Occupant Engagement for Sustainability
Occupant engagement for sustainability is an important means to bridge the gap between predicted and actual building performance, leading to energy and other savings averaging 9-10%.

Companies develop comprehensive occupant engagement programs that go beyond the more familiar energy, water, and waste reduction initiatives to encompass health, transportation, and community partnerships.

Corporate users aim at sustained behavior change, focusing employee engagement programs on four areas – awareness and education, social networking, data sharing, and incentives.

Owners engage tenant executives through amended leases and service contracts, incorporating sustainability clauses; they engage tenant employees through communications, sponsored events, and joint owner-tenant committees.

Companies utilize advanced technology platforms to increase participation.

Leaders capture and document employee feedback and results to evaluate and constantly improve programs.
Types of Occupant Engagement Programs

Employee Engagement
Corporate users engage employees by incorporating sustainability principles into their day-to-day activities at the workplace and/or at home.

Tenant Executive Engagement
Owners partner with relevant tenant executives in the move towards greater operational performance.

Tenant Employee Engagement
Owners directly engage the tenant employees who occupy their buildings to secure their support for sustainability initiatives.

A comprehensive occupant engagement program includes initiatives around:
- Energy use
- Water conservation
- Waste reduction & recycling
- Alternative transportation
- Health & IEQ
- Community engagement
Corporate Users
Key Drivers for Employee Engagement

- Reduced O&M Costs
- Reduced Environmental Impacts
- Improved Employee Productivity
- Increased Collaboration and Innovation
- Enhanced Employee Health
- Improved Employee Attraction & Retention
- Improved Community Relations
- Enhanced Brand & Reputation

Cloud Apps, a vendor of employee engagement software platform, report that their clients reduced energy use on average by 9-10%.

Stonyfield achieved 46% reduction in transportation GHG 2006-2010, a result of its Mission Action Plans program for employees.

MIT survey of 3,000 businesses, shows sustainability credentials are having an increasing influence on employment seekers.
Sustained behavior change requires that companies consider:

- **Enabling factors** (financial, organizational and technical resources, new skills)
- **Reinforcement** (feedback from peers, managers, experts, customers)
- **Motivation**
- Home-based, work-based, community based initiatives

An effective program includes four components:

- **Awareness and Education**
- **Social and Community Networking**
- **Data Sharing**
- **Individual Incentives**

Emerging Technology Solutions for Increased Participation

- **Education and Awareness**
  - SuMo, Tripos

- **Social and Community Networking**
  - Practically Green, SuMo, Facebook, Twitter, Yammer

- **Data Sharing**
  - CloudApps, IBIS®, Lucid Building Dashboard

- **Alternative Transportation**
  - Zimride, RideShark, iCarpool, NuRide

Vendors are increasingly offering their software solutions in the form of mobile applications for ease of access and versatility.
Decision Framework

- Establish executive green group and green teams
- Formulate a strategic framework for a comprehensive program
- Identify first initiatives: home- versus work-based

- Educate new hires and current employees
- Provide role-based education
- Raise visibility of sustainability actions through design & labeling

- Reinforce social sharing, promote role models, peer pressure
- Apply gamification (competitions, social media)

- Provide building performance data and progress-tracking visibility (dashboards, portals, newsletters, discussions)

- Offer a diverse set of financial and non-monetary rewards

- Evaluate success through formal and informal measurements
- Identify best practices and share results regularly
## Emerging Trends

<table>
<thead>
<tr>
<th>Awareness &amp; Education</th>
<th>B.E.E. Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Signs &amp; posters</td>
<td>• Dedicated education time</td>
</tr>
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<td></td>
<td>• Online tutorials</td>
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<tr>
<td>Social &amp; Community Networking</td>
<td></td>
</tr>
<tr>
<td>• Sponsored events (Earth Day)</td>
<td>• Green Teams</td>
</tr>
<tr>
<td>Data Sharing</td>
<td>• Online, face-to-face</td>
</tr>
<tr>
<td></td>
<td>• Community engagement</td>
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<tr>
<td>Individual Incentives</td>
<td></td>
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<tr>
<td>• Newsletters &amp; annual reports</td>
<td>• Dedicated portals</td>
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<tr>
<td></td>
<td>• Dashboards</td>
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<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>• Self-organized, grassroots</td>
<td>• Financial incentives</td>
</tr>
<tr>
<td></td>
<td>• Rewards &amp; recognition</td>
</tr>
<tr>
<td>Measurement &amp; Results</td>
<td></td>
</tr>
<tr>
<td>• Little or no KPIs, measurement or reporting</td>
<td>• Responsible executives</td>
</tr>
<tr>
<td></td>
<td>• Green Teams</td>
</tr>
<tr>
<td></td>
<td>• Defined KPIs</td>
</tr>
<tr>
<td></td>
<td>• Real-time results</td>
</tr>
<tr>
<td></td>
<td>• Documentation of success</td>
</tr>
<tr>
<td></td>
<td>• Expanded surveys</td>
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</tbody>
</table>

### 2011 Brighter Planet survey:
- 17% of employees are aware of a program
- Increase (since 2009) in the use of e-mail, intranet sites, social media

### 2010 Pew Center survey:
- 89% of companies have engagement measures for energy efficiency
- Most common measures: newsletters & e-mail (33%), education and training (22%)
Corporate Users: Sector Best Practice Case Studies
Capital One: “Be Green” Efforts

Overview of Initiatives
- Greenhouse gas emissions reduction
- Green building certifications
- Sustainable paper sourcing
- Waste reduction & recycling
- Green transportation
- Healthy diet
- Native landscaping and gardens

Motivation
- Beat our sustainability targets and deliver business value
- Educate and engage associates in our journey
- Foster green behaviors at work and home

Planning
- Created corporate Environmental Sustainability Office (2008); reports to CRE
- Manages corporate sustainability strategy
Capital One: Environmental Engagement Through Many Channels

**Implementation**

- 26 Green Teams manage enterprise & local awareness, volunteer activities across our sites

- Created active wiki page for education and social networking
  - Leader and employee blogs
  - Sustainability program & progress
  - Articles, photos, online contests
  - More than 3,000 associates engaged

- Developed online learning tool

- Holds environmental speaker series via webinars, audio bridge

- Hosts events (Earth Day, Earth Hour, NRD) and competitions (Reuse a Cup Challenge)

- Experiments with green pilots (ridesharing, gardens, benefits like solar, EV charging)
Capital One: Met GHG Reduction Targets, Improving in Sustainability Rankings and Greening Operations

**Challenges**
- Measuring engagement
- Catering information to employees who have various interests and knowledge base
- Competing priorities

**Results**
- Met five year 10% GHG reduction target in three years
- Implemented paper procurement policy
- Achieved green building certification for ~45% of office portfolio by EOY 2011
- Improved Newsweek green ranking from #147 to #80 in 2012
- Achieved ~7.5% associate participation via wiki page by EOY 2011

**Lessons Learned**
- Embed sustainability within existing programs
- Continuous education of associates is critical
- Help associates make a local connection and give back to the community
Federal sustainability policy and regulation

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Procurement</th>
<th>Energy</th>
<th>Water</th>
<th>GHG Emissions</th>
<th>Recycling</th>
<th>Transportation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EO13423</td>
<td>Office paper must contain at least 30% post-consumer content.</td>
<td>Reduce energy intensity by 3% annually through the end of FY 2015 or 30% by end of FY 2015, relative to baseline of each agency’s energy use in FY 2003.</td>
<td>Reduce water consumption intensity – gallon per square foot by 16% by the end of FY 2015 from a 2007 baseline.</td>
<td>Increase solid waste diversion “as appropriate”.</td>
<td>Reduce fleet’s total petroleum based consumption by 2% annually by FY 2015 from 2005 baseline.</td>
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<td>EISA 2007</td>
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Source: [www.1ere.energy.gov/empregulation/requirements_by_subject.html](http://www.1ere.energy.gov/empregulation/requirements_by_subject.html)

### Overview of Initiatives

**Initiatives for employees and tenants**
- Energy, Water, Waste reduction, IEQ
- Electronic stewardship, ‘Revolving Doors’
- Workplace, Mobility, Telework
- Sustainable travel programs, Fleet reduction
- Health and wellness (‘Consider the Stairs’, Healthy food options)

### Motivation

- Compliance with executive orders
  - Achieve cost savings (EISA)
  - Achieve environmental goals (EO13423, EISA, EO 13514)
- Increase employee and tenant satisfaction

### Planning

- PBS & FAS plan building and procurement training
- CPO & COO drive engagement & tracking efforts
- Green Teams (55+)
  - GSA, Tenants, Champions, and Charters
GSA: Leveraging Innovative Social Media Tool

Implementation

Employee Engagement

- **Dashboards** share building performance data
- **Green Teams** share Sustainability 101 tips
- **Online University** courses
  - Green Purchasing
  - O&M and the Environment
  - FM: Refrigerants and Ozone Depletion
  - Coming Soon: GSA PBS Sustainability 101
- **In-depth Training**: Office of Leasing
- **Events** (Earth Day, Energy Awareness Month, America’s Recycling Day)
- **Challenges** linked to events such as office supply reuse drives associated with moves
- **Sustainability Expert Network Directory (SEND)**
  - Bottom-up peer network
  - Searchable visual interface
  - Social media enabled (Salesforce Chatter)
    - 7 sustainability categories
    - 950 Subject Matter Experts
GSA: Increases Transparency

Implementation (continued)

Tenant Engagement

- Leverages several tools and platforms:
  - Sustainability Facility Tool (www.Sftool.gov)
  - Energy.data.gov
  - Sustainable Supply Chain Community
  - Knowledge Network
- Uses sustainable leases, MOUs, FM contracts

Evaluation

- Projected 52 cents per sf ROI from Building Link
- Increased access to internal expertise, reduced request response time, captured best practices

Lessons Learned

- Focus on data integration before visualization and sharing
- Share with abandon
- Social media can be an effective sharing and knowledge management forum
Intel: Encouraging Employees to “Learn, Act, Share”

Intel Employees demonstrating a “Sustainability in Action” project in Ireland.

Motivation
- Align strategically with sustainability goals
- Engage multiple functional groups
- Increase communication & participation

Implementation
- Ties all employee's variable compensation to environmental performance
- Provides monetary awards and recognition for creative sustainability projects:
  - Environmental Excellence Awards
  - Sustainability in Action (SIA) grants
- Supports Intel Employee Sustainability Network (IESN)
- Uses ‘Green Intel’ – employee portal & interactive online community

Results
- Estimated cost savings from SIA projects: $136 million
- Individual projects save up to $500,000

Motivation
● Boost morale & productivity
● Enhance employee health (high rates of heart disease, diabetes)
● Improve reputation

Implementation
● Launched Personal Sustainability Projects (PSP) at 130 stores in 2006:
  ○ Home-based, personal approach
  ○ Captain-led education (focus on savings)
  ○ Community programs (e.g., recycling)
  ○ Social sharing

Results
● 675k lbs. aluminum, 5.9M lbs. paper, 3.2M lbs. glass recycled
● 20,000 associates quit smoking
● 50% associate participation (1.3M)
● Cost: $30M since 2006

Source:
Motivation
● Reduce environmental impacts & achieve sustainability targets
● Improve employee awareness & retention

Implementation
● Designates cross-functional sustainability teams at each site (SAMBA network):
  ○ Comprised of JLL staff, P&G business unit & safety team members.
  ○ Formulate footprint reduction objectives and action plans (monthly meetings).
  ○ Share best practices (online forums, portal, annual conference, Earth Day).

Results
● Achieved 10.87% reduction in energy use since 2007.
● SAMBA participation grows annually (>500 members in 2012).
Key Drivers for Tenant Engagement

- Reduced **O&M Costs**
- Reduced **Environmental Impacts**
- Higher **Occupancy Rates & Tenant Satisfaction**
- Improved Ability to Achieve **Green Certification**
- Enhanced **Brand and Reputation**

- GPT reported a 29% **reduction in energy costs** in its retail portfolio after providing a tool to retail tenants to assess the ecological footprint of their fit-out designs.

- Hermes Real Estate’s (NY) developed an educational program that reportedly **reduced energy consumption**, **decreased waste to landfill**, and **lowered water use by 18%** in 2008.
Decision Framework

- **Define Program Scope**
  - Decide to focus on tenant executives or employees, or both
  - Identify initiatives with greatest impact

- **Engage Tenant Executives**
  - Update lease and service contracts (lease, MOU, FM contracts)
  - Incorporate updated design and construction guidelines, data sharing clauses, and tenant policies

- **Engage Tenant Employees**
  - Communicate regularly
  - Host events (Earth Day, Earth Hour, Climate Week)
  - Establish joint owner-tenant committees

- **Measure**
  - Modify tenant satisfaction surveys to address sustainability
  - Distribute special surveys on engagement for sustainability

- **Share Results**
  - Disseminate best practices, results using diverse methods
  - Consider real time data sharing, use of proprietary tools
Emerging Trends

TENANT EXECUTIVES

Sustainable Lease or MOU

<table>
<thead>
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<th>Construction &amp; Design Guidelines</th>
<th>Tenant Policies</th>
<th>FM Contracts</th>
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<tbody>
<tr>
<td>bcIMC</td>
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Others

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TENANT EMPLOYEES

Direct Engagement

<table>
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<tr>
<th>Communication</th>
<th>Tenant Committees</th>
<th>Sponsored Events</th>
<th>Measurement &amp; Results</th>
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</tr>
</tbody>
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Infrequent newsletters, tenant notices, and events

Advanced tenant engagement programs build on contracts, real-time data sharing, and regular communication
Owners:
Sector Best Practice Case Studies
Brandywine: Tenant Engagement through Effective Building Signage

Overview of Initiatives
● Energy, waste, water conservation
● Healthier office environments including:
  ○ green cleaning supplies
  ○ chemical supply management
● Alternative transportation

Motivation
● Improve building performance
● Enhance tenant satisfaction and retention

Implementation
● Established 2012 objectives for 7 practice areas (see list to left)
● Relies on regional Captains to help tenants with sustainability initiatives (e.g., single-steam recycling, LEED practices, car pooling)
What can you do to help make this a more sustainable, healthier building?

Stay tuned for tips on how you can:

- CONSERVE ENERGY
- IMPROVE RECYCLING
- BE SUSTAINABLE & HEALTHY

Implementation (continued)

- Created building signage to encourage sustainable behavior (Virginia, 2012)
- Uses Twitter for social sharing
- Provides monthly updates on ENERGY STAR scores (EPA contest)
- To require data sharing in future leases
- Communicates progress via newsletters

Challenges

- Some tenants do not readily share data
- No management structure for aggregating, verifying, analyzing data
- Smaller tenants are not as inclined to be engaged in sustainability efforts
- Emperor’s new clothes syndrome
Brandywine: Towards Portfolio Standards

Results
- Green cleaning program at 75% of portfolio
- Sustainable material purchasing at 72% of portfolio
- Responsible landscaping and integrated pest management at 50% of portfolio
- Water reduction strategy at 93% of portfolio

Lessons Learned
- Ensuring that all property managers and tenants have access to data is critical to effective engagement
- Smart building labels raise tenant awareness and conditions positive behavior
- Consistency of efforts and standards across regions tend to enhance level of engagement
Clarion Partners: Regular Events Foster Stronger Engagement

Focus of Tenant Engagement Program
- Energy, waste, recycling, water
- Alternative transportation
- Indoor air quality (IAQ)

Motivation
- Reduce operational impact and expenses
- Increase efficiency, improve ENERGY STAR rating, potentially pursue LEED certification
- Improve tenant satisfaction and retention

Implementation
- Efforts driven by asset managers, FM service providers (CBRE, Akridge)
- Documents best practices (sustainability website)
- Uses green leases or work letters
- Hosts regular events (Earth Day, Climate Week, Sustainability Drives) with vendors, utilities present
Clarion Partners: Seeking Greater Tenant Enthusiasm

**Clarion Partners’ Lenox Building, Atlanta, GA**

The Lenox Building, led by Jeff Peshut and Cheryl Messenger of CBRE, celebrated by extending Earth Day into a whole week of activities including an e-waste drive or recyclable electronic items, a “Recycling 101” session giving out information about free recycling services to tenants, and a tenant appreciation lobby social.

**Implementation (continued)**
- Communicates progress via newsletters, electronic tenant handbook
- Tracks energy data and ENERGY STAR scores via MACH Energy and Portfolio Manager
- Addresses sustainability in tenant survey

**Challenges**
- Limited human resources at corporate level
- Lack of control (50% of assets are joint ventures)
- Difficulty of measuring results and success

**Lessons Learned**
- Publicity and visibility can yield significant year-long results
- Tenants are very enthusiastic about sustainability, but often wary to share costs
- Monitoring and results tracking are critical to leverage successes from engagement
USAA: Tenant Interest Drives Success

Focus of Tenant Engagement Program
- Recycling
- Energy efficiency
- Green certification

Motivation
- Meet demand for LEED & ENERGY STAR buildings from tenants, investors
- Enhance brand & reputation

Implementation
- Efforts vary by managers
- Hosts events (Earth Day, quarterly town hall meetings, events in lobby)
- Forms joint green teams (FBI, Gtech buildings, Chicago)
- Communicates progress via newsletters, e-mail, & public website (WorkSpeed)
USAA: Towards a Comprehensive Program

Implementation (continued)
● Distributes manuals for tenant improvements (TI)
● Develops signage for recycling, energy, etc.

Challenges
● Limited human resources

Lessons Learned
● Visibility of activities is critical to success and participation
● Strong commitment from local managers is necessary
● Comprehensive signage is an effective, low-cost strategy
Motivation

- Improve performance of managed assets and communicate it to tenants.
- Improve tenant retention and satisfaction by supporting their sustainability goals.

Implementation

- Chartered “Sustainable Intelligence” program includes strategic goals for tenant and stakeholder engagement.
- Property teams engage tenants through:
  - Joint green teams
  - Hosted events, building tours
  - One-to-one tenant meetings
  - Communication (e-mails, posters, Facebook)
- Implementing Zerofootprint VELO energy use displays (Royal Bank Plaza, Toronto).

Results

- Achieved customer satisfaction of 90% in 2012, up from 87% in 2010.
GPT Group: Engaging Stakeholders for Sustainability

GPT Group’s Stakeholder Approach to Engagement

Motivation
● Boost occupancy rates, tenant satisfaction
● Improve operational efficiency
● Enhance brand & reputation

Implementation
● Uses five key approaches to engagement:
  ○ Face-to-face direct dialogue
  ○ One-way tenant surveys
  ○ Two-way partnerships through MOUs
  ○ Regular communication and reporting
  ○ Online feedback tools
● Allows all retail tenants to utilize Environmental Footprint Calculator

Results
● Increased waste diversion from 29% in 2005 to 50% in 2010
● Use of calculator resulted in reduced average energy consumption of 29%

Motivation
● Maintain certification of LEED properties
● Increase appeal for potential clients
● Improve operational efficiency

Implementation
● Conducts periodic tenant surveys
● Encourages face-to-face dialogue with tenants and their employees.
● Communicates regularly
● Upgrades leases with green clauses
● Utilizes joint tenant sustainability committees
● Distributes Sustainable Tenant Improvement Manual

Results
● In 2011, 60% of tenants implemented sustainability practices (up from 40%, 2008)
● Flat carbon footprint despite 5% growth

Source: http://www.betterbricks.com/graphics/assets/documents/Kennedy-Assoc-TI-guide_2010.pdf,
Key Takeaways

● Occupant engagement for sustainability is an important means to **bridge the gap between predicted and actual building performance**, leading to energy and other savings averaging 9-10%.

● Companies develop **comprehensive occupant engagement programs** that go beyond the more familiar energy, water, and waste reduction initiatives to encompass health, transportation, and community partnerships.

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● Companies utilize **advanced technology platforms** to increase participation.

● Leaders **capture and document employee feedback and results** to evaluate and constantly improve programs.
Q&A: Discussion