

**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

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Cleveland, Ohio

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**Facilitator CV: Judson A. Kline, AIA, LEED AP, ISP,**  
**Work Experience**

Partner and Sr. Vice President Herschman Architects, Inc. Focused in developing retail stores and Shopping Centers: the firm has been in practice for nearly 35 years, licensed in 48 states, wide variety of retail and shopping center clients, provide all A and E services 33 years at Herschman Architects. Prior experience with Richard L. Bowen Associates, Dorsky Hodgson Partners, Ballard HT Kirk Assoc., Bialosky Partners, Wilson Assoc. and the Austin Co.  
Instructor Kent State University College of Architecture and Environmental Design

**Education, Professional Background and Community Service**

Miami University (Oxford, Oh) Bachelor of Architecture  
Architecture Assn (RIBA, London, GB)  
Masters of Engineering Program Case Western Reserve University  
AIA (past president Cleveland Chapter), State Secretary (Cleveland)  
NCARB Certification-licenses in 11 states;  
Member ICSC,  
Chairman of the Board of Trustees John Hay High School of Architecture and Design (CMSD)  
Rotary Club of Shaker Hts., Oh (past president)  
Member of Orange Village, Oh. Planning and Architectural Review Bds.  
Greater Cleveland Real Estate Organization (President 2006)  
Past Member of the Park Synagogue Board of Trustees  
Greater Cleveland Boy Scout Council Eagle Scout Court of Honor Committee

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Challenging** times create unique opportunities to develop and leverage our knowledge and skill set in building a more sustainable future. This workshop will look at how architects can regain the leadership role in producing more sustainable projects by developing both internal and external business models to deliver the services needed to achieve this objective. Through a presentation designed to offer a pathway to this goal, architects can gain insight into developing practice areas where they contribute to building the preferred future and at the same time help themselves survive to meet that future. During the course of the program, we will consider:

- Where the market is in sustainability
- What are the challenges
- Where do opportunities occur to pursue the market
- How do we develop a strategic approach

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### The Heron

By  
Deng Ming-Dao

Heron stands in blue estuary,  
Solitary, white, unmoving for  
hours.  
A fish! Quick avian darting; The  
prey is captured.



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### Agenda

- Introduction and demand for a strategy
- Listing of the actionable ideas in sustainability
- Discussion of each idea
- Wrap up, conclusions, Q and A

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**HSW Topics:**

- Environmental Analysis
- Sustainable design

**Learning Objectives:**

- Learn where sustainable market place is heading
- Recognize the challenges and obstacles to entry
- Develop an understanding of the opportunities presented in building a more sustainable business
- Learn how to leverage assets in building a strategic approach

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Challenging times create unique opportunities to:**

- Develop knowledge and skills
- Build internal and external models for the delivery of new services
- Promote sustainability as a pathway to a preferred future
- Recapture the role of project and community leaders through the knowledge domain of sustainability
- Contribute to the quality of life in our communities
- Survive the economic downturn



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Where is the market headed and how do we recognize the opportunities it will present?**

- Over the last few years business, communities and people have become highly sensitized to the need to be more sustainable
- With the downturn in the economy sustainable business, products and development is seen as a means to re-vent the economy
- The number of LEED AP's has jumped and we are seeing them in all areas of endeavor
- This is a knowledge domain we understand and can lead
- Mayor Jackson of Cleveland recently convened a "Sustainable Cleveland 2019 Summit" to leverage the creativity and knowledge of northeast Ohio to develop strategic initiatives to change the business environment of the region



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**I have these 15 ...oops 10 Commandments**

**The Ten Actionable Ideas**

- 1 Implementing sustainable building feasibility
- 2 Development of sustainable products library to become a knowledge resource
- 3 Educating staff on products, theory and strategies
- 4 Assisting clients and communities with education programs and pro-bono services to develop credentials and legitimacy
- 5 Supplying case studies for promotion
- 6 Transforming our organizations and our clients
- 7 Energy modeling
- 8 Advising communities through services-guidelines, knowledge resource and consultation
- 9 Managing LEED certification/commissioning
- 10 Supporting internal operational changes

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**The Ten Actionable Ideas**

**IDEAS TEAMS**  
שכונת אידעו

- Build your teams
- Task the teams
- Support the teams
- Build capacity

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Implementing Sustainable Building Feasibility:**

- Making the decision
- Collaborative process
- The low hanging fruit
- Knowledgeable resources
- Convening the team
- Herding the cats

**"to be or not to be...sustainable"**

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### 1. Implementing Sustainable Building Feasibility

- Define the Services, objectives and activities:
  - Determination of client and project values
  - Identify project parameters
  - Identify project opportunities
- Determine the internal resources required:
  - Develop documentation tools
  - Educate and staff who will provide the service on protocols
  - Establish a methodology and cost spectrum
- Identify external resources needed:
  - Identify client support team
  - Support consultants and strategic partners

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### 1. Implementing Sustainable Building Feasibility

- Determine the service providers:
  - Identify appropriate staff to deliver the services
- Ascertain the value to clients:
  - Recognize the stakeholders the client responds to in setting the guidelines for the endeavor
- Establish the benchmarks for achieving the goals:
  - Production of cost benefit analysis for a project based upon recommended action plan
  - Deployment of the plan
  - Attainment of project goals established at the outset

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Development of sustainable knowledge resources**

**Building the library**

- Assign a librarian
- Connect with manufacturers and representatives
- Use lunch and learn as a vehicle
- Promote your library to clients, consultants and builders
- Collect reference documents
- Manage and catalogue material
- Create a virtual library as a directory within office system



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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**2. Development of a sustainable products library to become a knowledge resource**

- Define the Services, objectives and activities:
  - Determine values for internal and external services the library could facilitate
  - Identify opportunities this would facilitate
- Determine the internal resources required:
  - What technologies would be needed for support
  - Identify management of materials
  - Determine protocols for the library (labeling, categorizing)
- Identify external resources needed:
  - Make connections with resources (vendors, manufactureres and contractors)
  - Academic resources (local colleges and institutions)

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**2. Development of a sustainable products library to become a knowledge resource**

- Determine the service providers:
  - Identify in-house librarian coordinator
  - Assign tasks and responsibilities to multiple staff
- Ascertain the value to clients:
  - Support educational programs
  - Knowledge development
  - Research to support client value decisions
- Establish the benchmarks for achieving the goals:
  - Goals for attainment
  - Goals for services that can evolve from having the resource

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**Building the team**

- Legitimacy through knowledge
- Training staff to deliver the message on green building, LEED and Energy Star
- Develop powerpoints of
  - Case studies
  - System examples
  - Best practices
- Develop handouts
- Study and take LEED exam
- Develop speaking and presentation skills with in-house practice
- Tours

**Educating staff on theory, product and strategies**



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### 3. Educating staff on products, theories and strategies

- Define the Services, objectives and activities:
  - Educate staff to provide clients how to understand and pursue sustainable building strategies
  - Provide LEED, Energy Star and other green building educational programs
  - Promote tours of local projects to gain practical application
  - Identifying best practice approaches to process and projects
- Determine the internal resources required:
  - Development of collateral materials
  - Develop handouts to support educational programs
  - Develop marketing material for promotion
- Identify external resources needed:
  - Connections with manufacturers and reps
  - Connections with agencies, organizations and institutions

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### 3. Educating staff on products, theories and strategies

- Determine the service providers:
  - In-house staff LEED APs with good speaking and presentation skills
  - Marketing staff to promote external educational programs
  - Develop strategic external partners
- Ascertain the value to clients:
  - Enable clients to recognize the value of sustainable practice
  - Appreciate the value added to client endeavors
- Establish the benchmarks for achieving the goals:
  - Produce a demand for sustainable services
  - Producing multiple programs for clients, communities and other constituencies

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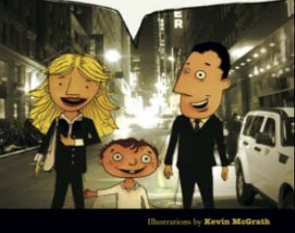
### Building legitimacy

- *petio principi* (a simple principle: to get a project you need experience and to get experience you need to do a project)
- Look for opportunities to assist an existing client, a community group or a NFP.
- "Do good, do well and win"\*

\*Brown Flynn Advisors

Assisting clients and communities using *pro bono* services to build legitimacy

Epic Careers By Inspiring Parents  
**MOMMY AND DADDY DO IT PRO BONO**  
 4  
 Written by Kara and Aaron Hurst



Illustrations by Kevin Muehrath

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**4. Assisting clients and communities with education programs and pro-bono services to develop credentials and legitimacy**

- Define the Services, objectives and activities:
  - Offer educational programs for clients organizations and communities to advance their goals for sustainability
  - Offer evaluative services to assist these entities in identifying opportunities and alternatives
  - Assist in helping to define sustainable strategies for clients, communities and agencies
- Determine the internal resources required:
  - Develop documents to define scopes for projects and services
- Identify external resources needed:
  - Clients and communities mission and strategic plans
  - Community master plan and vision statements
  - Legal, accounting and management resources to assist where these are needed

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**4. Assisting clients and communities with education programs and pro-bono services to develop credentials and legitimacy**

- Determine the service providers:
  - Engineering service providers
  - Architectural LEED APs
  - Clerical staff
- Ascertain the value to clients:
  - Enable these entities to pursue a strategy for sustainability
  - Establish the basis for value driven decision making
- Establish the benchmarks for achieving the goals:
  - Requested as a resource to pursue programs and projects
  - Facilitate an established number of programs

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**Developing Case Studies to promote application**

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**Building a data base and validate Sustainability**

- Seek opportunities to mine your own fields of information and resources
- Find projects or colleagues who have produced projects to investigate
- Produce data gathering forms
- Develop reports to handout to clients
- Find existing documentation to support the case

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**5. Supplying case studies for promotion**

- Define the Services, objectives and activities:
  - Development of specific case studies comparisons of LEED or Sustainable vs. standard approach projects
  - Development of a series of analysis “op ed” pieces for use in promoting sustainable design
- Determine the internal resources required:
  - Identify project study opportunities within practice domain
  - Develop the case studies for presentation
- Identify external resources needed:
  - Identify potential partners who could assist in developing the analysis and could use the product for promotion
  - Target client projects and engage them in the program

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**5. Supplying case studies for promotion**

- Determine the service providers:
  - Architectural and Engineering LEED APs
  - Outside consultants where required
  - Utility and building performance information
- Ascertain the value to clients:
  - Value is in the potential bust the myths of negative cost/benefit
  - Result in the means to produce ongoing and effective sustainable development projects
- Establish the benchmarks for achieving the goals:
  - Based upon engagement demand creation
  - Target a number of clients or projects to produce

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

<p><b>Building commitment</b></p> <ul style="list-style-type: none"> <li>• Work with existing clients to assist in linking corporate missions to sustainable goals</li> <li>• Facilitate value analysis to align policies and practices</li> <li>• Develop programs to provide training on sustainable practices consistent with corporate mission</li> <li>• Provide council to management on trends and changes</li> <li>• Assist in producing assessment tools and resources</li> <li>• Research new clients to find potential opportunities to promote the journey where there is interest</li> </ul>	<p><b>Transforming organizations and clients</b></p> <p><b>6</b></p> 
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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**6. Transforming our clients' and our own organizations**

- Define the Services, objectives and activities:
  - Working with clients to link the corporate mission to appropriate sustainable goals
  - Support value analysis to align policy and practices
  - Develop training regimens
  - Identify clients to promote opportunities to guide the journey
- Determine the internal resources required:
  - Collateral training material tailored to the client's program
  - Staff with good interpersonal skills to assist client
  - Promotional material
- Identify external resources needed:
  - Training facilities
  - Third party resources who can provide examples

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**6. Transforming our clients' and our own organizations**

- Determine the service providers:
  - Professional staff trained to lead and facilitate the process
  - Administrative staff to produce documents and tools
- Ascertain the value to clients:
  - In order to understand why to pursue sustainable building strategies, clients must be committed to the mission. The process of transforming culture will result in the desired commitment
- Establish the benchmarks for achieving the goals:
  - Engagement as an outside resource to lead sustainability programs for clients
  - Engaged to coordinate activities resulting from an action plan
  - Engaged to monitor and track practices and policies of the client

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

<p><b>Building a value structure</b></p> <ul style="list-style-type: none"> <li>• Work with existing clients to assist in analyzing existing facilities for performance</li> <li>• Document development           <ul style="list-style-type: none"> <li>◦ Internal documents for analysis</li> <li>◦ External documents to provide client resources</li> </ul> </li> <li>• Benchmark client activities through engineering services</li> <li>• Team with accountants to provide energy tax credit resources</li> <li>• Where firms do not have in-house engineering build strategic relationships to provide services</li> <li>• Develop and promote performance analysis services</li> </ul>	<p><b>Energy modeling and management</b></p> <p style="text-align: center; font-size: 24px; font-weight: bold;">7</p> 
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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### 7. Energy modeling

- Define the Services, objectives and activities:
  - Performance analysis for client facilities
  - Assist tax credit application process
  - Pre-design service to promote energy use based design
  - Determine total occupancy cost
- Determine the internal resources required:
  - Analysis documents
  - Training on energy software
  - Energy software
- Identify external resources needed:
  - Strategic partners to help promote the service
  - Access to hardware and software to support audits
  - Strategic opportunity to promote the services

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### 7. Energy modeling

- Determine the service providers:
  - Internal engineering staff to produce services
  - Business development staff to promote services
- Ascertain the value to clients:
  - Performance value to determine operational savings
  - Provide information on which to base value design decisions
- Establish the benchmarks for achieving the goals:
  - Contracts to provide the service
  - Resource of data to support savings potential

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

### Advising communities



**8**

**Orange Goes Green Certificate**

**Whereas:** the Village of Orange desires to provide an improved quality of life for its citizens through providing a sustainable future for the community by:

- reducing the community's carbon footprint;
- providing a positive example of sustainable development and building code compliance opportunities for buildings;
- increase the energy efficiency of buildings and homes constructed and renovated;
- improve the density and the community environment.

**Hereby:** certifies a participant for projects and savings in meeting the standards and guidelines set forth by the Village.

**Be it Resolved:** the Mayor and Council of Orange Village Recognize:

in meeting the requirements and standards of Orange Village in achieving sustainable planning, development or building of:

Are hereby certified as the Orange Goes Green

Mayor, Kathy G. Stubbins, Mayor      President of Village Council

Date: \_\_\_\_\_

### Becoming a knowledge resource for communities

- Connect with community planning and building departments to offer support in the development of standards, policies and guidelines
- Building a reputation through service
- Offering assistance in developing community awareness
- Facilitating sustainable building visioning for community projects
- With communities considering design-build delivery options providing consulting services to define, facilitate and monitor sustainable building

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**8. Advising communities through services, guidelines, knowledge resources and consultation**

- Define the Services, objectives and activities:
  - Assist communities as a knowledge resource in pursuing sustainable guidelines, policies and standards providing consultant services
  - Supporting community awareness programs as an outside speaker
  - Provide services in establishing sustainable design criteria for specific projects
- Determine the internal resources required:
  - Staff with personal and professional acumen to facilitate the service
  - Collateral material and forms to be used to facilitate the services
  - Promotional material to develop contacts and relationships
- Identify external resources needed:
  - Determined based upon specific needs

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**8. Advising communities through services, guidelines, knowledge resources and consultation**

- Determine the service providers:
  - Architects and engineers capable of acting in advisory capacity, likely senior staff with LEED experience and knowledge
- Ascertain the value to clients:
  - The service will enable communities to move forward on sustainable agenda
  - Will provide community resources to provide testimony and action in developing sustainable projects within the community being served
- Establish the benchmarks for achieving the goals:
  - Engagement as an outside resource by communities

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**Managing Leed Certification**

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**Building a practice**

- Support and manage LEED certification process
- Provide review and analysis of documents prepared by third parties
- Interface between stakeholders
- Monitor progress
- Coordinate commissioning process
- Strategic partnerships are useful to develop opportunities (engineers, architects, attorneys, consultants)
- Become knowledgeable of LEED software and resources
- Hold practice and training sessions for staff who may be engaged in the certification process

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**9. Managing LEED certification and commissioning**

- Define the Services, objectives and activities:
  - Support and manage LEED Certification process
  - Provide review and analysis of documents prepared by third parties in the development and building process
  - Coordinate commissioning
- Determine the internal resources required:
  - Development and use of standardized documents
  - Training and updates on LEED categories
  - Support staff to produce documents
  - Software to manage and maintain the information
- Identify external resources needed:
  - Contacts and consultants where necessary to guide the team
  - Training on software for management and modeling

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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**9. Managing LEED certification and commissioning**

- Determine the service providers:
  - Architect and engineer LEED APs
  - Interior Designer LEED APs
  - Administrative and support staff
- Ascertain the value to clients:
  - Clients seeking LEED certification recognize the value proposition this service offers
  - Commissioning process offers a higher level of performance in punch listing a project identifying system issues before they emerge
- Establish the benchmarks for achieving the goals:
  - Producing LEED certified projects (identify a target number)

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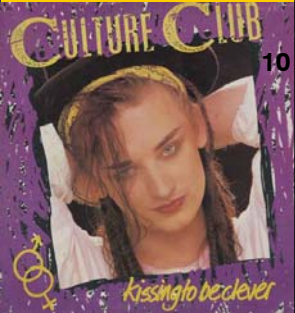
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**Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times**

**Building enthusiasm and Internal buy-in**

- Often the most challenging requires commitment to new habits
- Promote sustainable behavior
- Begin small and work upward
- Buddy system one-on-one is the best means to influence others
- Identify "Jiminy Cricket"
- Time to be a catalyst for change
- Identify core values
- Corporate exercises can be the means to create buy-in
  - dumpster dive
  - energy audit
  - sustainable procurement
- Share the knowledge with other firms teaching produces learning

**Supporting a changing culture and operation**



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**10. Supporting internal operational changes**

- Define the Services, objectives and activities:
  - Business strategy
  - Operational strategy
  - Culture strategy
- Determine the internal resources required:
  - Collateral literature and documents to promote change
  - Process for encouraging change implementation
    - Dumpster dive, sustainable procurement analysis, energy analysis
    - Policy programs
- Identify external resources needed:
  - Outside consultants and resources

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**10. Supporting internal operational changes**

- Determine the service providers:
  - Staff
  - Internal champions
- Ascertain the value to clients:
  - You need to walk the walk if you are going to talk the talk
  - Practice as an example
- Establish the benchmarks for achieving the goals:
  - When culture and practice achieve alignment

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Implementation: Look for the low hanging fruit.....**  
 Determine which of the tactics proposed can be achieved with the least effort then build to the more challenging



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Implementation: Developing the Strategy**

- Determine the champion who will lead the charge
- Set goals that make sense for the organization based upon firm knowledge, experience, market, skills and competencies
- Identify the resources:
  - People (build a team)
  - Financial (identify budget tailor the effort)
  - Collateral resources (material & technologies)
- Create the plan
- Assign tasks
- Identify value potential (clients, colleagues, etc.)
  - Tailor the message to the audience
  - Develop actions of value to the audience

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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Implementation: Developing the Strategy... Creating the Battle Plan**  
 build tactics for each of the action steps chosen to pursue



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Implementation: Begin by identifying a Champion who will lead the charge.**



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

Implementation: Identify the value proposition and resource requirements for each strategic tactical area



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

As the Heron is poised to respond to the opportunities that present themselves, we also need to be prepared to act with confidence and skill when the conditions are right.



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Ten Actionable Ideas to Implement Sustainability in Difficult Economic Times

**Conclusion:**

- The market and our world has changed significantly
- Architects possess a knowledge domain that is of value in managing the shift
- We need to form our own IDEAS TEAMS
- Identify our agendas and our capabilities and seize the moment



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