

Writing Energy Reduction Behaviour Change Proposals

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Introduction

This article explores points to consider when writing a proposal for behaviour change initiatives. Although this applies to an energy professional working within an organisation, the emphasis is more for energy consultants working for external clients.

As with many proposals it needs to be written so that anyone in the organisation at a management level can understand the document. So any jargon needs to be explained and it should be clear and concise.

The proposal is not just an offer of services with a cost but a strategy for partnership to achieve a common goal. So the proposal needs to explain the goal and the role of the client and that of the consultant with clear timelines, scope of work and costs. This then describes explicitly what is on offer and what can be expected. It also means any wrong or unrealistic expectations of what the consultant will do is dealt with at the very start.

Gap Analysis

In some organisations the behaviour opportunity is clear to both the consultant and the client and a detailed gap analysis is not required. However, for larger and more complex organisations a gap analysis is essential otherwise there is a false assumption of the current reality which can result in the wrong strategy.

But this poses a dilemma when writing a proposal. How can you write a proposal and define a strategy if it is unclear what the opportunities are or the correct strategy to be adopted?

In this case it is possible to put in a two part proposal: Part 1 is a Gap Analysis as a discrete piece of work which will identify the opportunities and an effective strategy. It might also include a small pilot to evidence effectiveness.

Part 2 is the Main Proposal based upon the findings of Part 1. This approach minimises risk of the wrong strategy but introduces a new risk that the client will conduct the Gap Analysis, the starter, but not order the main course. This means the Gap Analysis is a waste of time. It may seem inconceivable that such an illogical thing should happen. But in my experience it does.

Another way of overcoming the dilemma is for the scope not to be fully defined but for the client to give a call off contract with a maximum fee. This is a compromise but it can work.

Structure of a Typical Proposal

What should go into a behaviour change proposal? The front end and the back end (CVs, fees, commercial terms) will be the same for any proposal. So we will focus on the centre: the essence of the proposal defines the consultant's scope and that of the client with roles clearly defined.

A typical outline might be a seven step process:

1. Gap Analysis
2. Strategy
3. Design/Mobilise
4. Launch
5. Implement
6. Measure/Monitor
7. Maintain Momentum

Step 2 Gap Analysis

The **output** of a gap analysis is a description of the current reality (A) and the vision of a future reality (B) and a strategy for getting from A to B.

The **input** is data and people. Typical activities might be:

- Meetings with top management/energy staff
- Selected interviews/key site visits
- Staff awareness survey which identifies issues, culture, barriers, opportunities
- Review of policies/procedures and links to business objectives
- Review of energy data and past reports
- Develop a measurement and verification (M&V) plans
- Application of EnCO Matrix and profile scores

Step 2 Strategy

In most organisations it is useful to categorise people into the following groups:

- **Top Management**
- **Energy Practitioners** (Energy Managers, Estates, Facilities Managers, Data Analysts)
- **Significant Energy Users** (for example those who have a significant impact of an energy use either by decisions they can take (e.g. production manager) or those with hands-on control (e.g. BEMS operation))
- **All employees**

Step 3 Design and Mobilise

In this step the design of the initiative is based on the strategy. This may involve designing briefings, training, awareness, communications materials.

Mobilisation needs to be focused on top management and their role, briefing energy practitioners and initial training for key Significant Energy Users. So typical points for this step might be:

- Top management briefings (strategy/their role)
- Energy Practitioners Workshops
- Significant Energy User Workshops
- Engage Communications Department
- Design of training, publicity, awareness materials
- Design of online/social media/print materials (if appropriate)
- Design and publicise launch event
- Announce the initiative across the organisation via Comms

Step 4 Launch

It is usual to have a high profile Launch Event led by the CEO or Board Member so employees know this is important. For most launch events I write the speeches for the CEO and any other Board Member who wishes to speak. This is to ensure they say the correct things and do not go off message. High profile events need to be short, sharp and unambiguous. That is why every word counts. Generally CEOs are experienced and good communicators. They are used to aides writing speeches for them so this is not a patronising act but an enabling act and most appreciate the support. They usually add their own emphasis or story as it has to be their words and it is not good for them to lose eye contact with the audience by reading a script. They realise their role is to show Board commitment and inspire staff to action.

It is easy for Launch Events to go wrong. Therefore they need to be organised and controlled to the minute especially if the TV/Radio/Press are invited. The media have very short attention spans and are looking for sound bites. I usually prepare a Launch pack for key players which include timings, programmes and speeches. I make sure the media have these packs so if they quote the CEO, it is from the written speech.

It is important to give good notice to attendees. Keep it short and include a buffet lunch to encourage attendance. It is usually good to have the walls of the space filled with internal and external exhibitors which is open to all staff for the whole day.

So in summary:

- Launch the event (by CEO)
- Media invited
- Formal proceedings short and sharp
- Lunchtime weekday usually best
- Invite key people in the programme and senior/middle managers
- Revolve around a sustainability day exhibition for all staff
- Report launch

Step 5 Implement

This is where the hard work begins but should be seamless if Steps 1 to 4 have been done correctly. Implementation will be different for each initiative. It is useful to run the implementation for 12 months and have a major review and evaluate:

- What is going well?
- What is not going well?
- What changes are needed?
- What should be changed in moving into Years 2 and 3?

Step 6 Measure/Monitor

This will run in parallel with Step 5. The method of monitoring will have been decided in the Gap Analysis with the measurement and verification (M&V) plan.

Essentially the measurement is of energy data but wider sustainability programmes might include waste and water or other measureable resources.

In monitoring energy reduction it is important to take into account other factors which can impact energy use such as the weather, operating hours or the implementation of technical measures. It is important to be able to measure the impact of the behaviour changes by staff. Also regular feedback to top management and staff of summarised data is vital.

Another area for measurement is quantifying activity such as:

- Number of Energy Champions recruited
- Number of Energy Champions trained/deployed
- Number of Staff Surveys conducted
- Number of energy saving suggestions received

Essentially anything which can be counted should be counted.

Step 7 Maintain Momentum

This is particularly important in Year 2 onwards of the programme. However, it needs to be considered at an early stage so that momentum is not an afterthought but designed in during Step 2 Strategy stage. Further information on Momentum can be found in the article *Maintaining Momentum*.

If a proposal covers these seven key steps it provides a framework for readers to understand the approach will be taken. Often the details within each step cannot be detailed until the Gap analysis and Strategy are completed. But it indicates the intention and direction of travel.