



GREEN IMPACT CAMPAIGN

VOLUNTEER TOOLKIT



I will help a local
business reduce their
carbon footprint.



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**“THIS WAS SUCH A GREAT WAY
FOR ME TO EXPAND MY SKILLS
WITH SUSTAINABILITY WHILE
MAKING A POSITIVE IMPACT.”**

– Gwen Corrie, GIC Volunteer

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About Green Impact Campaign

Green Impact Campaign (GIC) is a nonprofit organization that provides students and volunteers across the country with training and cloud-based tools to conduct free energy surveys for local, small businesses in their community. Through these energy surveys, small business owners receive custom, actionable recommendations on how they can reduce their energy and water usage while students and volunteers gain professional skills and real-world experience relevant to future green careers. Green Impact Campaign is reducing the environmental impact of business on the planet while better equipping the next generation of climate leaders.

Why small businesses? Cumulatively, small businesses in the U.S. alone account for roughly \$60 billion in energy costs and nearly half a billion metric tons of carbon emissions. And even though the average small business can reduce their energy usage by 20-25% with simple, low-cost energy efficiency upgrades, most of them don't know where to begin. That's where we come in.

For the past several years, students and volunteers from over 70 communities have conducted free energy surveys for hundreds of small businesses, identifying over two million kWh of annual energy savings, equivalent to powering two thousand homes for a year.

But, GIC is much more than an organization, it is a movement. A movement of students and volunteers that are challenging the status quo. A movement to raise awareness about sustainability, to inspire change in the small business community, and to become the next generation of climate leaders. This is more than a volunteer opportunity, it is a chance to be a changemaker.

Welcome to the Campaign.

Green Energy Survey Overview

What is a “green energy survey”?

As a Green Impact Campaign volunteer, you will help local, small businesses in your community learn ways that they can reduce their energy and water usage and utility costs through a free green energy survey. These free green energy surveys are conducted using a self-training tool called GEMS, a cloud-based tool that prompts the user with simple yes/no questions about energy and water using systems in a business’s space and then automatically compiles a report with recommendations and savings estimates.

Why should I get involved?

You’ll help the environment, your resume, and a local business – all with one project. Whether you’re considering a career in sustainability or looking for a hands-on outreach project, this project benefits both you and your community.

- **Expand your knowledge.** Learn more about energy-efficiency and green business practices through real-world, hands-on experience.
- **Boost your resume.** Gain marketable professional skills in areas like *Sustainability Consulting, Project Management*, and more to reference in interviews.
- **Get certified.** Receive an official Green Impact Campaign Volunteer certificate to share on your LinkedIn profile and resume when you complete five or more energy surveys.
- **Connect and grow.** Connect with other volunteers and potential employers through the Green Impact Campaign network and learn about other unique learning opportunities.
- **Be part of something bigger.** Be part of a growing movement to raise awareness about sustainability and inspire change in the small business community.

MAKE SURE YOU’VE SIGNED UP AT THE GIC WEBSITE.

If you haven’t already, be sure to sign up at greenimpactcampaign.org/join/ in order to become a registered volunteer and gain access to GEMS, the tool used to conduct green energy surveys.



Campaign Checklist

Step 1: Sign up and review this toolkit (30 minutes)

- Sign up at <http://greenimpactcampaign.org/join/>
- Review this training toolkit and reach out to GIC staff with any questions

Step 2: Select local businesses (15 minutes)

- Make a list of local businesses that you'd like to target

Step 3: Reach out to selected businesses (15 minutes per business)

- Visit or call each selected business to explain the green energy survey and gauge interest

Step 4: Schedule and conduct the green energy survey (45 minutes)

- Schedule a day and time with the business to conduct the survey
- Complete the green energy survey using GEMS and send the results to the business

Step 5: Follow up with the business (15 minutes)

- Call or email the business owner to follow up with any questions they might have or progress updates

Total time commitment: 1.5 hours per completed survey

WE ARE A MOVEMENT . . .

TO RAISE AWARENESS ABOUT SUSTAINABILITY,

TO INSPIRE CHANGE IN THE SMALL BUSINESS COMMUNITY,

TO BECOME THE NEXT GENERATION OF CLIMATE LEADERS.

WE ARE GREEN IMPACT CAMPAIGN.

Let's get started . . .

Selecting a Business

Before you start reaching out to businesses, come up with a list of 5-10 local businesses that you want to target first. There are no restrictions on what type of business can receive a free energy survey. *(Use the Campaign Planner at the end of this guide to compile your list of businesses and track your outreach progress)*

Rule of thumb: For every 4 businesses you reach out to, 1 will most likely participate.

Here is a list of things to keep in mind:

- **Start with who you know.** Think of any businesses where you have existing connections. Maybe you have a friend that works there or maybe you're just a frequent customer. Whatever the connection, having an existing contact will go a long way.
- **All types of businesses are eligible.** There are no restrictions on what types or size of small businesses can participate. Restaurants, doctor's offices, retail stores, accounting offices, they're all eligible.
- **Think local.** The closer the business is to campus or home, the more likely they'd be willing to support a local, volunteer project. If you're a student, try to think of businesses close to campus and frequented by students.
- **Utilize the resources available to you.** If you're having trouble thinking of businesses, ask your professors, coworkers, advisors, or classmates if they have any ideas or know any local business owners. Or hop on Yelp and see what pops up.

Once you've compiled your initial list, rank them so you know who to reach out to first.

Reaching Out to a Business

Using the list you've compiled, begin to reach out to each business to introduce the program and ask if they would like to receive a free energy survey.

Keep these things in mind:

- **Always go in-person or call.** Small business owners are very busy. Because of this, unfamiliar emails often go ignored. The more personal, the more likely they are to say yes.
- **Don't go empty-handed.** Maybe the business owner doesn't have time to talk to you right now but is interested in learning more. Always bring a GIC Flyer (at the end of this toolkit) and a personal business card that you can give them to look over later and follow up.
- **Be mindful of the time of day.** When visiting or calling a business, try to pick a time of day when you know the owner will be there and a slower time of day for business.
- **Local businesses love students.** If you are a local student, be sure to make a point of saying that you are a student from the local university whenever introducing yourself. Local businesses are usually thrilled to help support local student projects.
- **It really is FREE.** Be sure to reiterate that the green energy survey costs them nothing and that no one will ever try to sell them something at a later point.
- **Talk dollars and make sense.** Some businesses might be interested in reducing their carbon footprint, but ALL businesses are interested in saving money. Be sure to stress the point that this free energy survey can help them save money while saving the planet.
- **Follow up, follow up, follow up.** Persistence is key. If the owner is not there, try to get a card and follow up with them directly or any other staff member that's in charge of paying the bills. Try to follow up at least three times before giving up on that business. And if a business says no, just remember, it's not you, it's them. Business owners are busy people and might not be able to participate for a multitude of reasons. So don't take it personal if they say no.

Sample Introduction

“Hi, I’m [YOUR NAME]! I’m a student at [LOCAL UNIVERSITY] and I’m currently volunteering with a program called Green Impact Campaign. It’s a nationwide program where students provide free energy surveys for local businesses to help them save money and reduce their environmental impact. It’s completely free and it’s a great way to learn about actionable ways to reduce your utility costs. Would you be interested in receiving a free energy survey? It only takes a couple minutes of your time and you’d really be helping me and our cause by participating!”

Sample Questions from Businesses

Business Owner: “Seriously though, how much does it cost?”

You: “It’s completely free. No fine print.”

“Is someone going to be knocking on my door next week trying to sell me something?”

“No. Unless the Girl Scouts are going around selling cookies next week. No one will ever try to sell you any products or services related to receiving this free energy survey.”

“I’m pretty busy. What’s involved with this energy survey?”

“It’ll only take me about 20 minutes to conduct the energy survey. You tell me a day and time that works best for you and then I’ll use a cloud-based program to answer some basic questions about your space, like the type of light bulbs you use. And then the program will give you custom recommendations on ways to reduce your utility costs, provide cost and savings estimates, and show you how your energy use compares to similar businesses.”

“What do you use to conduct the energy survey?”

“We use Green Impact Campaign’s tool called GEMS to complete the energy survey. It’s a cloud-based tool that was developed specifically to help small businesses reduce their energy usage and save money.”

“So what do you need from me to conduct this energy survey?”

“Not much. All I would need from you is some basic information about your business, like square footage and average monthly utility costs, tell me a time that works best for you for me to come conduct the energy survey, and a contact email address where you’d like to receive the survey results. That’s it!”

“How much savings will the energy survey find for me?”

“I won’t know for sure until I conduct the energy survey, but I can tell you that the average business that has received this energy survey has found energy savings of 25% through the recommendations.”

“Do I have to commit to implementing the recommendations?”

“No. Our goal is to give you the information you need to make your space more energy-efficient. We would hope that you implement the recommendations but there is no commitment.”

“What about privacy? Who else is going to see this energy survey?”

“None of your contact information, energy usage information, or survey results will be shown to anyone else except you and me. If you’d like to share your results with a colleague or someone else, that is completely up to you.”

“This all sounds great, but what exactly do you get out of this?”

“A lot. I’m always looking for ways to make a positive impact here in the community and gain some real-world skills for my resume. This allows me to do both!”

Conducting the Green Energy Survey

Before conducting the energy survey, you must do the following:

- Register the business at greenimpactcampaign.org/register (or have the business register themselves)
- Schedule a time with the business to conduct the energy survey

The following are step-by-step directions that you should follow along while completing your first energy survey using GEMS. For more detailed instructions, including screenshots, refer to the step-by-step GEMS Survey Guide at the back of this toolkit.

Conducting the energy survey using GEMS:

Step 1: Retrieve the business's 4-digit reference code

After a business is registered, GEMS creates a unique 4-digit reference code for that business's energy survey. You must retrieve this corresponding code before conducting the survey in order for the survey results to be sent to the right business.

- On your **computer**, go to <http://gems.greenimpactcampaign.org/>
- **Log in** using the unique username and password that was sent to you when you signed up
- Under the **Pending Surveys** tab, note the 4-digit **Reference Code** that corresponds to the survey you wish to conduct

Step 2: Access GEMS on your mobile device (or bring a print out of the GEMS survey)

Once you are at the business, ready to conduct the energy survey, use your smartphone to access GEMS and conduct the survey.

- On your **smartphone**, go to <http://gems.greenimpactcampaign.org/>
- Touch the GIC logo to begin
- Enter the 4-digit **Reference Code** and tap **Start survey**

Note: If you are unsure if you'll have cellular service, be sure to bring a print out of the GEMS survey to complete it and then enter the inputs on your computer at a later time.

Step 3: Answer survey questions

The survey consists of 7 sections: General, Lighting, Plug Load, Building Envelope, HVAC, Water, and Recycling. Be sure to enter data accurately and completely, as your inputs affect the final report results and recommendations.

- Tap the **General** tab and begin with this section
- **Navigation:** Tabs at the top of the screen indicate the 7 sections. The highlighted tab indicates the section you are currently editing. Tap another tab to view that section.

- **Questions:** Answer all questions to your best knowledge. **Tap the question text to view further explanations and example images.** Use the questions to guide you through the business's space, observing what is being asked and asking the business representative for any questions you cannot observe on your own. For each question, select **Yes, No,** or **N/A** depending on your findings. When specified, enter quantities.
- **Save:** Complete all questions in the section. Tap the **Save** button at the bottom of each section to save entered data before proceeding to the next section.
- Select the next tab to complete the next section. Repeat the process until all questions in all sections have been completed and saved.

Step 4: Review the survey results on your computer

After completing the energy survey, log back into GEMS on your computer to review the results before you approve and send them to the business.

- On your **computer**, go to <http://gems.greenimpactcampaign.org/> and log in
- Under the **Awaiting Approval** tab, click **View Report** for the corresponding survey that you recently conducted
- Click the **My Plan** tab. Under the **My Ways to Save** section, review the list of recommendations for the business, clicking on each recommendation to view the cost and saving estimates. Check to make sure that you didn't accidentally make any typos when inputting quantities, such as entering 100 light bulbs when you meant to put 10.

Step 4(b): Correct any errors

If necessary, correct any errors, typos, or incomplete questions by using your smartphone or computer to access GEMS and edit any survey questions. Remember to **Save** at the end of the edited section as you make changes.

Step 5: Approve and send the results

Now that you've reviewed the survey results and corrected any errors, you're ready to approve and send the results to the business. GEMS will automatically send the results to the business email address provided at registration.

- While in the **View Report** preview screen, click **Approve it now** in the red box at the top of the screen.
- Click **Approve** in the confirmation window.
- Congratulations! You've just complete your first green energy survey!

WAIT, HOW DO I GET A GEMS ACCOUNT AGAIN?

In order to use GEMS, you must sign up at greenimpactcampaign.org/join/ and you will be emailed unique login credentials that you will use to access GEMS and conduct energy surveys.



Following Up

After completing the green energy survey, follow up with the business to see if they have any additional questions and to hear about any plans or progress they've made since receiving the survey.

One week after completing the survey

Follow up with the business by phone or email to make sure they received their survey results and ask them to share their thoughts regarding their survey via a feedback survey.

Questions to ask:

- *Did you have any trouble viewing your energy survey report?*
- *Do you have any questions about the recommendations made?*

Things to send:

- GIC Feedback Survey: greenimpactcampaign.org/feedback-survey

One month after completing the survey

Reach out to the business by phone or in-person and consider asking some of these questions:

- *Have you implemented any of the recommended upgrades since the survey? If yes, did you use the progress tracker in GEMS to track them?*
- *Do you have plans to complete any upgrades in the next month/three months/year?*
- *Is there any additional information that would be helpful for you to implement any upgrades?*
- *Have you checked with the utility provider for available rebates and incentives to bring down project costs?*
- *Is there anything else I can do to help you in your sustainability efforts?*

If you're ever unsure of an answer, direct the business to contact one of our on-call GIC Experts by email at info@greenimpactcampaign.org or by phone at (202) 813-9442 for more information and support.

FAQs

What type of businesses can receive a green energy survey?

There are no restrictions on what type of businesses can receive a survey. Here's a list of some business types that would be great to target:

- Accounting offices
- Automotive repair
- Bar or pubs
- Barber shops
- Beer, wine, and liquor stores
- Chiropractic offices
- Churches or religious organizations
- Clothing stores
- Coffee shops or cafés
- Convenience stores
- Dentist offices
- Dry cleaners
- Fast food restaurants
- Grocery stores
- Hair salons
- Laundromats
- Legal offices
- Nail salons
- Physician offices
- Restaurants

I'm still figuring out what to say when reaching out to a business. What are the benefits for a business to receive one of these energy surveys?

- Receive customized energy and water saving recommendations and cost estimates
- Learn how their energy usage compares to similar businesses in their industry
- Gain public recognition for their participation through the GIC network

How much does the average business find in energy savings through the survey?

The average business finds enough energy savings to cut their utility costs by 25%.

How long does it take to complete an energy survey?

An energy survey typically takes *20-30 minutes* to complete.

What should I take with me when reaching out to a business?

- Green Impact Campaign Flyer (at the end of this toolkit)
- Personal/student business card (if you have one)

I'm curious to learn a bit more about how and why Green Impact Campaign was started?

Check out "The Story of Our Movement" here: greenimpactcampaign.org/history-green-impact-campaign

Why is Green Impact Campaign focused on helping small businesses specifically?

Great question. These three facts tell the story of why GIC is focused on helping small businesses:

- *FACT 1:* Small businesses in the U.S alone account for roughly \$60 billion in energy costs and are responsible for half a billion metric tons of carbon emissions every year.
- *FACT 2:* The average small business has the potential to cut their energy consumption by 15-20% through simple, low-cost energy-efficiency upgrades.
- *FACT 3:* The average small business is doing nothing about it because of a lack of expertise, money, or time.

How can I add my involvement with Green Impact Campaign to my LinkedIn profile?

Here's how to add your involvement to your LinkedIn profile:

Step 1: Log in to LinkedIn and click Edit Profile

Step 2: Add the Volunteer Experience & Causes section to your profile

(If you've added this section to your profile in the past, add a new Volunteer Experience)

Step 3: Input your GIC volunteer experience

- *Organization:* Green Impact Campaign (hyperlink to the GIC page)
- *Role:* Energy Audit Volunteer
- *Cause:* Environment
- *Date:* [insert dates of involvement]
- *Description:* Conducted free green energy surveys for local, small businesses in my community as part of a national campaign to reduce the environmental impact of business on the planet.

Instructions with screenshots here: greenimpactcampaign.org/adding-gic-to-your-linkedin-profile

Where can I find Green Impact Campaign on social media?

- *Facebook:* facebook.com/greenimpactcampaign
- *Twitter:* @GICorg
- *LinkedIn:* linkedin.com/company/green-impact-campaign

I still have other questions, where can I go to ask additional questions?

Send an email to info@greenimpactcampaign.org with any additional questions.

CAMPAIGN PLANNER

Use this planner to estimate time commitments and track your efforts.

>> Campaign Calculator

Initial Kick-Off Time (0.5 hrs) Time spent signing up at greenimpactcampaign.org/join and reviewing this toolkit	0.5 hrs
Selecting and Reaching Out Time (# of businesses to target x 0.5 hrs) Time spent conducting energy surveys and following up with businesses	+ _____ hrs
Survey and Follow Up Time (# of businesses to survey x 1.0 hr) Time spent conducting energy surveys and following up with businesses	+ _____ hrs
Total Project Time	= _____ hrs

>> Campaign Tracker

Business Information			Contact Information		Outreach Information		Survey Information			Follow Up	
Business	Address	Industry	Name/Title	Email/Phone	Contacted?	Interested?	Survey Date	Conducted Survey?	Approved & Sent?	1-week	1-month
Joe's Coffee	123 Roast Rd Town, DC 10000	Food Service	Joe Beans Owner	joe@coffee.com 555-555-5555	✓	✓	09/25/14	✓	✓	✓	✓

>> Other Notes & Genius Ideas:



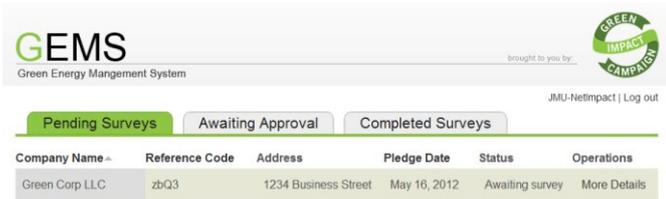
GEMS SURVEY GUIDE

Completing a Green Energy Survey in 5 steps.
It's fun. We promise.

1 Retrieve 4-digit reference code

COMPUTER: After a business is registered, GEMS creates a unique 4-digit reference code for their energy survey. You must retrieve their corresponding code before conducting the survey in order for the results to be sent to the right business.

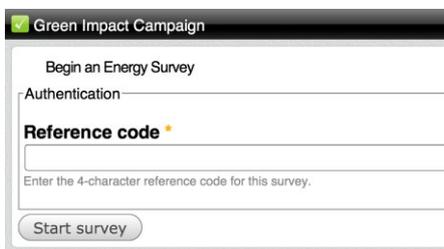
- 1 Go to gems.GreenImpactCampaign.org.
- 2 **Log in** using your chapter's unique login information
- 3 Under the **Pending Surveys** tab, note the 4-digit **Reference Code** that corresponds to the survey you wish to conduct.



2 Access GEMS on mobile device

MOBILE: Once you're at the business, use your mobile device to access GEMS and conduct the survey

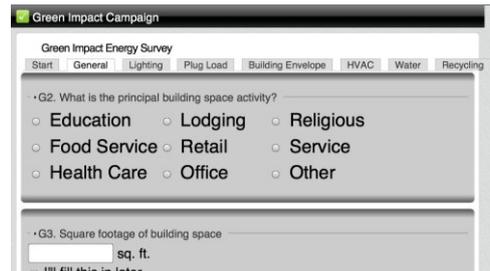
- 1 Go to gems.GreenImpactCampaign.org on your smartphone.
- 2 Touch the GIC logo to begin.
- 3 Enter the 4-digit **Reference Code** for the corresponding survey you are conducting. Tap **Start survey**. GEMS generates the survey questionnaire for the selected business.



3 Answer survey questions

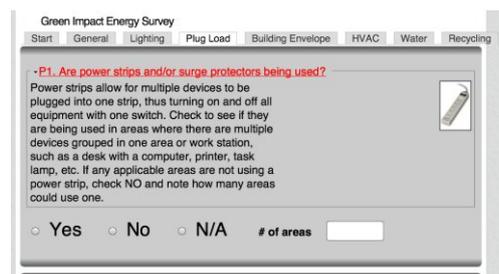
MOBILE: The survey consists of 7 sections: General, Lighting, Plug Load, Building Envelope, HVAC, Water, and Recycling. If a team is conducting the survey, assign specific sections to individuals. Only one person can complete or edit a section at a time to avoid losing data. Be sure to enter data accurately and completely, as this affects the final report results and recommendations.

- 1 Tap the **General** tab and begin with this section.

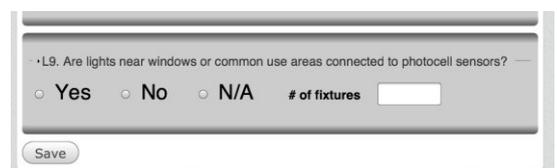


- 2 **Navigation** - Tabs at the top of the screen indicate the 7 sections. The highlighted tab indicates the section you are currently editing. Tap another tab to view that section.

- 3 **Questions** - Answer all questions to your best knowledge. **Tap the question text to view further explanations and example images.** Use the questions to guide you through the building, observing what is being asked. For each question, select **Yes, No, or N/A** depending on your findings. When specified, enter quantities for observations.



- 4 **Save** - Complete all questions and quantities in the section. Tap the **Save** button at the bottom of each section to save entered data before proceeding to the next section.

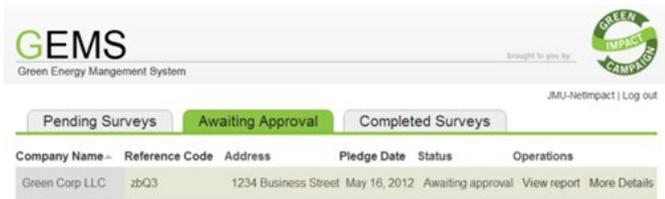


- 5 Select another tab to complete the next section. Repeat the process until all questions in all sections are completed and saved.

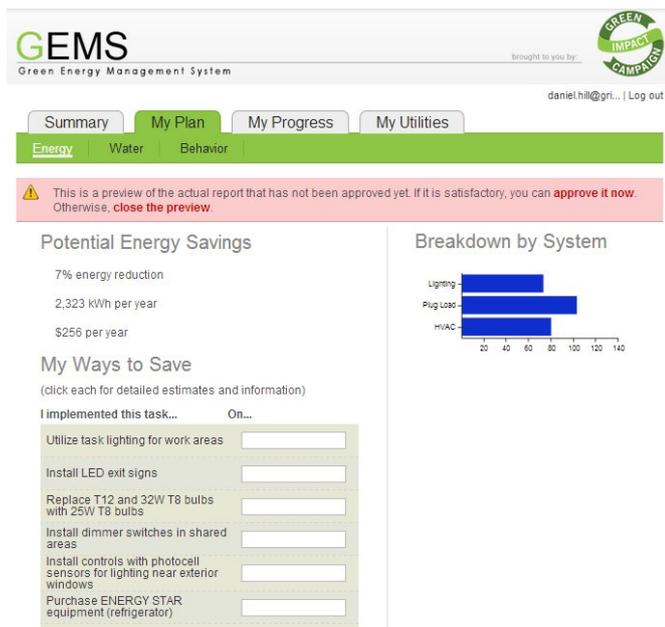
4 Review the results

COMPUTER: After completing the energy survey, log back into GEMS on your computer to review the results before you approve and send them to the business.

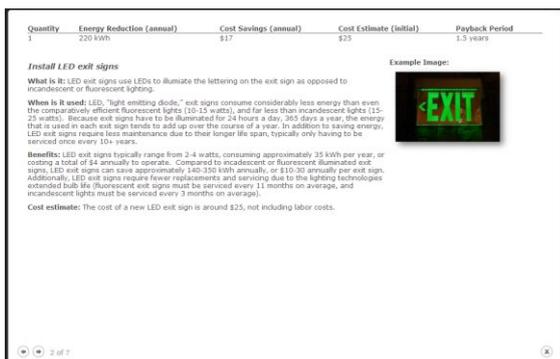
- 1 Go to gems.GreenImpactCampaign.org and log in.
- 2 Under the **Awaiting Approval** tab, click **View Report** for the corresponding survey that was recently conducted.



- 3 Click the **My Plan** tab. Under the **My Ways to Save** section, review the list of recommendations for the business.



Note: Click each recommendation to view cost and saving estimates and more detailed information for what is being recommended.



4(b) Correct any errors

MOBILE: If necessary, correct any errors, typos, and incomplete questions by using your mobile device or using your computer to access GEMS and edit any survey answers. Remember to select **Save** at the end of the edited section as you make changes.

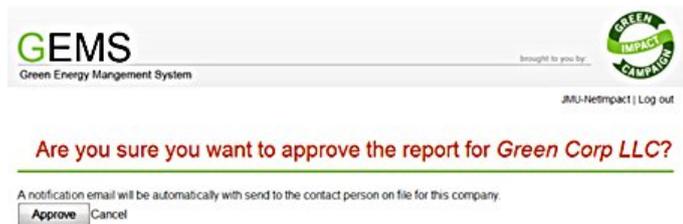
5 Approve and send results

COMPUTER: After reviewing the survey results and correcting any errors, approve the survey report. GEMS will automatically send the survey results and recommendations to the business email address provided at registration..

- 1 While in the **View Report** preview screen, click **Approve it Now** in the red box at the top of the screen.



- 2 Click **Approve** in the confirmation window.



- 3 Congratulations! You've just completed a Green Energy Survey!



FREE ENERGY SURVEYS. FOR LOCAL BUSINESSES. BY LOCAL VOLUNTEERS. GREEN IMPACT CAMPAIGN.



Green Impact Campaign is a national outreach program to help local businesses reduce their utility costs and carbon footprint through free energy surveys using cloud-based tools.

20 MINS

Average time it takes a volunteer to conduct an energy survey

25%

Average energy savings found from an energy survey

By receiving a free energy survey, you will:

- Receive custom energy saving recommendations
- See how your energy usage compares to similar businesses
- Measure your progress and impact by tracking your upgrades
- And it's completely FREE!

SIGN UP FOR YOUR FREE ENERGY SURVEY TODAY:

GREENIMPACTCAMPAIGN.ORG/REGISTER

