OE Project Charter

Project Name:	Energy Management: Marketing and Outreach
Prepared by:	Lisa McNeilly
Date (MM/DD/YYYY):	July 25, 2011

Project Charter Version History:		
Version	Date (MM/DD/YYYY)	Comments (Draft, Signed, Revised – current status)
1.0	July 25, 2011	Draft w/ VC Denton comments included
1.1	11/02/2011	Proofed/edited

Document Purpose

The Project Charter documents the formal understanding between the Project Sponsor and the Project Manager/Team, including the definition of success for the project.

Once approved, the Project Charter communicates the current agreement between the Project Sponsor and the Project Team throughout the lifecycle of a project. The Charter provides a high-level overview of the project, including the definition of project success and project resource (people and funds) requirements.

Requests and additions to the project scope are considered "out-of-scope" for the current project. When a scope addition or change is required, a scope change request will be prepared that includes an impact analysis of project cost, resources, schedule, and risk. The Project Sponsor will formally approve the scope change request, if appropriate.

The project manager will retain additional documents that provide detail on the management of the project, including a communications plan, an issues log, a risk log, a change management plan, a budget, and a work schedule.

Review & Approval		
The Project Sponsor signature indicates approval of the Project Charter, and authorizes the Project Manager/Team to use identified resources to proceed with the detailed planning and execution of the project; using this charter as guide		
Project Sponsor(s) Name	Signature	Date
VC Edward Denton		

A. Case for Change

UC Berkeley does not use energy as efficiently or as wisely as we could. Energy services – like heating or lighting – are too often managed as if energy is "free," a scenario that encourages waste. As the design team investigated the current state of campus energy funding and use, identified opportunities and looked at best practices, our team realized that to truly create a sustainable energy savings plan, we needed to:
- better monitor buildings and energy usage and fix problems more quickly
- provide support to campus units and individuals so that they could save energy
- share some of the incentives to save with campus units
- craft new policy that supports this effort.

With little central control over the use of energy resources and robust research programs to support, energy use is based on many factors and decisions/activities by individuals across the campus community. To date, the lack of cohesive, comprehensive guidance on those areas that influence energy use has meant that decisions around building systems and procurement standards are guided by basic compliance and not performance.

While there are numerous initiatives in individual buildings led by faculty, staff, and students, there is **currently no comprehensive campaign to motivate individual behavior change to reduce energy**. The impact of these individual campaigns can be large. For example, the Green Campus program holds Blackout Battles each semester in the residence halls where the winning building has reduced electricity usage by as much as 16%. However, these savings have been difficult to sustain when the campaign is over and are not replicated campus-wide. *Motivating individual behavior change is also complicated by the fact that most people on campus do not know how much energy is used in their buildings.*

(Source: Design Phase ENERGY Business Case v9)

B. Purpose

The Marketing and Outreach project addresses one of the four main recommendations of the design team: Emphasizing **individual actions** through campus outreach.

Initiate campus 'Save Energy' outreach campaign – Individual behavior change is at the heart of the Incentive Program. Our success will be related to how well we communicate with the campus and convince people to make needed and permanent changes. The goals of the outreach campaign are to make energy usage more visible; create tools and share ideas on ways to reduce energy; create interesting, compelling, and consistent messages; establish social norms around using less energy; and maintain the messaging over time.

C. Results

#	Success Measure
1	*Reduce total campus and auxiliary energy usage (estimated run-rate savings by FY13-14: $700,000)*
2	*Provide relevant information to stakeholders, as measured by website hits*
3	*High OU participation rate*

D. Scope

The focus of the Marketing and Outreach project is to develop, launch, and maintain a campus-wide campaign on energy reduction. The campaign will be accompanied by an incentive program for Operating Units, which will be managed by a separate project (the Energy Office). The Marketing and Outreach campaign will cover most campus buildings and occupants, although some elements will at least initially target larger, main campus buildings. Key elements include:

- Develop a campaign name, visual identity, website, and marketing plan (with a contracted marketing consultant).
- Include competitions, energy audits, resources on how to reduce energy usage, and other information to help OUs participate in the program.
- Ensure adequate and on-going resources and staff to support the campaign.
- Introduce concept that "energy is not free."
- Coordinate with the OE Procurement and IT teams to make energy efficient equipment easier to purchase. Power management software – that can power down equipment after hours – may be better supported by the distributed desktop support under consideration by the IT team.
- Provide a clearinghouse and resource for all outreach efforts and service learning opportunities, including those currently underway by students and other campus groups.
- Communicate with stakeholders on all aspects of the EMI.

E. Project Constraints & Assumptions

#	Name
1	Assumes that Energy Office and Incentive Program are implemented. Installation of all proposed meters and related software complete at beginning of outreach campaign, requiring a high level of project coordination with other elements of the EMI.
2	Demand for energy audits and other resources may sometimes be greater than supply.
3	Assumes that decisions from procurement and IT teams (that affect the energy saving potential for Operating Units) are finalized in time to be included in initial outreach materials and campaign.
4	Without the buy-in and participation of OUs, energy savings will not reach estimated levels.

F. Project Milestones & Deliverables – Details may change upon completion of final workplan

Milestone	Deliverables	Date
Implementation team fully staffed	Hire an outside consultant, a Communications Coordinator, and students	Consultant: July 2011; Staff: Summer-Winter 2011
Formalized working relationship with Energy Office	• Draft and execute an MOU between PP-CS and the Office of Sustainability • Establish identity and branding for Energy Office	Summer 2011
Marketing plan and materials developed	• Create website for overall program that can also provide users information on building and/or Operating Unit usage • With Energy Office, develop format for energy "usage records" for OUs that clearly	By initial launch: Oct/Nov 2011

	show monthly usage (in total and relative to established baseline) • Establish a visual identity • Develop one-pager and other tabling materials • With Energy Office, identify and develop strategy for OU Energy Stewards	
Energy audits conducted (with Energy Office)	• Develop strategy for providing building-level information on energy-saving potential • Work with students and student groups to formalize audit protocol, document past building audits, and develop schedule for remaining buildings • Work with building and OU Energy Stewards and building occupants to speed adoption of recommendations	Initial set of buildings: by initial launch (Oct/Nov 2011); on-going
Initial launch	Host a large, roll-out event to introduce Energy Manager, incentive program, and outreach to initial buildings	Oct/Nov 2011
Campaign rolled-out to all buildings	• Schedule of buildings established and mini-launch events held at each • Ensure a presence at major events (CACS Summit, Staff Appreciation Day, CalTopia)	Nov 2011 – on-going

G. Impact Statement

1 – Low, 3 – Medium, 5 –High

Potential Impact	What and Who is Impacted	Rating (1-5)
Students	Minimal behavior changes around energy usage will be voluntary.	1
Staff	Minimal behavior changes around energy usage will be voluntary.	1
Faculty	Minimal behavior changes around energy usage will be voluntary.	1
Energy Stewards	Will be asked to help implement some recommendations, but their workload will likely vary by Operating Unit and building. Will be designated by OUs.	3

H. Finance Description

The project will require $510,000 in OE funding, although some of this funding may be covered through centrally captured savings. Expected run-rate savings (including both centrally-capturable savings and those accruing to Operating Units) is expected to be $700,000 per year. These numbers may change if any major program changes occur.

I. Risks

Risk	Mitigation Strategy
Risk that participation may be too low, especially if completely voluntary.	Operating Units will be asked to designate contacts and set goals early in the process, and regular feedback will be given.

Risk that program is perceived as not fully successful, given anticipated increases in cost of energy and growth in new buildings.	Assessments of the initiative and presentation of metrics will be able to separate the impact of the initiative from these known increases. Successes will be widely advertised, along with cumulative impacts.
Risk that financial savings will not be a sufficient motivator of significant change (especially for smaller units).	Extensive marketing and outreach campaign planned, which will draw from established social marketing research. Outreach will include information on the cumulative savings.
Risk that some savings/avoided costs may be lost to induced demand and that constant reinforcement of behaviors may result in the attenuation of learned behaviors over time.	Intermittent rewards will be considered and a varied menu of incentives and messages will be sequenced.
Efforts need to be coordinated with that of the IT and Procurement teams especially, in order to deliver consistent and clear messages around possible energy savings.	Since the recommendations of the Procurement and IT teams are not yet final, a coordination plan will be developed in implementation phase. It is not expected that there will be any additional costs associated with the coordination. Instead, the marketing and outreach documents will accurately reflect the new systems.

J. Communication

Highlight the communication requirements between the Sponsor, the Key Stakeholders and the Project Team, including the frequency of check-ins, project reviews, and status reports (in person and written).

- Project Managers: Will meet bi-weekly to coordinate work and will share status reports.
- VC, Facilities Services: Regular meetings with Project Managers for project review.
- Steering Committee: TBD
- Project website: Will be used to share information with a broader audience and will be updated regularly
- Newsletter/ad hoc electronic communications: Will be used to share project status with key stakeholders and others on campus.
- Operating Units and Energy Stewards: Regular communications (electronic and in-person) will occur with the Energy Office and the Office of Sustainability.

Appendix A - Project Roles & Responsibilities

Describe the roles and responsibilities of the project participants.

*The **Project Sponsor** has ultimate authority over the project. The sponsor provides resources, helps resolve escalated issues, approves scope changes, approves major deliverables, and provides high-level direction.*
Name VC Edward Denton

*The **Functional Owner** is responsible for managing the impact of the project within their functional area. Their responsibilities include ensuring agreed-upon project tasks and deliverables are completed, incorporating the views of their customers, providing functional expertise in a particular area, articulating requirements, and working to ensure that business needs are met.*
Name Lisa McNeilly (coordinating with Chris Christofferson/Energy Office)

*The **Project Manager** leads the team in planning and implementing the project from initiation to closure. Their responsibilities include scope and change management, keeping the project plan current (deliverables, schedule, and resources), issue and risk management, maintaining project documents, reporting project status, and facilitating conflict resolutions within the project and between cross-functional teams.*
Name Lisa McNeilly

*The **Project Steering Committee** includes key stakeholders and subject matter experts. The steering committee provides guidance on key issues.*
Name TBD (will share with other two Energy Management projects)

*The **Subject Matter Expert (SME)** provides expertise on project elements including business process and current or new technical solutions. Their responsibilities include maintaining up-to-date experience and knowledge on the subject matter, validating recommendations, and providing advice on what is critical to the performance of a project task.*
Name AVC Christofferson, Judy Chess, Sara Shirazi, Karl Brown, others TBD

Name	Roles
*The **Team Members** responsibilities include understanding the work to be completed, completing the research, data gathering, analysis, and documentation. They inform the project manager and team members of issues, scope changes, risks, and quality concerns. They also proactively communicate status and manage expectations.*	
Kira Stoll	Marketing and Outreach
Christine Shaff	Communications for all three EM projects
Student lead	Outreach

Appendix B - Key Terms & Definitions for this Project Charter

Define key terms unique to this Project Charter.