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Executive Summary

The San Diego Regional Green Business Network (SDRGBN) developed this step-by-step Green Business Network (GBN) Toolkit as a blueprint for municipalities and other public agencies interested in establishing their own GBN. Section I presents three GBN case studies from public agencies around the country to provide examples of how agencies have successfully implemented their GBN programs. The case studies include details on each program’s membership and member requirements, key engagement strategies, lessons learned and testimonials from network staff.

If an agency would like to pursue the creation of their own GBN, then they can evaluate the feasibility of a local network and how to move forward by following the seven key steps to establishing a successful GBN described in Section II. Each step includes an overview, a summary of key implementation actions and suggested deliverables. The seven key steps to establishing a successful GBN are highlighted in Figure 1.

**FIGURE 1. Seven Steps to Establishing a Green Business Network**

The circular presentation of the process highlights the need for continuous evaluation and updates for a GBN to meet its goals while also meeting the needs of its members. Through constant review and improvement, GBNs can evolve into robust programs that provide resources to businesses looking to become more sustainable.
GBN Case Studies

The following GBNs, namely the “Green Business Program” of Santa Barbara County, City of Portland’s “Sustainability at Work” and City of Austin’s “Austin Green Business Leaders” have followed differing paths to success. Santa Barbara used a statewide model to develop its program, Portland offers no-cost services to all businesses within its jurisdiction and Austin provides membership ranking based on each member's commitment to an established set of sustainability measures.

Santa Barbara County, CA

Membership

The Green Business Program of Santa Barbara County is part of the statewide California Green Business Program.1 To join, prospective members must become a Certified Green Business by completing a checklist of required and suggested green measures. Only certain business industries are eligible to be certified under the Green Business Program: automotive shops, lodging establishments, office/retail stores and restaurants. Currently, more than 90 businesses have been certified green in Santa Barbara’s Green Business Program.

Requirements

To become a Certified Green Business, a business must complete the following four-step process.

1. Register and work with the Green Business Program coordinator to complete the application process and pay a certification fee of $300 – $600, depending on the size of the business.

2. Attend a four-part Green Business Academy workshop series to learn about how to complete the checklist and meet program requirements.

3. Implement all required green measures with the assistance of Green Business Program staff.

4. Achieve certification upon completion of all requirements, granting the business membership to the Green Business Program.

Members must recertify their business every three years by completing an abbreviated version of the initial certification process and paying the recertification fee, which is half of the original certification fee paid ($150 – $300). To receive recertification, a business must maintain the green measures implemented in the previous checklist and pursue new green measures.

Key Engagement Strategies

The primary method for engaging businesses in the Green Business Program of Santa Barbara County is through the certification process. As part of this process, direct interaction occurs with businesses through the four-part workshop series “Green Business Academy,” as well as via on-site meetings where program staff provide hands-on technical assistance and verification for implementing required green measures. Certified businesses are recognized at an annual luncheon and select certified businesses are featured in online case studies.

To promote the certification program and available resources, staff make presentations to trade groups, chambers of commerce and other business organizations. In addition, any business can access the online Green Tool Kit that provides resources to help businesses meet the requirements of the Green Business Program. The Green Business Program also utilizes its website, Facebook, workshops, webinars and social mixers to engage and educate Santa Barbara County’s business community.

**Lessons Learned**

“Do your homework on establishing a good budget. We have ended up being more popular than our budget allowed for — in other words we were victims of our own success,” states Frances Gilliland, program director of the Green Business Program of Santa Barbara County. Adequate funding resources are needed to effectively and efficiently engage the local business community. Gilliland suggests the budget should provide funding for at least one full-time employee to successfully run a program like Santa Barbara’s.

**Testimonial**

“Our program brings businesses together to work toward certification as a cohort where they share their experience and information freely with one another, bringing added value to the certification process. So for us, the most important benefit of a Green Business Program, or network, is the opportunity to work with so many wonderful local businesses in a supportive, collaborative environment.”

– Frances Gilliland, program director, Green Business Program of Santa Barbara County

**City of Portland, OR**

**Membership**

The City of Portland’s Sustainability at Work program offers various resources to businesses considering greening their operations. While many no-cost resources are available to all businesses, those businesses wishing to obtain official recognition for their sustainability efforts must pursue certification. Sustainability at Work has three certification levels: certified, silver and gold. Currently more than 200 businesses are certified.

**Requirements**

To become a certified Sustainability at Work business, applicants must complete the following steps.

1. Download an application for the appropriate business type (office, restaurant, retail or grocery) and complete at least the minimum eligibility requirements. Other business types are eligible for certification, but must contact Sustainability at Work to apply. Minimum

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eligibility requirements vary based on the business type, but all include the following requirements.

a. Location within Portland city limits
b. Two or more employees and not a home-based business
c. Recycling of paper, metal, plastic and glass
d. Does not store garbage and recycling containers on public sidewalks or streets
e. Does not distribute single-use plastic bags to customers
f. Does not serve or package food in polystyrene foam containers
g. Set a sustainability goal to work toward during the coming year

2. Email the application to Sustainability at Work. There is no application fee to apply.

3. Schedule an on-site verification visit with a Sustainability at Work advisor to document all green measures claimed are implemented at the business.

4. Receive certification based on the number of completed actions beyond the minimum eligibility requirements. Action areas are grouped into various categories based on the business type and include food; reduce, reuse, recycle; employee engagement; transportation; energy; water; community engagement; and additional actions.
   a. Certified businesses must complete at least 12 actions
   b. Silver businesses must complete at least 25 actions
   c. Gold businesses must complete at least 45 actions

Businesses must recertify every three years by submitting a new checklist and meeting the latest program requirements. There is no cost for recertification and businesses do not have to necessarily pursue additional actions to recertify, unless the program requirements have changed since last completing the checklist.

**Key Engagement Strategies**

Any business in the City of Portland can meet with a Sustainability at Work advisor (at no cost) who will help strategize the best sustainability efforts for the individual business, conduct an on-site sustainability assessment and assist with employee engagement efforts. Regardless of membership status, businesses can learn more about greening their operations via the Sustainability at Work website to read the latest blog articles, access a comprehensive resource guide and sign up for the program’s e-newsletter. Additional business resources include ordering recycling boxes, recycling and composting posters and faucet aerators online at no-cost.

Sustainability at Work provides additional benefits to those businesses that achieve certification, including marketing tools and resources and an award plaque for those achieving Gold certification. While the certification process is the primary method by which Sustainability at Work engages its members, it also sends out e-newsletters twice a month, provides information via their website and social media accounts and hosts an annual facilitated networking event. Sustainability at Work also participates in the annual GoGreen Conference in Portland.

**Lessons Learned**

Pursuing and earning certification is the main reason businesses participate in the Sustainability at Work program. Often, sustainability efforts are spearheaded by support staff at a business, and
certification gives them the leverage they need to get their owners and managers comfortable with pursuing various sustainability measures. Additionally, Sustainability at Work serves as a central hub for city departmental programs. Instead of a business having to go to multiple city departments to find out what programs and incentives are available for various sustainability measures, businesses can simply engage with a Sustainability at Work advisor who will help them navigate available resources. The advisor is a huge advantage for small business owners who may not necessarily have the staff or time available to filter through different programs on their own.

Sustainability at Work staff have found that e-newsletters sent out twice a month are the best method of continuous engagement with their members. These e-newsletters have a low opt-out rate and focus on providing businesses with bite-size pieces of sustainability information that are easy to understand and not overwhelming. Further, the annual facilitated networking event hosted by Sustainability at Work typically sells out, as businesses find great value in being able to learn about what sustainability actions other businesses are taking and how they accomplished their goals.

**Testimonial**

“The value we offer to businesses is a one-stop shop of sustainability information that’s relevant for them. We save them time in searching for and sorting through a large amount of sustainability information so they can get what they need when they need it.”

“The value we offer to our funders (the city and regional government) is as a trusted voice among the business community. We also can connect city leaders with the businesses and individuals within the business community who are champions of climate action, can voice their support of citywide climate action initiatives and can provide examples of their own climate work to help other businesses understand how doable it is.”

— Lindsey Maser, sustainability advisor, City of Portland (OR), Sustainability at Work program

**City of Austin, TX**

**Membership**

The Austin Green Business Leader (AGBL) program is led by the City of Austin’s Office of Sustainability. It is open to all businesses located within the City of Austin, from home-based enterprises to large international corporations serving a variety of industries. To join, prospective members must complete an application demonstrating the business has pursued a variety of sustainability actions. Certified businesses are ranked as either Silver, Gold or Platinum Green Business Leaders. There is no fee to apply for certification. In addition, the AGBL website offers no-cost resources for businesses looking to go green. AGBL currently has more than 200 member businesses, representing almost 40,000 employees.

**Requirements**

To become a certified AGBL member, businesses must complete the following steps.

1. Download and complete the green business scorecard.
   a. Apply during the open enrollment period (January to February)
   b. Complete at least one action from each of the seven categories (communication and outreach, resource management, water, energy, healthy work environment, transportation and community stewardship)
   c. Comply with all federal, state and local laws and regulations

2. Office of Sustainability staff will verify on-site the actions identified in the scorecard.

3. Receive certification based on the number of completed actions, each of which have varying point values. The certification level awarded is based on the final number of points earned.
   - Silver: 40–59 points
   - Gold: 60–99 points
   - Platinum: 100–160 points

There is no cost to complete the application process and no recertification requirements to remain an Austin Green Business Leader.

**Key Engagement Strategies**

Any business can download the Office of Sustainability's *Green Business Resources* guide, which contains sustainability strategies for specific business types and available resources and corresponding AGBL scorecard action items. Businesses can subscribe to *Rethink*, the Office of Sustainability's e-newsletter, as well as read blog posts detailing stories to help advance the city's sustainability efforts. Additionally, AGBL-certified businesses can receive marketing materials, official recognition on the City of Austin's website, and networking opportunities at member-only events.

AGBL program staff report that direct emails are the most effective communication strategy. To help inform staff, the program sends out periodic surveys to members to better understand what they like about AGBL and identify opportunities for improvement. Through this effort AGBL staff gleaned that businesses highly value networking events. As a result, AGBL now hosts three to four lunchtime events per year. Overall, AGBL staff found that businesses want to learn from other businesses and hear how they achieved their sustainability goals.

**Lessons Learned**

The most important lesson learned by AGBL staff is that businesses should be engaged at the onset of the GBN development process to create a robust program that attracts local businesses. By enlisting a diverse group of key local business owners from the start, they are more invested in the program, thus increasing its likelihood for success. Overall, AGBL staff have found that smaller businesses focus more on the name recognition benefits of a green business program, while larger businesses tend to look for monetary savings from efficiency measures. Understanding the goals of the businesses participating in the program is key to success.

To measure success, AGBL recommends that staff set clear and realistic goals and metrics before starting a program to clearly monitor performance and progress toward achieving those goals.
Finally, AGBL staff have found they need to refine the program every few years to continue to meet the changing needs of local businesses. If any significant changes are needed, AGBL staff ensure that a diverse group of key business stakeholders are informed of upcoming changes and get their feedback prior to implementing any major program changes.

**Testimonial**

“A community-led green business program can help businesses protect the environment, save money and make your city a more livable place. Our Austin Green Business Leaders program helps local businesses get ahead of their competitors, grow their client base and strengthen customer loyalty...Joining a green business program can help businesses boost employee retention and productivity by promoting health, wellness and eco-friendly practices.”

– Marc Coudert, Office of Sustainability, City of Austin

### Steps to Build and Sustain a Local GBN

Groups interested in developing a network can follow this process to establish a GBN that meets local goals, while acknowledging staffing capacity and availability of resources.

Each step includes an outline of its purpose in the process, action items and suggested deliverables.

When considering establishing a GBN, local jurisdictions or public agencies should examine the following.

- Existing climate action plan measures to reduce business energy, water and/or waste consumption
- Ability to effectively engage local businesses in sustainability issues and actions
- Access to programs or resources that serve local businesses’ sustainability needs or desires

<table>
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Establish a Budget

The first step in creating a GBN is to understand the realities of budget and staffing constraints. With each identified goal, member offering and communication strategy, there is an associated cost that needs to be borne by the GBN. These costs include both operational needs (e.g., staffing, web hosting, customer relationship management “CRM” software) and implementation needs (e.g., marketing, recruitment, hosted events). Initial costs should include funding for the development, branding and marketing of the network itself (as outlined in each step of the Toolkit).

The budget can be the largest determinant for what the GBN will consist of and how it will operate. For example, if a local jurisdiction only has staffing hours for half of one staff member's time (full-time equivalent, or “FTE”), then by necessity the GBN must have a much smaller scale than one that can be staffed by two FTEs year-round. The key is to scale the program to the resources available, leveraging external programs and networks (such as the SDRGBN) to fill in the gaps between fiscal constraints and program goals.

**Action Items**

1. Identify staffing needs and budget constraints.
2. Identify external funding sources; types of available funding (e.g., local government partnership, funding through local utilities); how long the funding might last and any constraints tied to the funding (e.g., money must be spent on certain focus areas or certain business types).
3. Identify all costs of developing and operating the GBN on an annual basis. This will be revised throughout the development process.
4. Identify the benefits to both local jurisdictions/public agencies and participating businesses. If possible, attach a monetary value to these benefits.
5. Review all analyses and determine whether the network can be financially supported year after year or if funding is contingent on grants, sponsorships or other uncertain funding sources.

**Suggested Deliverables**

- Multiyear budget that includes forecasts for
  - Staffing needs
  - Funding sources
  - Network development costs (first year only)
  - Operating costs

Engage Key Stakeholders

By including the local business community from the onset, the GBN will have a group of founding members invested in its success.
Throughout the GBN development process, staff should engage key stakeholders to ensure buy-in from the local community. Engaging local business stakeholders (e.g., industry leaders, top employers, industry and business associations, businesses that are sustainability leaders, etc.) from the start of the program will ensure the GBN will meet the needs of its business members most effectively.

In addition to engaging local business owners, staff should look to engage potential GBN partners. By engaging local utility and jurisdictional or public agency stakeholders, the GBN can be better aligned with and take advantage of existing programs and services (e.g., SDRGBN, local utility programs and local municipal departments like water, economic development and environmental services).

**Action Items**

1. Research top employers, industry leaders, etc., to determine target founding members for the GBN. These businesses ideally will have well-developed sustainability goals.

2. Evaluate business sectors (e.g., restaurants, convenience stores, hotels, etc.) that may have shown a strong interest in sustainability; they can also be leveraged to be founding members.

3. Create a stakeholder engagement plan outlining how stakeholders will be involved in the GBN development process (e.g., surveys, discussion groups, etc.).

4. Obtain stakeholder feedback from key local business partners to inform them about the GBN and provide them the opportunity to participate in the development and ongoing implementation of it.

5. Engage potential GBN partners such as other GBNs, utilities and other local jurisdiction or public agency departments to get their input and support for the new GBN.

6. Reevaluate the budget as needed to incorporate feedback from the local business community and potential GBN partners regarding business needs and resources available.

7. Continue to engage stakeholders for feedback throughout the entire GBN development process.

**Suggested Deliverables**

- Stakeholder engagement plan
- Business stakeholder list with member business and point of contact information
- Potential GBN partner stakeholder list with contact information
- Updates to budget (Step 1) as needed

**Develop a Framework**

The next step in the GBN building process is to analyze the demand for a GBN, taking into consideration the needs of local businesses and their goals for the GBN, as well as the goals of program staff. Developers should keep the budget in mind when creating the framework for what the GBN will consist of, choosing communication methods and setting goals. If funding is limited, jurisdictions should consider how the GBN will leverage the resources of the SDRGBN or other local programs to achieve its goals.
To better define the framework for the GBN, staff should focus on the purpose and goals of the program. For example, the GBN can be focused on:

- Networking
- A certification program
- Training and resources
- All of the above

Additionally, staff should create a clear mission statement and associated goals for the program. This is a key time to solicit stakeholder feedback from local business leaders to ensure that the mission and brand of the network aligns with what local stakeholders need and desire. To understand better what businesses hope to gain from participating in the network, staff should engage key business stakeholders identified in Step 2 to understand their ideas on key value propositions for joining the network and associated goals for their participation. Value propositions could include:

- Monetary savings
- Marketing support
- Networking opportunities
- Positive differentiation from competitors
- Earning certification
- Giving back to the community

Once the mission statement and goals of the program are clearly established, staff can work on defining a clear brand identity. At a minimum, this will involve developing a logo and associated style guidelines (colors, fonts, etc.) for use in all marketing materials. Even if the style guidelines are less than a page, having a structure for designing marketing materials will help contribute to a stronger brand identity for the program through consistency in branding. If developing a website, the mission statement, goals and any narrative surrounding the logo and color choices could be featured on an “About Us” page.

**Action Items**

1. Brainstorm at a high level the purpose and goals of the network among local jurisdiction staff. Evaluate any existing local or statewide programs with which the local jurisdiction’s program can be aligned and leverage resources from, such as the SDRGBN.

2. Draft a framework for what the network will consist of (e.g., certification, membership structure and requirements, benefits available to members, etc.).

3. Set SMART (specific, measurable, achievable, realistic and timely) goals for the network for the first few years. Develop key performance indicators to track progress toward these goals (e.g., number of members, number of local utility program participants, etc.).

4. Further develop and refine the goals and framework of the local green business program, including construction of a clear mission statement.

5. Engage stakeholders to get feedback on the goals, framework and mission statement of the program. Revise as needed.
6. Once a clear purpose has been set, brainstorm ideas for a logo that represents the purpose of the green business program. This logo should be unique and meaningful. The logo colors can help inform the overall colors for the branding guidelines for the program.

7. Go back to key stakeholders to get their feedback and buy-in on the logo, as well as revised goals, framework and mission statement of the program. Integrate stakeholder feedback into final versions.

**Suggested Deliverables**

- Framework structure of network components, including mission and goals for the GBN
- SMART goals and associated key performance indicators
- Logo and brand guidelines
- Updates to budget (Step 1) as needed

**Develop Marketing Materials**

GBN staff should brainstorm and identify the marketing needs of the program, keeping in mind any budget constraints. It is important to have a consistent form of communication with network members, such as a website or e-newsletter. Additionally, some businesses highly value social media, so staff need to investigate ways to leverage social media channels to promote the network and its members. Finally, staff could create and provide branded physical materials, such as brochures, banners, decals or staff polo shirts for members.

Staff should create a marketing calendar to identify launch dates and develop timelines for developing required collateral pieces. For example, if the GBN will have quarterly newsletters, put the launch date on the calendar, as well as key milestones (draft copy, obtain approvals, etc.) in developing that content.

If staff identified additional resources beyond what was budgeted in Step 1, then staff should go back and evaluate marketing needs and budget constraints and adjust either or both as necessary to ensure adequate funding for identified key marketing needs. Staff should formalize this marketing plan in a working document that can be revised as needed.

**Network Website: A Key Starting Point**

A good starting point for most GBNs is to develop a website or webpage (if hosted on the local jurisdiction’s website). The website can serve to

- Manage all member contact information (i.e., customer relationship management system)
- Determine how the network will communicate with its members (emails, website, social media, mail campaigns, etc.)
- Inform stakeholders about the GBN and network updates
- Recognize members
- Provide resources to both members and prospective members
- Host a master calendar of sustainability events (e.g., Earth fairs) and trainings (e.g., energy efficiency trainings hosted by the local utility)
- Provide contact information for network staff if businesses have any questions
**Action Items**

1. Create a marketing plan identifying the marketing needs of the program, how staff will communicate with network members and a basic marketing calendar for key communications.

2. Revise the marketing plan and/or budget as needed to meet needs of the program and the constraints of the budget.

3. Develop and launch marketing collateral pieces per the marketing plan.

**Suggested Deliverables**

- Marketing plan
- Marketing collateral identified in the marketing plan
- Updates to budget (Step 1) as needed

**Recruit Members**

Once the GBN is officially launched, the next step is to recruit members. Before reaching out to prospects, staff should be sure to have an enrollment form that outlines member requirements and identifies key information needed about member businesses (e.g., industry, building size, number of employees). Also, staff should create a process for how this data will be managed utilizing the contact management solution. This could be tied to the website, an email service (e.g., MailChimp or Constant Contact), another customer relationship management software or an Excel spreadsheet.

Once the GBN has an established structure for enrollment, staff can begin member recruitment. The first members from day one should consist of the key local business leaders who were engaged in the program development process. This will help the network quickly develop a core set of founding members who are sustainability leaders within the community.

Next, leverage the relationships of existing local business organizations, such as chambers of commerce, industry associations or professional associations, to recruit more members. Additionally, staff should encourage core members to recruit a few additional businesses to join the network, possibly by offering a referral incentive for those who recruit the largest number of new members.

Depending on the budget and staffing availability, further recruitment strategies can be implemented. For example, staff could launch a recruitment campaign by sending out mailers to businesses, presenting at local business association events, conducting in-person outreach or tabling at community events. Staff could choose to conduct targeted outreach to recruit influential businesses within the community through one-on-one engagement efforts.

**Action Items**

1. Establish a set of founding members from the business stakeholders engaged in the program development process.

2. Engage founding members to determine best value propositions for participation in the network.
3. Leverage existing business organizations to recruit additional members.

4. Encourage founding members to recruit additional businesses. Consider offering a referral incentive (e.g., recognition on website or in newsletter for businesses who recruit the most members).

5. Actively recruit additional members through a formal recruitment campaign or targeted outreach efforts.

**Suggested Deliverables**

- Enrollment form and process
- Tool to collect and manage member contact and organizational information (e.g., website, email service, other customer relationship management software or Excel spreadsheet), as well as a process document with instructions on how to maintain and update this data
- List of founding members
- Recruitment of new members
- Updates to budget (Step 1) as needed

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### Actively Engage Members

In conjunction with the marketing plan, program staff should develop a member engagement plan with details on how program staff will connect with members beyond the marketing communications already identified. Engagement methods could include the following items.

- Consistent communication aligned with marketing plan
- Peer-to-peer networking events
- Educational workshops
- Staffing booths at public events (e.g., Earth fairs or industry association events)
- Technical resources (e.g., energy audits or a list of available local utility rebate programs)
- List of sustainability measures for businesses
- Marketing toolkit (e.g., member decal, advertising, social media content)
- Formal recognition for member achievements (e.g., hosting an awards ceremony or funding additional marketing tools like videos or paid advertisements)

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### Scorecards: An Effective Engagement Tool

A GBN scorecard is a valuable tool to track businesses’ implementation of sustainability measures and identify the areas in which businesses need the most support. Scorecards even can be used to recognize businesses that demonstrate exemplary performance in implementing sustainability measures.

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### Jackie’s Jackets

**Segment Scores:**

- ENERGY SCORE: 97%
- WATER SCORE: 100%
- WASTE SCORE: 100%
- TRANSPORTATION SCORE: 100%
- ENGAGEMENT SCORE: 100%
- MISCELLANEOUS SCORE: 100%

**Overall Score:** 96%

[Update Scorecard]

[Print Scorecard]
**Action Items**

1. Brainstorm ideas among program staff for engaging GBN members. Be sure to identify any engagement methods that may be beyond current budget and staff availability.

2. Discuss the most feasible engagement strategies with the core group of member businesses to see what types of engagement methods would be most interesting and beneficial to them.

3. Based on stakeholder feedback, create a member engagement plan. This plan should align with the marketing plan and include a calendar of events, as well as more details on any technical resources provided. Ensure that this plan keeps in mind any budget and staffing constraints.

4. Update the marketing plan to include communication regarding upcoming events and workshops, as well as to let members know of any new resources that become available.

**Suggested Deliverables**

- Member engagement plan
- Updates to marketing plan
- Updates to framework and budget (as needed)

**Manage Day-to-Day Operations**

The key to running a successful GBN is active management of day-to-day program operations coupled with regular updates to all planning documents. Depending on the GBN's framework, components of membership engagement and budget and staffing constraints, the day-to-day operations could look very different network to network.

On a high level, an average day of operating a GBN could include the following.

- Member recruitment
- Researching and developing content for communications
- Developing and distributing marketing collateral
- Updating and maintaining website content, including updating calendar of events and blog
- Contact database management
- Event planning
- Answering business questions about sustainability
- Door-to-door outreach
- Researching content for educational workshops and trainings
- Evaluating checklist and scorecards
- Recognizing members through events, awards, marketing, etc.

Additionally, in managing a GBN, it is important for staff to continuously review and evaluate efforts to ensure proper staff, budget and tools necessary to run the network will continue to be available. Staff should update goals and planning documents on a regular basis. Any time changes are proposed to the network structure or operations, staff should return to key stakeholders to get their input and advice on proposed changes. Staff could share lessons learned and best practices through attending conferences and events.
The most effective way to manage day-to-day operations, while keeping in line with stated goals, is to create an implementation plan. This plan should align with the marketing and engagement plans and provide concrete steps toward achieving the networks’ stated goals. An implementation plan identifies the status of the network and future goals, along with steps needed to achieve those goals (e.g., grow membership by 200 percent over two years, increase email open rate by 5 percent in the next year, etc.). The implementation plan also could include a specific recognition program to distinguish members for their participation and/or sustainability achievements. This could be as simple as a marketing toolkit with a network member logo or as complex as a sustainability scorecard that is submitted for annual awards.

The plan should feature a detailed evaluation, measurement and verification process to make sure day-to-day operations are contributing to the overall mission of the network. Staff should revise goals as necessary due to budget and staffing constraints and/or changes in what businesses prefer regarding engagement. Additionally, if implementation is completed by multiple parties or staff members, roles and responsibilities should be clearly defined to establish who is responsible for completing specific tasks.

**Action Items**

1. Document processes and sample timelines for developing and distributing new communications and update marketing plan accordingly.

2. Create an implementation plan.

3. Daily operations (see above list for examples).

4. Review and update planning documents on a regular basis.

5. Repeat the entire toolkit process (Steps 1 to 7) on a periodic basis to ensure the GBN is continuing to meet stated goals and member needs.

**Suggested Deliverables**

- Updates to marketing plan
- Implementation plan
- Updates to framework and budget (as needed)
As a mission-driven nonprofit organization, CSE works with energy policymakers, regulators, public agencies and businesses as an expert implementation partner and trusted information resource. Together, we are the catalysts for sustainable energy market development and transformation.