

Creating a Sustainability Action Plan that works



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What is a Sustainability Action Plan?

Since its inception, the mission of the AIA 2030 Commitment has been to support the 2030 Challenge and transform the practice of architecture in a way that is holistic, firm-wide, project-based, and data-driven. That is why signatories are asked to document a Sustainability Action Plan within six months of joining. Some companies may have this type of document on hand, while others may need to start from scratch. This guide was created to help you develop—and ultimately implement—a Sustainability Action Plan, regardless of where you are starting.

While this document provides ideas for where to start, there is no one-size-fits-all Sustainability Action Plan (SAP). Your SAP will be unique and should acknowledge and support your firm's specific needs. It provides an opportunity to focus on the cultural dimensions that will drive success for your firm before diving into the technical aspects of the program.

At its core, a Sustainability Action Plan (SAP) is a statement of a company's approach to sustainable design. The introspective process required to create an SAP provides an opportunity to think through—strategically and methodically—how to translate sustainability values and aspirations into a comprehensive approach for transforming a company's practice and portfolio. In particular, it helps you identify your top sustainability goals and the metrics you will use to measure improvements.

For many, achieving the AIA 2030 Commitment targets will require changes in your organizational culture, systems, and processes—which require a plan and an intentional change management effort. The more effort you put into establishing the right processes and policies, the fewer the challenges you will see throughout implementation. It may be tempting to dismiss the SAP process but, done well, it can do double or triple duty for your company. Consider how your SAP can serve as:

1. An actionable, company-wide strategy for developing sustainable design best practices to meet the program's goals,
2. A measurement framework with a continual focus on evaluation, adaptation, and improvement,
3. A long-term planning tool to ensure ongoing alignment of values, goals, and practice,
4. An information-sharing platform that communicates your values to clients and peers,
5. A shared understanding among staff of how the company achieves consistently higher levels of performance and aligns consultants with its goals.

Focus on how your company and projects add value and gets us closer to achieving our shared goal of carbon-neutral buildings by 2030. Since your SAP serves as your company's strategy, we encourage you to look beyond the AIA 2030 Commitment requirements of making a commitment, setting energy goals, and tracking data. Consider what other sustainability measures your business could take into account. How could you improve sustainability throughout your office? How do you engage the community through your sustainability efforts?

Also consider how your SAP may be a living document that, beyond the program requirement of being updated every three years, is continuously referenced by employees and frequently reviewed to measure progress. For firms that already have a plan, this document should be used to revisit and update that plan.

“ There’s no such thing as a right or wrong or ‘perfect’ Sustainability Action Plan. The only ‘wrong’ SAP is an SAP that is stagnant. Ours has evolved and transformed into an internal living document, which we have found to be a valuable tool in engaging members in the firm, adding ideas, and continuing our path to transform our practice.”

—Gwen Fuertes, AIA | Leddy Maytum Stacy Architects



Image provided by Leddy Maytum Stacy Architects.

Creating change at your firm

Change management is a process through which people are engaged in creating the change they will be participating in.

Change management (CM) is a deliberate process that draws on a vision and purpose to create the culture and tools needed to successfully achieve a vision. It is not a top-down directive that dictates staff to take specific actions and meet certain metrics. In fact, that approach is more alienating and will not create a culture of empowerment and innovation that is often necessary to meet sustainability goals.

Creating an SAP with a strong CM lens is an opportunity to create new processes and systems that facilitate the work your staff does and instill personal accountability among staff.



Key principles for effective change management

No one said change was easy! Consider the following change management principles while creating your Sustainability Action Plan.

Timing

It is never too soon to start engaging those involved! However, it should be done before change is complete.

Take your time

Pace is important. Take the time to do it once and do it well. When creating change, slow is fast!

Iterations

Big changes should not happen all at once. Take small steps to give people time to adjust. This also provides the organization with the ability to be flexible and pivot if processes are not working in practice as they were envisioned in the planning stages.

Inclusion

Make sure the engagement around developing your SAP is cross-functional and cross-hierarchical; including interns and young designers can provide insights and innovations that can alleviate pinch points throughout the design process.

Multidirectional

Creating your SAP and the CM process that accompanies it should not simply be top-down. There should be enough “bottom-down” and “middle-out” to facilitate and encourage meeting your objectives.

Communication

It is essential to make sure you are communicating changes effectively to your entire company. Evaluate the right channels for communication, and make sure that communications are responsive to cultural diversity and neurodiversity.

Invest in your culture

Your company will inevitably need adjustment time and resources as your organizational culture shifts. Double down on strengthening culture, leadership, and team effectiveness through different independent and team activities.

Make tough decisions

As you shift how your business operates, there may be people who no longer align with your organizational culture. Address these behaviors to avoid damaging morale and hindering company success.

Reward

Recognize and reward when team members are following through or going above and beyond to ensure company success.

Establish authority for changemaker(s)

Changemakers must be given authority to create change. Make it clear that sustainability initiatives are a real priority for the company.

Balance your carrots & sticks

Ensure that the measures created are not all punitive. Balance your “carrots” and “sticks” with initiatives that motivate your employees to contribute to a more positive and innovative organizational culture.

Promote innovation

A sustainable company is an innovative company! Promote and de-risk thinking outside the box. Make it okay to make (non-catastrophic) mistakes. Use “failure” to learn and grow, developing a culture of learning within your office.

Address conflicts

With any change, there is a certain amount of friction. Address complicated situations proactively and help people (especially managers and team leaders) learn how to manage conflict productively.

Engaging your team

Using the principles of change management will make it easier to engage members of your company in a meaningful way.

The process to develop your SAP will vary depending on your company size. If you are a larger company, you might want to create a steering committee or task force of three people (or so) to spearhead and organize the effort. We recommend including a member of executive leadership in this group to provide guidance and act as a conduit to the rest of the leadership team. Ideally, the process to develop your SAP will be a mix of small-group work and at least one all-staff meeting to accomplish the objectives. Smaller companies may have an easier time engaging all company members during a meeting or workshop setting. If your company is somewhere in the middle, you might mix and match some of these large-company and small-company strategies to make it work for you. No matter the size of the business, it is important to have a kickoff meeting. You will find a sample agenda for SAP kickoff meeting in the [Resources section](#).



TIP:

Smaller companies may have an easier time engaging all company members during a meeting or workshop setting. No matter the size of the business, it's important to have a [kickoff meeting](#).

Organizations of all sizes can benefit greatly from both internal and external surveys. Internally, anonymous surveys will allow the shyer members of your staff to speak up and share their experiences and ideas. Externally, surveying current and past partners, clients, consultants, and other stakeholders can also provide invaluable feedback about where improvements can happen. If you do not do a survey, make sure to give staff time and space to communicate their concerns, needs, and ideas. You will find sample survey language in the [Resources section](#).

When creating new processes, it is also important that they foster a more equitable and inclusive workplace; the group of people making SAP implementation decisions should be diverse and culturally responsive. [AIA's Guides for Equitable Practice](#) can help ensure your organization meets the career development, professional environment, and cultural awareness expectations of current and future employees and clients.

“ Our Sustainability Action Plan helped define the scope for a new internal working group at KieranTimberlake called Beyond 2030. The group consists of approximately 15 people from different disciplines who focus on several themes to support our AIA 2030 Commitment pursuit. Subgroups formed within the working group help influence our design process, improve building operations in our office, expand internal training and education, advance advocacy and outreach, and support reporting on benchmarking and project data.”

– Andrew Cronin, AIA | KieranTimberlake



Image provided by KieranTimberlake. (C) Michael Moran/OTTO

Elements of a Sustainability Action Plan

We've provided a framework—and real examples—to get you thinking about the different ways you can create positive change throughout your company and beyond. Overlap between sections is okay—it may help you find new connections and efficiencies.

There are many different ways to organize your SAP. At a minimum, your SAP should include your company's commitment, your energy goals, and how you plan to track and report your data in the Design Data Exchange (DDx).



Company commitment

Summarize your philosophy.



Design and approach

Spell out milestones in your design and goal-setting process.



Goal setting and evaluation

Determine what you'll measure and how.



Governance and reporting

Define who will track data, when it will be collected, and how it will be reported.



Internal training and education

Describe how you will build capacity.



Outreach, advocacy, and external knowledge-sharing

Consider how you are sharing best practices with peers.



Operations and outlook

Take a bigger-picture look at your company's environmental impact.

Company commitment

This section lets you summarize your company's philosophy related to sustainable, equitable, and resilient design objectives. It should reflect input from across your company, which you can solicit via focus groups, all-staff meetings, surveys, and other means. Leverage that feedback to align your culture, systems, and processes around clear company and portfolio goals.

Some companies choose to lead this section with an inspirational manifesto or vision statement. Others rely on key performance indicators (KPIs) and quantitative goals to build alignment. Both can be effective, and we have provided examples of each. When crafting your SAP, consider which approach will be more effective within your culture.

This is perhaps the most important section of the SAP because it sets the stage for compelling and impactful change. For that reason, it is also a good place to outline your CM plan and communication strategy.

Start by answering these questions:

1. Why did you join the AIA 2030 Commitment and what motivates you?
2. How does sustainability relate to overall company goals? Consider quality assurance processes, business development, and staff recruitment and retention.

3. How do you define sustainable, equitable, and resilient design within your company? Consider the ten principles outlined in the [AIA Framework for Design Excellence](#).
4. How do you communicate your sustainability values to staff, clients, and peers? Transparency can be a tool to drive change.
5. What does success look like, and when will you achieve it?
6. What [CM principles](#) will you apply to ensure everyone is on the same page and stays motivated?



TIP:

Consider using an anonymous staff survey to baseline the status quo. See the [Resources](#) section of this document for more information.

How other companies have tackled this:

FIGURE 1

CAW Architects created The Manifesto to clearly state their priorities. Palo Alto, Calif. (20–49 employees)

THE MANIFESTO

Architecture creates places where life happens. We have the power to choreograph these spaces. Architecture demands integrity, awareness, and thoughtfulness. These qualities define our work. Architecture is a record of its time. We recognize that we are making a mark on a continuum. Architecture is a responsibility. In our profession, **THE STAKES COULDN'T BE HIGHER.**

We celebrate the constraints and challenges of every project. They are the starting point. **WE RESPOND TO CONTEXT AND CLIMATE.** We endeavor to mend campus plans and integrate with urban fabric. We give new life to old buildings. We respect history and aspire to enhance a building's past with our work. We strive for enduring works of beauty and functionality.

Our tools are markers and trace, study and inspiration, shadow and light. The form of our buildings express function and program. We pursue clarity of plan and section. **WE VALUE MATERIALS FOR THEIR INHERENT PROPERTIES** and aim to use them honestly. We seek to distill our projects to their essence: from concept to diagram, from massing to detail.

Making architecture is hard. It requires optimism and stamina, humility and ambition. We do not wear black capes. We wear work boots, hard hats and furrowed brows. We ask relentless questions. We collaborate with experts across many fields to **CREATE BUILDINGS THAT LAST.** We make mistakes and we learn from them.

We actively develop the culture of our firm. We create avenues for growth. Everyone is empowered to contribute. From the grassroots up, from the leadership down. We prioritize mentorship and education. **OUR GOAL IS TO CONTINUALLY LEARN.** We value our individual talents and realize the power of collaboration.

Our work furthers the missions of those who do good work. THAT is our motivation and inspiration. We are grateful for our clients and the trust they place in us. Every project is worthy of our best, no matter how small or humble the program. **WE CREATE RESPONSIBLE, MORAL ARCHITECTURE** to give back to our communities.

WE ASPIRE TO CHANGE THE WORLD FOR THE BETTER, ONE BEAUTIFULLY DESIGNED PROJECT AT A TIME.

FIGURE 2

TruexCullins Architecture clearly laid out their short- and long-term sustainability goals in their plan. Burlington, Vt. (20–49 employees)



“ We have many documents, including a project process roadmap, that have influenced office culture towards sustainability. But because they are all in different places, we are updating our sustainability action plan to incorporate all of these other goals and plans we’ve set around sustainability outside of the AIA 2030 Commitment program requirements.”

—Heather Holdridge, Associate AIA | Lake|Flato Architects



Image provided by Lake|Flato Architects.

Design & approach

Use this section to spell out specific changes or milestones in your design and goal-setting process. While not necessary, we encourage you to think beyond energy efficiency and define processes around other [AIA Framework for Design Excellence](#) principles.

One way to approach this section is to layer AIA 2030 Commitment milestones into existing processes or workflows. This is a great way to introduce incremental change into your workflows. Another approach is to publish a checklist of milestones for individual project teams and consultants. If you go this route, be sure to develop baselines and goals with a variety of stakeholders.

**TIP:**

Use the worksheet in the [Resources](#) section to identify milestones and quality assurance methods for each design phase.

Start by answering these questions:

1. How will your design process change to institutionalize performance targets across the company?
2. What project delivery methods do you most commonly use? How can they support your sustainability and resilience goals?
3. How is energy modeling integrated into the design process? How do people know what is expected of the energy analysis at different design stages?
4. What green certifications do you most commonly use? How do certified projects contribute to your sustainability and resilience?
5. How and to what extent will you include renewable energy strategies on your projects?
6. How and to what extent will you use whole-building life cycle assessment (LCA) to measure embodied carbon?

How other companies have tackled this:

FIGURE 3

SMRT Architects and Engineers created an energy modeling workflow to ensure project teams are getting and using energy data to make the best decisions for project performance. Portland and Bangor, Maine; Schenectady, N.Y.; and Andover, Mass. (100–499 employees)

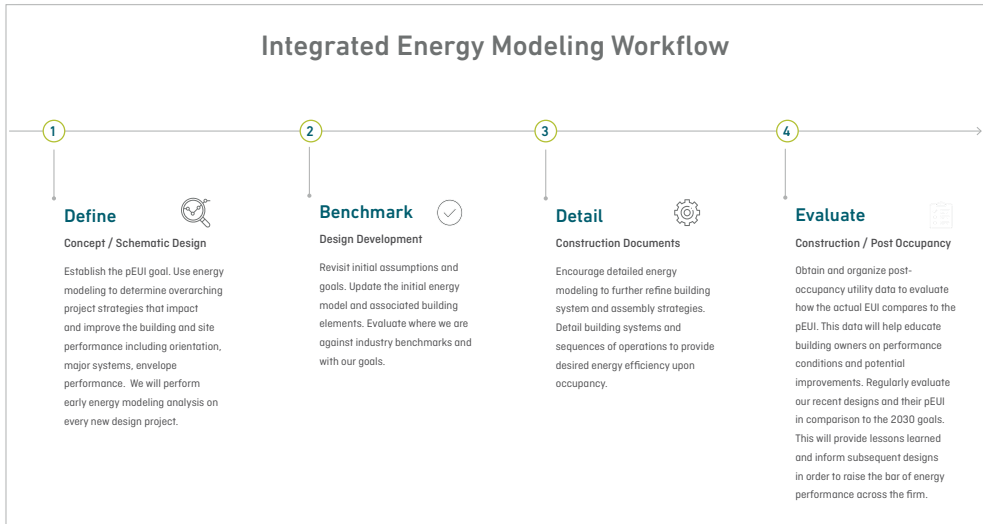


FIGURE 4

TruexCullins is reassessing its project process, establishing clear action items to improve the design of every building they work on. Burlington, Vt. (20–49 employees)

DESIGN PROCESS & REPORTING

Incorporating sustainable design methodology into all phases of a project

In order to meet the goals of the AIA 2030 Commitment, TruexCullins is incorporating new sustainable design tools and methods into our workflow. This will be followed by a process to gather energy data for all active projects and report it to the AIA on an annual basis.

To achieve our 5 and 10-year goals, we have identified the following action items, in benchmarking and reporting, energy, carbon, and materials.

By tailoring specific sustainable design initiatives to each phase of a project, the entire design process is enhanced, and project delivery is improved. We start by exploring multiple possibilities, then through a series of informed decisions, arriving at a solution that most effectively meets the client's goals.

Integrated Design Process:

- At the project planning phase: Establish project goals and energy targets with the client.
- During the pre-design and concept design phase: Perform early energy modelling – over multiple iterations – to establish building form, orientation, and performance level.
- Throughout project execution: Perform full detailed energy modelling; establish standards for envelope performance; and connect initial system designs to Revit libraries and details.
- Measurement and verification: Complete envelope commissioning; and collect post occupancy data.

Private Residence, Energy Modelling Studies

Action Items

BENCHMARKING AND REPORTING

- Select 1 project from each studio to develop and test a benchmarking and reporting process that could be rolled out firmwide.
- Develop design checklists for architecture and interior design projects to integrate sustainability measures into each design phase.
- Establish protocols for collecting and reporting energy data.
- Identify a Sustainability Coordinator to lead the implementation across all design studios and project types.

ENERGY

- Establish energy targets in the predesign phase of each project.
- Establish standards for when to use energy modelling on projects.
- Implement Autodesk Insight for early energy modeling with multiple iterations to explore design options.
- Work with Energy Modelling consultants on larger projects.

CARBON

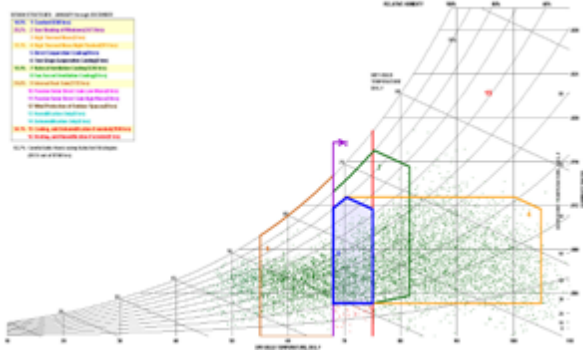
- Evaluate the Tally Life Cycle Assessment app for Revit to measure the embodied carbon of building materials.
- Decrease the use of high-embodied carbon materials in current projects

MATERIALS

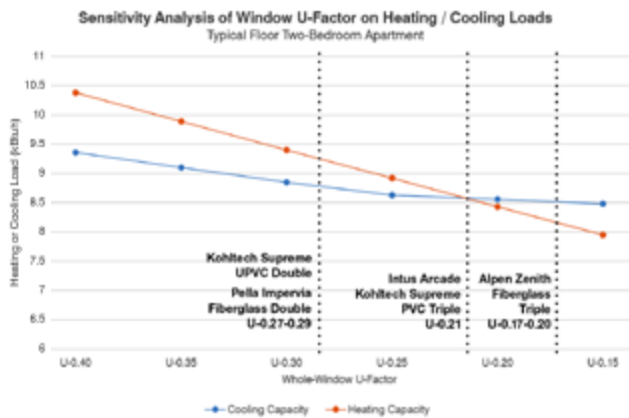
- Require Environmental Product Declarations [EPDs] or Health Product declarations [HPDs] on every project.
- Perform Life Cycle Assessments on projects, evaluating material transparency, content, and emissions.
- Decrease the use of Red List materials with the most harmful impact on environmental and human health.

FIGURE 5

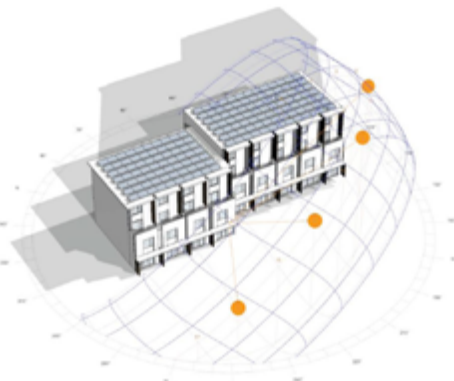
Utile has created a tailored approach based on project types. The document also stresses the importance of energy modeling and strategies to reduce energy usage at early design stages. Boston, Mass. (50–99 employees)



Utile prioritizes passive environmental strategies according to the bioclimatic needs of local conditions, as exemplified by this psychrometric chart analysis for a residential community in Aqaba, Jordan.



Utile conducted in-house energy modeling to determine trade-offs between window performance, heating and cooling capacity, and cost for a 48-unit mixed-use development in Brockton, MA.



Solar analysis informed orientation-specific shading design and solar panel feasibility for a proposed 18-unit energy-positive housing development in Roxbury.

Tailored Approach For Distinct Project Types
We will work with our clients to align the following best practices with project-specific goals:

- **Multifamily Housing:** To achieve the highest levels of durability, comfort, and operational savings, we support a Passive House approach. This integrates high-quality insulation, airtight and thermal-bridge-free construction, and right-sized, highly efficient mechanical systems.
- **Institutional:** To maximize benefit for long-term owner-operators, we will design to minimize operational energy costs through passive design strategies including daylighting and tuning facades per orientation. Careful design of systems to further minimize energy expenditure and maximize indoor air quality will underpin our approach.
- **Commercial Interiors:** We will optimize materials health, daylight, and electric lighting design to minimize operational energy and enhance indoor comfort and wellness.

In-House Building Performance Analysis

We take advantage of cutting-edge analytical tools to assist in the sustainable design decision-making process for every type of building. Conducting these analyses in-house allows us to answer critical questions about performance as early in the process as possible, minimizing risk and leading to well-integrated, optimized design outcomes.

- Every project starts with climate analysis using Climate Consultant to identify and prioritize passive design strategies.
- Early in the design process, we run “simple box” energy models in BEopt and Archsim to gain quick feedback on key envelope considerations such as window-wall-ratio, glazing performance by solar orientation, and insulation levels.
- We model daylight and solar performance in DIVA to evaluate our designs for visual comfort and daylight distribution and to determine optimal design solutions.
- We have the capability to conduct life-cycle cost analyses to evaluate the long-term operational impact of design options.
- In the later stages of design, we can evaluate thermal bridging through the use of THERM to mitigate heat loss and envelope condensation risk.

Goal setting & evaluation

You can't improve what you don't measure. At a minimum, your SAP should reinforce the 2030 Commitment predicted Energy Use Intensity and predicted Lighting Power Density targets. Then dive deeper into additional data your company will track and how you'll use it.

Many signatories go beyond the AIA 2030 Commitment program targets to include utility data collection, embodied carbon calculations, and post-occupancy evaluations (POEs). Consider what other data you will track to reach the goals you have committed to. Consider the energy-related definitions in the table below and how you can set goals around them.

TIP:

Use the worksheet in the [Resources section](#) for an abbreviated list of metrics inspired by the AIA Framework for Design Excellence that you can track in your company. For metrics not supported by the AIA's Design Data Exchange, consider how and where you'll track them.



Start by answering these questions:


1. How do you currently track project data across design phases?
2. What data are most relevant to your organization, project teams, and clients?
3. What incremental targets will help you meet your goals?
4. How does your current portfolio compare to AIA 2030 Commitment targets?
5. What post-occupancy information will you be collecting?

Common energy-related definitions	
Energy Use Intensity (EUI)	A unit of measure of a building's annual energy consumption normalized by annual consumption relative to the building's area expressed as unit of energy/area/year. In the U.S, EUI is typically measured as total annual energy consumption (kBtu) divided by area in square feet and expressed as (kBtu/ft ² /year). 1 BTU is the amount of energy required to heat 1 pound of water by 1°F. One kBtu is 1,000 BTUs.
Predicted Energy Use Intensity (pEUI)	The modeled predicted energy use for a project, as measured by an energy model. It most often measures site energy consumption but can also account for source energy.
Lighting Power Density (LPD)	A project's total wattage from installed lighting divided by the total square foot (W/sf).
Site energy	The net energy produced and consumed by a building on the project site. It represents the energy consumed by the building as measured by the utility meter and reflected in utility bills and is likely a primary driver for the client. It does not represent the energy used to, or the emissions from, providing energy to the building.
Greenhouse Gas (GHG) Emissions	Gases that trap heat in the atmosphere, contributing to the greenhouse effect and global warming.
Operational carbon	Greenhouse gas emissions that are released due to building operations.
Embodied carbon	All the greenhouse gas emissions along building supply, from cradle to grave.
Climate change mitigation	The intent to change the trajectory of climate change by reducing emissions.
Climate change adaptation	the work of preparing for the climate impacts that will inevitably occur; resiliency

How other companies have tackled this:

FIGURE 6

CAW Architects includes post-occupancy evaluation and additional sustainability measures. Palo Alto, Calif. (20-49 employees)

<p>POST-OCCUPANCY</p> <ul style="list-style-type: none"> • Conduct post-occupancy evaluations, capturing and cataloging feedback to reference for future projects. This evaluation should take place about a year after occupancy but can occur as soon as 6-8 months. • Collect both qualitative and quantitative data - to understand how the building functions and to maintain a relationship with the client 	<p>PROJECT COMPLETION</p>	
<p>SUSTAINABILITY MEASURES</p> <ul style="list-style-type: none"> • Collect qualitative and quantitative building data when possible by collaborating with intelligent groups that specialize in this type of analysis • Assist with training of facility managers to ensure systems are used and operated at peak efficiency • Prepare a sustainability report to be used in future projects as "lessons learned". Use sustainability goals set at the beginning of the project as a framework and build upon. • Quantitative data could include: <ul style="list-style-type: none"> • Daylighting levels • Ambient noise • General volatile organic compound (VOC) levels • Thermal envelope • Space usage • Qualitative data could include: <ul style="list-style-type: none"> • Happiness • Productivity • Perceived health impact of the environment • Overall occupant comfort 		
		

Cowell Dining Commons | UC Santa Cruz

YMCA of Silicon Valley | YMCA

EcoCenter | The Environmental Volunteers

FIGURE 7

Sanders Pace Architecture reassessed their design process to incorporate research at the very beginning of the design process, ensuring that well-informed goals are set. Knoxville, Tenn. (10–19 employees)

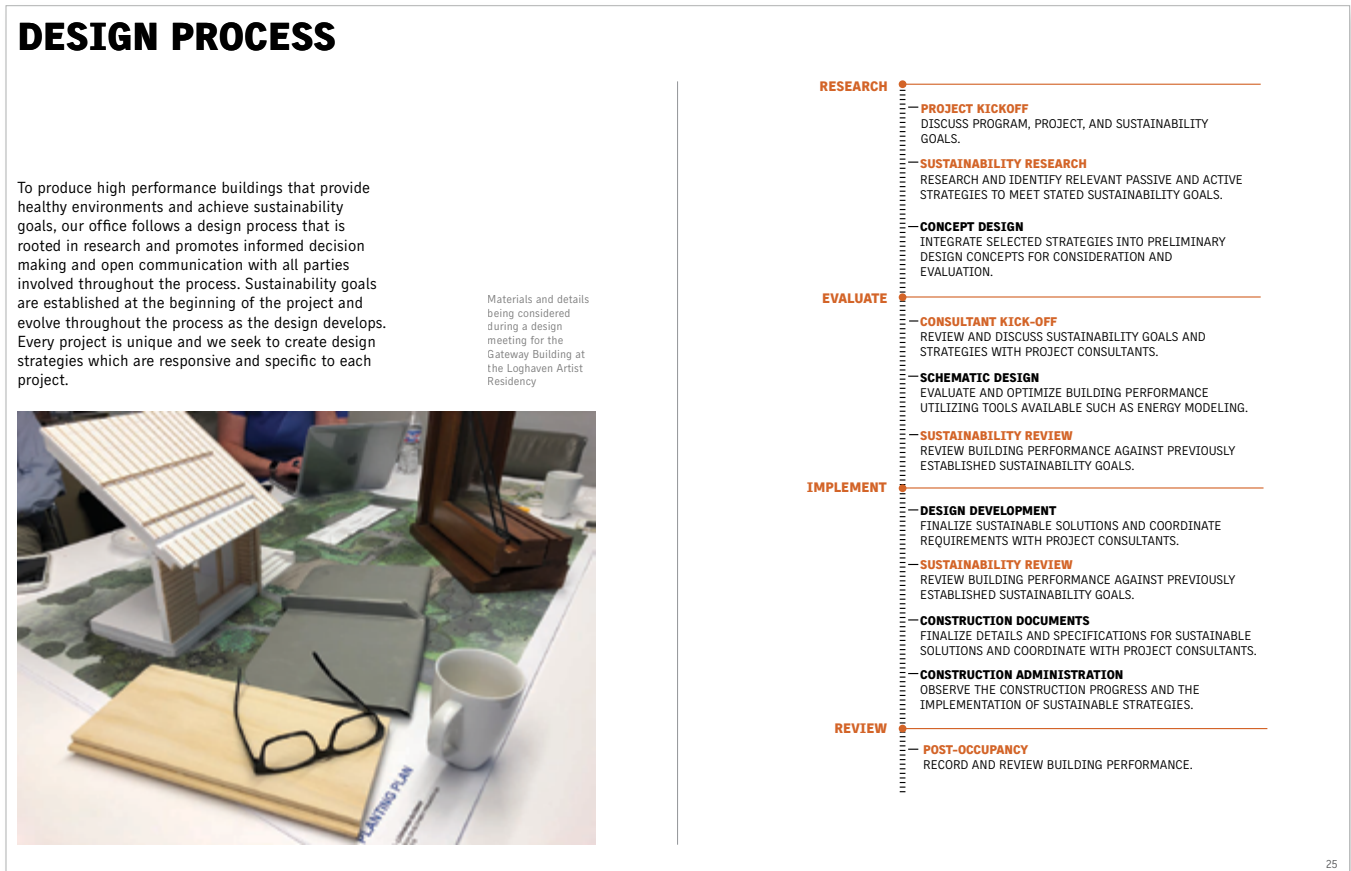


FIGURE 8

KSS Architects clearly defined the projects it would track and report in the DDx in its SAP. Princeton, N.J.; Philadelphia; & New York City (50–99 employees)

DEFINITION

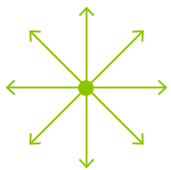
APPLICABLE PROJECTS: All new construction and all major renovations, additions, and interior projects where the envelope and energy usage can be impacted, with a construction cost above \$10 million

Governance & reporting

The most asked about component of the SAP is establishing a process for adding project data into the DDx. There's no right answer, but if well-integrated into your workflow, adding project data to the DDx will not increase your existing workload.

This section defines who will track data, when it will be collected, and how it will be reported and shared. No two companies track and report data the same way, and that's okay!

The Sustainable Performance Institute has outlined some of the most common approaches to reporting:



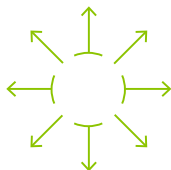
Centralized

This can be a first step, or for smaller firms, permanent. As sustainability becomes more entrenched, the purpose and responsibilities of this role also evolve.



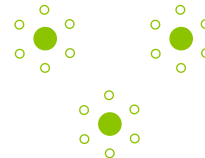
Hybrid: Central + distributed

This network approach, where a central person (or team) leads strategically and supports leaders within different business units or office locations. This approach creates localized understanding and institutionalized feedback loops.



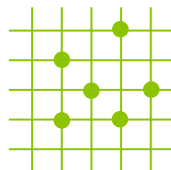
Centralized team

Especially in a mid/large firm, this approach intentionally brings together people from different roles to represent all the functions in the firm – management, business development, design, IT, business units, etc., as needed.



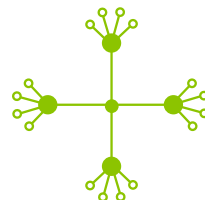
Integrated

In small firms, it's especially important that each person understands how to integrate sustainability, even if there are specific individuals who do specialized tasks, such as LCA analysis. For larger firms, this may be thought of as the ideal "end state" even if there are leaders who guide strategic sustainability development.



Distributed

This approach is especially fitting in larger firms that have multiple offices with distinct cultures or have grown by acquisition/merger. Here, you pick the people who will be most effective in the role to further the goals.



Decentralized & team based

In mid/large firms, having a fully decentralized model can be very effective and the distributed leaders become the "centralized" team which is also similar in some ways to Hybrid. This can be team based (especially if you have a stable "studio" model), business unit based, or location based.

Regardless of the method you select, take time to document roles and responsibilities for each design-team member, including consultants. It will help you later.

Once you've agreed who will report, consider how you will track data. AIA 2030 Commitment signatories use the DDx to track, analyze, and report energy and carbon data for your whole portfolio. The DDx lets you directly input project information, bulk upload a spreadsheet of all your information, or (depending on the energy modeling tool your company uses) import via an API connection. Reference the graphic to better understand the options and pick the right method for you.

Given the who and the how, when does it make the most sense to update your data? Is information uploaded at specific project benchmarks? Is it uploaded every month or every quarter? Does it make more sense to wait until the reporting period in March to

add all your data? Whatever path your company chooses, make sure it avoids staff burnout.

Note: While it might be easy to create a reporting plan in a vacuum, being inclusive early will save you from future challenges. Foster a culture of sustainable and innovative design that everyone supports and that motivates your collective work.

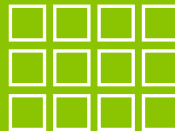
Start by answering these questions:

1. How is project evaluation and 2030 reporting handled?
2. Which projects will and will not be included?
3. Who collects data? When is data added to DDx? How is it added?
4. How will data insights be shared with leadership and staff?



Direct input

- Great for smaller firms or portfolios
- High degree of control over data
- Easily manage team permissions



Bulk upload

- Great for firms with an in-house database
- Inputs limited to core fields
- Quickly upload hundreds of projects



Via energy modeling software

- Great for firms who regularly model projects
- Connects with multiple software providers

TIP:

A solid governance plan is most important for larger companies with more data. Some companies establish entire data management teams, which include project designers, sustainability leads, and information technology support, among others.

Here are a few additional considerations for larger companies:

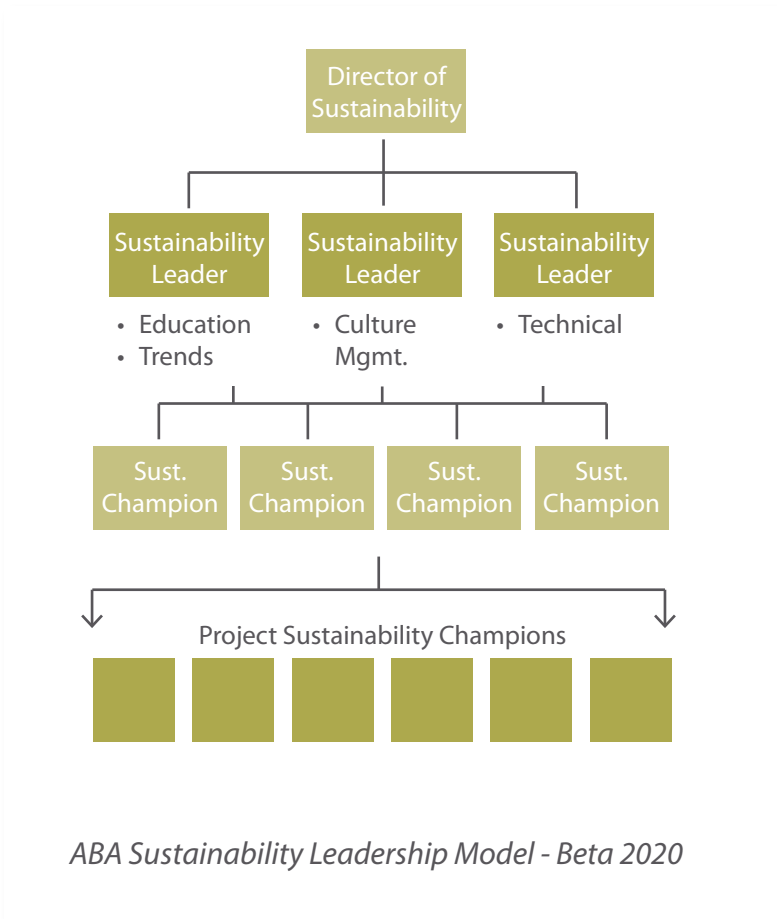
- Which business units (regional, practice, sector) are accountable for progress?
- What are the means for ongoing data management and input into the DDx?
- What is a reasonable feedback frequency between the DDx data management team and individual units?
- How can existing data management protocols support AIA 2030 Commitment reporting?



How other companies have tackled this:

FIGURE 9

Anderson Brulé Architects is developing a leadership structure to empower project team leaders by testing this beta structure and continuously adapting it. San Jose, Calif. (20–49 employees)



Internal training & education

Reaching your sustainability and resilience goals takes investment, and there is nothing more valuable than your team. This section should describe how your firm will build capacity within your design teams. Consider how you can keep your staff up-to-date with best practices and motivate designers to push the envelope and develop professionally. See the [Resources section](#) of this document for examples.

AIA offers virtual and in-person educational opportunities, including webinars, conferences, white papers, and technical how-to guides on building internal capacity. Many local [AIA Chapters](#) host COTE® Committees, 2030 Commitment roundtables, and similar sustainability discussion groups.

Start by answering these questions:

1. How does your company support staff growth in sustainable, equitable, and resilient design disciplines? Consider both cultural and financial support.
2. How does your company learn from projects for continuous improvement and share knowledge across the organization?
3. What skills are needed for each role within the company?
4. How important are professional memberships and certifications to your business?
5. Who will ensure everyone is up-to-date with their trainings and professional development?

AIA sustainability resources to get your firm started

On-demand education:

- [AIA+2030 Certificate Program](#)
- [Materials Matter Certificate Program](#)
- [Resilience and Adaptation Certificate Program](#)
- [Embodied Carbon 101 series](#)

AIA resources:

- [Architect's Guide to Building Performance Simulation](#)
- [Architect's Primer on Renewable Energy](#)
- [Disaster Assistance Handbook](#)
- [Healthier Materials Protocol](#)
- [Adaptation, Deconstruction, and Reuse Guide](#)
- [Modular and Off-site Construction Guide](#)
- [Framework for Design Excellence](#)

How other companies have tackled this:

FIGURE 10

Corgan has an extensive sustainable design curriculum around several key sustainability areas to ensure staff have a holistic understanding of sustainability topics. Atlanta; Austin, Dallas, Frisco, and Houston, Texas; Flagstaff and Phoenix, Ariz.; Los Angeles; New York City; Orlando, Fla.; London. U.K.: & Singapore (500–999 employees)

CORGAN SUSTAINABILITY PLAN

Staff Development

Sustainable design is a constantly evolving discipline. To evolve as a profession and as a firm, staff at all levels have the responsibility and the opportunity for continuous development. We provide significant opportunities for our staff to hone their knowledge in the art and science of sustainable design through both external and internal education and training.

Our firm boasts a significant number of staff with professional credentialing in the LEED and WELL programs. To encourage our staff to grow professionally and show our commitment to furthering the firm's knowledge base of sustainable design practices, Corgan provides reimbursement for 50% of WELL AP and LEED exam fees. Every year Corgan provides the opportunity and funding for existing and emerging leaders to attend numerous educational and professional conventions and symposia focusing on sustainability.



Sustainable design is sensible, responsible, cohesive, and integrated. Through instilling these simple values, we can design spaces resonating with poetry and performance. To increase our staff agility, we provide significant opportunities to hone the sustainability craft with our designs through our internal educational and training offerings. Historical education and training opportunities include the following accredited curriculum sessions:



FIGURE 11

Architects Hawaii Limited uses the JUST Policy to ensure it is providing equitable opportunities to its employees. Honolulu (100-499 employees)

TRAINING & EDUCATION

In order to support staff growth in sustainable design disciplines, we will ensure staff is invested in the firm's sustainable design goals and can contribute to the success of those goals.

- Determine a minimum amount of staff training and education on sustainable design issues
- Provide support for staff to attend conferences and education programs focusing on sustainable design programs
- AHL is an early adopter of the JUST Policy from the Living Building Challenge and continues to look for ways to incorporate the beliefs and practices of the LBC in our projects and daily operations.

As part of the JUST Policy, AHL supports and encourages continuing education and training opportunities for our employees. AHL has an annual continuing education budget that allows each employee to pursue continuing education including training activities that are relevant to an employee's professional knowledge and to the specific needs of his or her job.

Just.

Organization Name: Architects Hawaii Limited
Organization Type: Service Provider
Headquarters: Honolulu, Hawaii
Satellite Facilities: None
Number of Employees: 85

Social Justice and Equity Indicators:

<p>Diversity</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Non-Discrimination <input type="checkbox"/> Gender Diversity <input checked="" type="checkbox"/> Ethnic Diversity <p>Equity</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Full Time Employment <input checked="" type="checkbox"/> Pay-Scale Equity <input type="checkbox"/> Union Friendly <input type="checkbox"/> Living Wage <input checked="" type="checkbox"/> Gender Pay Equity <input checked="" type="checkbox"/> Family Friendly <p>Safety</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Occupational Safety <input checked="" type="checkbox"/> Hazardous Chemicals 	<p>Worker Benefit</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Worker Happiness <input checked="" type="checkbox"/> Employee Benefit <input type="checkbox"/> Continuing Education <p>Local Benefit</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Local Control <input checked="" type="checkbox"/> Local Sourcing <p>Stewardship</p> <ul style="list-style-type: none"> <input type="checkbox"/> Responsible Investing <input checked="" type="checkbox"/> Community Volunteering <input type="checkbox"/> Positive Products <input checked="" type="checkbox"/> Charitable Giving <input checked="" type="checkbox"/> Animal Welfare <input type="checkbox"/> Transparency
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THE SOCIAL JUSTICE LABEL

AHL-001
EXP. 01/15/2021

INTERNATIONAL LIVING FUTURE INSTITUTE™ justorganizations.com

Outreach, advocacy, & external knowledge-sharing

This section speaks to the power of your brand and of architecture as a whole. Document how your company will encourage knowledge-sharing through industry education, public outreach, and advocacy. While it is important to motivate your staff to create better buildings, you should also consider how you are sharing best practices with peers.

Increasingly, clients are interested in partnering with companies that can help them meet energy-efficiency and climate goals. Identifying yourself as an AIA 2030 Commitment signatory in your marketing materials is one quick way to signal your values to prospective clients.

Start by answering these questions:

1. How are your sustainable, equitable, and resilient design strategies communicated to clients?
2. How does your company contribute to the sustainable design community? Consider participation in events, conferences, and professional memberships.
3. Does your company advocate on the local or national level for policies that advance the practice of architecture?
4. What reputation do you have among clients and peers?
5. Can you join—or establish—a local 2030 Roundtable or Committee on the Environment®? Contact your local [AIA chapter](#) for more information.

According to AIA research, 42% of architects engage in sustainability or resilience advocacy. How does your team stack up? The collective voice of architects is essential for designing a better future for our cities and our planet.

[Download AIA's civic engagement toolkit >](#)

How other companies have tackled this:

FIGURE 12

Hargis Engineers has made marketing and sharing of best practices a key pillar of their SAP. They use their quarterly newsletter to make sure external audiences can learn from its project results. Seattle (100–499 employees)

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3. INCORPORATING MARKETING
Commitments

Share best practices that accentuate building performance:

- Designed performance
- Operational performance
- Baseline performance
- Certification performance (if applicable)
- AIA performance target

Publicize client-approved results with internal and external communication channels

HARGIS

FIGURE 13

CAW Architects created immediate, short-term, and long-term goals for sharing best practices and educating external stakeholders. Palo Alto, Calif. (20–49 employees)



FIGURE 14

SMRT Architects and Engineers committed to advocacy and outreach on several levels, from volunteering in the community to impacting policy changes. Portland and Bangor, Maine; Schenectady, N.Y.; & Andover, Mass. (100–499 employees)

Outreach

Advocacy & Outreach

- SMRT encourages employees to volunteer in their local communities by providing paid time to do so.
- We encourage participation and pay for employee memberships in relevant professional organizations.
- We are thought leaders: we drive the conversation and lead meaningful discourse in our professional communities.
- Through our work with WELL in our Portland office, we will host tours and information sessions regularly.
- Our participation in the Maine Climate Council Working Group positions us to positively impact policy.
- We're committed to increasing industry awareness on upfront/embodied carbon.

FIGURE 15

Architects Hawaii Limited participates in advocacy throughout Hawaii on every level. Honolulu (100–499 employees)

OUTREACH & ADVOCACY



PHOTOGRAPHED FROM LEFT: JOSHUA STANBRO, MAKENA COFFMAN, CHIP FLETCHER, KIRK CALDWELL, VICTORIA KEENER, BETTINA MEHNERT, ROSANNA ALEGADO

AHL engages in outreach and advocacy in a handful of ways from the membership level to board positions.

President and CEO, Bettina Mehnert, serves on the City and County of Honolulu's Climate Change Commission and regularly participates in panel discussions and events to spread awareness on the Commission's efforts as well global statistics and predictions. Numerous staff hold board positions and drive sustainability efforts in the local AIA, IIDA, & USGBC professional chapters through collaborative A&D events or community outreach programs.

All of AHL's military and government projects are LEED (or equivalent) certified as are many of our institutional and private sector projects. Currently, nearly 40% of our technical and design staff are LEED Accredited Professionals (LEED AP) and we encourage and support all staff to learn about sustainability and become LEED AP as well.

As climate change and all its destructive forces make front page news, more and more of our clients are realizing the obvious benefits of being sustainable and resilient. Increasingly, it is no longer an option to just do projects the traditional way, and we are seeing more and more clients actually bring sustainable design and resilient ideas to us. There is a positive shift in the attitude toward sustainability and an increased desire to be more sustainable in the industry.

Operations & outlook

There is a carbon cost to the business of design. Use this final section to take a bigger-picture look at your company's environmental impact. Note specific strategies you can implement to improve your operations and reduce your carbon footprint.

Increasingly, companies are documenting health and well-being policies in their SAPs. Relevant examples include flexible work schedules, nutritious snacks, and public transportation benefits. In addition to increasing worker productivity and satisfaction, many health-promoting policies also promote a smaller carbon footprint.

They can also foster a more equitable, inclusive workplace and work to support the local communities we live and practice in.

As architects are called to find solutions to many of society's most pressing issues, we must have the talent, passion, and creativity of a diverse cohort of students, professionals, and leaders. [AIA's Guides for Equitable Practice](#) are an exceptional resource for companies evaluating their operations and outlook.

Start by answering these questions:

1. What is your company's current carbon footprint?
2. What policies or programs do or could you offer to create a diverse and inclusive culture?
3. What policies or programs do or could you offer to promote employee health and well-being?
4. What policies or programs do or could you offer to further reduce your carbon footprint?
5. What policies or programs do or could you offer to increase engagement and support of your local community?
6. How can these policies and programs become personal commitments of each staff person to the future of the firm?



TIP:

Online carbon calculators are a convenient way to understand your carbon footprint. Check out the [Resources section](#) for a checklist of operational policies inspired by the AIA 2030 Commitment community.

“ In adopting the Sustainability Action Plan, we performed a carbon footprint analysis of the firm and identified incremental strategies to reduce our footprint over time. As a result of this analysis, we have updated several of our studio’s procedures and policies, such as replacing disposable single-serve coffee cups, integrating composting, and adding reimbursement for public transportation to the policies. The SAP has increased awareness of these strategies in our design process and helped establish an overall tone and approach for our work, practice, and culture.”

—Sarah Wood, AIA | RATIO



Image provided by RATIO

How other companies have tackled this:

FIGURE 16

HUS Architecture included the sustainability of their office operations and community impact in a best practice matrix. Chicago (5-9 employees)

	SS/L+T	WATER	ENERGY	MATERIALS	AIR QUALITY	ALLY
Internal (Office)	<ul style="list-style-type: none"> Proximity Semi-close transit Credit for DMV/bikes CTA pre-tax Proximity to transit, food, community, study Discourage driving Encourage walk/transit Office location Joint use - Lunch and learn Working Remotely Develop Office Sustainability Plan -> Future Space (3 mo.) 	<ul style="list-style-type: none"> Minimizing dish washing water (ongoing) Currently using bottled water Checking water source 	<ul style="list-style-type: none"> Power strips shut off (ongoing) Turn off lights when not in use Rewire projector (1 mo) Energy-star appliances Offset - renewables LEDs - table lamps & general Insulation Metering In-house education Learning/becoming experts Energy Modeling 	<ul style="list-style-type: none"> Weigh waste Compost Tracker impacy Salvage material furniture Start sourcing research Amazon? Local? Purchasing evaluations Green cleaning? Recycling paper Notebooks (6 mo.) Office Shacks Bulk/evaluate Zero waste 	<ul style="list-style-type: none"> Plants & natural light Chore chart Unit A/C - control loud aim for central A/C Radiator - no control Neg - Smelly office location Pos - Try to move Regular Trash -> better air quality Lights vs. projector control Future Office Plan (1 yr, monthly update) Non-smoking building Neg - Copy machine by desks - goal isolate Flex space + standing desks Screen time/View policy 	<ul style="list-style-type: none"> In-house matt. study (1/yr monthly update) One division per year? Start 03-10 Office practice - people HR Flex time Work remotely Health Care 401k Yoga Plans Plants/Sunny environment Support individual growth Learning ... Network Fri Fridays Volunteer opportunities Library -> office
Projects (Clients)	<ul style="list-style-type: none"> City - proximity CTA to jobs (Ongoing) Suggest rain barrels Retainage design strategies (ie. permeable pavers) Identifying design & materials Landscape - not current 	<ul style="list-style-type: none"> Identifying low flow fixtures for use at different scales (1yr (2020) Summer Creating schedule PBC - Diksen, Waters Encouraging no irrigation for landscaping Starting to teach ourselves how to look at water reclamation L&L on water reuse and reuse systems Water as passive energy sources Water Metering Asking clients for water usage 	<ul style="list-style-type: none"> 2030 (On going 2 proj./yr + updated sap/ppap) ID projects to report ≥ 400 sf. + mech work Fess Home Project selection LEED AHNC Raise the bar on efficiency in energy Establish w/ clients Carbon offset Promoting AHNC program 	<ul style="list-style-type: none"> L&L - Develop sustainable policy/request (1 mo) ex. Laura's Pizza Start conversation on waste and materials Life cycle (2 mo) PBC PBC Industry/materials Waste/Recycling Tour Zero Carbon Transportation/Local Listing local manufacturers Reuse Materials in design Renovation focus/promotion 	<ul style="list-style-type: none"> Design w/ light + view Ventilation of Spaces Balanced Spaces Material Selection Low VOC Low Glare Windows + Performance L-L Aging visibility Contrast in design CPS - conversations w/ principals + circulation Coordinate w/ eng. + consultants to push design concepts AHNC Wave 1 calcs. evaluate system (1yr 2020 Summer) 	<ul style="list-style-type: none"> Communication/Collaboration Stay in contact Being responsible Thinking about final client CHA Residents Students Bldg Violators Design w/ Accessibility Universal Design as Philosophy (ongoing - 6 mo) Develop Library/Tools Help clients make better informed decisions (LCA, PBC) Collaborative design (Program cross culture)
Community (Beyond)	<ul style="list-style-type: none"> Clean-ups Tree replant Conservation Volunteering (general) (2 Fm Friday/yr) 	<ul style="list-style-type: none"> James Patchett Lecture on prairie and water usage (4 mo.) Community measures to educate people on waste in water Implementing rain barrels when possible Health of water system Asian Carp 	<ul style="list-style-type: none"> Where our power is coming from Advocacy Grants available to clients (6 mo. plan 2/yr) ID partners to support 	<ul style="list-style-type: none"> Mindful materials Promote reclaimed materials RX/tool shed/plant Project waste stream Waste stream understanding China/Sorting Gypsum Crusade Waste Tour (Fall Fm) Life cycle - Greater scale Recycling Programs 	<ul style="list-style-type: none"> How to scale/educate residents Promote and educate "Healthy Buildings" Industry/Mindful Mats - Low VOC Asphalt Plant + Local Concerns Monitoring + Taking action (Look for open commentary review) Planting trees Promoting clean air 	<ul style="list-style-type: none"> People's health/safety Advocacy Letter Writing (1/mo. - ongoing) Immigration/gun control Access to health LGBTQ/BLM/Inclusivity Mental Health Restorative Justice Homelessness Mentoring - AIS Resiliency-prop. Gentrification Be visionary not reactionary Support our community Pro-bono/volunteer work Budget + Use Support Sect 3 Program Support addt. small business

DSK Architects + Planners is a firm that knows that sustainable design leads to a healthier planet, healthier people, and a more equitable society. Their work with clients focuses on incorporating renewable energy, designing the orientation of windows to balance natural light and heating costs, specifying wall assemblies to reduce the need for air conditioning, and supporting institutions that work to reduce climate impact.

They also know that the first step to fixing the climate crisis is understanding their individual impact on the climate and their overall carbon footprint.

The COVID-19 pandemic gave DSK the opportunity to examine their environmental impact and look at ways to change how they operate moving forward. Their research found that changing just a few of its policies and procedures could make a world of a difference during COVID-19 and beyond.

Commuting

The largest measurable environmental impact DSK has had throughout the pandemic is in terms of commuting and traveling. Before COVID-19, DSK already had work-from-home options available; yet each week, DSK staff drove over 4,844 miles to and from work. Over the first 11 weeks of shutdown, staff drove 53,284 fewer miles and saved 1,776 gallons of gasoline—the equivalent to 16 metric tons of carbon emissions! Since returning to the office is optional, staff members have driven 95,647 fewer miles. In total, the shutdown and limited reopening through November 2020 has reduced their commuting carbon emissions by 43.9 metric tons or the equivalent of 723.6 trees grown for 10 years!

Business travel

Switching to virtual meetings for all but essential client and site visits has dramatically reduced DSK's environmental footprint, as plane flights and long car trips have a substantial impact on the firm's carbon emissions. DSK reduced its total business travel by car by 79% and by air by 98%. DSK went from driving 18,812 miles for business trips in March through June 2019 to 2,017 miles in the same months of 2020, a difference of 16,795 miles not driven. Given drivers' average of 27.3 miles per gallon, this was equivalent to not emitting 9.6 metric tons of CO₂. Their average flight was approximately 600 miles and was responsible for 140 kg of CO₂ emissions per passenger, meaning that they reduced airplane carbon emissions by 16.7 metric tons. In total, business travel carbon emissions were reduced by 26.3 metric tons, equivalent to growing 433 trees for 10 years.

Computers

While it's hard to gauge average energy use when some staff members are checking emails while others are running Photoshop, rendering, and editing a 3D model at the same time, DSK assumed 11.02 kWh extra each week per computer since they use remote computer mirroring software. With 30 employees working from home, DSK consumed ~330.6 kWh extra for each week of shutdown, 3,637 kWh total. Employees were back in the office approximately 23% of the time, so 255 kWh extra are being consumed each week during the reopening phase, 6,376 kWh total so far. In total, DSK has consumed 10,013 kWh extra electricity for running computers from mid-March to early November 2020, which has the carbon emissions equivalent of emitting 7.1 metric tons or getting rid of 117 trees.

Printing

While architects work primarily with digital tools, there is a fair amount of printing, sketching, and reading things on paper. From April 1, 2019, to October 31, 2019, DSK printed 64,835 pages. From April 1, 2020, to October 31, 2020, DSK printed 8,082 pages or 88% fewer pages. In total, DSK saved the equivalent of 6.4 trees over the course of the COVID shutdown and reopening.

DSK has noticed changes in HVAC use, office appliances, and lights, though many of these savings would be offset by at-home consumption and would be difficult to quantify. As a relatively small firm, with only 30 employees, over 8 months it managed to save the carbon equivalent of growing 1,052 trees for 10 years, which shows that everything we do—big or small—can have a tremendous impact on the well-being of our planet. The numbers speak for themselves!

Total*	
Commute	-43.9 metric tons CO ₂ saved
Client/site visits	26.3 metric tons CO ₂ saved
Computers	+7.1 metric tons CO ₂ used
Printing	0.3 metric tons CO ₂ saved
Total	63.4 metric tons CO₂ saved

**Figures mentioned are as of November 6, 2020 and incorporate an 11-week shutdown beginning in March and a reopening period beginning in early June.*

Concord, Mass. (20–49 employees)

Updating your Sustainability Action Plan

Reviewing and updating your SAP helps you to reach your AIA 2030 Commitment and larger sustainability targets. While 2030 signatories are expected to update their SAPs every three years, we recommend you review your progress more often.

During your review, don't forget to take advantage of the progress your company has made! Consider presenting your yearly numbers to your office and engaging team members in a discussion. Look for areas of improvement and find lessons learned that can be rolled out on all projects. Evaluate how changes in your organizational culture or the market should factor into your updated SAP.

Your SAP will be most useful to your company if it is treated as a living document that motivates and guides your business' evolution towards a more sustainable portfolio.

“ Our Sustainability Action Plan has been our Guiding Principles over the past decade. Our firm had evolved under these principles, along with our five-year vision statement toward sustainability. Every office has infused our Guiding Principles in their own unique way, which is ever-evolving and reflective of each office culture. Our Sustainability Action Plan is ingrained into our design process and our internal scoring tool evaluating our implementation of our design process.”

—Lindsey Piant Perez, AIA | DLR Group

Resources & worksheets

Sample SAP kickoff meeting agenda

Use this agenda to host your SAP kickoff meeting.

Agenda item	Notes
<p>1. Assign a meeting leader and notetaker. <i>(1 min.)</i></p>	
<p>2. Introductions: Ask everyone in attendance to briefly state the reason they are attending and why they are interested in creating or updating the company's SAP. <i>(Varies depending on size of group; try to keep to 5 min.)</i></p>	
<p>3. Small-group discussions: Rapid company-wide sustainability self-assessment and possibilities brainstorm</p> <p><i>(30 mins. There may not be time to cover all these topics in one meeting or with a large group. Consider splitting into smaller group discussions per topics 3b–3e below or choose the most interesting topics as a warm-up, with a follow-up meeting scheduled to continue the brainstorm.)</i></p>	
<p>3a. Does the company currently have any sustainability goals, values, or agenda? Identify what these are and where they show up in the company's external or internal messaging, operations, and practice. Is the company meeting these goals? How are these goals manifested within the practice, in project teams, and/or at individual staff levels?</p> <p><i>(This topic could start as a group discussion to get folks warmed up. This content can also provide an authentic footing or a basis for the "Company commitment" section of the SAP.)</i></p>	
<p>3b. Design and approach: How is high-performance design implemented on each project? What are the characteristics of an ideal project team that works to achieve sustainable, thoughtful design and incorporates the 2030 targets and measures from the AIA Framework for Design Excellence, regardless of client direction? What tools, champions, and/or education is needed? (See "Design & approach" section.)</p> <p><i>(Consider sorting these notes into categories of strengths and barriers.)</i></p>	
<p>3c. Goal setting and evaluation: What data about projects does the company currently track? Are there goals attached to these metrics? What practices should be instituted to include metrics for the 2030 program—including energy modeled data, predicted EUI, fuel types, LPD, embodied carbon, etc.? What formats for regular feedback on project-specific or company-wide performance would work best for your organizational culture (format, method frequency, etc.)?</p>	

<p>3d. Governance and reporting: What characteristics of your organizational culture/structure already exist to enable putting a streamlined reporting practice into place?</p>	
<p>3e. Internal training and education: What models of continuing education are currently in place at the company? What elements of training and education should be enhanced to allow team members for any project to design, analyze, and synthesize project designs to achieve the 2030 targets? What aspects of education are needed—tools, communicating with clients, effective consultant coordination, etc.?</p> <p><i>(Review the examples within “Governance & reporting” section above.)</i></p>	
<p>4. Share and discuss: Each small breakout group designates a leader to share themes of the discussion, for the group to digest and further discuss. <i>(20 min.)</i></p>	
<p>5. Next steps: Leader summarizes action items, topics or themes for further research, and time for the next meeting (or sub-group meeting). Notes should be distributed after the meeting.</p> <p><i>(Depending on the size of the group or outcome of the discussion, the notes can be the basis of an outline for the SAP to be shared with the company.)</i></p>	

Intake assessment worksheet

Use this intake assessment from Sustainable Performance Institute to better define your firm's culture and character.

Firm Culture intake assessment

The purpose of this intake assessment is to better align sustainability strategies with the culture and character of your organization. A particular strategy might be very effective in a firm that is highly structured and bureaucratic but may be a disaster in a firm that has a looser, more "entrepreneurial" culture and structure. In an assessment, you describe the character, culture and personality of your firm. One way to think of it is as if you were describing to your friend, a person that you are fixing them up with on a blind date. How would you describe this person to your friend? S/he's funny, kind, energetic, ambitious. S/he's kind, serious, studious and thoughtful.

There are many aspects of a firm's "personality". The following questions are an attempt to distill what defines your organization. Please feel free to add information that may not be asked about. There is no particular order to these questions. Below is a summary of the topics:

1. **Change management:** how does change happen in your firm? What has determined success (or failure) in past change efforts?
2. **Leadership effectiveness:** how well do leaders (at all levels) behave in a way that is consistent with the firm's values, support staff to realize their potential, inspire through vision, and support continuous improvement?
3. **Culture and core values:** how do your firm's core values manifest tangibly in your firm culture?
4. **Professional development:** does the firm invest adequately in skill building, mentoring, and knowledge management?
5. **Accountability:** how do you know "it's happening", or if it's not – how do you help?
6. **Achievements:** what strategies have you implemented to integrate principles of sustainability into your practice?
7. **Client / consultant relationships:** are they aligned to help you achieve your goals?
8. **Promotion pathways:** do key roles include aspects of sustainability performance?
9. **Structure:** how is your firm structured and managed to execute the work? How consistent are teams from start to finish?
10. **Acquisition/merger experiences:** how have they impacted your culture and brand?
11. **Research and innovation:** to what degree is this happening in your firm?
12. **Continuous improvement:** how does your firm learn from your work, across portfolio?
13. **Methodology:** has your firm aligned your project delivery process to ensure consistently high-performance outcomes across your portfolio?
14. **Business Health:** does your firm have diversified revenue streams? How do you maintain profitability and financial resilience?

Sample survey from Atkin Olshin Schade Architects

After signing on to the AIA 2030 Commitment, AOS conducted a company-wide survey to assess its design values and aspirations, existing design practices and office operations, as well as the risks and opportunities for improving sustainable design outcomes. The survey included approximately 20 multiple-choice questions, with opportunities to write in additional comments. Insights from the survey prompted valuable discussion and formed the basis for developing an ambitious sustainability action plan with the entire AOS team's input and support. Use these questions to inspire your own all-staff survey.

Core questions included:

1. How important is it for our work to reduce its contribution to global GHG emissions?
2. What are the most important ways for our firm to have a sustainable impact?
3. What are the risks in our firm embracing sustainability as a core value?
4. What are the opportunities in expanding our commitment to sustainable design?
5. How effective is our current design process in producing high-performing buildings?
6. Which past projects would you identify as having successful sustainability outcomes?
7. What are the main obstacles to improving our sustainable design practices?
8. What actions are our peers taking that we can emulate or improve upon?
9. What are the targets and goals we can hope to achieve over the next three to five years?

Milestones & quality-assurance methods by design phase

Use this worksheet to document your design process and milestones by design phase.

Design phase	Milestone	QA method
Concept		
Schematic design		
Design development		
Construction documents		
Construction administration		
Project closeout		
Post-occupancy		

Establish baselines for AIA Framework for Design Excellence principles

Use this worksheet as a starting point to establish baselines.

AIA Framework for Design Excellence principle	Key performance indicator (KPI)	Baseline	1-year goal	5-year goal
P1. Design for integration	Approximately what percent of projects are designed to meet one or more green certification?			
P2. Design for equitable communities	Approximately what percent of projects involved a structured participatory or community design process?			
P3. Design for ecosystems	Approximately what percent of projects tracks use of native or climate-appropriate plants supporting native or migratory animals?			
P4. Design for water	Approximately what percent of projects track on-site water management?			
P5. Design for economy	Approximately what percent of projects are major retrofits of existing buildings?			
P6. Design for energy	What is the current pEUI across your portfolio, approximately?			
	Approximately what percent of projects use energy modeling during the design process?			

<p>P7. Design for well-being</p>	<p>Approximately what percent of projects involve client discussions about health and well-being?</p>			
<p>P8. Design for resources</p>	<p>Approximately what percent of projects use whole-building LCA?</p>			
	<p>Approximately what percent of projects incorporate health and environmental impacts into building product selection criteria?</p>			
<p>P9. Design for change</p>	<p>Approximately what percent of projects include qualities of resilience?</p>			
<p>P10. Design for discovery</p>	<p>Approximately what percent of projects are evaluated using a post-occupancy evaluation?</p>			

Employee training opportunities

Use this worksheet to assess your current training opportunities.

SECTION 1. Baseline

Measure	Estimate current percent
What percent of staff are aware of your participation in the AIA 2030 Commitment?	
What percent of staff are familiar with the AIA Framework for Design Excellence?	
What percent of staff possess one or more sustainability and resilience credential, such as LEED AP, WELL AP, Living Future Accredited, or Certified Passive House?	
What percent of staff are extremely or very confident discussing climate change adaptation with clients and team members?	
What percent of staff are extremely or very confident discussing climate change mitigation with clients and team members?	
What percent of staff plan to acquire additional sustainability or resilience knowledge within the next 18 months?	

SECTION 2. Inventory

Training opportunity	Yes/No (circle one)	Notes
Provide e-learning opportunities	Y N	
Offer in-house curriculum or educational opportunities, such as lunch and learns	Y N	
Provide coaching or mentoring	Y N	
Promote cross-training on sustainability or resilience teams	Y N	
Establish minimum continuing education requirements	Y N	
Provide subscriptions to sustainability periodicals, books, websites, etc.	Y N	
Host internal employee interest groups	Y N	
Provide support for professional memberships	Y N	
Provide support for staff to attend conferences and events	Y N	
Other:		

Strategies for reducing your company's carbon footprint

Use this worksheet to inventory common approaches to reducing your operational carbon footprint and increase workplace productivity. We also recommend calculating your carbon footprint and analyzing areas to reduce your negative impact.

Strategy	Priority level	Status
Office energy use		
Turn off lights when not in use		
Install energy efficient or LED lights throughout the office		
Introduce energy-saving power strips		
Ensure appliances are energy efficient		
Use renewable energy for power		
Purchase carbon offsets		
Adjust air temperature comfort zone and dress seasonally		
Water		
Minimize dishwashing soap		
Minimize bottled water usage		
Install low-flow toilets and faucets		
Implement rainwater harvesting and/or management strategies		
Resources		
Go paperless (or at least print double-sided)		
Replace disposable cups with reusable items		
Take steps to reduce waste, including tracking progress		
Create a comprehensive recycling plan		
Start a composting program		
Research your current sources/supply chains; try to support local vendors as much as possible		
Create and implement purchasing evaluation criteria		

Strategy	Priority level	Status
Transportation		
Make remote working available more often		
Encourage biking, walking, and public transportation		
Provide transit benefits		
Offer bike racks and benefits		
If possible, consider a more accessible office location		
Offset travel- and commuter-related carbon		
Health		
Source local and healthier foods when catering meetings		
Introduce plants and other biophilic elements		
Use green cleaning supplies		
Provide a gym and showering facilities for employees		
Community impact		
Understand how the effects of climate change are impacting your community		
Create volunteer opportunities to help your community become more resilient		
Assess community resiliency and project impact on design projects		
Contribute to low-income and minority architecture student mentorship and scholarships		

Acknowledgements

AIA project staff

Content development

Paola Capo, Manager, Sustainability & Communities by Design

Matthew Welker, Assoc. AIA, Director, Sustainability Operations & Metrics

Brand & Creative

Erin Egan, Account Manager, Brand & Engagement

Theodore Fischer, Manuscript Editor

Rachel Jones, Sr. Manager, Brand & Creative

Stacy Moses, Art Director

Contributors

AIA thanks the following individuals for sharing their information and insights for this report:

Barbra Batshalom, Assoc. AIA, Sustainable Performance Institute

Jeannie Bertolaccini, AIA, Ordiz-Melby Architects

Benjamin Bromberg Gaber, Assoc. AIA, DSK Architects

Frank Bostrom, AIA, Frank Bostrom

Seth Dunn, AIA, Siegel & Strain Architects

Rand Ekman, FAIA, HKS

Kit Elsworth, KieranTimberlake

Gwen Fuertes, AIA, LMS Architects

Keith Hempel, FAIA, LPA Architects

Amy Latva-Kokko, AIA, DSK Architects

Michael Lejong, AIA, MAHG Architecture

Ashley Mulhall, AIA, Orcutt | Winslow

Tate Walker, AIA, OPN Architects

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Questions?

Join the 2030 Peer-to-Peer network to learn what others are doing and the questions they are asking. Email us to join the network or ask any other questions at 2030commitment@aia.org.

For more information and resources, visit aia.org/2030commitment.



The American Institute of Architects

1735 New York Avenue NW
Washington, DC 20006-5292
aia.org