

How-to Guide

CAMPUS GREEN FUND IMPLEMENTATION



aashe

The Association for the Advancement
of Sustainability in Higher Education

In partnership with
the Campus Green
Fund Collaborative

How-to Guide

Campus Green Fund Implementation



ON THE COVER:

University of Illinois sustainable student farm manager, Zack Grant, picks produce to be sent to the university dining halls. *Photo Credit: Jason Lindsey.*

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McGill University (Montreal, Canada)
University of California, Berkeley
University of Illinois at Urbana-Champaign
University of Texas, Austin
University of Vermont

WRITTEN BY:

McKenzie Beverage - Sustainability Coordinator, Butler University
Karen Blaney - Program Coordinator, Operations, The University of Texas at Austin
Kevin Ordean - Co-Founder, NAU Green Fund, Northern Arizona University
Mieko A. Ozeki - Sustainability Projects Coordinator, The University of Vermont
Katherine Walsh - Coordinator, The Green Initiative Fund, University of California, Berkeley
Lilith Wyatt - Sustainability Officer, McGill University

DESIGN & EDITING BY:

Vanessa McVay - Blue Dog Creative
Monika Urbanski - Programs Coordinator/Analyst, AASHE

ASSOCIATION FOR THE ADVANCEMENT OF SUSTAINABILITY IN HIGHER EDUCATION:

AASHE is working to empower higher education to lead the sustainability transformation. We do this by providing resources, professional development, and a network of support to enable institutions of higher education to model and advance sustainability in everything they do, from governance and operations to education and research.

CAMPUS GREEN FUND COLLABORATIVE:

We are a non-registered group of campus sustainability officers involved in coordinating and managing green funds on our respective campuses. Please visit our Facebook page at www.facebook.com/CampusGreenFundCollaborative for more information.

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Introduction

With the growth of the higher education sustainability movement, colleges and universities are increasingly adopting programs and initiatives aimed at resolving social and ecological issues. As institutions deal with revenue shortfalls and budget cuts, securing funding for sustainability projects and initiatives is especially challenging. Campus green funds (CGFs) seek to create the financial means for implementing sustainable education, research, operations, planning, administration, and engagement. They represent one of the many financial mechanisms utilized for campus sustainability projects.



Background & History

Over the past decade, CGFs have become a popular funding mechanism for financing sustainability projects in higher education. Detailed information on 154 green funds at 136 higher education institutions can be found in AASHE's recently launched [Campus Sustainability Green Funds Database](#). The University of Colorado - Boulder was one of the first institutions to implement a campus green fund in 1973, and for 40 years this fund has supported its Environmental Center, one of the largest student-led centers of its kind in the nation ([learn more](#)). CGFs increased in the mid-2000s with new funds peaking in 2009. This trend matched the growth of the sustainability movement in North America, which was significantly buoyed by commitments made by higher education institutions toward sustainability in campus operations, academics, administration, and culture.

A campus green fund is a financial mechanism dedicated to the funding of projects for the benefit of an institution's sustainability efforts. CGFs provide funding for sustainability projects and programs occurring on a campus, including, but not limited to, renewable energy installations, energy and water retrofits, educational outreach, and hiring sustainability personnel (see examples of CGF-funded projects at right).

EXAMPLES OF CGF-FUNDED PROJECTS:

- Anti-oppression training in residences
- Campus bicycle initiative
- Campus food bank
- Campus tree inventory
- Community Engagement Day
- Community home energy-audits
- Community revitalization initiatives
- Green building initiatives
- Indigenous Awareness Week
- Integrating equity and diversity into admissions
- Investment/divestment research
- Native plant nursery and habitat restoration activities
- Paid student sustainability internships
- Photovoltaic system installation
- Relief drives for disaster-stricken communities
- Student-community garden
- Waste management systems
- Water and electrical sub-metering



Aboriginal awareness event at McGill University.

CGF Benefits

Campus green funds are effective in sparking interest and additional investment in sustainability efforts at institutions where lack of money can act as a barrier to these efforts. CGF projects can help kickstart collaboration among stakeholders. Unlike projects funded by other financial mechanisms such as green revolving loan funds, campus green fund projects do not necessarily generate significant financial savings or a return on investment that can be reinvested into the fund. Projects backed by CGFs are often one-time, small-scale, or pilot initiatives that often cover a broad definition of sustainability; including social, economic, and environmental dimensions. A critical benefit of CGFs is the potential for expanding knowledge of sustainability and its many applications by providing educational and research opportunities to students, faculty, staff, and administrators.

The base funding for CGFs can be derived from a variety of sources (see examples below). Student fee-based funds are the most common CGF funding source. A 2008 AASHE-partnered publication, [Raise the Funds: Campus Action Toolkit](#), describes how to go about developing a fund strategy from a variety of funding sources.

COMMON CGF FUNDING SOURCES:

- **Administrative funding:** Funds from an administrative office or academic department budget, often distributed in the form of budget appropriations or grants.
- **Donation driven funding:** Donations, gifts, or grants from alumni or foundations.
- **Student funding:** Student fees or student association budgets.
- **Hybrid funding:** Funds from a combination of sources above.



The Macdonald student-run Ecological Gardens at McGill University.
Photo credit: Owen Egan.

Using this Guide

This how-to guide is a collection of best practices and lessons learned in developing and implementing campus green funds from institutions that currently operate them. Major steps related to specific phases in a CGF's life cycle are outlined, with examples and links from a variety of institutions included. Due to the many differences between institutions, the guide takes a broad view of the process.

- Chapter One: Design & Campaign - *How do I start a green fund on my campus?*
- Chapter Two: Implementation & Management - *How do I transition the campus green fund from proposal to program? How do I keep the program on track and make it successful?*
- Chapter Three: Education & Outreach - *How will others learn about the campus green fund and its projects?*
- Chapter Four: Evaluation & Reporting - *Are the green fund projects performing well? Is the overall performance of the program meeting the original intent of the fund?*

Chapter One: CGF Design & Campaign

Step One: Your Vision

Before you launch a campaign, take some time with your core team members and trusted advisors to create a draft vision for your green fund. The vision for the fund may shift during design and campaigning, but it is important to begin with a preliminary concept. Several questions should be considered:

- What is the intent of the fund? – Is your institution primarily looking to increase visibility and interest in campus sustainability through the fund? Are there expectations for its implementation, such as improving sustainability in campus operations or curriculum? Will co-curricular opportunities increase, such as internships and volunteer activities?
- What will be the source of funding? – The CGF can be supported by academic and administrative funds, donations, external funds such as grants, student funds, or a combination of these. The source of funding should be determined based on institutional strengths, culture, and characteristics.
- What should be funded? – CGF funding may go toward projects that take on an environmental focus, or projects that also incorporate social or economic dimensions. Some institutions may give priority to key areas of focus, such as alternative energy, while others may opt for a broader approach.
- Who are your long-term allies and likely future grantees? – Your institution may choose to give priority to student-led projects over those proposed by faculty or staff. Funding availability for collaborative projects with external partners should also be considered.



Bicycle lanes across the quad at University of Illinois.
Photo credit: Jason Lindsey.



University of Vermont solar trackers. *Photo credit: Sally McCay.*

Step Two: Do Your Research

Hundreds of other institutions have already gone through the process of establishing a campus green fund. Learning about their challenges and successes will help to strengthen your own case when seeking approval.

Identify at least ten institutions that have successfully implemented campus green funds (AASHE's [Campus Sustainability Green Funds Database](#) is a good place to start your research). Best practices can be incorporated from any type of institution, but it is best to find a few examples from institutions that are similar to your own. Call or email contacts at these institutions for more information and document everything that you learn.

Sample Questions to Ask Other Universities:

- How is your CGF funded?
- How did you tie your proposal to institutional priorities?
- What were the biggest hurdles you faced early on?
- Was there opposition to your proposal? How did you overcome it?
- What are the administrative costs?
- What is your funding cycle?
- How do you measure success?
- What is the most valuable lesson you learned?

Review the results and identify the strongest points of resonance with your own institution's administration and culture, making note of anything not considered when drafting the initial vision. If any schools of comparable size and administrative structure successfully implemented CGFs, reference them as main examples in your proposal. Make sure all documentation is clear and organized in case of questions or concerns.

Step Three: Structure a Proposal

The information collected during the research stage can now be used in structuring a CGF proposal. This proposal should be tailored to the specifics of your institution and your audience (see [Appendix A: Sample Proposal](#) provided by the University of Vermont Clean Energy Fund).

Considerations for Writing a Proposal:

- How does the proposed CGF tie to the institutional mission, strategic plan, and any evident priorities?
- Describe where the funding should come from: optional fees, mandatory fees, or matching dollars.
- Discuss the administrative costs associated with the fund, and whether the fund itself will cover them.
- Include a sample of bylaws to explain how the CGF would potentially operate (more on bylaws in *Chapter Two*). Include a disclaimer indicating that the bylaws and operating procedures will be finalized once the fund's governance structure is in place.
- Include case studies or examples from your *Step One* research to describe what similar institutions are doing.
- Describe potential projects that could be funded at your institution. Talk to people who would seek CGF funding and make sure that their projects are accurately represented in the proposal. Be sure to consider national trends and successful projects at other institutions.
- Describe the criteria you would use to evaluate the projects for funding.
- Suggest a length for the funding cycle (three years, five years, ten years, ongoing).
- Describe the mechanism(s) for evaluation and renewal, including how you will determine if the fund should increase, decrease, or stay the same.
- Indicate how you will measure success.



University of California Berkeley's BicyCAL Bike Shop.

Step Four: Build Support

Assembling a coalition of supportive stakeholders will increase the likelihood that the CGF proposal will be approved in a timely manner. When meeting with stakeholders, try to align the green fund with your institution's priorities, and listen to feedback from each stakeholder. Make changes that fit the needs of the institution as well as the proposal. Be clear that you are asking for the stakeholder's support. If the initial response is "no," ask what the concerns are and find out how these may be overcome. Do not get discouraged - patience, good manners, and flexibility will eventually win you a toehold, and relationships built at this stage may help with implementing and managing the fund down the road (see tips for toughing it out below).

A clearly demonstrated common interest across campus will increase the likelihood that top administrators will support the fee itself and the results of a campus referendum to institute the fee. In particular, the more student support that can be demonstrated, the better your chances.

Understanding and Using the Organizational Chart

You will need support from various levels within the organization to make your CGF proposal a reality. This includes:

- Upper administration - President, chancellor, provost, vice presidents, deans, or equivalents
- Financial decision makers who can authorize additional funding or student fees
- Faculty/staff councils and university governing boards
- Student government associations or equivalent
- Technical specialists - Accountants and CFOs who can provide resources once the concept of the fee is approved.

Keep in mind that the official organizational chart never tells the full story of influence and association between institutional staff. There are advisors and confidants of key decision makers all over the university. Talk to the people that the decision makers trust, and turn them into champions. Then the decision-makers will be better primed to listen to your pitch.

You may benefit from identifying someone to help manage the fund after it is approved. A Sustainability Office or Accounting Office is a good place to start. Engaging this person prior to approval may help move things along during the formal campaign.

TIPS FOR TOUGHING IT OUT:

- Be prepared for setbacks and delays during the overall campaign
- Select a faculty or staff advisor who can help open doors, navigate the bureaucracy, or serve as a strategy consultant
- If you find evidence that someone is stalling, work with your advisors and allies to devise a strategy to handle the slowdown
- Be friendly, polite, and professional - Arrogance, public shaming, or name-calling will damage or derail your campaign

Step Five: Plan & Implement a Campaign

Once you have gained the support and input of most of the decision makers, it is time to formally build a campaign for official approval. The line between campaigning and building a network of support can be blurry, so the lessons learned from one should influence the direction of the other. There is a delicate balance between keeping stakeholders happy while maintaining the CGF core vision.

Planning a Campaign

- Consider best campaign practices from other institutions and apply what most resonates with your campus governance and culture. Know your audience and what works on your campus.
- Have a realistic timeline - Take into consideration the speed at which change occurs at your institution. The timeframe from concept to implementation of a CGF is typically measured in semesters or years.
- Decide on a working title for the fund, a catch phrase or motto, and a temporary brand or logo that will attract followers and give them something to share.
- Select your method of gauging support and set targets - how many votes, survey responses, petition signatures are enough? Base this on a realistic projection of how much of the population will respond overall.



Tim DeChristopher, guest speaker, at University of Vermont's Energy Action Seminar. *Photo credit: Mieko Ozeki.*

Implementing a Campaign

A campus green fund campaign is often a formal process where approval may differ according to funding source. For example, student-funded CGFs typically involve getting the CGF initiative on a student government ballot and putting it to a vote. Such campaigns should focus on informing students about what is being proposed and getting them to vote.

Once the necessary campus bodies approve the CGF, the decision to formally initiate the fund may need to go before a Board of Regents/Chancellors/Directors or similar governing body. You will likely have the opportunity to present the fund vision and campus decision, and you may have an advocate at your side (such as a student body representative). Keep in mind that meeting schedules for these governing bodies vary - expect a long delay, but don't be surprised if there is rapid turnaround!

After an institution's governing board approves the fund, a final set of approvals may be needed, wherein the administration assigns the fund to a responsible department and provides some form of staff support.



University of Illinois students researching algae. *Photo Credit: Jason Lindsey.*

Step Six: Evaluate Campaign Results

At the end of the campaign, you will find out whether the CGF proposal was approved. Either way, your work is not yet complete. If the CGF proposal was approved on the first try, excellent work. The next step is implementation (*Chapter Two*). If it was not approved, console yourself with the fact that most proposals do not pass on the first attempt. Take this time to evaluate your process and decide when and how to pursue follow-up campaigns.

Considerations if the CGF is Not Initially Approved:

- Look practically at the situation, overcoming emotional reactions
- List the reasons you were given for why the fund wasn't approved
- Identify those factors that are within your control, and look for solutions to those concerns
- Consider whether a different fund type would be better received
- Talk to others about your experience - consult campus leaders, original contacts, and peer institutions
- Sit down with your team and reevaluate
- Start planning for Round Two

Chapter Two: CGF Implementation & Management

The CGF implementation and management steps outlined in this chapter may happen within overlapping timeframes, but each has distinct priorities and considerations. The implementation team and any dedicated CGF staff should work together to accomplish these steps.

Step One: Who's Who & What's What

The first step is to convene the key stakeholders from your campaign into a coalition of partners for maintaining the overall program and individual projects. Understanding who's who and what's what will ensure the long term success of the fund. Key stakeholders are those who were supporters of your green fund campaign, those who will be frequent applicants to the fund, and those who will be involved with approving or implementing projects. Consider creating a map and contact list of your key stakeholders.

Campus Green Fund Stakeholders

- **Campus Facility Services** - In cases where proposed projects might require the alteration of campus infrastructure and grounds, facilities services will need to be involved.
- **Sustainability-Focused Entities** - Departments, offices, and centers working on sustainability can help determine the sustainability needs and gaps of the campus, and can help build partnerships.
- **Business and Financial Services** - A Business or Finance Office can provide the correct procedures for transferring funds, budgeting, and reconciling accounts; as well as resources for submitting annual CGF financial reports and statements.
- **Other Academic and Non-Academic Departments** - Green funds can lift staff morale and engage new people with sustainability programming. Research funded through CGFs will benefit campus operations and foster student-faculty-staff partnerships.
- **Students and Student Organizations** - Engaging and collaborating with students and student organizations is vital to the success of a green-fund, especially if the fund is student-fee financed.
- **Green Fund Staff** - A dedicated staff person can serve as an identifiable face for the fund, providing day-to-day support and continuity (see page 17 for more on hiring green fund staff).
- **Support Staff** - Other kinds of support staff for the fund may include individuals in finance, IT, marketing, and human resources.

Step Two: Assembling a Green Fund Committee

The allocation of funding from your campus green fund should be managed by a collective body that represents the sustainability-related interests of your campus. This commonly involves a formal committee with representation from students, faculty, staff, and sometimes alumni. Before structuring your CGF committee, take the time to research other successful committees on your campus.

Committee Structure & Member Selection

If your fund is financed by student fees, you may consider giving the students the majority representation on the committee. You may also consider having permanent “ex-officio” positions - campus experts who can provide guidance around topics like facilities, capital projects, and sustainability. Many successful committee structures have appointed or represented “seats” that remain the same annually but are filled by different individuals who are appointed by the groups or departments that hold the seats (see committee structure examples below).

The annual recruitment of committee members should include a “call letter” to those who appoint the represented seats. Seats may be filled through an open application process or through nominations.

Committee Charge & Functions

The CGF committee is generally facilitated by a green fund staff person or by a committee chair, meeting on a schedule selected by the members and reinforced by the committee bylaws. The most critical functions of the committee are as follows:

- Inaugural committee should write the fund’s bylaws (see *Step Two: Bylaws* on page 15)
- Award available funds to applicants on scheduled and publicly announced funding cycles
- Provide committee member training on the mission and rules set forth by the bylaws
- Make any necessary changes or updates to the bylaws
- Remain informed of the state of the fund’s finances
- Monitor progress of the fund’s grant project

EXAMPLES OF COMMITTEE STRUCTURE:

- The Wesleyan University [Green Fund](#) is run entirely by students. It consists of a committee of four members and one chairperson chosen through an application and confirmation process at the beginning of each year.
- McGill University’s [Sustainability Projects Fund](#) Working Group is composed of half students and half staff, chaired by the Sustainability Director, and stewarded by a full-time coordinator. They operate through consensus and review applications monthly. The Office of Sustainability manages all funds.
- The University of Washington [Campus Sustainability Fund](#) committee is comprised of seven student members, with faculty and staff serving an advisory role. Students oversee the fund, manage budgets, conduct outreach, and serve as project liaisons.
- The University of Utah’s [Sustainable Campus Initiative Fund](#) (SCIF) is managed by a full-time coordinator. The eight-person allocation committee awards grants once each semester and is comprised of students, faculty, and staff.



Pollinator on Illinois' campus. *Photo credit: Jason Lindsey.*

Step Three: Bylaws

Bylaws are the committee's guide to internal functions. Campus green fund bylaws ensure consistency, transparency, and ethics regarding the management of the fund's finances and activities. Bylaws should be created by the inaugural committee in accordance with any fee mandates and formal referendum language. Although it may seem obvious, bylaws should not reflect the personal agendas of any committee member, and must be consistently upheld (see links at right and [Appendix B: Sample Bylaws](#) provided by the University of Illinois Student Sustainability Committee).

Successful bylaws often state:

- The mission of a fund
- The formation, voting powers, and duties of the fund committee
- Procedures for allocating funds, general requirements, and preferences of accepted project proposals
- Regulations for fund documentation, reporting, and auditing
- Procedures for amending bylaws
- Rules for committee adjustments, project funding guidelines, and details regarding paid green fund staff positions

LINKS TO BYLAWS:

Appalachian State University
[Renewable Energy Initiative](#)

Indiana University
[Student Sustainability Council](#)

University of California, Berkeley
[The Green Initiative Fund \(TGIF\)](#)

University of Texas, San Antonio
[Green Fund](#)

University of Wisconsin La-Crosse
[Green Fund](#)

University of Vermont
[Clean Energy Fund](#)

Step Four: Funding Guidelines & Criteria

Once the committee and bylaws have been established, funding guidelines and criteria for potential projects should be created. Guidelines and criteria provide consistency from one committee to the next and offset any personal bias among committee members. They are utilized when designing the fund's application materials and the scoring rubric (see below for a comparison of guidelines and criteria and links).

Comparison of CGF Guidelines & Criteria

GUIDELINES	CRITERIA
<ul style="list-style-type: none"> Established and permanent rules for allocating CGF's finances - basic requirements all applicants must meet in order to be considered References to university, state, or federal laws and policies Example: "All projects must be implemented on campus property" 	<ul style="list-style-type: none"> Subjective preferences based on fee referendum and the fund's priorities Allows applicants to be creative within a set of parameters Example: "The committee gives preference to applications submitted by students"

Processes for Designing Guidelines and Criteria

While guidelines will be more restrictive due to existing policies and procedures, determining fund criteria can be a more creative process. Consider processes such as the following:

- Convene an annual retreat to discuss the committee's priorities for the fund's finances.
- Establish topical focus areas and create criteria according to topic area (e.g. energy and water conservation, habitat restoration, sustainable food sourcing, and waste reduction).
- Prioritize specific goals within each topical focus area (e.g. prioritizing carbon reduction over project visibility to the public).
- Conduct a campus sustainability gap analysis and prioritize projects that close the gaps.

FUNDING GUIDELINES & CRITERIA:

University of Pennsylvania
[Penn Green Fund](#)

McGill University
[Sustainability Projects Fund](#)

Harvard University
[Student Sustainability Grant Program](#)

New York University
[Green Grants](#)

Step Five: Hiring Green Fund Staff

While hiring a green fund staff position is not an absolute necessity for a successful campus green fund, there are multiple benefits to creating and filling such a position. Among them are providing fund continuity, historical knowledge and visioning; managing the fund's daily activities; and aligning the fund with the institutions' long-term planning and goals. In the absence of a designated staff position, a fund can rely on the leadership and continuity of a committee chair, staff/faculty advisors, or other supporters.

Creating the Green Fund Staff Position

The committee should be involved in deciding whether or not to create a staff position and how it should be funded. A review of relevant roles, responsibilities, education, skills, and experience should be conducted (see below). The department that houses the position should also be consulted as it will be involved in the hiring process, salary and benefits, and securing staff office space. Your Human Resources office can help throughout the hiring process (view [Green Fund Coordinator job descriptions](#) at UC Berkeley).

Roles, Responsibilities, Education, Skills, & Experience

ROLES & RESPONSIBILITIES

- Coordinate grant application processes
- Advise and support the committee during grant selection
- Track progress of funded projects
- Advise the project leaders
- Manage the fund's finances
- Document and archive committee and project work
- Promote the fund and its projects
- Manage the daily administrative tasks
- Provide messaging for media inquiries

EDUCATION, SKILLS, & EXPERIENCE

- Bachelor's and/or Master's degree
- Campus sustainability experience
- Higher education experience
- Student affairs and or facilities experience
- Project and grant management skills
- Public speaking skills
- Supervisory experience
- Advising experience
- Strong writing skills
- Web content management skills



Farmstand at University of Texas, Austin.

Step Six: The Grant Application Process

CGF projects will be identified and selected through a grant application process that can vary between institutions. With no single best approach, the CGF committee should decide what works best based on member availability, campus precedent, and any relevant cultural or financial factors. Some considerations include:

- Single, multiple, or rolling application cycles
- Single or multi-stage application processes
- Funds with more in-depth pre-application work than others

Creating a Grant Application

The grant application document should reflect the guidelines and criteria established in *Step Three*. Application questions should prompt applicants to address components of a completed and successful project. The CGF committee should evaluate applications through a rubric to determine funding allocations (see [Appendix C: Sample Application](#) provided by McGill University's Sustainability Project Fund).

A Two-Stage Application Process

If your application process includes a pre-proposal or abstract stage, your committee will have separate review meetings for the abstract and application stages. The abstract application can be shorter and will not require all details to be solidified or all approvals secured.

Benefits of a two-stage process include the following:

- Abstracts can weed out projects that do not meet funding guidelines, ideas that are not feasible, and projects that have already been attempted.
- Two potential deadlines can allow for resubmission of an abstract.
- Incorporating the committee's abstract feedback can lead to a stronger application and higher probability of funding.
- The abstract process allows for financial guidance and budget adjustments.
- Committee feedback can direct the applicant to the appropriate approving authority if needed.

GRANT APPLICATION COMPONENTS:

Project title

Sponsoring department/organization

Names, affiliations of the project team members

Project description

Relevance to campus

Metrics and measurability

Project timeline

Outreach, education, and publicity plans

Any necessary project approvals

Partners and collaboration

Project budget, amount requested, and matching funds/donations

Long-term financial viability of project

Assisting Potential Applicants

Guidance to applicants should be provided through a central website or at minimum, on request through an easy-to-find email address or download link hosted on another site. The following options are suggested:

- Post all application materials, resources, deadlines, and timelines on a website or within an electronic guidebook, with contact information for applicant questions
- Hold free, open application workshops where committee members or green fund staff can review application procedures and answer questions
- Meet with applicants, if staff capacity allows it, to coach them in person
- Consider posting examples of winning grant applications

Developing a Scoring Rubric

To select the winning applications, a scoring rubric that reflects funding guidelines and criteria should be developed and used. A rubric ensures projects are scored equally from year to year and the voting process is not compromised by committee members' personal preferences. For full transparency, consider publicizing the rubric with the application materials so applicants can view how their project ideas will be scored. A simpler rubric may be used for the abstract stage if the fund has a two-stage process (see [Appendix D: Sample Scoresheet](#) provided by TGIF at the University of California, Berkeley).

Selecting Winning Applications

Following the CGF application deadline, the committee should select projects for funding. At the beginning of the selection process, the committee should review and discuss the scoring rubric and voting procedures, and should reference the bylaws, funding guidelines, and criteria as needed throughout the selection process.

Determining Project Feasibility

Prior to final approval, CGF projects should be vetted by the appropriate campus officials to determine project feasibility, scope, schedule, and budget; as well as identifying who will do the work. Labor union rules and university policies should be kept in mind when assigning jobs to university employees or students.

In particular, the committee should establish a relationship with the Facilities department to vet projects that propose alteration to the campus built environment and grounds. If Facilities does not already have a representative on the committee, a Facilities liaison should be requested. The liaison should review the planning and project management process for each project to help determine how to work within that process.

Feedback and Resubmission

The CGF committee should provide constructive and impersonal feedback on each application, ensuring that the application process is a positive experience for all applicants regardless of acceptance. Consider working with applicants beyond the award date to either re-submit or reconfigure projects into ones that are more feasible. Including an abstract stage in the submission process is useful for the purpose of providing feedback.

Step Seven: Implementing & Managing Funded Projects

The CGF committee or green fund staff should announce and publicize the winning grant projects to the campus community and public. This is a moment of celebration before getting down to the critical business of implementing and managing the projects.

Now considered “project leaders”, the applicants receiving funding should be in charge of implementing the project using the granted funds. The committee or green fund staff should provide project leader training, project reporting procedures and deadlines, and on-going project support (see [Reporting Requirements](#) for TGIF projects at University of California Berkeley).



University of California, Berkeley Waste Audit Team in Action.

Project Leader Training

Consider requiring all project leaders to attend and complete a project implementation training prior to receiving any grant funding. Requiring project leaders to sign a contract or grant release form after the training should also be considered. This form should list project and grant requirements as mentioned in the training, and should mention other project expectations such as transparency and access to plans and results. The training should outline:

- How funds will be disbursed
- Translating the grant application into a project implementation plan
- How to recruit and hire students to work on the project (if applicable)
- All grant reporting requirements, procedures, and deadlines
- Tools on managing the grant budget and steps for requesting budget or timeline adjustments
- Requirements and tools for education, outreach, and publicity
- Guidance on responding to media inquiries
- Proper use of the green fund logo and brand
- General communication with the committee or green fund staff person

Project Implementation, Reporting, and Auditing

The project leader should create a project implementation plan that translates the goals and metrics of the grant application into tasks and steps to be accomplished. The plan can include an ordered list of project steps with budget costs and deadlines assigned to specific members of the project team. It can be edited as challenges arise and later published upon project completion.

The green fund should provide all project leaders with tools for managing their projects and tracking progress. Examples include online project management tools or shared folders that contain all project requirements, training materials, and reporting procedures. If the CGF has a website, these materials should be posted there. Communication and project reporting is critical for the continuous improvement of the green fund program. Required communication and project reporting will provide insights on CGF projects, finances, and the fund's mission (see *Chapter Four* for more on evaluation and reporting). Examples of reporting requirements in a written report include:

- Accomplishments
- Challenges
- Recommendations
- Timeline progress
- Budget update/expenditures to date
- Metrics on impact - qualitative and quantitative
- Education and outreach materials produced

Project Closing

A project should be considered completed once it has achieved the goals and plans proposed in the grant application and has expended all funds appropriately. It is the responsibility of the committee or green fund staff person to collect documentation of the project's completion. This documentation should include details on finances and a written report outlining all project activities.

Unused project funds should be returned to the general fund for reallocation to other grant projects, unless the committee approves additional project activities for the original grant application. If appropriate, a completed project should also have a long-term viability plan. The need for such a plan may have already been indicated on the grant application (see *Step Six* on page 18). If the applicants answered yes and submitted their plans, this is the point at which those plans would take effect. For example, a campus operating unit may now include this project's on-going costs in its annual budget.



Composting at UC Berkeley's Blake Garden.
Photo credit: Janet De Haven.



Engagement event to develop McGill University's Vision 2020 Sustainability Strategy.

Photo credit: Will Miller.

Chapter Three: CGF Education & Outreach

Education and outreach is a key component to the success and longevity of any campus green fund program. Institutions should develop a brand for the fund, create a CGF website, use social media and press, and reach out to members of the campus community.

Numerous opportunities for getting involved in the fund should be provided to the campus community. The green fund staff and committee should consider different publicity strategies for each opportunity. Special attention should be directed toward:

- The application process - when and how to apply to access funds
- Student internships and learning opportunities available
- Providing access to activities, metrics, results, and accomplishments of funded projects
- Overall impacts of the CGF, annual successes, and information on how the campus community can learn more

Messaging to publicize the campus fund should incorporate language that helps build relationships with campus partners. Transparency of the fund's finances and activities should also be a core theme. While the CGF staff and committee should be involved in marketing the fund, the projects themselves should also promote the fund through their materials, events, and deliverables. For this reason, including education and outreach in project leader training (page 20 in *Chapter Two*) is integral!

HOW TO GET INVOLVED:

University of Illinois
Student Sustainability Committee

Appalachian State University
Renewable Energy Initiative

University of California, Berkeley
The Green Initiative Fund

Step One: Branding Your Green Fund

In order to begin the branding process for a CGF education and outreach plan, it is critical to obtain two levels of information. First, there should be an understanding of your CGF operations, history, goals, and strategic plan. Developing an understanding on these aspects will ensure that there is consistency and accuracy of messaging. It will also help the population fully grasp what the fund is all about, and where it is going. Second, there should be an understanding of the audience and place. Students at your institution are not necessarily the same as students elsewhere. There are subtle (or stark) differences that can exist even between universities that are close geographically. Understanding your particular audience ensures that the message will be effective in your specific context, and that your faculty, students, and staff will find ways to connect to your green fund. Marketing students or faculty make a great addition to the team. If you do not have any at this point in the process, consider recruiting volunteers or creating a marketing internship.

Logos & Slogans

Establishing a logo or design element can help identify your brand and raise recognition. A slogan could also be used along with the logo to create a mood or feeling associated with the CGF brand. In rare cases, the logo or slogan used during your campaign may be adequate; but it is likely that your new governing entity will want to establish a permanent brand for the life of the CGF. Pictured at right, UT-Austin's logo was designed by a graduate student responding to a competition run by the Green Fee Committee. The combination of student engagement and guidelines provided by the university resulted in an effective design that is steadily building recognition around the campus.

It will be necessary to work with your institution's marketing office or a similar department. Therefore, establishing a brand may not be as straightforward as it sounds, and may take a considerable amount of time. A thorough vetting of the institution's policies will be needed.

Working with graphic design students is a great way to get a low- or no-cost solution. Provide students with any branding specifications and restrictions before having them create the design, and consider involving the relevant marketing departments from the beginning. Once the logo is created, it should go through the necessary approvals.

The fund should establish standards on when and where the logo or slogan should be used. In most cases, green fund projects should include the logo on all project marketing materials, project websites, related publications, and in any articles or press releases related to the projects. The CGF committee or staff should also develop guidelines on when and how project leaders should use the logo or other branding materials.



University of Texas at Austin
green fee logo.
Design credit: Jeanie Fan.

Step Two: Creating a CGF Website

The website is the central source of information for applicants and any member of the public that is curious about the CGF. It should be easy to use, comprehensive, and frequently updated. The website should include information on the following:

- CGF committee makeup
- Information on contacting or getting involved with the committee
- History of the CGF and information on the administrative home for the fund
- Past and current funded projects (with grant amounts)
- Application information and timeline
- Past and current media about the projects (if applicable)

It is very likely that your university has a standard for web design, or even a content management system. Understanding how the web sites are maintained is important when first developing a website and when changes to the site must be made. It is important to understand who will be authorized to make changes as well as any software and training needs.

A sustainability-related project clearinghouse on an institution's website can be useful for recruiting potential green fund applicants who would like to get involved but need ideas for a project. The clearinghouse collects project ideas and initiatives from employees, offices, and students interested in sustainability, making ideas readily available for applicants.

PROJECT CLEARINGHOUSES:

Rensselaer Polytechnic Institute
Sustainability Clearinghouse

University of California, Santa Cruz
Project Clearinghouse

Indiana University Bloomington
Clearinghouse Report

Step Three: Using Social Media & Press

Green fund stories and opportunities can be promoted through social media tools like blogs, Tumblr, Facebook, Twitter, YouTube, Vine, ISSUU, Prezi, and MailChimp. From blogging about funded projects' accomplishments to tweeting about an available student internship for the fund, social media can be used for quick publicity as well as archiving the fund's activities. Involving students in social media promotion provides learning opportunities and is a great way to boost student interest in the fund.

Press can include news articles, videos and films, and interviews related to the green fund or its projects. To ensure for brand and message consistency, consider having a single point of contact for all press inquiries. Press should include the CGF name and logo, and if possible, mention of the grant cycle timeline. If the press is about a specific project, be sure to refer to the grant award amount.

Step Four: Campus Outreach & Education

When looking to educate and engage members of the campus community, it is important to get the right information to the right people. Because the make-up of every campus community is unique, it is important to develop a clear understanding of what is important for your students, faculty, staff, and administration. Other universities may have best practices that can help inform your plan, but you are unlikely to replicate their results if your population has other priorities.

To ensure that your message has a wide reach within the campus community, CGF projects should be publicized through common communications outlets such as the following:

- University media (newspaper, website, radio, TV)
- Forums, lectures, fairs, and conferences
- Signage and other ongoing campus recognition
- Videos and documentaries
- External media (non-university newspapers, blogs, radio, TV)
- Presentations to classes and faculty/staff meetings
- A dedicated project symposium

Education and outreach is important beyond informing the campus community about green fund opportunities and attracting applicants and projects. Through education and outreach, a focus on fund transparency can be emphasized, which will strengthen the fund's brand identity, helping to maintain positive relationships and create new ones. Project leaders can demonstrate project success by showing that funds are being used responsibly and ethically. Transparency also lets stakeholders feel more involved throughout the life of the campus green fund.



Celebration of the McGill University Sustainability Projects Fund's 100th project. *Photo credit: Will Miller.*

Making an effort to fund feasible faculty-proposed projects can lead to positive word-of-mouth publicity for the fund within academic departments, and wider interest from both students and other faculty. Reporting your program's success in a public venue (e.g. on a website or in the school newspaper) will also drive potential applicants to the fund.



Honors Quad Energy Challenge at University of Texas, Austin. *Photo credit: Karen Blaney.*

Chapter Four: CGF Evaluation & Reporting

Evaluation and reporting of the campus green fund and its projects are required measurements of good governance. Public support for sustainability efforts can suffer amidst uncertainty about total costs and benefits. It is important to demonstrate that the fund is effective, and to continually learn and improve upon it.

Top Four Objectives of Program Evaluation:

- Be transparent and accountable to the campus community
- Reflect on the CGF's activities and gauge progress
- Continuously learn and improve the CGF program
- Engage the campus community in the learning process

Remember, in all they do, CGFs ought to themselves embody the principles they aim to promote. This means that the methods of evaluation and reporting should also embody sustainability. Along with being inclusive, efficient, adaptive, collaborative, and transparent, they should help to enable the flourishing of both people and the planet.

Tips for Evaluation & Reporting:

- Set up regular expectations, framework, and schedule for what will be evaluated, when, and by whom
- Provide all necessary information about how the fund is adhering to your guidelines, criteria, description, and mission
- The burden is on the CGF staff or committee to not only provide the right information, but also for it to be accessible
- Use the fund as an opportunity to align with the learning and research mission of the institution

Step One: What to Evaluate

Both projects themselves and the fund as a whole need to be evaluated. On the project-level, required deliverables such as reports, videos, or interviews should include metrics on whether project objectives were met as well as lessons learned. Though one final report per project and per year for the fund are requisite, project deliverables such as infographics, videos, flyers, posters, and other creative promotion are also reportable results. Mixed methods work best to collect data as well as to report on it. Project reports can be made public and can later be used as an evaluation resource for the fund as a whole.

At the fund-level, evaluation should answer the following question, “Is the fund mandate being advanced, and is progress being made?” Answering this question requires an understanding of the original mission and intent of the fund, which can be reviewed in the referendum approving the CGF, the application guidelines and criteria, and the committee bylaws. Once this understanding is reached, tools to measure progress should be developed. These may include project report templates, surveys, and feedback forms for use while tabling or at events. A plan for reviewing project-specific reports to evaluate the fund as a whole should also be developed. This information can then be analyzed, synthesized and made public.

Evaluating Structure & Process of CGFs

STRUCTURE

- Staffing structure and resources
- Services offered to campus community
- What projects are funded: themes, stakeholders, timeline
- Review committee terms of reference

PROCESS

- Outreach and public relations
- Application process
- Review of applications
- Project implementation and evaluation
- Reporting and communication

In the scope of evaluation and reporting, be sure to include and celebrate outcomes that are beyond the initial intent of your fund objectives. For example, green fund representatives at McGill University learned that the campus had the right people and the right ideas, but lacked seed funding, institutional memory, knowledge to make things happen, and a network of likeminded people. As a result, McGill’s fund actively provided each of these through coaching applicants, a back-and-forth review process, building strong relationships, and project matchmaking. If you do something similar, be sure to report on all resulting outcomes, not just on where the money went.

Fund Renewal

Project evaluation will inform a renewal vote, if and when your fund comes up for renewal. It is important to supply the new round of campaigners with what has worked and what hasn’t, an argument for whether the fee should be increased, and illustrations regarding whether the structure or processes of the fund should change. If your evaluation has showed that the fund works well as it is, make sure those campaigning have that data to back up their claim that the fund should be renewed. Be sure to abide by campaign regulations of who is allowed to campaign and when.

Step Two: Evaluation Metrics

The most robust metrics are both quantitative and qualitative (see [Appendix E: Sample Metrics](#) for Green Fund & Project Evaluation). Using both numeric and descriptive metrics helps make clear that the numbers are important, but they aren't the whole picture. For example, having 50 event attendees who were enthusiastic about an event is better than having 100 attendees who left the event with mixed feelings.

Quantitative Metrics

Gather both project-specific metrics and numbers that you can aggregate at the fund level. For example, project #22 led to 11 papers published on active transportation; all of the fund's projects led to 57 published papers. Make sure the numbers you use illustrate the breadth of impact. Consider including life-cycle costs, monetary return on investment, savings in energy and harmful emissions, public health consequences, impact on social justice, effects on quality of life, integration of academic mission, and community partnerships.

Qualitative Metrics

Gather testimonials through feedback forms and surveys. This will help to flesh out some of the energy and richness that is hard to capture with numbers alone. Testimonials will help personalize the projects, and give faces (even if anonymous) to those involved with or impacted by the projects. They will also help to demonstrate if the mandate and goals of the fund are being advanced. Quotes can be included in reports and reporting materials at the project level and fund level.

Navigating Challenges

You may have to navigate data availability, uncertainties about conditions and effects, complex human and environmental systems, contradicting information, and non-responsive projects or individuals. Learn and improve by trial and error, building relationships with those who can help you, and transparently report your efforts.



University of Vermont's Compost Power greenhouse project.
Photo Credit: Holly Lee Greenleaf.

Step Three: Mechanisms for Evaluation & Reporting

There are many different ways to find people or capacity (person-time) to conduct evaluation and reporting. Using a combination of mechanisms (outlined below) will provide a comprehensive assessment of the fund and its projects.

Fund Evaluation Mechanisms

PROJECT TEAM FINAL REPORTS	<ul style="list-style-type: none"> • Have projects identify what they will measure and how before releasing funding • Provide templates to make it easier for project leaders to report info
INTERNAL STAFF TEAM REFLECTION	<ul style="list-style-type: none"> • Can include reporting on lessons learned, outreach, staffing, and events
CONVENE INDEPENDENT COMMITTEE	<ul style="list-style-type: none"> • Ensure proper representation while keeping it small so as to be effective (4-8 people) • Ask your academic program review office for guidance (usually found in the Academic Affairs division)
INDIVIDUAL PROJECT AUDITS	<ul style="list-style-type: none"> • Choose a random sample to audit independently • Can be done by fund staff or a review committee
ANNUAL & FINANCIAL REPORTS	<ul style="list-style-type: none"> • Analyze spending trends in different topical areas and compare with fund intent • Is the money being spent the way it was intended?
SURVEYS	<ul style="list-style-type: none"> • Work with appropriate department on campus to develop a survey • Surveys can measure social factors such as health impacts, perception, accessibility of funds, learning outcomes, etc.
CLASSES	<ul style="list-style-type: none"> • Offer course credit to a group of students to conduct life cycle assessments, perform cost-benefit analysis, etc. • Find a professor that would like to offer an aspect of CGF evaluation as a class project
CONSULTANTS	<ul style="list-style-type: none"> • Hire professionals or work with departments (faculty and/or students) that have expertise in the specific areas (e.g. finance, strategizing, accounting)
INTERNS	<ul style="list-style-type: none"> • The learning, student perspective, and community-building of allowing interns to evaluate the fund are valuable • Alternatively, students are in need of experience and would be willing to volunteer
EXTERNAL AUDIT BY UNIVERSITY	<ul style="list-style-type: none"> • Contact the internal auditing office to inquire about auditing



Pedestrian pathway at McGill University.

Conclusion

Campus Green Funds ignite sustainability efforts at colleges and universities by enabling people with good ideas to take action. They provide institutional memory, networks of connections, and expertise on sustainability to improve projects. Since the impact institutions have on the world is primarily through scholarship and the people who pass through their doors, CGFs are well-positioned to support sustainability initiatives that explore the grand challenges of the 21st century, develop solutions, and lead by example. Higher education is the ideal place to experiment, innovate, learn, and grow our human and ecological systems, and CGFs are a great place to start.

We hope this guide has provided a useful roadmap for all phases of a the campus green fund process: design & campaigning, implementation & managing, education & outreach, and evaluation & reporting. Questions or comments about the contents of this guide can be submitted through the Campus Green Fund Collaborative [Facebook page](#). Please be in touch with any feedback you might have!