SPI helps companies deliver on their promises of sustainability by providing education, tools, resources, consulting and certification.

Be real. Differentiate yourself.
Learning Objectives

**Connect** sustainability concepts to measurable business objectives and create a sense of urgency that will encourage top level support.

**Evaluate** organizational capability using an industry framework, identify barriers and prioritize key performance indicators so you can make a business case for high-level commitment.

**Assess** and implement intentional change management strategies that will ensure long-term, consistent improvement and support those “leading from the middle”.

**Overcome** resistance more effectively using specific communication strategies based on negotiation theory that will help increase buy-in and build coalitions within your firm.
• How many of you are from small (and large) firms?
• How many of you have (sustainability) strategic plans (for work/office)?
• How many of you have LEED certified projects in your portfolio (more than 25%)?
• How many of your firms have signed on to the AIA 2030 Commitment?
• How many of you have a Dir. of Sustainability or equivalent title?
CAPABILITY VS. TARGET

Client targets: LEED, NZ, LBC, 2030 = “WHAT”
Frameworks for change = “HOW”

WHY FOCUS ON THE ORGANIZATION (INSTEAD OF PROJECTS)?
1. PROJECT DELIVERY METHODOLOGY - ORGANIZATIONAL
2. PROJECT SPECIFIC ROADMAP TEMPLATE
ARE WE “THERE” YET?

With all the progress we’ve made to ‘green’ our built environment, we have a long way to go. We face crises of climate change, public health, habitat devastation and economic implosion – so the question remains: What will it take to get “there” – to be on a path towards sustainability?
WE’VE BEEN DRAGGED . . . KICKING AND SCREAMING . . .

The industry is just starting to approach design using performance, metrics & accountability
TAIL HAS BEEN WAGGING THE DOG
WE NEED TO ADDRESS “THE ROOT” OF THE PROBLEM
INDIVIDUAL(S)

ORGANIZATIONS + PORTFOLIOS
What really makes the difference. . .

Between **GREEN** design and **BROWN** design?

There are 4 aspects that must be addressed to achieve success. . .
Transformative Elements - Order of Importance

**MINDSET**
How we think, the assumptions we make, our perceptions of role and expectations of interaction

**PROCESS**
Collaborative decision making, clarity and transparency in decision making and clear performance targets

**TOOLS**
Analysis, strategies, life cycle costing, specifications

**PRODUCTS AND TECHNOLOGIES**
Technologies, strategies, things you buy (“green bling”)

“Greenshift Framework” © 2005
It’s time to change the paradigm....
OF RELEYING ON A FEW KEY CHAMPIONS
THAT IS NOT “INSTITUTIONALIZING” SYSTEMS: PROCESSES

In successful companies, the (old) ‘green group’ transform to “pollinators” and integrators for performance across the company.
WHAT ARE THE CHARACTERISTICS OF A TRULY “GREEN” FIRM?
WHAT
SPI Framework
Vision
SMART Goals
Strategic Plan

HOW
Communication
Negotiation
Leadership
Barriers Analysis
Stakeholder Analysis
Change Management
WHAT

HOW

↑
TRULY GREEN FIRM
- Commitment (is just the first step…)
- Vision, SMART goals & implementation plan
- Culture (!)
- Clear expectations for everyone
- Clear accountability structure, at all levels
- Leadership development throughout organization
- Effective communication plan
- Effective CHANGE MANAGEMENT plan
Define success factors for *external* relationships
- Intentional, proactive team building
- Well-crafted solicitations, agreements
- Effective communication protocols
- Formal partnering methodology
- Project roadmaps help ‘design’ process
- Collaboration effectiveness is measured, learned from!
- Knowledge management
- HR: education/cont. learning, perf. review, handbook, new employee orientation.
- Accountability incentivized + enforced
- Education plan: technical & interpersonal
- Communications: systems & protocols
- Management processes & quality control processes
- Tools, resources, IT, internal dwg/spec standards
- Operations. Leases for office space
- Marketing
- Portfolio-wide performance data tracking
- Corporate environmental footprint
- Third party building certifications
- Internally driven standards / best practices!!!
- Metrics related to strategic plan implementation
  (leadership effectiveness, tool utilization rates)
- Social impact baseline
  (diversity, community engagement, and fenceline impact)
- Clear performance goals (Internally driven)
- Methodologies institutionalized, tied to QC
- High Perf Design = basis of design
- Skills and knowledge (align with goals)
- Clearly articulated processes
- Roadmaps for decision-making (IDP)
- Quality control processes (implemented)
- Appropriate / timely use of tools & resources
The Myth of IDP
Integrated Design Process (IDP)

Integrative Design Process

Linear Design Process

Diagram by Bill Reed
MAPPING PROCESS: REDESIGNING THE DESIGN PROCESS
**NOT WIN**
- Debrief
denial

**CLIENT KICKOFF**
- Principle of operations & cost
- Expectations
- Use of owner project requirements

**INTERNAL KICKOFF**
- Team
- Scope
- Schedule
- Performance goals
- Systems
- Budget
- From RFP or from work done in part
- Checklist
- Team map for critical path design
- Internal project goals
- Basis of this type will always return on investment

**TEAM SELECTION**
- Email to dept heads
- Who is available for who is right person
- Important step
- Training to empower people
- Develop in-house expertise
- New roles or projects (possibly full-time)
- Exp energy modeler
- Building science group
- Facade
- Acoustics
- Occupancy
- Lighting
- Clarity of roles on projects
- Lack of integrative design professionals
- Right ppl at right levels

**BIG CLIENT KICKOFF**
- Facilities
- Use of CPL
- Owner feedback
- Bottom line
## EXISTING MILESTONES

<table>
<thead>
<tr>
<th>EXISTING MILESTONES</th>
<th>Identify client (action items)</th>
<th>RFP</th>
<th>PROPOSAL</th>
<th>INTERVIEW</th>
<th>ORIENTATION / KICK OFF</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CURRENT ACTIVITY</strong></td>
<td>position XYZ to get work. business development</td>
<td>Respond to all RFPs</td>
<td>Gather information</td>
<td>Convince client that XYZ is the best choice for the project</td>
<td>WIN PROJECT!</td>
</tr>
<tr>
<td><strong>BARRIERS</strong></td>
<td>misconceptions of experience</td>
<td>internal bandwidth</td>
<td>sometimes best interviewee isn’t same person daily involvement project</td>
<td>Required to define fee before clarifying project goals (and impacts on scope/timing)</td>
<td></td>
</tr>
<tr>
<td>What is challenging?</td>
<td>developer buildings/lack of perf. focus</td>
<td>expectations for consultants to be educators</td>
<td>related to team/interview skills (Best interviewers and point people)</td>
<td>Getting access to the decision makers and understanding who has authority for decisions</td>
<td></td>
</tr>
<tr>
<td>Frustrating? What’s not working? Feels like it goes wrong?</td>
<td>few constraints</td>
<td>external team experience 1.) established team good for stability, not innovation 2.) new team brings innovation but client perceives risk</td>
<td>better statement of firm goals &amp; process (sust)</td>
<td>Getting buy-in / goals are not consistent</td>
<td></td>
</tr>
<tr>
<td></td>
<td>time for business development</td>
<td>firm partnering question 1.) market driven 2.) location driven</td>
<td>no “playbook” for telling the story</td>
<td>Finding the best sus! partners (external)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>resources (available - allocation)</td>
<td>fixed fees defining the team vs. skillbased selection</td>
<td>lacking metrics to illustrate points (current)</td>
<td>Internal alignment (client interactions)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>strategic planning (reactive)</td>
<td></td>
<td></td>
<td>Decision making more “budget” driven rather than “performance” driven (value)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>prioritizing</td>
<td>XX ABS (7) 18% MBE/NEE # of qualified firms available (no competition)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## DESIRED CHANGES

<table>
<thead>
<tr>
<th>IDEAL:</th>
<th>Develop clear targets for biz dev (defined by specific metrics) and cultivate most desirable clients (having developed clear internal identity and goals will inform this)</th>
<th>Cultivate “ideal” project opportunities</th>
<th>Establish teams that are trusted and innovative</th>
<th>Determine: project performance goals, indicators of success for process and project, Determine what is being tracked for this project for 2030, and ___ (other).</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ANALYSIS</strong></td>
<td>What questions should be asked/answered at this phase?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>What minimum internally driven performance goals do we set? Diff. for diff. bldg types?</td>
<td></td>
<td></td>
<td>What does “success” look like in terms of process/interactions/collaboration?</td>
</tr>
<tr>
<td></td>
<td>Do we need to work with our partners (engineers) to figure this out?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Integrative Process Roadmap
Integrated Design Project RoadMap
WHERE ARE YOU GOING?

...AND HOW WILL YOU GET THERE?
Goal Setting: Defining the Future

Not all goals are created equal! SMART vs. DUMB
• **Specific**: State what exactly you want to accomplish (answers: who, what, where, why?)

• **Measurable**: How will you demonstrate and evaluate the extent to which the goal has been met?

• **Achievable**: stretch & challenging goals, within ability to achieve outcomes. Use action-oriented verb.

• **Relevant**: how does the goal tie to your key responsibilities? How is it aligned to core business objectives?

• **Time-bound**: set 1 or more target dates, the “by when” to guide goal to successful completion
Goal Setting: Defining the Future

SMART goals would not look like:

We value sustainable design
We will improve our sustainable design processes
We are committed to sustainability
We will be a leader in sustainability

Rather, SMART goals look more like:

We will increase the percentage of our completed projects that are LEED certified by 25% in the next year.

We will increase our sustainability training contact hours for all employees by 50% in the next 6 months

We will institute a process for tracking all project performance within 6 months and aim to gather real data for 10% of our projects in the first year.
GOING FROM GOALS TO ACTIONS

STRATEGY+IMPLEMENTATION

*It’s more than a memo…*
Implementation
Change Management
MANAGING INTENTIONAL CHANGE
INSANITY

Doing the same thing over and over again and expecting different results

Albert Einstein
Change is a design problem, not an inevitable outcome

John Kotter
Harvard University

Leith Sharp
Harvard University
Dual Operating Systems
CBIS Rationale
Importance of Being Intentional

**UNFREEZE** : DISRUPT
Define Your Practice Now
Baseline assessment

**CHANGE** : FRAME INTENT
Set Your Goals & Indicators
Clear direction, make it real!

**REFREEZE** : EMBED ESSENCE
Institutionalize culture, actions
Manage change intentionally
Importance of Being Intentional

**UNFREEZE : DIS R U PT**

**Understand current situation**

Baseline assessment – 360 feedback
Project Delivery Mapping - allows for unprecedented dialogue
Deconstruct – find invisible losses and missed opportunities
Understand interests, perceptions
Create alliances
Create urgency+ empowerment
Design change

* Assess your capability to change / culture
8 Steps to Transformation: Kotter

1. ESTABLISH A SENSE OF URGENCY

2. FORM POWERFUL GUIDING COALITIONS

3. CREATE A VISION

4. COMMUNICATING THE VISION

5. EMPOWERING OTHERS TO ACT ON THE VISION

6. PLANNING FOR AND CREATING SHORT-TERM WINS

7. CONSOLIDATING IMPROVEMENTS AND PRODUCING STILL MORE CHANGE

8. INSTITUTIONALIZE NEW APPROACHES
William Bridges: Stages in Transition

Change is fast

Transition is slow
DUAL OPERATING SYSTEM
Being a Change Leader in a Command Control Operating System is Exhausting
Management Driven Hierarchy (or Command and Control) alone is inadequate for the task of leading significant amounts of engagement, change & innovation.
What Does a Command Control Operating System Do Well?

- Directs
- Specialization
- Scales Up
- Efficiency and incremental improvement
- Consistency and Predictability
- Accountability
- Concentrates power and wealth

“Rationale for Organizational Reinvention” by Isharp is licensed for sharing and adapting under Creative Commons CC BY-AS 4.0
What Does Command Control NOT Do Well?

- Change / Feedback loop iterations
- Agility
- Shared Purpose
- Learning
- Empowerment
- Innovation
- Self-reflection
We are moving from a command control operating system to a dual operating system aligned around shared purpose.

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Getting Good at Idea Flow Means Integrating Two Operating Systems
ADAPTIVE OPERATING SYSTEM
Emergence

Integration

COMMAND CONTROL OPERATING SYSTEM
Execution

"CBIS Framework" by L.Sharp, adapted in part from J.Kotter; licensed for open sharing and adapting under Creative Common BY-AS 4.0
<table>
<thead>
<tr>
<th>Properties of the Adaptive Operating System and the Command &amp; Control Operating System</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADAPTIVE OPERATING SYSTEM</strong></td>
</tr>
<tr>
<td>Intrinsic motivation to enact shared purpose</td>
</tr>
<tr>
<td>Community structure, relationships</td>
</tr>
<tr>
<td>Boundary crossing connectivity</td>
</tr>
<tr>
<td>Co-created change, leadership as a system</td>
</tr>
<tr>
<td>Applied learning focus</td>
</tr>
<tr>
<td>Socially supported learning, story</td>
</tr>
<tr>
<td>Dynamic, multiple, transient</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>COMMAND CONTROL OPERATING SYSTEM</strong></td>
</tr>
<tr>
<td>Extrinsic motivation to enact mission &amp; vision</td>
</tr>
<tr>
<td>Authority structure, transactions</td>
</tr>
<tr>
<td>Division and hierarchy</td>
</tr>
<tr>
<td>Top-down change, leadership as a linear</td>
</tr>
<tr>
<td>Execution focus</td>
</tr>
<tr>
<td>Strategy, metrics, reporting</td>
</tr>
<tr>
<td>Structure, single, permanent</td>
</tr>
</tbody>
</table>

*“CBIS Framework” by [L.Sharp](https://example.com), adapted in part from [J.Kotter](https://example.com), is licensed for open sharing and adapting under Creative Commons*
Idea Flow Requires Understanding the Idea Life Cycle and Matching Each Phase to the Right Operating System

**Sensing/Investigate** New Ideas

**Purpose/Intention**

**Champions**

**Piloting** and Learning by Doing

**Collaboration/Group Intelligence**

**Capacity Building**

**Social Learning/Peer Influence**

**Pivoting**

**Pitching**

**Invitation/Permission** to AOS to Explore

**Resourcing** AOS

Piloting/Stakeholder Engagement

**Alignment** with Business, Strategy, Politics etc.

**Risk Assessment**

Implementation Strategy

Approval

**Execution** & Scaling

“Idea Flow - Common Phases in the Life Cycle of Ideas” by L.Sharp, is licensed for open sharing and adapting under Creative Commons
SHIFT FROM ORGANIZATIONAL STRATEGY

TO PERSONAL SKILLS THAT ENABLE CHANGE
NOW YOU NEED A TOOLKIT
COMMUNICATION TOOLKIT

ACTIVE LISTENING
INTEREST BASED DIALOGUE
STAKEHOLDER ANALYSIS
BARRIERS
INFLUENCE
CHANGE MANAGEMENT
Lewin Force Field:  DRIVING  RESISTING
**Stakeholder Mapping**

1. Looks for market niche
2. Looks for city priorities
3. Initial Meeting between project team and officials from zoning, BRA urban planning and the BRA assigned project manager who represents BRA economic Development
4. Developer devises a snapshot of possibilities
5. The Developer creates an initial concept
6. Informal introduction to influential groups
7. Issue Letter of Intent with BRA
8. Further Development of Concept into a Pro Forma
9. Developers seek Funding from a number of different institutions

**Barriers and Opportunities For Green Development**

- A green circle denotes a point influence to the design.
- A dark blue circle indicates a key stakeholder.

**Barriers**

1. The process at this stage is very fragmented. There is not yet a clear process and the design team has not been fully assembled. Developer relies on input from critical design team members who may not be aware of early stage intervention strategies.
2. Feasibility and profitability analysis does not include life cycle considerations, or benefits of sustainable strategies that are ‘out of the box’ thinking and achieve biggest gains.
3. A collaborative, integrated design process is not typical practice, and negatively impacts the outcome driving up cost and inefficiencies.

**Opportunities**

4. The Health benefits of green buildings can generate significant market demand.
5. Property owners that commit early on to a collaborative process and green strategies can capture capital cost savings.
6. The Mayor and City are strongly supporting the green initiative and taking a leadership role.
7. The Review process (and other potential BRA/ City involvement) is an opportunity for early coordination and collaboration to explore green strategies.
8. Green design language can be included in any RFQ/RFP.
9. There are many current programs and activities in various city departments that can support green development and job creation, affordable housing and healthy communities.
Stakeholder Mapping

? Who are the relevant decision makers?
? Who are the chief influencers?
? Who are affected by?
PSYCHOLOGY OF INFLUENCE – R. CIALDINI

- Reciprocity
- Scarcity
- Authority
- Social Proof
- Commitment & Consistency
- Influence
Positions vs. Interests

Positions are what people say they want from each other:

"I want to cut the up-front construction costs and just do what we’ve always done in the past."

Interests are why they want what they say they want.

1. I’m short on cash;
2. I want to maximize my profits;
3. I want to minimize risk;
4. I want my boss to be happy with my work."

Set your goals based on your interests, not your positions. During the interaction with the other person, strive to understand and satisfy the other person’s interests.
COMMUNICATION SKILLS

The Listening Triangle

LISTEN FOR INTERESTS

ASK OPEN-ENDED QUESTIONS OR SHORT PROMPTS

REFLECT THOSE INTERESTS BACK TO THE SPEAKER
Let’s be intentional about the future we build

Success has three ingredients:

Strategy
Communication
Change Management

Image: Scientific American 9/06
THANK YOU

THE FUTURE IS IN OUR HANDS

bb@sustainable-performance.org
More free resources!

Resources & Tools: www.sustainable-performance.org
Community: LinkedIn – SPI Leadership Circle group
Blog: www.sustainable-performance.org/blog

Not free: Assessment, Consulting & Certification