

Green Resident Education: Final Report Case Study

Completed on behalf of Southwest Minnesota Housing Partnership

The Southwest Minnesota Housing Partnership is committed to maintaining NeighborWorks Green Organization designation. That includes implementing green practices across all organizational activities, including green resident engagement and adopting green Maintenance and Operations. This case study shares lessons from their efforts to expand green resident engagement.

The Plan

Initially, this effort was focused on piloting a green resident engagement program at four Southwest Minnesota Housing Partnership sites, in partnership with their management company, Lloyd Management. The project was designed to begin with an assessment of best practices. The second step was a series of on-site resident interviews to assess resident interest in green topics, and a workshop with on-site management staff to assess their interest and also give orientation on basic best practices. Third was developing a series of online tools to coordinate planning and information sharing between sites and owner/manager. It was to close with a second on-site workshop to develop and pilot on-site activities.

Getting Started

The first working session with Housing Partnership and Lloyd Management staff was designed based on the [Green Resident Engagement Best Practices Review](#). Besides resident interviews designed to learn what topics interested residents, there were sessions with on-site management staff to learn what topics they were interested in and what green maintenance and operations challenges they were wrestling with. There were also interactive activities to teach the best practices and begin to design activities to implement using them.

A Lesson in Listening

The process of scheduling the working session revealed a disconnect between the expectations of the property owners and the management company. The owners wanted to build on implemented green maintenance and operations to add green resident engagement, tailored to each property. The management company wanted to ensure expectations would stay within reasonable time commitments for on-site staff and

Lesson: Invest time building buy-in from all partners up front.

fit with each individual staff's strengths, and the lack of detail defining "green resident engagement" meant the expectation may have seemed more time-consuming than it actually was.

The staff session was changed from a resident engagement planning session to a listening workshop because the facilitator was unable to access needed information from Lloyd Management. During the workshop, on-site staff were very engaged in discussions of what aspects of green engagement were working -- and weren't working -- at their respective sites. They appreciated a safe space to discuss things that they were struggling with, particularly around recycling and waste management where residents either weren't recycling, or were recycling improperly and creating extra work and nuisances they had to deal with. Senior staff at Lloyd and at the Housing Partnership learned about challenges they hadn't known about, and on-site staff used the opportunity to brainstorm solutions with team members. It was clear that on-site staff were open to implementing more green engagement with their residents, but that implementation of green maintenance and operations were not yet uniformly practiced on the four sites, something that came as a surprise to the Housing Partnership.

Next Steps: Stepping Back, Building Understanding and Buy-in

The first working session demonstrated a need to revamp the project scope. The project team stepped back. The next step, critical to building the buy-in needed for implementation, was to ensure mutual understanding between the Housing Partnership and Lloyd Management of each organizations' priorities, as well as the reasons they had for those priorities.

Substantial time was devoted to one-on-one phone calls and conference calls between leadership teams. These conversations revealed Lloyd Management's concern around minimizing additional demands on on-site staff was important for Lloyd to maintain the high management standards expected by the Housing Partnership. Similarly, Lloyd Management learned that the Housing Partnership's push for green management was tied to funder requirements.

Lesson: Push all partners to name their motivations and goals. Once everyone understood management wanted to maintain high standards, and owners wanted to comply with funding requirements, implementation went smoothly.

Addressing Stakeholder Needs, Accomplishing Shared Goals

These discussions resulted in a couple of shifts in the plan. The plan was tailored to meet each partners' core needs, namely doable-for on-site staff while maintaining quality and meeting funders' requirements. It was also responsive to the way each partner preferred to work.

First, instead of focusing on green resident engagement, the primary focus would be to systematically implement green Maintenance and Operations (M&O) at the four pilot sites. This was a higher priority for the housing partnership, and it aligned with one of the best practices revealed in the initial best practice study: modeling green practices in M&O is key to building buy-in for green resident engagement, and is useful for educating residents. The plan was to ensure successful implementation at pilot sites first, and then it would be rolled out at other Housing Partnership sites managed by Lloyd. Green resident education would be integrated into that effort.

Lesson: Address feedback. Tailor plans to the specific goals, needs, and work style of each stakeholder.

Second, Lloyd Management leadership strongly preferred with a centralized approach rather than a site-specific one. They felt it would achieve better on-site buy-in and reduce the time and effort required of on-site staff for implementation. The team adopted a Flisrand Consulting recommendation to break green M&O into manageable sub-activities (green cleaning, green product specifications, waste reduction and recycling, green landscaping, etc.), and systematically implemented one per quarter over the next two years. This would also give on-site staff at the four pilot sites an opportunity to play a leadership role in the larger roll out by providing feedback about what was and wasn't working.

The Need for Champions

For this centralized approach to succeed, it was important to have a champion at each organization to keep plans on track and to reevaluate whether the plan was working. The Housing Partnership identified Sharie, who was already the key contact for Lloyd Management's reporting, as their point-person. It was critical that Lloyd Management identify a green M&O project lead, as most of the work would take place in Lloyd's central office. There was a two-month lag while Lloyd identified Sarah as the person with the time and experience to play this role. Sarah had worked as an on-site manager and she understood the concerns of on-site staff. Together with her open-minded approach and her talent for really listening to feedback from on-site staff, she was a perfect candidate to helping the team shift to new practices.

Lesson: Project champions willing to take on challenges are critical.

Preparing for Attempt #2

The second implementation workshop plan was transitioned to a working session, where online planning tools and resources would be reviewed by senior staff at both organizations and tested by the project leads identified at each organization.

Online tools were designed to provide easy access to existing resources, to make planning simple and straightforward, and to integrate communication between owner and management team into the process. Tools were placed in a shared google drive to facilitate shared editing within one document. They were all designed using the principles of [Community-Based Social Marketing](#). Tools included:

- [Green M&O Planning Spreadsheet](#): This spreadsheet outlines the topic areas, includes specific performance goals, schedules the quarter a topic will be implemented, outlines talking points on the topics to be used both with on-site staff and residents, and links online resources like “[Green and Healthy Property Management](#)” that are intended to guide implementation planning. It also includes a rough editorial calendar with links to online articles and resources appropriate for resident communications.
- [Green M&O Planning Template](#): This worksheet is designed for the staff lead planning implementation for sites. When the template is complete, the plan includes timeline, goal, talking points, details on expected staff actions and how they are communicated to on-site staff and residents, prompts for strategies to ensure success, links to online resources, and reporting requirements.
- [Green M&O Guide: On-site Implementation Template](#): This worksheet is similar to the Planning Template, but abbreviated to include only information relevant for on-site staff. It is intended to be a tool to communicate the implementation plan to on-site staff.

Lesson: Design tools to encourage good plans. Avoid “busy-work” and use strategic prompts. Accomplish multiple goals in one space. Here, the planning spreadsheet sets the topic timeline, is pre-populated with tools and is a reporting tool.

Working Sessions Designed around Listening

The [second working session](#) was designed around building buy-in by all staff, from on-site staff up to organizational leadership. It was also organized to highlight implementing green M&O is a collaborative effort, one that has to work for everyone from residents and on-site staff to the executive leadership of both Lloyd Management and the Housing Partnership.

The first session engaged the senior leadership at both the Housing Partnership and at Lloyd Management to reaffirm and explore the [agreed-upon goals](#) for the project. The goal for that session was to share each organizations’ goals and motivations, and then to explore the minimum structure that would achieve those goals using an activity titled

“[Min Specs](#).” This discussion proved key for reinforcing buy-in and understanding the challenges facing the respective organizations. It also guided updates to the M&O Planning Template.

The next sessions were very hands-on and tested out timeline development and the implementation plan for the first implementation module, green cleaning. This was chosen as a clear-cut task and an easy place to start. The process of completing the M&O Planning Template led champions Sarah and Sharie to clarify “green” product standards, and they explored online databases of products to ensure product accessibility in the rural region. They brainstormed ways to set up a convenient transition for on-site staff, including providing each site with a basket of approved green cleaning products and a request to let Sarah know which worked and which didn’t.

Lesson: Make implementation convenient. Provide good resources, and reduce or avoid adding new tasks for implementers.

A final session that day shared the draft plan with regional managers supervising the pilot site staff to solicit their feedback and ensure their buy-in. The second day was focused on addressing any gaps and feedback from the first day, as well as connecting with the Lloyd Management communications staff to plan how to communicate the green M&O changes to residents. The communications would be integrated into the new site newsletter templates, and beyond informing residents would incorporate a secondary goal of encouraging residents to adopt similar practices in their own homes. The working session concluded with an update to the whole team, including senior staff. When the two-day session ended, a plan was ready to be implemented at the four pilot sites, and a follow-up check in was planned for half-way through the implementation.

Check-in Questions:

1. How is implementation of [topic] going?
2. What has been great?
3. What has been difficult or frustrating?
4. Does anything need to be changed?
5. There will be another cycle of green M&O coming in a month. Is there anything you’d recommend about how to roll out [topic]?

Follow-Up Report: A Consensus on Success

Sarah and Sharie held a check-in meeting two months into the green cleaning implementation. Before they got to the check-in questions, Sarah dove in with a report. “I have been super impressed with the on-sites willingness to work with this. They’ve been awesome and understanding. There hasn’t been any attitude, they’ve been honest about what does and doesn’t work.” Both Sharie and Sarah felt that because of the second work session, implementation had been fairly simple. “Mostly conversations with co-workers,” and researching some products, said Sarah. Sharie noted that the Housing Partnership is pleased because it is moving forward and they have relatively

little involvement in the process other than providing clarifications on acceptable products.

It hadn't been all easy. Sarah had started as planned by providing each site with a basket of six different types of green cleaning products, distributing them with a request for feedback on what did and didn't work. "It wasn't as smooth sailing as I thought it would be," and it took multiple efforts to find products that people liked. Some products had unpleasant smells while others didn't work. However, because on-site staff knew their honest feedback was welcome, they shared their opinions. After two months of trial and error, they had all found products they liked and that are very cost-effective. Two sites are using water and vinegar for almost everything. A local distributor provided an all-purpose, [Green Seal certified](#) bulk concentrate cleaner ([Clean by Peroxy](#)) that is well-liked and which can be mixed for a wide variety of uses. An automated measuring dispenser makes mixing up the concentrate hassle-free.

Lesson: Build in opportunities for feedback from all stakeholders, and address it respectfully. Here, on-site buy-in was strong because they knew their opinions would be heard.

This was reinforced by three off-line conversations between two of the on-site staff and one of the regional managers with Flisrand Consulting. "The on-sites are both pleased with it, working with it, and they don't have any complaints. Everyone is open to it." From the on-site staff who manage cleaning staff, "It has gone great. It was just a change in product. They gave us each a kit, and I didn't have to go shopping or anything." "They distributed baskets of supplies and asked us for feedback. [The person who cleans] was excited about getting to try them out and choose which was best." They all highlighted Sarah's key role in it going so well. "They are in close contact with Sarah to let her know how it's going." and "Sarah is great at the people part!"

The only problem on-site staff mentioned was a minor misunderstanding with some of the residents at a site with a fairly large older population. "I put out fliers and a poster telling the residents what we were doing. A daughter called because her mother was concerned she couldn't use her products in her apartment anymore." The misunderstanding was easily cleared up.

Two cleaning challenges remain at especially difficult turn-overs: disinfectants and oven cleaners. Sarah heard from on-site staff that while some of the green cleaning products could work on difficult ovens, they would require multiple cleaning sessions over several days -- something that is not viable for turning units in a timely way. Flisrand Consulting heard from on-site staff, "Some products don't work -- especially ovens, glass cleaners." The search remains for products that work in these situations. Flisrand

Consulting is seeking recommendations for these product categories from other green affordable housing providers.

Given the partnership structure of the green cleaning implementation, Lloyd Management and the Housing Partnership have agreed to postpone the rollout to other sites until acceptable disinfectants and oven cleaners are found. All partners agree it is better to roll it out more slowly and to do it right, avoiding frustration by other on-site managers, than to move quickly and undermine on-site staff buy-in for green M&O.

Next Steps

Lloyd Management is also moving forward with planning the second quarter of green M&O, this one focused on green product specifications for regular maintenance and at unit turn-over, and is even beginning to think about the third quarter implementation of waste reduction and recycling. Sarah and Sharie have scheduled check-ins for the full two-year cycle of implementation that include a mid-rollout check in and a pre-rollout planning call.