

Waterville 2020 Vision Group

# **Implementation Guide**

**Tools, Methods and Procedures  
for achieving the 2020 Vision for  
Energy Conservation and Sustainability**

**Version of February 2, 2009**

**Running Start Institute**  
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## Key Implementation Tasks

The goal of implementation is to quickly and efficiently advance the 2020 team's eight strategic objectives to higher stages of accomplishment.

The basic task of implementation is to create conversations that empower others to make progress. Success will depend on the ability to:

- **focus on results** and discovering what must be done to achieve them
- **delegate tasks** that you cannot or choose not to do yourself – without losing control of the process
- **coach others** on how to make, measure, and report progress
- **increase cooperation among diverse people** with different backgrounds, experiences and skill levels.
- **teach a common implementation language** that allows individual volunteers and teams to understand one another
- **choose effective implementers** who can advance projects to higher stages of accomplishment
- **monitor** the work of Project Teams and team leaders
- **define and acquire additional resources** as the 2020 Action Agenda advances to higher stages of accomplishment
- **remain flexible and positive** through the many expected and unexpected changes during the implementation process

The following suggestions are the result of many years of experience helping organizations achieve their visions. Do not change them lightly, but adopt them as needed to make the implementation process more effective.

# **A Successful Implementation System Includes**

Objective Leaders

Project Leaders

Other Implementers

An Effective Communication System

Reliable Measures of Status and Progress

Regular Periodic Reviews and Course Corrections

Periodic Updates

# The Role of Objective Leaders

## ***RESPONSIBILITIES***

1. With Project Leaders, develop a Project Charter for each project in your objective
2. Guide and support Project Teams within their objectives
3. Convene Objective Team meetings as necessary
4. Monitor status and progress of projects within their objectives
5. See that Project Leaders have the tools they need to make progress.

## ***TASKS TO BE DONE/DELEGATED***

- Model effective use of the Implementation System
- Find/allocate resources for Project Teams
- Schedule and conduct Objective Reviews
- Recruit/acquire implementers and other resources
- Record and communicate information about status and progress

# The Role of Project Leaders

## *RESPONSIBILITIES*

1. With their Objective Leader, develop a Project Charter for their project
2. Guide and support their Project Team to achieve its goals
3. Convene and conduct Project Team meetings
4. Monitor the status and progress of their project
5. Help y their team get the resources it needs
6. Report status and progress to their Objective Leader
7. Communicate effectively with their Project Team and other resources.

## How to Organize Objective Teams

### A. Establish Version Control

- Designates one person to enter all changes into the Action Agenda
- Let everyone know where to find the most up-to-date version of the Agenda

### B. Establish a Schedule for Updating the Action Agenda

- With other Objective Leaders, determine how often you are going to update the Action Agenda.
- Decide what information to collect and provide for each update.
- Notify all implementers of the updating schedule.

### C. Identify Objective Team Members

- Decide whom you would like to work with to monitor and coach the Project Teams in your objective. Keep your Objective Team small - two or three members are adequate for guiding most objectives.
- Brief objective team members on their role. Provide materials from this Guide for them. Decide how you are going to share the work of monitoring and coaching the Project Teams in your objective.

### D. Decide which projects must be implemented now and which, if any, can be deferred until later

### E. Appoint Project Leaders and project team members

- Choose people who can facilitate team meetings effectively and keep people focused on achieving project milestones.
- With each Project Leader, discuss possible project team members. Keep Project Teams small - three to five members should be adequate to implement most projects.
- Appoint Project Team members.

### F. Focus on Milestones

- Make a list of all the milestones in your objective. Update the list frequently.
- Arrange milestones in chronological order, beginning with the earliest.
- Discuss the milestones and due dates with the leader of each project. Determine if the milestones are realistic; edit and/or change due dates as needed.
- Report changes of milestones and/or due dates to the designated version control.
- Use the list of milestones to monitor the work of Project Teams and to coach Project Leaders.
- Every time a milestone has been met, thank the Project Team. Celebrate if possible. Notify people who need to know. Then ask the Project Leader to set at least one new milestone. That way, your Project Teams will always have specific goals and due dates to work toward.

### **G. Establish Expectations for Project Leaders**

- Set review dates (preferably monthly) for monitoring the progress and status of each project.

### **H. Train Project Leaders**

- With other Objective Leaders, set a date for training Project Leaders.
- Ask the Catalyst facilitators to provide this training and training materials
- Make a plan for training Project Leaders who are unable to attend this session.

# How to Help Teams Make Progress

## DOING THIS

**ADVOCATING:** speaking in favor of a suggestion or describing its benefits

**BRAINSTORMING:** creating options for how to achieve a vision, objective, or project

**SORTING:** organizing initiatives into groups

**INFORMING:** providing information on any subject

**PLANNING:** determining the next steps required to make progress

**PRIORITIZING:** deciding the relative importance or urgency of various options

**RESEARCHING:** discovering new information

**STAGING:** determining the stage of accomplishment of a project or objective

**UPDATING:** reviewing or revising plans

**VISIONING:** describing the organization's future as you truly desire it to be

**VOTING:** choosing between or among options

## HELPS PROJECT TEAMS DO THIS

learn the benefits of taking a specific action

choose the best ways to achieve its vision

understand which initiatives can be achieved through similar work or with similar resources

make choices based on accurate information that is available to everyone

understand the most efficient or effective things to do next

determine how to allocate resources

decide how to set priorities, allocate resources, or determine next steps

understand what kind of work is needed to make further progress

see how the organization's interests have changed over time

define long-term goals the organization is highly motivated to work for

make responsible choices about policies or resources.

# How to Report Status

*Use this guide to find out which objectives and projects may need extra attention or additional resources.*

## STATUS GREEN

We're making good progress. We have the resources we need. There are no bottlenecks blocking our progress.

## STATUS YELLOW

Our progress is slow. We may need new resources if our progress doesn't improve soon. We need to monitor this carefully to be sure we aren't falling behind.

## STATUS RED

Our progress is blocked. We seem to be stuck. It's time to remove bottlenecks, find new resources, and get back on track.

## STATUS BLUE

We've finished all our work on this. It's time to celebrate and reassign resources to other tasks.

## How to Monitor Project Teams

*Objective Leaders use this to get the information they need for Objective Reviews and to coach Project Leaders.*

1. Decide how often you will monitor Project Leaders. Set specific dates for monitoring sessions.
2. Have this Guide and the Project Charter available for reference.
3. **Determine the team's progress**
  - **STATUS** - Green, Yellow, Red or Blue. Use "How to Measure Progress," to coach Project Leaders if they are unsure of their project's status.
  - If you are concerned about the lack of progress in any project, determine what additional resources the project team may need, and how you are going to help it get these resources.
  - **MILESTONES** - Determine whether project milestones are being met on schedule. If they are not being met, decide what additional resources the project teams may need. If necessary, help the team get these resources. If the current milestones have been met, work with the Project Leader to set one or two new milestones.
  - **STAGE OF ACCOMPLISHMENT** - Review the current stage of accomplishment of the project. Use "How to Measure Progress," to coach Project Leaders if they are unsure of the stage. Acknowledge and appreciate teams whenever they move to higher stages of accomplishment.
4. Summarize these findings so you can report them to your Objective Team. Use "Objective Review Template" on page 17.
5. Thank Team Leaders for their commitment and their hard work. Encourage them to contact you at any time for assistance. Confirm the date and time of the next monitoring session.

## How to Report Progress

*Measuring progress is the heart of the implementation process.  
Project Leaders use this sheet to update their Objective Leaders.*

1. Have this Guide and the Project Charter available for reference.
2. Report the status and progress you team has made since the previous report.

**PROJECT STATUS** - Green, Yellow, Red or Blue. Use "How to Measure Progress," If you are not sure of your project's status, work with your Objective Leader to determine it.

If you are concerned about the lack of progress of your project, discuss what additional resources your team may need. Develop a plan to get these resources.

**MILESTONES** – Report on each project milestones. If they are not being met, ask for additional resources or discuss your plans for meeting them. If your milestones have been met, work with the Project Leader to set one or two new milestones.

**STAGE OF ACCOMPLISHMENT** – Using "How to Measure Progress," report the current stage of accomplishment of your project. If the stage has changed, be ready to explain why you think so.

3. Discuss any other matters that are affecting the status and progress of your project. These may include the need for additional tools, resources, communication, etc.
4. Confirm the date and time of your next monitoring session.

# How to Conduct Objective Reviews

*Objective Leaders use this outline to develop agendas for Objective Reviews.  
Have copies of underlined materials available at each meeting.  
Facilitate this agenda yourself or ask others to facilitate it.*

## 1. Orient Everyone

- Identify the number and name of your objective and review its current Stage of Accomplishment.

## 2. Focus on Making Progress

- Review each project within your objective
  - A. Project Status – Green, Yellow, Red or Blue. If you are concerned about the lack of progress, determine what additional resources the project team may need. Discuss how to help the team get these resources.
  - B. Milestones. Note milestones met and new milestones set since your last Objective Review. If project milestones are not being met, decide what additional resources the project teams may need. Discuss how to help the team get these resources.
  - C. Stage of Accomplishment: - Determine current stage of accomplishment of the project. If the stage is not advancing as quickly as you wish, decide what additional resources the project team may need. Discuss how to help the team get these resources.
- Record this information and any actions or decisions you make in the Objective Review Summary, page 17.

## 3. Review Your Resources

- Report any requests from Project Leaders for additional resources (people, funds, information, tools, etc.)
- Decide if/how you can provide these resources.
- Record this information in the Objective Review Summary.

## 4. Schedule the Next Meeting

- Set the date, time and location of the next Objective Review.
- Record this information in the Objective Review Summary.

## 5. Invite Questions

- Ask for questions
- If necessary, refer questions to others for additional information.

6. **Show Your Appreciation** – Thank everyone for working together.
7. **Send your Objective Review Summary** to version control and other designated people.

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# A. Objective Review Summary

*Objective Leaders provide copies of this summary to fill out at each team review.  
Send copies to version control and other designated people.*

Objective \_\_\_\_\_ Review Date \_\_\_\_\_  
*Objective Team members present* \_\_\_\_\_

OVERALL OBJECTIVE STATUS (blue-green-yellow-red) \_\_\_\_\_  
OVERALL STAGE OF ACCOMPLISHMENT: Current \_\_\_\_\_ Last Review \_\_\_\_\_

<b>PROJECT 1</b> _____ Status _____ Stage of Accomplishment: Current____ Last Review _____ Milestones Met _____ _____ New Milestones Set _____ _____ Resources Needed _____ Comments _____
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<b>PROJECT 2</b> _____ Status _____ Stage of Accomplishment: Current____ Last Review _____ Milestones Met _____ _____ New Milestones Set _____ _____ Resources Needed _____ Comments _____
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<b>PROJECT 3</b> _____ Status _____ Stage of Accomplishment: Current____ Last Review _____ Milestones Met _____ _____ New Milestones Set _____ _____ Resources Needed _____
---

Comments \_\_\_\_\_

**PROJECT 4** \_\_\_\_\_  
Status \_\_\_\_\_ Stage of Accomplishment: Current\_\_\_\_ Last Review \_\_\_\_\_  
Milestones Met \_\_\_\_\_  
\_\_\_\_\_  
New Milestones Set \_\_\_\_\_  
\_\_\_\_\_  
Resources Needed \_\_\_\_\_  
Comments \_\_\_\_\_

**PROJECT 5** \_\_\_\_\_  
Status \_\_\_\_\_ Stage of Accomplishment: Current\_\_\_\_ Last Review \_\_\_\_\_  
Milestones Met \_\_\_\_\_  
\_\_\_\_\_  
New Milestones Set \_\_\_\_\_  
\_\_\_\_\_  
Resources Needed \_\_\_\_\_  
Comments \_\_\_\_\_

## B. Project Charter

Objective Number and Title \_\_\_\_\_

Current Stage of Accomplishment: \_\_\_\_\_

Prepared by: (Names of Objective Leader and Project Leader) \_\_\_\_\_

Beginning Date \_\_\_\_\_

Project Number and Name \_\_\_\_\_

### PROJECT SCOPE

- Specific results of completing the project \_\_\_\_\_  
\_\_\_\_\_
- why these results are important \_\_\_\_\_
- what they will enable the 2020 Group to do \_\_\_\_\_  
\_\_\_\_\_
- how you will know when the project is complete \_\_\_\_\_
- estimated date of completion \_\_\_\_\_

Sponsor (Person or group who will provide of financial and other resources for completing your project) \_\_\_\_\_

Customers and Key Stakeholders (Other people who will use or benefit from the results of your project) \_\_\_\_\_  
\_\_\_\_\_

Customer Requirements (List what your project team will deliver that will satisfy your customers' needs.) \_\_\_\_\_  
\_\_\_\_\_

Final Products (Describe the specific form of the items/materials/data that your project team will deliver.) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Project Milestones and Due Dates

- Stage 2 Milestone and Date

\_\_\_\_\_ Date by which we will be committed to pursuing this project

- Stage 3 Milestone and Date

\_\_\_\_\_ Date by which we will have identified the steps needed

to implement the project

- **Stage 4 Milestone and Date**  
\_\_\_\_\_ Date by which we will have the resources we need to launch the project.
- **Stage 5 Milestone and Date**  
\_\_\_\_\_ Date by which we will be organized to implement this objective
- **Stage 6 Milestone and Date**  
\_\_\_\_\_ Date by which we will be implementing this project, even though we don't have enough feedback to judge whether or not we are making progress
- **Stage 7 Milestone and Date**  
\_\_\_\_\_ Date by which we will have evidence that we are making real progress
- **Stage 8 Milestone and Date**  
\_\_\_\_\_ Date by which we will be learning how to consistently get the results we want

**Completion Criteria** (How we will know our project is complete) \_\_\_\_\_

\_\_\_\_\_

## PROJECT ASSURANCE

**Reviews and Dates of Approval Required by Project Sponsor** \_\_\_\_\_

\_\_\_\_\_

**Status Reports Required by Objective Leader:** Monthly status reports (blue-green-yellow-red) on progress, milestones achieved, remaining tasks, and issues.

## PROJECT RESOURCES

List project team members and other resource people and what each will contribute.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Final Delivery Dates:** Deliver to (person) \_\_\_\_\_ by (date) \_\_\_\_\_

**Limit of Effort** (estimated number of hours/days that will be needed to complete the project) \_\_\_\_\_

**Spending Limit** (estimated amount of money that will be needed to complete the project) \_\_\_\_\_

## C. Stages of Accomplishment

### Stage Zero: Open

"We are wondering what to do now."

"We are opening ourselves to new possibilities in connection with our vision."

(Brainstorm, envision, transcend, meditate, dream about how things ought to be.)

*"Are we willing to consider this?"* If No, Stage 0; If Yes, Stage 1

### Stage One: Explore

"We are speculating about the potential of this Objective wondering if it will help us achieve our vision."

"We are imagining different possibilities."

(Wonder, explore, hypothesize, ponder, reflect, sketch, imagine)

*"Are we sure we'd like to seriously examine this?"* If No, Stage 1; If Yes, Stage 2

### Stage Two: Assess

"We're figuring out if we are really going to pursue this."

"We are studying the consequences of pursuing this Objective and assessing its feasibility."

"Will it help us accomplish the vision? Is it possible to do?"

"What are the pros and cons of this? What are the benefits and risks? How much time & money will it require?"

(Analyze, investigate, study, probe, define, estimate, research)

*"Are we really going to pursue this?"* If No, Stage 2 or back to Stage 0; If Yes, Stage 3.

### Stage Three: Plan

"We are laying out a step-by-step process for achieving this Objective."

"We are figuring out what has to be done to accomplishing this Objective."

"We are laying out a process for achieving this." (What are the steps?)

"We are identifying needed designs, materials, people, skills and resources."

"We are thinking about how much time we'll need and sequence of events."

(Formulate, devise, engineer, design, storyboard, outline)

*"Do we know what to do to achieve this?"* If No, Stage 3; if Yes, Stage 4.

### Stage Four: Resource

"We are lining up the resources we need."

"We are gathering the means to turn the plan into reality."

"We are pulling together the resources for carrying it out: approaching helpers, lining up materials, arranging finances, etc."

(Gather, collect, acquire, search, find, research, interview, contract, finance)

*"Do we have the money, time and other resources necessary to succeed?"* If No, Stage 4; if Yes, Stage 5.

### Stage Five: Structure

"We are getting organized to implement this objective."

"We are organizing the implementation of this objective."

"The resources are available."

"Everyone understands what is expected."

(Delegate, assign, schedule, finalize, double check, tie up loose ends, order, organize, authorize, charter)

***“Are we ready to start this today, with all the details worked out?”*** If No Stage 5; if Yes Stage 6.

#### **Stage Six: Measure**

“We’ve started implementing, but we are still learning how best to measure our performance/progress.”

“As yet, we don’t have enough feedback to judge whether or not we are making progress.”  
(Measure, calibrate, sort, quantify, forecast, anticipate, internalize, characterize, pre-assess)

***“Are we systematically measuring our performance/progress?”*** If No, Stage 6; if Yes, Stage 7.

#### **Stage Seven: Implement**

“The evidence shows that we are making real progress.”

“We may even have achieved identifiable success, but there is no clear certainty that it is durable or repeatable.”

(Do, manifest, demonstrate, break through, perform, fulfill)

***“Are we clearly progressing?”*** If No, review/re-visit previous Stages; if Yes, Stage 8.

#### **Stage Eight: Formalize**

“We are learning how to consistently get and regulate the results we want.”

(Document, regulate, control, standardize, edit, verify, capture best practice, internalize, understand, clarify)

***“Have we defined our processes so that we can consistently repeat our success and teach others to duplicate it?”*** If No, Stage 8; if Yes, Stage 9.

#### **Stage Nine: Refine**

“We are continuously improving our processes and products.”

“Our focus is on sustaining high throughput.”

(Improve, upgrade, reengineer, enrich, revise, expand, adjust)

***“Are we satisfied with the way everything is working?”*** If No, Stage 9; if Yes, continue as-is or Stage 10.

#### **Stage Ten: Complete**

“We’ve achieved enough of what we wanted” “We’re celebrating our success and redirecting our efforts.”

“It is time to declare victory, alter expectations or refocus our attention on a new Objectives or a new Vision.”

(Evaluate, finalize, conclude, hand-off, divest, consolidate, close, celebrate)

***“Are we ready to move onward to something else?”*** If No, Stage 10; if Yes, repeat the cycle.

## D. 2020 Implementation Roster

1. **Generate Renewable Energy & Promote Conservation** – John Joseph.Cathy Nadeau  
TEAM: Mike Willey, David Gilpatrick (nom), Ken Fletcher, Chris Bryan, Tom Tietenberg, governmental people from communities, Sustainability Committee member, Charlie Brown

Project 1 – Improve Efficiency of Commercial and Institutional Buildings \_\_\_\_\_  
\_\_\_\_\_

Project 2 – Improve Energy Efficiency of Residential Buildings \_\_\_\_\_  
\_\_\_\_\_

Project 3 – Develop Community Alternative Energy Infrastructure \_\_\_\_\_  
\_\_\_\_\_

SHOWSTOPPERS: Objective II, 124, 184, 185; Objective V, 167, 168, 192; Objective VI, 3.

2. **Improve Transportation Efficiency and Choices** – Jim Wood  
TEAM Susan MacKenzie, Ann Beverage, Peter Garrett, Bill Basford, Chris Huck, Rosemary Winslow

Project 1 –

Project 2 –

Project 3 –

Project 4 –

3. **Build Organizational Capacity and Monitor Results** – Sasha Hayes-Rusnov  
TEAM: Michael Donihue, Eric Brown, Ross Nason (nom), Blanche Davison, Greg Brown (nom), Tom Davis (nom), Tom Longstaff

Project 1 –

Project 2 –

Project 3 –

Project 4 –

4. **Rethink, Reduce, Reuse, and Recycle** – Geoff Hill  
TEAM: Michael Donihue, Eric Brown, Ross Nason (nom), Blanche Davison, Greg Brown (nom), Tom Davis (nom), Tom Longstaff

Project 1 –

Project 2 –

Project 3 –

5. **Generate and Manage Financial Resources** – Doug Carrick  
TEAM: Steve Aucoin, Steve Crate, Tim Trafford (nom), Jon Languet

Project 1 –

Project 2 –

Project 3 –

6. **Engage the Educational Community** – Iver Lofving  
TEAM: Ashley Sennett, Francis Rodrigue, Linda Woods,

Project 1 –

Project 2 –

Project 3 –

Project 4 –

7. **Grow and Support Local Food** – Shannon Haines  
TEAM: Laura Patterson, Ann Beverage, Chris Huck, David Gulak, Heather Merrow, Stu Silverstein, Nancy Emery

Project 1 –

Project 2 –

Project 3 –

8. **Communicate!** – Steve Erario  
TEAM: Danielle Hodgkins, Faye Nicholson, Marilyn Canavan

Project 1 –

Project 2 –

Project 3 -

## E. Running Start Institute Resources

Michael Kelly  
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