Sustainability Officers 1.0 to 2.0 Toolkit: Strategic and Sane Workload Management of People, Projects, and Programs on Your Campus

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Tavey Capps, Duke University
Lindsey Cromwell Kalkbrenner, Santa Clara University
Mieko A. Ozeki, University of Vermont
Session Overview

Sustainability staff are involved in many initiatives at a time, and often these are run in collaboration with multiple stakeholders.

Sustainability Offices (SOs) go through different stages of development:

• **Version 1.0** consists of one staffer--it was easy to determine priorities, manage workflow, and keep track of programs and contacts.

• **Version 2.0** consists of multiple staff (or students) and a bigger presence on campus. The priorities, workflow, and people management have become increasingly complex.

Faced with more “hands in the toybox” and increasing demands from the campus community....
... The work of the Sustainability Officer can feel less sustainable and feel more insane.
Practitioner Questions

How do we juggle multiple concurrent projects, share institutional memory, nurture relationships with campus contacts, repeat best practices, and avoid past mistakes?

&

How do we create a sense of personal sustainability within the professional operation of our sustainability programs?
Presenters

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Sustainability Coordinator

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Environmental Sustainability Director

Lindsey Cromwell Kalkbrenner
Sustainability Director

Mieko A. Ozeki
Sustainability Projects Coordinator

Baylor University
Waco, TX
~15,300 FTE
Undergraduate and Graduate Students

Duke University
Durham, NC
~15,000 FTE
Undergraduate, Graduate, Professional Students

Santa Clara University
Santa Clara, CA
~8,000 FTE
Undergraduate and Graduate Students

University of Vermont
Burlington, VT
~13,000 FTE
Undergraduate, Graduate, Medical Students
Four Institutions...Four Different Organizational Structures

Baylor University
Office of Sustainability

Duke University
Sustainable Duke
Four Institutions...Four Different Organizational Structures

Santa Clara University
Office of Sustainability

University of Vermont
Office of Sustainability
We do not claim to be Zen masters of managing our campus Sustainability Offices.

We are practitioners, like you, who have experienced implementing projects and programs through trial by fire.

We hope to provide you with some frameworks and tools for managing your office efficiently, effectively, and sanely.
Managing and Engaging Collaborators and Stakeholders on Campus
Sustainability Committees and Student Advisory Boards

Campus Sustainability Committees
- Variety of ways to organize and lead
- Reps from across campus - faculty, staff and students
- Roles and purpose dependant on your campus
- Subcommittees on specific topics

Student Advisory Board
- Purpose and role:
  - What are your expectations?
- Board makeup:
  - Representative of student population
- Application process:
  - Needs to be seen as an honor to serve
- Tasks:
  - Use them!
  - Earth Week/Creation Week, Campus Ops Feedback, etc.
Managing and Engaging Students

• Student Environmental Leaders Summit
  o Semi-annual student gathering
  o Include key staff sustainability contacts
  o Listserv of student leaders of groups
  o Challenges - cataloguing throughout the year – wiki?

• Campus Sustainability Project database
  o Maintained by Sustainable Duke
  o Updated quarterly
  o Proactive way to propose sustainability project ideas that would benefit Duke
  o Challenges - tracking existing/previous projects
Managing and Engaging Students

Student Interns
- Specific audiences/topics
- Weekly team meetings
- Co-sponsor: engage from within

SCOOPS
- Leaders from student orgs.
- Space to nurture collaboration
- Prevent burn-out
To Tweet or Not to Tweet?

Using Social Media
• Facts/updates
• Pictures
• Behind-the-scenes
• Direct communication
• Reporting to Office

Measuring effectiveness
Strategies to Integrate Sustainability Priorities with Campus Community

- Use your website as key tool for information:
  - Sustainability 101 data: provide the basic info that students need about campus initiatives
  - Specific information on utility data - what is available - real time, monthly data, what buildings, etc. - helps student/faculty have realistic expectations for projects
  - Standard project data request form - quick resource for students/faculty to fill out that provides details that campus staff need to evaluate potential projects and provide information.
Websites for Transparency & Outreach

Archive data, stories, & news
(Drupal-based website)

Share stories via video.
(Vimeo)
Certifications

- Duke Green Lab Gold
- Green Dorm Room Certification provided by the Dorm Eco-Reps & Sustainable Duke
- Duke Green Workplace
- Green Event Certification
What other tools or methods do you use on your campus to collaborate and engage campus community?
Managing Projects and Programs
Is it a Project or a Program?

A project is:

**Temporary** in that it has a defined beginning and end in time, and therefore defined scope and resources.

**Unique** in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal.

A program is:

A group of related projects managed in coordinated way to obtain benefits and control not available from managing them individually.

*Professional Development opportunity*

Become a PMP (Project Management Professional) via PMI (Project Management Institute). See [www.pmi.org](http://www.pmi.org)
Snapshots of Project & Program Management

From an office of 1 to Many
Offline Management Tool: Project Management via White Boards at Baylor University
Major initiative

Worker tasks and communication

New and ongoing projects

Hardware requests

Work space

Blue Sky ideas
Online Management Tool: Project Management via Google Docs at Santa Clara University

Why Google Docs?

- Free
- Access anywhere
- Students have Gmail accounts
- Living document backed up in the cloud
Types of Documents

• Project Outlines
  o Think before we act
  o Project management
  o Institutional memory
  o Future planning

• Instructions
• Journals
• Collaborative docs
# SUSTAINABILITY COMPONENTS

Describe the dimensions of sustainability that will be included in this project.

What will the target audience learn?

<table>
<thead>
<tr>
<th>Economics</th>
<th>Social Equity</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Less consumerism</td>
<td>- Local agriculture → better treatment of workers</td>
<td>- Local, organic agriculture</td>
</tr>
<tr>
<td>- Supporting local agriculture</td>
<td>- Organic → better conditions for workers</td>
<td>- Less consumerism</td>
</tr>
</tbody>
</table>

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## PROJECT REVIEW

(After project is complete)

<table>
<thead>
<tr>
<th>RESULTS</th>
<th>WHAT WORKED WELL</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Number of attendees: 14</td>
<td>Paige did a good job of explaining the basics of canning without a kitchen to demo recipes</td>
</tr>
<tr>
<td>B. Diversity of departments who attend: Environmental Studies, Athletics, Office of Marketing and Communications, Development, Management, Business School-Dean's Office, Access Card Office, Business School- Under grad business programs, International B</td>
<td>The apricot preserves were a big hit</td>
</tr>
</tbody>
</table>
## Organizing multiple google docs

### Project Outlines TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
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<tr>
<td>PROJECT</td>
<td>SCOOPS 2012-13</td>
<td>ALL</td>
<td>Michelle</td>
<td>2011-12</td>
<td>6/8/2012 MT</td>
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<td>STAGING</td>
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<td>PROJECT</td>
<td>Welcome Weekend: Get Organized &amp; Student Involvement Fair</td>
<td>SUMMER</td>
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<td>PROJECT</td>
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<td>SPRING</td>
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<td>FALL</td>
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<td>PROJECT</td>
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<td>INSTRUCTIONS</td>
<td>Graduation Pledge</td>
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<td>BOARD</td>
<td>Local Ways to Get Involved in Sustainability</td>
<td>ALL</td>
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Hybrid Model of Project & Program Management: Using offline and online tools at the University of Vermont

Strategic Level Planning from 30,000 ft

Step 1: Brain Dump
Step 2: Mind Map
Step 3: Get colorful w/Post-it notes to review programs & projects w/collaborators
Step 4: Individual Work plan
Project and Program Level Planning

1. Develop project scope.

2. Create a schedule and milestones.

3. Create work packages, including tasks to address specific project goals.

4. Post scope, schedule and milestones, tasks on PM tool - Basecamp.

5. Post documentation and check off completed tasks, etc.
What project management tools and techniques do you use to help you succeed in your work?
Lessons Learned

Document, document, document...especially when closing a project.

Share lessons learned by making it easily accessible whether through online or offline tools.

Research, try out, select, and then customize your management tools to match how your group works on projects.
Online Tools

Free Services:
• Google Apps:
  • Docs, Hangout, etc.
• Do.com
• YouTube
• Dropbox
• Evernote
• Free Conference Call
• Skype
• Doodle
• Yammer
• Asana
• Hootsuite

Low-cost Services:
• 37 Signals Suite:
  o Basecamp, High Rise, Backpack
• Issuu.com
• Vimeo
Recommended Books

- *Getting Things Done* by David Allen
- *The Mind Map Book* by Tony Buzan
- *ReWork* by Jason Fried
- *Influence* by Robert Cialdini
- *Switch* by Chip Heath and Dan Heath
- *The Leadership Challenge* by Kouzes and Posner
- *Presentation Zen* by Garr Reynolds
- *Nudge* by Richard Thaler and Cass Sunstein
As a Sustainability Officer, think of three skills or knowledge areas that you would like to learn or to improve on in the next week, month, or year to help you at your job?