

## 2 Proposed Approach

The tasks identified in the city's RFP are discussed in four subsections below.

- Project Kickoff and Ongoing Management
- Task A: Environmental Sustainability Program Assessment
- Task B: Environmental Sustainability Program Strategic Plan
- Task C: ESTF-2 Recommendation Validation Support

Each subsection describes the proposed approach, deliverables, and the Cadmus team's key strengths. The work and progress reporting schedule for each task of the project is shown in a later section.

### *Project Kickoff and Ongoing Management*

**Kickoff meeting:** At the outset of the project, the Cadmus team leads will meet with members of the Mountain View team and/or the Environmental Sustainability Task Force (ESTF-2) to clarify goals, scope, Cadmus and city roles in each task, priorities, project timeline, and internal communication management protocols. The Cadmus project director (Cadmus PD) and project co-managers (Cadmus PMs) will be the primary points of contact and responsible for managing Cadmus task-specific teams, integrating experts as needed, and ensuring overall quality and timeliness of project deliverables. Cadmus assumes at least one city point of contact and/or group of City staff collaborating on this project. The Cadmus project director and one project co-manager will attend the kickoff in-person.

**Regular project management meetings:** Based on the project plan, Cadmus will work with the city team to establish a clear schedule and system for regular project management meetings. Meetings may become more or less frequent at various points in the project depending on the activities currently underway and may integrate other Cadmus team members as needed.

#### **Deliverables:**

- Kickoff meeting minutes
- Project timeline
- Regular project meeting minutes

#### **Team Key Strengths**

- Cadmus has over 20 years of experience in sustainability project management for large multiyear multimillion dollar engagements, down to smaller \$10,000 projects for individual municipalities and nonprofits, enabling us to tailor an efficient process for Mountain View that draws on proven processes, existing templates, and skilled local project managers.

*Task A: Environmental Sustainability Program Assessment*

This section discusses our approach to completing the high-level assessment of the city’s Environmental Sustainability Program, as described in the RFP. It includes the following components:

- i. Status review of current programs, roadmaps, action plans, and progress
- ii. Benchmarking against 10 comparable and leading U.S. cities; benchmarking against transportation and energy efficiency leading cities worldwide
- iii. Effectiveness of the city’s current programs
- iv. Comparison with other city strategies relating to sustainability goals
- v. Identification of sustainability goal opportunities or constraints in relevant city departments
- vi. Identification of sustainability synergies or conflicts/tradeoffs with City Council goals
- vii. Identification of staffing opportunities or constraints in relevant city departments
- viii. Identify regional sustainability efforts and corresponding city collaboration effectiveness
- ix. Identify internal, intra-department, and external process improvements
- x. Provide recommendations regarding program effectiveness-measuring tools

The approach for each of these components is discussed below, mapped to the roman numeral labeling used in the RFP (note that Task 2: Benchmarking has been subdivided into two discrete areas denoted as ii(a) and ii(b)). A list of deliverables and summary of team strengths follows the component approaches.

*Subtask i. Review status*

In this subtask, Cadmus will review the status of current programs, roadmaps, action plans, sustainability messaging, and historical progress over time. We will leverage the in-person visit from the project director to conduct an initial select set of interviews on site, with key stakeholders identified by Mountain View project staff. We will interview current city sustainability personnel to determine what resources the city has devoted to its sustainability programs over time, environmental outcomes, the drivers of these outcomes, and barriers to action. Examples of these are:

<b>Program Variables of Interest</b>	<b>Examples</b>
<b>Resources</b>	Dollars, full-time-equivalent employees, website pages
<b>Environmental Outcomes</b>	GHG emission reductions, recycling rates/waste reduction, energy consumption, jobs, land use
<b>Drivers of these outcomes</b>	Vehicle miles traveled (VMT), urban form, traffic patterns, energy efficiency standards/practice, HVAC and other appliance usage trends, % renewables on the electric grid, and electrification trends
<b>Barriers to Action</b>	Split incentives, range anxiety

There are also many trends over which the city has a lesser degree of control that impact its emissions (e.g., population growth, percentage renewables on the electric grid), and we will explicitly separate the city’s “sphere of control,” “sphere of influence,” and “everything else” and how these spheres have impacted the city’s outcomes and program status.

Once the plans and progress are clarified through research and interviews with city personnel, the Cadmus team will prepare a flowchart of the business processes the city’s sustainability department

currently pursues to execute on its vision. This will map out how the sustainability program has engaged over time with stakeholders—internal, intra-departmental, external engaged stakeholders, and external stakeholders in the wider public—allow comparison to Cadmus’s knowledge of best practices from other cities and further comparison through the Benchmarking research (Task ii). This process will draw on the best practice knowledge of multiple groups across Cadmus, including the Strategy and Policy team’s extensive sustainability planning with U.S. cities, Cadmus EPA ENERGY STAR marketing team, which has significant perspective on community engagement and strategic communications; and Cadmus’ international offices, which bring deep knowledge of leading sustainability-related stakeholder engagement and planning processes in Europe.

*Subtask ii(a). Benchmark against 10 comparable and leading U.S. cities*

In this subtask, Cadmus will work with the City of Mountain View to develop criteria for selecting 10 cities with comparable characteristics and programmatic focuses of particular relevance to the city’s context. These could include, for example, comparable population trends, transportation and building emissions characteristics, and existing or emerging sustainability commitments and programs. Project Partners Ariella Maron and Katherine Gajewski maintain a database of over 3,000 U.S. municipalities that have made a local, regional, national, or international commitment to climate action. This includes several dozen indicators of city context, characteristics, and actions, which can serve as a sophisticated tool for identifying suitable peer cities for further research. Depending on the results, we may make additional recommendations and iterate the final list in consultation with city staff to further narrow or expand the results to arrive at the 10 most applicable cities for benchmarking (e.g., California-only, tech-heavy jurisdictions, and municipal budget sizer are all possible filters). We could design our research to include different cities for different topic areas so Mountain View can be compared with the most widely recognized leaders in spheres such as sustainable transportation, building codes, renewable market development, and waste reduction.

Cadmus will then conduct research on the current and planned sustainability programs and practices of these target cities. To better understand operational, structural, governance, and longitudinal information that may not be publicly available, Cadmus will also reach out to all or a subset of these cities to request short interviews. Through our team’s strong relationships with Urban Sustainability Directors Network contacts, Cadmus will seek to interview 5 to 10 sustainability directors (or equivalent sustainability leaders) to obtain further details on staffing levels and structures, governance models, funding and financing strategies; as well as to fill gaps in the desk research on the implementation status, outcomes, success factors, and design elements of key programs of interest.

*Subtask ii(b). Benchmark against sustainability strategy best practices globally*

As part of the assessment, the city’s greenhouse reduction roadmaps and action plans will be compared to Cadmus international database of GHG emissions reduction best practices, especially with regard to renewable electricity, transportation, buildings, and electricity consumption. This will measure the City’s status relative to worldwide best practice as well as identify any strategies that other leading cities have used to reduce these emissions that Mountain View may not have tried or could reasonably implement.

As a crosscheck and validation, we will conduct the same analysis on the Carbon Disclosure Project's open database,<sup>1</sup> which tracks 189 global city's emissions and climate actions. Cadmus will also take advantage of climate strategy frameworks from past projects and those developed by partners and collaborators, such as the CNCA *Framework for Long-Term Deep Carbon Reduction Planning*,<sup>2</sup> Cadmus' *Pathways to 100* renewable energy supply planning framework,<sup>3</sup> the forthcoming *Pathways to EVs* framework, and the forthcoming *Guidebook for Equity in Energy Innovation Program Design*, which is being developed by Cadmus in partnership with 21 USDN member cities and project observers.

### *Subtask iii. Assess effectiveness of the city's current programs*

Given the breadth and specificity of the city's existing sustainability initiatives, assessing the overall sustainability program's effectiveness is both a quantitative and qualitative exercise. The RFP describes 10 sustainability initiatives, including the detailed 94 actions presented in the city's environmental sustainability action plan, overall target setting, broader climate action plans, adopting a green building code, residential energy conservation programs, recycling and zero waste programs, multimodal and transportation demand management strategies, water recycling and conservation, and co-locating jobs and housing. Each of these programs and actions have different program effectiveness metrics, making it difficult to simply aggregate their collective impact. For example, residential energy conservation programs have key performance metrics such as energy saved, program costs, and total number of participants. Where possible, metrics like these can be translated into common metrics like GHG reductions for the city and aggregated across programs.

However, we recognize assessing program effectiveness involves more than just aggregating emissions reductions from individual programs. In consultation with city staff, Cadmus' transportation, building, waste, renewable energy, and water experts will develop 6-8 crosscutting program performance metrics that can be applied broadly to the suite of sustainability initiatives. These could include, for example, total emissions reduction potential, potential impacts on economic development and affordability, financial cost-effectiveness to the city, cost-effectiveness to residents and businesses, etc. In consultation with city staff, Cadmus will then weight these six scales and rank each of the city's actions for effectiveness toward desired outcomes. This ranking will bring to light which actions have the most potential impact. Finally, each will be qualitatively ranked in terms of implementation status to identify

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<sup>1</sup> Carbon Disclosure Project. "Welcome to the CDP open data portal." Accessed August 2018:  
<https://data.cdp.net/>

<sup>2</sup> Carbon Neutral Cities Alliance (CNCA) and Innovation Network for Communities (INC), available at <http://www.usdn.org/uploads/cms/documents/cnca-framework-12-16-15.pdf>. Cadmus has collaborated with INC to deploy the framework in global learning exchanges and has collaborated extensively with CNCA and its member cities on developing programs and policies aligning to the framework.

<sup>3</sup> Cadmus. *Pathways to 100: An Energy Supply Primer for U.S. Cities*. May 8, 2017. Available online:  
<http://www.mc-group.com/pathways-to-100/>

those strategies that are lagging behind their potential, meeting, or exceeding expectations in terms of and desired impact.

*Subtask iv. Account for other city strategies relating to sustainability goals*

Like any city, Mountain View must balance numerous priorities to ensure the best possible quality of life and outcomes for its current constituents and future generations. Policies and programs are established to achieve a balance of social, economic, and environmental goals. As a rapidly growing tech hub within the regional context of the San Francisco Bay Area, Mountain View must deal with many acute challenges in housing, affordability, education, transportation, and more.

In this subtask, the Cadmus team will identify strategies owned in other departments which (a) align with or support progress toward the city's goals and (b) those which amplify the challenges of attaining them. For instance, Mountain View's Economic Development Strategy is to grow new businesses, which as a secondary effect of new activity increases the city's total GHG emissions; it may also lead to increasing population growth and density, impacting emissions and other environmental impacts. Similarly, zoning and planning department actions will impact future traffic flow, built environment, energy consumption, and more.

Cadmus experts will review Mountain View's General Plan, Precise Plans, zoning ordinances, economic development strategies, public works capital planning documents, parks maintenance, and more. As an optional task, in addition to this effort, Cadmus can consider regional planning activities outside of Mountain View's direct control, such as transportation investment programming through MTC, Santa Clara County initiatives, and PG&E and Silicon Valley Clean Energy initiatives.

Leading into Tasks v and vi, Cadmus staff will identify the departments and strategies that have the most impact on emissions, waste reduction, and transportation environmental outcomes and will recommend highly relevant strategies for further analysis to identify potential cross-departmental coordination opportunities. Specifically, Cadmus will assess these other departments' actions in terms of the scale of impact they could have on environmental goals, the pace at which they could have impact, and the likelihood that these programs will result in widespread changes to patterns of constituent behavior (e.g., consumer based on consumer economic attractiveness and market acceptance).

*Subtask v. Identify sustainability goal opportunities or constraints in relevant city departments*

Given this mapping of city departmental goals and their impact on sustainability and total city emissions, in this task Cadmus will identify any opportunities where greater cross-departmental coordination and/or consideration of GHG impacts would increase the effectiveness of the city's environmental sustainability efforts. In consultation and coordination with the city project manager, Cadmus will select six to 10 representatives of other city departments, such as Economic Development or Zoning and Planning, to interview 1-on-1 in order to understand their perspectives on points of overlap, surface key challenges they see in meeting overlapping or "conflicting" city goals, and to identify potential opportunities for cross-departmental coordination or collaboration. Cadmus staff have conducted similar stakeholder interviews for numerous city clients and bring a sophisticated understanding of the

complexities of cross-departmental coordination and partnership. Preparation for stakeholder interview processes involves a stakeholder mapping exercise with the city project manager and other sustainability staff; selection and prioritization of stakeholders for outreach; discussion of known interests or issues likely to come up (or which the Cadmus team should prompt discussion); and various interview best practices such as providing project context, ensuring confidentiality, single-stakeholder interviews (where possible), and interviewer neutrality.

### *Subtask vi. Identify staffing opportunities or constraints in relevant city departments*

As part of the interview process described above, Cadmus will compile and synthesize findings around key themes that emerge, which will likely include staffing and resource limitations; implementation barriers; priority policy initiatives; and opportunities for coordination across departments. Cadmus will develop a short summary memo providing an overview of findings and discuss this with the city team, in particular flagging those opportunities that are most hindered by resource constraints.

This information will then be used to begin identifying ways in which existing city fulltime employees (FTEs) are or could support sustainability efforts. Along with existing dedicated Sustainability staff, this will provide a baseline of existing FTEs which can be mapped against an estimate of needed staffing levels to be developed as part of the Strategic Plan's three scenarios. Cadmus will work with the city and Cadmus team advisors to draw on a range of experience staffing environmental sustainability programs and projects.

From there Cadmus will work with the city project manager to identify ways other department staff could be engaged in existing or planned initiatives. Cadmus will also evaluate potential funding opportunities that could bring additional resources to increase staff capacity (e.g., CivicSpark fellows, grant funding opportunities from CEC and ARB, funding from U.S. Department of Energy, and public-private partnerships). Although more detailed assessment of funding opportunities will continue in Task viii, initial research at this stage will be important for assessing staff constraints against the city's needs and goals. Cadmus can also recommend ways in which new or temporary FTEs can deliver savings to city operations that could justify longer-term deployment of staff resources (e.g., continuous commissioning, energy audit programs, other initiatives with positive impacts on the municipal bottom line)..

### *Subtask vii. Identify synergies or conflicts/tradeoffs with City Council goals*

To widen the scope beyond conflicting or synergistic city departments, in this subtask, Cadmus will examine synergies or conflicts/tradeoffs between environmental sustainability and other Council priorities or important city goals. In addition to reviewing public City Council goals and at the city project manager's option, the Cadmus team could interview members of the City Council to better understand their views on points of intersection, conflict, or mutual reinforcement.

Mountain View's FY 2017-2019 goals include promoting strategies to protect vulnerable populations and preserve the socioeconomic and cultural diversity of the community and the quantity, diversity, and affordability of housing. The Cadmus team is committed to supporting sustainability that centers equity considerations into the analysis and strategy development, and meaningfully engages underrepresented

communities. As discussed in the box below, this has been a critical element in an increasing number of city and state project engagements, foundation-funded thought leadership, and collaborations with NGO and city partners.

We will seek to integrate a strong equity focus throughout the strategic plan and analytical framework for the assessment and strategic plan, aligned with the definitions of equity utilized by the Urban Sustainability Director's Network (USDN).<sup>4</sup> This could include drawing on our past and current work with cities on integrating equity into planning and program development, as well as input from stakeholder and community meetings, to develop tailored crosscutting equity-oriented evaluation criteria for screening each potential climate action and sustainability program under consideration. These could include, for example, a qualitative analysis of the benefits and burdens of a proposed policy, focusing on impacts to frontline communities. This effort could also help identify where equity-oriented data and metrics will be needed as part of climate actions to establish baselines and track progress toward goals. The results of these screens will help determine which proposed actions help the city meet its equity goals and what adjustments would be needed to ensure more equitable outcomes from proposed actions. Finally, while we understand robust community engagement has already been conducted in development of the city's sustainability plans and that resident engagement is not a stated task in this project, our team is open to selective interviews with key stakeholders outside of community government and can assess the timing and number of such engagements in consultation with city staff at the outset of the project.

## Integrating Equity into the Sustainability Action Agenda

For years, Cadmus has worked directly with local governments to ensure that all stakeholder perspectives are included within climate strategies, particularly within communities that have traditionally been underserved by energy and climate programming to date. As we help Mountain View evaluate its previous climate programs and consider its future, our team will focus on the distribution of benefits and burdens across the Mountain View community, and work to with Mountain View to design a strategy that places its most vulnerable populations first. Our team has worked closely with several Foundations to develop an Equity and Energy Supply Transformation framework, which contains a series of discussion questions to examine different components of program design and development. This framework is closely aligned with the Urban Sustainability Director's Networks equity programming. We would adapt this framework to apply to the Sustainability Action Agenda to ask critical questions about Council priorities and how programs could be developed or adapted in a way that is truly inclusive by considering people of low-to-moderate income, new Americans, communities of color, ability, and individuals who are chronically or persistently homeless.

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<sup>4</sup> Park, Angela. *Equity in Sustainability, An Equity Scan of Local Government Sustainability Programs..* Urban Sustainability Directors Network. September 2014. Available online: [https://www.usdn.org/uploads/cms/documents/usdn\\_equity\\_scan\\_sept\\_2014\\_final.pdf?source=http%3a%2f%2fusdn.org%2fuploads%2fcms%2fdocuments%2fusdn\\_equity\\_scan\\_sept\\_2014\\_final.pdf](https://www.usdn.org/uploads/cms/documents/usdn_equity_scan_sept_2014_final.pdf?source=http%3a%2f%2fusdn.org%2fuploads%2fcms%2fdocuments%2fusdn_equity_scan_sept_2014_final.pdf)

*Subtask viii. Identify regional sustainability efforts and corresponding city collaboration effectiveness*

Bay Area collaborations and funding opportunities on environmental sustainability are numerous and include community choice aggregation programs, utility programs, transit networks, regional carbon emissions targets, and climate adaptation collaborations. For this subtask, the Cadmus team will identify possible regional funding sources then evaluate the current program's effectiveness in taking advantage of these sources.

**Identify possible regional and national funding sources.** We will generate an inventory of possible regional and national funding sources for the prioritized top 10 most-effective actions and characterize each by these categories:

- Funding source
- Funding type
- Activities covered by the funding
- Amount of funds available
- Fund cycle
- Application process
- Key organization contacts
- Next steps to pursue

We will gather information from desk research of federal agencies, publicly available information from philanthropic organizations, and other leading Bay Area cities' funding strategies, and we will supplement these through consultations with Mountain View's Sustainability Department and other local and federal agencies to learn what funding sources have been already been used or previously considered. Cadmus also maintains a growing in-house database of philanthropic organizations that invest in city sustainability to enable mapping of specific geographic and topical focuses to potential funders. Cadmus will also consider potential public-private partnership models, especially with Google and other leading firms operating in Mountain View. To this end, we will conduct up to five interviews with such firms to explore what funding they may have available and how their own sustainability planning could dovetail with the city's. These conversations can be informed by our understanding of city-business collaborations in other cities and potential collaborative models that are emerging around the country (e.g., joint power purchasing, state policy engagement, green ribbon committees, etc.). For example, Cadmus has partnered with the Boston Green Ribbon Commission and A Better City to engage Boston's largest commercial real estate, institutional, public, academic, and corporate leaders around mutually-reinforcing sustainability initiatives.

We will take advantage of our team's past research, thought leadership, and strategy support to other leading U.S. cities to match financing mechanisms to different types of actions. For example, Cadmus has developed a matrix of more than 60 financing strategies available for climate adaptation actions implemented by municipalities, residents, businesses, and others. We have provided similar support for Washington, D.C., as part of its Climate Ready DC implementation planning and can apply lessons from this and similar projects from cities around the country to inform Mountain View.

**Assess program effectiveness.** Once potential funding sources are identified, the Cadmus team will examine Mountain View's historical program effectiveness in leveraging these sources and collaborating with potential partners, and current plans. Effectiveness metrics may include total regional funding dollars utilized, grant application success rates, and total regional sources used versus available.



*Subtask ix. Identify internal, intra-department, and external process improvements*

From the above research, Cadmus will provide recommendations regarding process improvements within the Environmental Sustainability Program, between the program and other city departments, and between the program and potential external environmental sustainability partners and funders. These may include:

- Labor savings improvements where interdepartmental staff labor responsibilities can be shifted or shared, resulting in overall city labor savings
- Stakeholder engagement process improvements (internal, inter-departmental, engaged stakeholders, and the general public) that can reduce costs and improve communication and outcomes for the city
- Funding opportunities, both regional and national, that the city is not taking advantage of, and methods to increase funding success
- Strategies to solve apparent conflicts between City Council, sustainability, and other city department goals, and take advantage of synergies
- Methods to improve the effectiveness of city programs, to accelerate GHG reductions and waste reductions for the city
- Business process streamlining to improve how Sustainability Department action plans and goals are executed
- Sustainability frameworks and tools to improve how the city prioritizes, tracks, assigns implementation responsibility, and measures progress for its programs. This could include, for example, building on a template we developed to help the City of San Francisco Department of the Environment begin mapping strategic plan strategies and goals to specific programs, persons responsible, KPIs, and timelines.

While the above process is not simply a matter of applying a generic model, Cadmus is highly experienced with developing and applying organizational process improvement models, frameworks, and structures to sustainability program management. For example, we supported EDF with the development of communications materials to explain the “Virtuous Cycle of Strategic Energy Management” framework, which has been used as part of the EDF Climate Corps program for the past several years.<sup>5</sup> This is one framework we have adapted to GHG reduction and sustainability because its “continuous improvement” concept is widely applicable and intuitive to stakeholders.

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<sup>5</sup> Environmental Defense Fund. *The Virtuous Cycle, A Framework for Strategic Energy Management*. Available online: <http://edfclimatecorps.org/sites/edfclimatecorps.org/files/content/thevirtuouscycleofstrategicenergymanagement.pdf>

**Figure 1. Illustrative Framework for Continuous Improvement  
(the Virtuous Cycle of Strategic Energy Management Framework)**

## Components of the Virtuous Cycle

Five components of the Virtuous Cycle drive continuous improvement in energy management.



The Virtuous Cycle demonstrates how an entity’s executive, financial, human resources, performance management, and public relations functions must be aligned to overcome systemic barriers and create a cycle of continuous improvement. This framework has led to the identification of more than \$1.5 billion of energy efficiency savings since 2008 through the EDF Climate Corps,<sup>6</sup> and it has recently been adopted by the Retail Industry Leaders Association (RILA).<sup>7</sup> Barriers in one function can prevent action even if the rest of the corporate functions are aligned but, if each department is equipped with the right information, resources, and authority, targets set by executive leadership will be followed by successful implementation and positive public relations, which will reinforce the executive targets in a cycle.

### *Subtask x. Provide recommendations regarding effectiveness of program measuring tools*

For the top 10 most important programs/actions the Sustainability Department is pursuing, Cadmus recommend the tools to measure the effectiveness of these actions and programs toward achieving the city’s GHG reduction targets (with a particular focus on the city’s transportation programs). As described above in subtask iii, such effectiveness metrics are program specific for transportation, vehicle miles traveled, job-domicile distance, emissions/vehicle, percentage of electric or hybrid vehicles, and population density are all important metrics.

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<sup>6</sup> Environmental Defense Fund. “Virtuous Cycle of Strategic Energy Management.” Accessed August 2018: <http://edfclimatecorps.org/impact/virtuous-cycle>

<sup>7</sup> At RILA, it is called the 2015 "Retail Energy Management Maturity Matrix." Retail Industry Leaders Association. “Leadership Model.” Accessed August 2018: <http://www.rila.org/SUSTAINABILITY/RETAILENERGYMANAGEMENTPROGRAM/Pages/MaturityMatrix.aspx>

# Environmental Sustainability Program Assessment and Strategic Plan Proposal

For these 10 programs, we will describe typical ways their key performance indicators are measured based on our deep modeling knowledge and performing evaluation, measurement, and validation (EM&V). In addition, we will describe applicable datasets and methodologies, measurement accuracy, and potential measurement tools that can be used to gauge program effectiveness over time. We will make measurement tools and methodology recommendations that balance cost, complexity, difficulty, and accuracy to enable measurement of progress over time.

## Deliverables:

- All components, described above, will feed into a Draft and final Mountain View Environmental Sustainability Program Assessment Report,<sup>8</sup> which includes the following:
  - Status review of current programs, resources, outcomes, and what proportion of these are within the city's sphere of control and influence
  - Business process map, including stakeholder engagement plan and comparison to best practice
  - Results of US. city scan for comparable benchmark cities
  - Interviews results with 5 to 10 comparable US benchmark cities, comparing Mountain View program to these cities
  - Mapping of city's roadmap and action plans against worldwide best practice, including identification of strategies the city should consider as it moves forward
  - Qualitative ratings and rankings of the city's sustainability action plans for effectiveness, and identification of primary barriers to action
  - 10 barriers to city action and two to three potential solutions/best practices to address these
  - Mapping of other city department goals relative to sustainability and their qualitative impact on the city's sustainability efforts, using the same effectiveness scale as above
  - Results from city departmental interviews to identify their goals, viewpoints, and constraints and how these intersect with sustainability goals, viewpoints, and constraints
  - City departmental interview results that explore opportunities or constraints with regard to the availability and sharing of staff or other city resources
  - Review of City Council goals and potential synergy and/or conflict with sustainability goals; included with be an equity rating for each sustainability action, to include equity within the effectiveness ranking of sustainability actions

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<sup>8</sup> To maximize efficient use of the city's available funding, Cadmus is recommending a single-deliverable process that covers the outputs of all subtasks discussed above. However, certain interim deliverables may be developed to support stakeholder engagement or key discussion or decision points throughout the process. In addition, where the city has specific timing needs for key outputs, other interim deliverables could be identified during project contracting or kickoff.

# Environmental Sustainability Program Assessment and Strategic Plan Proposal

- A list of regional and/or national funding sources that are applicable to the top 10 most effective actions and an assessment of how effective the city has been and will be in pursuing these funding sources
- A list of recommended sustainability program process improvements encompassing labor, stakeholder engagement, funding, goal conflict resolution, GHG reduction, business processes, sustainability frameworks or paradigms, and continuous improvement
- For the top 10 most effective GHG programs, a description of typical program key performance indicators and recommendations regarding measurement tools and methodology for use as the city moves forward
- Two to four in-person meetings to present interim results and the draft and final reports

## Team Key Strengths

- Expert input from highly experienced former city sustainability directors to inform assessment of Mountain View's program
- National and International best practice knowledge resources, database, expertise, and access to network of leading sustainability directors
- Local staff that know what will work in the California and Bay Area environment
- Highly experienced and sensitive stakeholder engagement process to help enable greater coordination, collaboration and partnership across city departments
- Cutting edge thought leadership with regards to sustainability and equity, transportation, and building emissions reductions
- Process improvement experts in sustainability action plan execution, strategic planning, and program evaluation and measurement.

## *Task B: Environmental Sustainability Program Strategic Plan*

Our usual process in developing a strategic plan is to include a high level of stakeholder interaction and facilitate this interaction by showcasing the opportunities, barriers, and choices stakeholders have and then to facilitate their decision-making, promoting ownership of these decisions which then spurs action. However, for this project, Mountain View has already conducted an extensive level of iterative stakeholder engagement to sort through its options and has created multiple climate action plans to this effect. The city knows what actions it wants to take, and the question is how to accomplish these most efficiently and effectively. The city wants to know the costs versus the benefits of accelerating or slowing its sustainability plans so that it can weigh these against all city priorities.

Our strategic plan will therefore narrowly focus on these elements and consist of two parts, according to the RFP (as shown in roman numeral labeling):

- (i) Level of Response Scope Definition
- (ii) Options and Recommendations for each Level of Response

*i. Level of Response Scope Definition*

The city has already defined actions and the costs and benefits of each action in the ESTF-2 report, the Climate Protection Roadmap (CPR), the Municipal Operations Climate Action Plan (MOCAP), and the Greenhouse Gas Reduction Program (GGRP). Business as usual emissions and the GHG reductions expected for each action is defined.

Nevertheless, some potential solutions and actions may be missing that the city should consider adding to its program. For the top 10 most effective actions identified in Task 2 A above, Cadmus will more fully explore the barriers to action for the city, and potential solutions/best practices to address these. For electric vehicles, this may be upfront cost and consumer market acceptance; for energy efficiency in buildings, split incentives between owners and renters can be a barrier. Cadmus will draw upon its internal databases and experts to present two to three solutions each to these key barriers, to potentially supplement Sustainability Department plans. For example, for low-to-moderate income (LMI) consumers with low credit ratings, PACE financing or city-sponsored loan programs can help address the up-front capital needs and credit risk for LMI energy efficiency projects.

Using the results from all these documents and the above program assessment that establishes industry leading actions, Cadmus will classify each action in these action plans into “basic” (i.e., business as usual), “advanced,” and “industry leader” “level of response” categories. For each action, we will classify the total emissions impact of the action, market penetration as applicable (i.e., percentage of cars electrified), and the timing of the action (e.g., the industry leading level of response will achieve lower emissions faster). In some cases, a bundle of actions is required to effect change, and in this case the bundle will be included or not in one of the above level of response categories. For instance, the ESTF-2 report recommends “a holistic suite of actions to encourage people to switch to alternative modes of transportation: restrict parking, make transit free and convenient, design streets for bikes and pedestrians, and extensively encourage alternative commuting practices through outreach.” This suite of actions would be placed into the “Advanced” or “Industry Leader” category, while not doing this suite of actions could be “basic.”

In keeping with our strategic planning experience, Cadmus expects to accomplish this classification together with city stakeholders, presenting a draft “level of response” scope definition and the reason behind each choice to involved stakeholders in the form of a steering committee; and receiving feedback as part of a half-day workshop. The steering committee should be comprised of city staff, ESTF-2 members, and other sustainability-engaged stakeholders (i.e., local utilities, transit authorities, major employers, environmental advocates, equity community groups).

Taking into account steering committee feedback, the Cadmus team will finalize the mapping of sustainability actions to level of response categories. Using the above reports, the Cadmus team will create a simple Excel model for the city to approximate the resulting emissions for each level of response, using the Greenhouse Gas Reduction Program 2012 model and assumptions for calibration (unless the city identifies an alternative preferred model).

Although there are action timing projections embedded in the city action plans and the ESTF-2 report, it is possible to spend more to accelerate action; and vice-versa, to slow down due to lack of funds or other resources (referenced below as “timing versus resource investment” trade-off). To estimate reasonable action timing, we will consult with project partners Katherine Gajewski and Ariella Maron to evaluate if the city’s original timing estimates relative to resources is reasonable.

## *ii. Options and Recommendations for each Level of Response*

In the last subtask, timing versus resource estimates were evaluated for the city’s primary actions. Using these estimations as a base, Cadmus will project timing versus resources (dollars, FTE, and other pertinent resources) for each level of Response.

Once an initial estimate is made, the Cadmus team will seek further validation from outside experts and sustainability directors, for example, by conducting follow-up interviews with up to 5 to 10 of the sustainability directors engaged in Task A.ii who may have expressed willingness to provide further review or advisory support. As part of these USDN-network interviews, Cadmus will also validate the city’s assumption with regards to program structure, Environmental Sustainability program roles and responsibilities, expected funding, and answer other questions the city may have regarding sustainability program execution.

We will then present findings and obtain further city feedback on each level of response’s assumptions regarding program structure, program roles and responsibilities, and expected funding to ensure that city program costs are fully estimated. Finally, options and recommendation for the appropriate resource levels and organizational structure will be given for each level of response (i.e., basic, advanced, or industry leading).

### **Deliverables**

- Identification of policies, programs, and actions that the city should consider.
  - Classification of city potential actions into “basic,” “advanced,” and “industry leader” courses of action, including assessment of reasonable timing with regards to these, and the resources needed to achieve each level of response.
  - Recommended Sustainability program structures, stakeholder engagement, and funding strategies to achieve each level of response.
  - Steering committee half-day workshop to obtain feedback on draft results
  - Final report reflecting this feedback

### **Team Key Strengths**

- Experienced former sustainability directors’ views on Sustainability program strategy, and the resources needed for each levels of response
- Strategic recommendations from a cadre of experts in equity, sustainability finance, marketing, program design, stakeholder engagement, process improvement, and organizational structure.
- Experienced strategic planners able to seamlessly integrate with Mountain View’s previous planning, filling in gaps.

*Task C: ESTF-2 Recommendation Validation Support*

In this subtask, Cadmus staff will be available on an hourly basis to help city staff validate select ESTF-2 recommendations by the end of 2018 or early 2019. Cadmus has broad technical assistance capabilities, including these:

- Transportation modeling and validation
- Policy analysis and design, including building codes
- Building energy use modeling
- Land use and planning expertise GHG emissions modeling and savings
- Consumer economic value proposition modeling
- Consumer market acceptance and surveying
- Project financial analysis
- Project finance and incentives analysis

**Deliverables**

- Technical assistance to help validate ESTF-2 recommendations

**Team Key Strengths**

- Deep experience with delivering technical assistance across the country
- Modeling capabilities and data that can be used to validate ESTF-2 assumptions and plans
- Knowledge of the wider Bay Area action environment to better integrate ESTF-2 recommendations

## 7 Project Schedule

Below is a Gantt chart of the project schedule, starting in October and continuing through early March. The “X”s show major deliverables, and this schedule is subject to adjustment per the RFP.

Task	Oct-18			Nov-18				Dec-18				Jan-19				Feb-19				Mar-19							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
<b>TASK 1: Project Kickoff and Ongoing Management</b>	[Gantt bar]																										
<b>TASK 2: A: Program Assessment</b>	[Gantt bar]																										
<b>i. Status Review</b>	[Gantt bar]																										
<b>ii. (a) Benchmark Against 10 Comparable U.S. Cities</b>				[Gantt bar]																							
<b>ii. (b) Benchmarking against leading cities worldwide</b>				[Gantt bar]																							
<b>iii. Effectiveness of City's current programs</b>				[Gantt bar]																							
<b>iv. Accounting for other City strategies relating to sustainability</b>				[Gantt bar]																							
<b>v. Identification of City sustainability opportunities/constraints</b>				[Gantt bar]																							
<b>vi. Identification of City staffing opportunities/constraints</b>				[Gantt bar]																							
<b>vii. Identification of synergies/conflicts with City Council goals</b>				[Gantt bar]																							
<b>viii. Identify regional sustainability collaboration effectiveness</b>	[Gantt bar]																										
<b>ix. Identify process improvements</b>	[Gantt bar]																										
<b>x. Program effectiveness-measuring tools</b>								[Gantt bar]																			
<b>Draft report presentation</b>												[X]															
<b>Final report</b>																[X]											
<b>TASK 3: B: Program Strategic Plan</b>	[Gantt bar]																										
<b>i. Level of Response Scope Definition</b>																[Gantt bar]											
<b>ii. Options and Recommendations for each Level of Response</b>																[Gantt bar]											
<b>Draft Task B Report presentation</b>																					[X]						
<b>Final Task B Report</b>																								[X]			
<b>TASK 4: C: ESTF-2 Recommendation Validation Support</b>	[Gantt bar]																										
<b>Support on Hourly Basis</b>	[Gantt bar]																										