



CITY OF MADISON PROJECT CHARTER

Updated 10/17/11

Project Name	Green Madison – Neighborhood Challenge
Sponsors	City of Madison, Wisconsin Energy Conservation Corporation (WECC), Madison Gas & Electric (MG&E), and EnAct.
Project Manager	Larry Studesville; Paul Grimyser, Mary Lou Krase
Primary Stakeholder(s)	City of Madison residents
Business Case / Statement of Need <i>(Why is this project important now?)</i>	
<p>The goal of the Neighborhood Challenge is to build awareness, participation, and increase the number of post-assessment completions for owner-occupied, residential homes, within the City of Madison. The Neighborhood Challenge’s primary focus is the residential market segment, however the Neighborhood Challenge will generate limited commercial leads, and will address cross-over between the residential and commercial market segments, and produce a case-study for an improvement of a commercial public facility (grand prize). Secondary goals include generating awareness of the Green Madison program among renters and non-owner occupied homeowners and to encourage more energy efficient and sustainable behaviors throughout the greater Madison community.</p>	
Project Description / Statement of Work	
<p>The Neighborhood Challenge is a year-long community challenge with the purpose of engaging citizens at every participation level, while improving the number of post-assessment “whole-house” energy improvement completions.</p> <p>The Challenge is broken down into two phases:</p> <p>Phase I – November 1, 2011 (Launch) – April 2012 (Isthmus Earth Day Event – Award Neighborhood Prizes)</p> <p>Participation in the Neighborhood Challenge is a point based system. Individuals (renters, home-owners, and students) will be able to earn points for pledging to reduce energy consumption (lowest points) to higher levels of points by performing “actions” such as attending an educational workshop or completing the Home Performance with ENERGY STAR pre and/or post assessment (see Point System section). Points are awarded based on the difficulty of the actions the participant is performing – so taking an online pledge (through Green Madison website) is the lowest amount of points because this can be done from home or work. Attending a workshop or hosting a neighborhood event is worth more points because there is more effort and some cost associated with the effort. Signing up for and completing the pre and/or post assessment is the most costly in terms of time and financial resources, so homeowners that complete an assessment earn the highest level of points, which also reinforces the point of the competition – get more completions.</p> <p>So, what are the points for? For Phase I of the Challenge, Neighborhood Associations will be able to sign-up to participate in the Challenge (sign-up must be completed by December 15, 2011). Neighborhood Associations will be able to earn points based on their actions and the actions of their residents. Participating Neighborhood Associations will have an incentive to encourage their residents to: (1) visit Green Madison website to take the pledge and earn points; (2) attend or host a neighborhood event that promotes energy efficiency (Green Madison/EnAct); (3) complete pre and/or post Home Performance assessments (Green Madison). Neighborhood Associations will be incentivized to promote the Neighborhood Challenge based on the awards being donated by Madison Gas & Electric:</p> <ul style="list-style-type: none"> • 1st Place - \$5,000; 2nd Place - \$2,000; and 3rd Place - \$1,000 <p>Phase 1 prizes will be awarded at the Isthmus Green Day Event scheduled for April 21, 2012. Neighborhood Challenge partners will be responsible for documenting and tallying points they offer for the challenge: for instance City of Madison will use an online pledge (under development) and will promote the pledge through the Green Madison website. Participants that want to earn points for their Neighborhood Association will need to</p>	

complete the registration and then City staff will be responsible for awarding points to participating Neighborhood Associations. EnAct will be hosting education workshops and awarding points for neighborhood EnAct meetings during the course of the Neighborhood Challenge and will provide an attendance list/sign-in sheet with names and addresses of attendees to Green Madison staff so participants receive points and are eligible for individual prizes. Prizes will be awarded randomly at the individual level based on donations from challenge partners (community – Mary Lou). Individuals (renters, students, & homeowners) will be eligible to win individual prizes donated to the Neighborhood Challenge (watt meters, Green Madison logo merchandise, CFL light bulbs, power/surge protectors, gift cards, etc). Mary Lou Kruse will be heading up the donations and awarding of individual prizes. Prize donors and winners will be announced in the Green Madison Newsletter (published on a quarterly), Green Madison Facebook page, and any other partner’s website, newsletters, or press releases. Green Madison will send a copy of the Newsletter to prize donors, to ensure notification of who won their donation (prize) and when it was awarded. The individual prize donations will encourage those that are not part of an “active” neighborhood association to participate in the challenge, and will further incentivize individuals in “active” neighborhood associations to do more to earn both individual and neighborhood points and prizes.

Key Dates for Phase I:

- **October 28, 2011:** Send notification to all neighborhood associations.
- **November 1, 2011:** Kick off the Challenge, leveraging fall advertising push.
- **December 1, 2011:** Neighborhood Associations must notify Green Madison of intent to compete in challenge.
- **January 1, 2012:** Tie into New Year resolutions theme, media outreach encouraging people to focus on controlling their energy use in 2012. One way to do that—through the Green Madison Challenge!
- **April 21, 2012:** Leverage Isthmus Green Day Event and half-way point of Challenge. Announce neighborhood awards at the Isthmus Green Day Event.
- **April 22, 2012:** Leverage Earth Day through community activities and Isthmus Green Day Events – Sustainable Showcase.

Point system:

Individuals will earn points by taking specific energy-efficiency actions and moving through the Green Madison program. We have been mindful to offer opportunities for non-owner occupied residents to engage in Green Madison and the Challenge, but also stay focused on the ultimate goal of driving program participation and completions by placing much higher point values on key program actions. Below is the point breakdown, please contact us if you would like to add points for an activity through your organization:

- **Pledge (25)**
 - Opportunity for non-owner occupied residents to engage
 - Collect data, use for targeted follow up throughout duration of Challenge and beyond
 - City Staff will be responsible for tracking and awarding points
- **Pre-Program Survey – EnAct Website (25)**
 - This is for homeowners, renters, and students
 - EnAct will be responsible for tracking and sending points to City.
- **Change light bulbs via Light Bulb Finder app (50) or (75)**
 - Opportunity for non-owner occupied residents to engage
 - Leverage mobile app partnership (or worksheets submitted to Green Madison)
 - Individuals will be responsible for sending their “shopping list” to GreenMadison@cityofmadison.com with their name and address to earn point. **To earn (25) more points**, include a photo of someone installing or purchasing a light bulb, with the shopping list (in the photo). Photos can be added to Green Madison website and/or Facebook page.
- **Attending an EnAct Event with energy related topic (50)**
 - This is for homeowners, renters, and students
 - EnAct will be responsible for tracking and sending points to City.
- **Workshops & Community Events (75)**
 - Award points based on participation – using sign-up sheets and City Calendar (collects sign-ups).

- Events would be hosted by City, MG&E, and other partners.
- Hosting organization will be responsible for tracking and sending points to City (Mary Lou & Paul).
- **Hosting an EnAct Meeting (100)**
 - Homeowners, renters, and students
 - EnAct will be responsible for tracking and sending points to City.
- **Pre assessment (250)**
 - This is where people start to commit to and invest in the Green Madison process, and thus, this is weighted more heavily than previous steps
 - WECC will be responsible for sending list of participants (names and addresses) to City for the awarding of points. (Includes REEIP participants & those that have already participated in Green Madison – will be awarded point for the prior participation)
- **Post assessment (500)**
 - Completions are the primary purpose of the Challenge, and thus, weighted most heavily
 - WECC will be responsible for sending list of participants (names and addresses) to City for the awarding of points (can be same list as above – just a designation of progress).

*Points will be retro-actively awarded for any pre and/or post assessment completed as part of the Residential Energy Efficiency Incentive Pilot (REEIP) or for the 500+ Green Madison participants that have already entered the program.

** As soon as the City of Madison is able (time permitting), City staff will be posting the current level of points earned on their website. We will work with IT to determine the easiest way to post and update points.

***The City of Madison Staff and IT Department is currently working on drafting and incorporating the pledge into the Green Madison website. We are hoping to have this completed by the end of October 2011, but have delayed to start of the Neighborhood Challenge to build in some flexibility.

Phase II - May 2012 – October 2012 (Final Prize Announcement)

The Neighborhood Challenge switches focus from a “Neighborhood” challenge to a “Community” challenge after the awarding of prizes at Isthmus Green Day. While individual prizes will continue to be awarded (as received), the focus of the challenge and the points earned through the challenge will change. Points will be re-allocated to a larger geographic area such as Neighborhood Resource Teams (NRT’s), Planning Councils, Neighborhood Sectors, or another City recognized division (Community Centers, Libraries, etc). The idea is to begin to leverage existing rivalries and allegiances in the Madison community to encourage participation and to increase the community pride aspect of the Challenge. The final prize is up to \$10,000 worth of energy efficiency improvements for a public facility (paid for using City of Madison Formula Grant Money).

Potential Divisions (will be decided on by February 2012, or quicker):

- **Neighborhood Resource Teams (NRT’s):** (revised – will not work for Neighborhood Challenge)
- **Planning Councils:** (3 city-wide divisions: East Isthmus, South Metropolitan, & Northside)
- **Neighborhood Sectors:** (9 city-wide divisions: FarWest, West, North, NearEast, East, Isthmus, SouthWest, NearWest, & SouthCentral)
- **Community Centers:** (17 city-wide divisions: Bayview International Center, Boys & Girls Club – Allied, Boys & Girls Club – Taft, Bridge Lake Point Waunona Neighborhood, East Madison, Goodman, Kennedy Heights, Lussier Community Education, Madison Senior, Meadowood Neighborhood, Northport Apartments, Packer Community Learning, Vera Court, Warner Park, West Madison Senior, Wil-Mar Neighborhood, and Wisconsin Youth & Family)
- **Libraries:** (9 city-wide divisions: Central, Alicia Ashman, Goodman South, Hawthorne, Lakeview, Meadowridge, Monroe, Pinney, and Sequoya)

Ideally, leveraging existing rivalries and allegiances already recognized in the Madison community will produce the best results as people will be more likely to identify with these groups, rather than question, “which group do I

belong to?”

Ideally, the smaller the groups the easier it will be for City staff to transfer points from the first half of the competition into Phase II. Once city leaders and community partners select and agree upon a division for Phase II (by February 2012, if not quicker), the division will be published on the city website and the rules for Phase II will be explained.

Basic rules: *If a geographical division is selected*, then up to five public facilities (community center, library, church or house of worship, park, ect...) within each division will be nominated based on the need for energy efficiency improvements, by the City Team, Council, or Sector selected; with Green Madison partners having final approval of the list of the five public facilities. The division with the most points as of September 2012 will have their five public facilities listed on the website (with some description of need, photo(s), and services offered) and the entire community will be able to vote for the most deserving. The winning division will have bragging rights as they won (most points) and have a more efficient community building in their area to use. To vote, the community will be asked to log-on to Green Madison or link through partners web pages to vote for the public facility that deserves (in their opinion) the ultimate \$10,000 energy efficiency improvement. Voting will last for the first three weeks of October 2012, National Energy Efficiency Month, and the City and its partners will be able to post information about energy saving ideas and tips for people to read/use as they log-on to vote for a public facility. Green Madison will announce the winning facility the last week of October 2012, during National Energy Efficiency month and highlight the changes that will occur and how the building will be more efficient.

If a categorical division is selected – community centers or libraries – then these facilities will be listed on the website as an eligible recipient of the final prize. The points earned through the first half of the competition (Phase I) will be redistributed to the eligible facilities based on location; and these facilities will continue to earn points through the remainder of the competition (Phase II) through the existing “point system” from Phase I. The winning facility will automatically be selected by the geographic area that earns the most points – so for an example if the “Libraries” is the selected categorical division and the most points are earned for the Monroe Street Library, then Monroe will be eligible for up to \$10,000 worth of energy efficiency improvements. There would be no “voting” in this instance, because of the limited number of facilities across the city.

No matter which division geographical or categorical is selected by city leaders and partners, there will be several benefits to Green Madison. The Green Madison program will see increased amount of participants in the program and more “whole-house” or completed energy improvements. In addition, awareness of the program in both the residential and commercial sectors should improve greatly, as should traffic to the website and Facebook page. The commercial sector will have another completed job (improved public facility) with a case study for their portion of the Green Madison website. Costs for this Challenge will be relatively low as most of the marketing and advertising will be done electronically, through neighborhood and community associations, and by word-of-mouth. The most expensive portion of this Challenge will be staff time for calculating points and working on various aspects of the Neighborhood Challenge.

** City staff attempted to resolve a final division for the Phase II of the Neighborhood Challenge before sending this document out, but there was not time for a final determination, or to reach all the partners for their thoughts.

Stakeholder Roles and Responsibilities

Stakeholders	Roles	Responsibilities
City of Madison	Organizer, Sponsor	Tracking points, scheduling meetings, website updates, updating partners, Grand prize of \$10,000 – Formula grant.
WECC	Marketing	Marketing collateral initial e-mail; tracking points (pre/post assessments)
Madison Gas & Electric (MG&E)	Organizer, Sponsor	Neighborhood prizes, scheduling and tracking events.
EnAct	Organizer	Reporting points, scheduling and tracking events approved events for EnAct events.
Isthmus Green Day	Organizer, Sponsor	Neighborhood Award Ceremony – part of Green Day Event.

Project Definition

Project Goals	The goal of the Green Madison Challenge is primarily to build participation and completion numbers for Green Madison. Focus is on residential program, but businesses leads will also be captured. Secondary goals include generating awareness and excitement for the program and encouraging energy-efficiency behaviors among the Madison community.
Project Scope	One year Neighborhood Challenge – two independent, but related phases of the challenge
Project Deliverables	Increased participation in Green Madison program, higher levels of energy efficiency improvements, greater awareness of energy efficiency and sustainability across the community.

Project Team Roles and Responsibilities

Team Members	Roles	Responsibilities
Larry Studesville - City	Decision-maker	Approval for City
Todd Conkey - WECC	Decision-maker	Approval for WECC/Better Buildings Grant
Brian Driscoll - WECC	Decision-maker	Approval for WECC/Better Buildings Grant
Paul Grimyser - City	Challenge manager	Implementation and monitoring; other duties as needed
Mary Lou Krase - City	Challenge manager	Prize generation, newsletter, marketing (City); tracking and reporting points
Colleen Lies - WECC	Marketing	Green Madison marketing (as needed);
Anna Svensson - WECC	Marketing	Green Madison marketing (as needed);
Shannon Kahl - WECC	Tracking Green Madison participants	Sending list of Green Madison participants to City.
Laurie Irwin – MG&E	Decision-maker/manager	Approval - Madison Gas & Electric
Bob Stoffs – MG&E	Decision-maker/manager	Coordinating MG&E events, tracking and reporting points?
Anne Nardi - EnAct	Challenge Manager	Coordinating EnAct events, tracking and reporting points

Project Constraints / Risks / Key Inputs *(Elements that may restrict or place control over a project, project team, or project action; results from other projects or input from other sources needed for project to be successful)*

Isthmus Green Day is an essential piece for the Neighborhood Award for Phase I of the Neighborhood Challenge. Paul Grimyser and Annie Nardi are on the committee and will continue to monitor developments and work with Isthmus to ensure success.

City leaders need to authorize division for Phase II as quickly as possible so coordination with partners and requests for web updates can be complete. Will also need to notify potential recipients and determine if commercial grade energy inspection/assessment is needed for facilities.

Coordination with partners and prize donors will be a key factor for individual prizes for the next year. Working with partners to determine how many prizes are available, how many prizes will be wanted/needed from donors, a schedule for prize drawings, an award process (do they need to come to city to collect prize, sign release?) ect... will be necessary.

Determining if City's web team is able to design and build web site for Green Madison as necessary is a concern. Web team is limited in size and time right now. Will need to share project scope once project is approved and generate a timeline for website improvements to see if targets are achievable.

Implementation Plan / Milestones *(Due dates and durations)*

Will be developed on approval of Project Charter

Communication Plan *(What needs to be communicated? When is communication needed? To whom? How?)*

Will be developed on approval of Project Charter

Sponsor Sign-Off

_____ Date: _____
 Larry Studesville

_____ Date: _____
 Todd Conkey

Brian Driscoll

Date: _____

Direct questions about this document to: Paul Grimyser, Community Development Energy Grant, 608-261-8965