

GROUP PROJECT ASSIGNMENT OVERVIEW

You are to work in teams that address a current issue pertaining to implementation of sustainability. These are not case studies but rather real-time and live issues in the field. Your solutions will be sent to actual people in the field who are in key positions to make changes. A detailed description of the project is in the appendix.

Deliverables: a 10 page proposal to the client and a 15 minute pitch / presentation of your proposal.

Timeline:

- 1/28 The project will be explained in class
- 1/30 Choose your team and project topic
- 2/27 First project update due (one page progress report and plan going forward)
- 4/8 Second project update due (one page progress report and plan)
- 4/28 Written proposal due by 5pm
- 4/29 Presentations

Grading Criteria: You will be judged based on the following criteria: (1) potential for impact; (2) feasibility of impact (in other words, similar to cost/benefit, what is the impact for the amount of time/resources needed to be invested); and (3) following the below criteria of what needs to be included in a successful proposal.

Proposal:

A successful proposal will have the following elements:

1. *Project statement.* One of the most important yet overlooked aspects is clearly defining your (1) challenge and (2) your overall project mission. Often, the work is perceived to start with figuring out the “how”, but actually it begins with clarity around the “what” and “why”.
2. *Methodology.* Explain how you come up with the recommendations, how your analysis was conducted, and other relevant information about the process you used.
3. *Recommendations for lasting change.* Provide an overview of recommendations as well as an outline of major activities. Do not simply list generic statements but rather put yourself in the shoes of the client. Keep in mind that the recommendations and actions need to be “sustainable” also in terms of resources (time, money) for the client.
4. *Learning.* What did your team learn from this project that can be transferred into your future work and personal lives? Please go beyond the content to focusing on the process. In other words, how can you use a similar process learnt in this class to address other issues in your future work in life. Every organization will have its own social and environmental issues that are unique to the organization depending on its strategy and core competencies. Therefore, there is no “cookie cutter” method to integrating sustainability or social responsibility. But there are certain guiding principles that can be employed. So in summary, please state (a) what you learnt

from this project that you can apply to your future work and personal life as well as (b) at least 3-5 principles for implementation.

5. *Appendix*. Include any other relevant information in the appendix including your interview protocols.

Page limit: 10 pages single-spaced total (including cover page, diagrams, graphs, etc.). An appendix may be added and that will not be counted towards your total of 10 pages.

Interviews:

One of the most important factors that will lead to success is proper research. A valuable source of information on how to change behavior is to interview those whose behavior you are hoping will change. A recommended methodology is to use the Appreciative Inquiry methodology which examines the core competencies of a system and its strengths so that you can build on them. It also is a way of asking what has worked well in the past that we can build on. For example, if you want to implement behavioral change around sustainability, you do not need to only ask questions about sustainability but can also find out what has worked well in creating behavioral change in the past. To guide you in the interview process, you can use the following documents on Concourse:

- Interview Template (fill out after interview)
- Interview Tips
- Interview Guide – although this guide is meant for your other assignment (Case Studies and Interviews), the questions in the guide might give you ideas for questions you can ask in your own interviews

General advice:

- Start on time! The one mistake which most teams make which leads to a lower grade is that you start too late. If you start late, then you have no time to do a proper consulting project but instead it ends up being more superficial, looking like a typical paper with nothing much new offered that we already didn't know.
- Especially be careful about scheduling interviews. Quite often people will cancel or postpone scheduled interviews. So make sure to start as soon as possible. You have very little buffer time due to the duration of the course.
- Embrace ambiguity. This project is a reflection of what you will encounter working in the field. Often you will be presented with situations that are confusing and/or do not have one clear solution/answer. Often you will feel like you are "in over your heads".
- Keep in mind the difference between being an expert and a facilitator. The main goal is client success and not to make yourself look smart. Therefore, do not put pressure to have to come up with all the answers by yourself. Rather be a facilitator and find answers from others. For example, you can find out from clients and their stakeholders what has worked well in the past and why.
- Research: Do not reinvent the wheel. Find out what has been done not only by the client but also learn from other related initiatives around the world. Also, get to know as much as you can about the client.
- Feel free to contact the instructor if you have questions.

PROPOSED TIMELINE FOR GROUP WORK

How your group approaches the project is up to you. However, a frequent mistake made by groups is that they wait until too late which not only means that you have to scramble but it is extremely difficult to do high quality work due to the nature of this project. The project takes time for observation and immersion before coming up with a proposal. Therefore, the following timeline is proposed. Also, because classes are designed to help support your project work, below are suggestions on how to integrate class learning into your work.

Phase one (January 30- February 4)

- Choose your team
 - Identify your topic area / project challenge, especially your research questions
- Class learning – use class sessions on introduction to CSR and sustainability to help frame your topic area*

Phase two (February 4-18)

- Create action plan – be sure to schedule interviews ahead of time but also be careful to schedule once a little research has been done so you know who are the most effective
 - Research – learn as much as you can about your organization, its context, and topic area, including visiting site (instructions given in class as well as potential times)
- Class learning – use class sessions to further refine topic area to make sure that it is in the context of “finding the AND” as well as to craft excellent research questions*

Phase three (February 18-April 3)

- Interviews and observations
- Class learning - use learning from Design Thinker simulation to help with second phase of project, especially with observations, synthesizing learning, and ideation*

Phase four (April 3-10)

- Synthesize learning
- Class learning – use learning especially from how organizations implement sustainable value (e.g., base of the pyramid) to understand how your work can be integrated back into the organization*

Phase five (April 10-17)

- Ideation
- Class learning – use learning from class session on change to think of breakthrough change and results (i.e., strengths-based, scaling up, engaging the whole system)*

Phase six (April 17-28)

- Finalize proposal
- Prepare final presentations

Phase seven (April 29)

- Final presentations and sharing of learning

PROJECT DESCRIPTION

History of The State:

A brief historical description of both the theater and the work that has progressed to this point in its current incarnation is available at www.thestatesb.com. Our Facebook page has some fun photos, both old and new, at www.facebook.com/TheStateSB. My involvement in the theater stems from an innovative public-private partnership business plan contest called "Pitch Your Plan". There is a wealth of information [on this website \(http://dtsbpitch.com/\)](http://dtsbpitch.com/) about the building and its history.

Strategy and Key Goals of The State (straight from director, Drew Elegante):

My vision for The State is that it transforms into this pulse of what's "cool" downtown by not being afraid to try new things (not necessarily new to the world but certainly to the city) and helping to support and promote the musical, visual, and culinary arts scenes in South Bend. Part of that includes being a welcoming place that has the potential to become South Bend's melting pot for the surprisingly diverse community we have here. Another part of it is displaying leadership by being the first B-Corporation (triple bottom line) business in the downtown area.

To achieve this vision we will return the building to its roots as a vaudeville and movie house by offering a rentable venue for concerts, symposiums, poetry readings, gallery showings, weddings, etc... while also running some in-house programming for things like a "brew & view" where you can have a beer and some food while you watch a great flick. Overall we're looking for events that are catered to a more adult audience balanced with some fun events for the big college student population we have here at our 5 colleges/universities (30,000 plus students in the area).

With that long-term vision in mind there are several steps along the way that will help us get there. The first step for me was a critical evaluation of the structure and systems in the building to get a sense of project scope. Is the building going to fall over, which systems that we have now work, is there mold/asbestos/lead that needs to be dealt with. That is already underway and near completion. The next phase has two facets. The first is simply getting people in the door by identifying short-term safety and comfort solutions because buildings that have things going on in them tend to fare better than those that don't. This time is essentially R&D for us, identifying what works and what doesn't by hosting events with friendly audiences that can provide us with the feedback to make iterative improvements to our offering.

The second facet which follows from the first and is the one that I am very excited about you helping us with, is to try and bring modern, innovative solutions to bear against some of the big challenges we face here to create a solid plan we can use to guide our actions (and fundraising activities) moving forward. The major goal with this facet is to find ways

to keep our fixed costs low and do things in an environmentally friendly/sustainable manner.

Description of projects:

- I) **HVAC Systems:** We are left with a legacy system that was installed somewhere in the 1920's to provide for our heating and cooling needs. The system is currently inoperable and would undoubtedly be very inefficient if it could be turned on. Consisting of both forced air and radiant heat elements, this project will involve the evaluation of modern methods of efficiently heating and cooling the space using existing infrastructure where possible. A side goal is identifying ways to more efficiently insulate the building given what we have to work with (3 foot thick masonry walls with zero insulation). Analysis should be done with both financial and non-financial metrics to showcase created value and current financial incentives should be taken into account. Creativity is welcomed!

- II) **Waste Streams:** When fully operational, we could see thousands of people coming through here every week producing food, packaging, and human waste streams. As a good steward of our environment and corporate citizen, not to mention putting waste in the dumpster costs money, we want to look at ways to a) minimize the waste produced and b) maximize the usefulness of the waste that is produced. Business decisions need to be made on a variety of financial and non-financial metrics so being able to quantify results will be key and also help us to promote our endeavors to other businesses in the area.

- III) **Community Engagement:** The social component of Triple Bottom Line businesses are often the toughest to define and quantify against metrics. Because The State management believes in the power of B-corps and developing the community, we would like to explore ways in which we can better serve and help develop the community. Part of this is identifying strategic community and public-sector partners whose missions are aligned with ours. One such example is The Music Village whose mission is to improve musical awareness. The success of this group can directly impact our financial performance as a venue so it makes good sense to partner with them to help ensure they are able to achieve that mission. Because it's such an esoteric concept we are willing to entertain any ideas and hope that students really take the time to get to know the diverse and vibrant community around them.

Resources:

Please note that one of the keys of the project is trying to find your own resources in the community. This is similar to a real-life project you might be faced with in a corporation where you have to figure things out yourself. You will have some guidance but a lot is up to you to go out into the community and meet people.

The Music Village – Kellirae Bown

La Casa de Amistad - Becky Ruvalcaba
IUSB Center for Sustainability – Mike Keen
McMenamin Brothers in Oregon
Municipal Energy Office – Jonathon Geels
Sustainable Retrofitting – Elicia Feasal
Crystal Valley Comfort in Middlebury
Home Energy LLC – Russ Draper
ND Office of Sustainability – Myles Robertson
DTSB – Tamara Nicholls-Smith
DSIRE US Gov Incentives DB - <http://www.dsireusa.org/>

For your project, in addition to the above challenge, please address each of the three following elements (to be added to section 3 of your proposal “Recommendations for lasting change”):

1. **Strategy:** How does your project fit into the overall social and environmental responsibility strategy of the organization (i.e., The State)? If this is just a stand-alone project, then not only might it not have a huge impact, but it also might seem disingenuous. On the other hand, even if the organization is not far along its social/environmental responsibility path, your project can be an important stepping-stone if it is positioned correctly. Therefore, please make sure to spell out the follow-up to your project, how it fits into broader organizational goals, and intentional ripple effects resulting from it.
2. **External Communication Strategy:** How will you communicate your social/environmental strategy with your primary (shareholders, customers, suppliers) and secondary stakeholders (local community, government, broader society)? How does it further your overall image and identity?
3. **Internal Communication Strategy:** More importantly, how will you communicate your efforts internally among the key stakeholders of The State (e.g., employees, owner, customers, partners)? How can you use these projects as a way to further engage stakeholders? What specific action steps do you have to help stakeholders find greater intrinsic motivation, meaning, pride, and alignment between personal and organizational values? You do not need to address each of the previous questions because many of the strategies will overlap. What is important is that you address the issue that stakeholders might have values that go beyond only making money – and how can social/environmental responsibility be a way for stakeholders to engage more of their whole selves by working with The State and as a result lead to positive outcomes (e.g., motivation, well-being, satisfaction, engagement).