your plans.

There is often an opportunity to present to executive during the evaluation stage, where you can report on results from the program from previous years and incorporate feedback into plans for the following year. You may also want to present to executive during the “Develop the Plan” stage, before plans are finalized.



Helpful hint

Delivering periodic updates to the executive team can help to ensure that your plans align with other organizational objectives and continue to have appropriate resources allocated for implementation.

APPENDIX 1—PLANNING

TIER 1

Participants	Provides the group with
<p>Key Account Manager</p>	<p>Planning tools and templates, knowledge of requirements, reporting and how requirements are assessed</p> <ul style="list-style-type: none"> ○ Facilitation skills to manage the planning process ○ Community-based social marketing expertise ○ Best practice campaign ideas and approaches from sector ○ Relative energy savings impact of different behaviours based on industry averages and BC Hydro estimate (Energy Manager contributes the specialized knowledge for a client) ○ Knowledge of BC Hydro programs
<p>Key contact (if not Energy Manager)</p>	<ul style="list-style-type: none"> ○ Context – primary driver for campaign initiatives (visibility, energy savings, reputation, etc.) ○ Organizational profile—where do most employees work, what types of work they perform, building types, working hours ○ Organizational priorities ○ What types of campaigns are successful in the organization and why ○ Green Team network, capabilities, time commitment, working arrangements ○ Support for campaign ○ How to measure results
<p>Energy Manager</p>	<ul style="list-style-type: none"> ○ Strategic Energy Management Plan <ul style="list-style-type: none"> ○ Building energy usage information, such as: –Business Energy Performance Initiative scores which systems have Direct Digital Control systems that provide floor information ○ time of day consumption patterns ○ Energy Management Information Systems data ○ Where occupants have the most control ○ Relative energy savings impact of different behaviours based on a specific organization ○ Capability to measure energy savings from employee engagement

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APPENDIX 1—PLANNING

Participants	Provides the group with
<p>Facilities Manager/Property Manager</p>	<ul style="list-style-type: none"> ○ Where are the opportunities for occupant behaviour change (space heaters, closing bay doors, blinds left open) ○ What scheduling changes could implement if had occupant buy-in (lower/raising temperature set points, removing space heaters and fans) ○ Idea of which measures will save the most energy ○ Capability to measure energy savings from employee engagement
<p>Green Champion representatives</p>	<ul style="list-style-type: none"> ○ What behaviours are currently being practiced? ○ What are the barriers to the desired behaviours? ○ What are the primary means of communications with this group? ○ A representative sample of opinions (Eg. by conducting a survey)
<p>Target group representative(s)</p> <p>This group should be expanding as you move up the Tiers, with an increasing number of campaigns and participation by sites—you will need representation from all groups, such as tenants, students, teachers/administrators, contractors, customer groups, property managers, lab managers, etc</p>	<ul style="list-style-type: none"> ○ What behaviours are currently being practiced? ○ What are the barriers and motivators to the desired behaviours? ○ What are the primary means of communications with this group? ○ A representative sample of opinions (Eg. By conducting a survey)

TIER 2

Participants	Provides the group with
<p>Sustainability office</p>	<ul style="list-style-type: none"> ○ Organization’s sustainability goals (relative importance of energy management in overall plan) ○ How campaign fits in with existing groups, plans, campaigns (carbon neutral, environmental goals, climate change and adaptation strategies) ○ Resources available to support campaign initiatives ○ Profile of sustainability advocates (which senior managers) ○ Which sustainability campaigns have been most successful and the key elements of success ○ Barriers to sustainability action

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APPENDIX 1—PLANNING

TIER 3

Participants	Provides the group with
<p>Communications department</p>	<ul style="list-style-type: none"> ○ Effective internal communication channels and approaches, key elements for success ○ Timelines and tips to support campaigns ○ How to best reach target audiences and senior management ○ Advice on messaging and branding ○ How to measure awareness ○ How to make conservation results publicly available (by Tier 4)
<p>Key contractors</p>	<p>The following key functions may be contracted out and should have direct representation:</p> <ul style="list-style-type: none"> ○ Facility management ○ Janitorial ○ Food Services ○ Security ○ IT Services
<p>Conservation Governance Committee</p>	<ul style="list-style-type: none"> ○ Comprised of senior managers, this group serves as a steering committee to provide WCA planners with strategic advice and communicates successes to the Executive Team ○ This group may be the same as the Energy Manager Quarterly Committee or a Sustainability Steering Group in the organization ○ The WCA Plan should be presented to the whole committee; however only one representative’s signature is required on the WCA Plan
<p>Human Resources</p>	<ul style="list-style-type: none"> ○ Value of conservation and volunteer experiences in employee retention ○ Value of conservation in employee recruiting ○ Support for volunteer work within the organization ○ How conservation can be incorporated into job descriptions where energy management is not their core responsibility ○ Training practices—how to integrate conservation into employee training, how to get campaign behaviours adopted as standard policies/ training/operating practices
<p>Chief Financial Officer</p>	<ul style="list-style-type: none"> ○ Financial value of conservation (Eg. savings on rates, carbon neutral taxes) ○ Business case for employee engagement

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APPENDIX 1—PLANNING

TIER 4

Participants	Provides the group with
<p>Executive Team</p>	<ul style="list-style-type: none"> ○ Input on importance of energy management in corporate agenda ○ Advice on how to best advance energy management at the organization ○ Recognition of achievements, Green Champion work and value proposition to the organization

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