
Book Guide

CREATE A SUSTAINABILITY TEAM

CHAPTER THREE

PRACTICAL SUSTAINABILITY

How-to Guide: Creating Your Sustainability Team

Chapter 3

Building a strong sustainability team is the foundation for driving meaningful environmental and social impact within your organization. Whether you are starting from scratch or enhancing an existing group, this guide will walk you through the essential steps to create a team equipped to deliver results.

“Whether your organization is hiring a team, or pulling one together from within, the most important part is having the right people on that team.” (*Practical Sustainability*, p. 79)

Step 1: Understand the Purpose of Your Sustainability Team

Before assembling the team, clarify the goals you want to achieve. Typical objectives include:

- Reducing energy, water, and waste costs
- Embedding sustainability into organizational culture
- Achieving certifications or compliance
- Driving innovation in products, services, or operations

Having clear goals ensures your team members stay focused and aligned with organizational priorities.

Record some goal ideas in the space below:

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Step 2: Identify Key Roles and Responsibilities

Successful sustainability teams rely on diverse expertise and perspectives. The following roles are essential to cover the range of skills and influence needed:

Role	Key Qualities	Primary Responsibilities
Team Leader	Strong organizer, communicator, and influencer; has management support	Drives the team forward; coordinates tasks; liaises with leadership; accesses and reports on sustainability metrics
Project Manager	Detail-oriented, proactive, knowledge of organization	Develops and executes project plans; manages timelines and resources
Finance Representative	Analytical, budget-savvy, understands organizational metrics	Assists with budgeting, ROI analysis, and financial justifications
Maintenance Manager	Technical knowledge, supplier relationships	Identifies efficiency opportunities; manages materials and chemical inventories
Sales & Marketing	Customer insight, storytelling skills	Creates sustainability communications; supports supplier engagement
Facility Manager	Operations knowledge, bill analysis skills	Oversees building systems; identifies savings in utilities and maintenance
General Employees	Diverse perspectives, varying priorities	Represents broader workforce; challenges ideas; increases buy-in

Note: Small organizations may combine roles or assign them to fewer people. The key is having these capabilities covered. See the Team Role Matrix for examples of how these people fit in your organization.

Record some candidates for each role on the next page.

Role	Possible Candidates
Team Leader	
Project Manager	
Finance Representative	
Maintenance Manager	
Sales & Marketing	
Facility Manager	
General Employees	

Step 3: Recruit Your Team

- **Leverage Passion:** Invite employees who are motivated by sustainability to join the team. Their enthusiasm will help drive momentum.
- **Ensure Broad Representation:** Include team members from all relevant departments to ensure comprehensive insight and organizational buy-in.
- **Seek Leadership Support:** The team leader must have clear backing from management to access resources and authority to assign tasks or redesign the team as needed.
- **Balance Perspectives:** Add employees who are less passionate but influential to challenge assumptions and improve program robustness.

Step 4: Define Roles and Set Expectations

- Use the Team Role Matrix as a foundation for clear role descriptions and expectations.
- Document who is responsible for what and establish communication norms.
- Clarify time commitments, reporting responsibilities, and decision-making authority.

Step 5: Launch Your Team

- Hold a kickoff meeting using the provided template to:
 - Introduce team members and roles
 - Align on goals and priorities
 - Establish meeting cadence and communication channels
 - Review immediate next steps and assignments

Step 6: Support and Sustain the Team

- Encourage the team leader to use the Focus Guide to maintain momentum and manage relationships with leadership.
- Regularly assess team readiness and dynamics using the Self-Assessment tool.
- Utilize tracking tools to manage projects, tasks, and KPIs transparently.
- Use case discussions to foster continuous learning and problem-solving.

Final Tips

- **Start Small:** It's better to have a small, effective team than a large, inactive one.
- **Adapt Roles Over Time:** As your program grows, revisit roles and team structure.
- **Celebrate Successes:** Recognize contributions and wins to keep motivation high.

Sustainability Team Kickoff Meeting Template

Meeting Title:

"Sustainability Team Kickoff – Aligning Our People, Purpose, and Plan"

Duration: 60–90 minutes

Facilitator: Team Leader or Program Manager

Attendees: All core team members (from Role Matrix)

Agenda Overview

Time	Topic	Details & Talking Points
0–10 min	Welcome & Introductions	• Brief round-robin: name, role, one sentence on why they're here • Icebreaker: “What's the most sustainable thing you did last week?”
10–20 min	Why This Team Exists	• Present org's sustainability vision • Share leadership support and expectations • Emphasize impact of team's work on culture & cost
20–30 min	Team Roles & Structure	• Review Team Role Matrix handout • Define core responsibilities • Discuss expectations for communication, time, and task ownership
30–50 min	Initial Priorities & Projects	• Present first set of focus areas (e.g., energy, waste, water) • Ask: “What pain points do we already know about?” • Identify low-hanging fruit
50–65 min	Working Together	• Team norms: collaboration, honest feedback, decision-making • Meeting cadence: how often, when, how long? • Where will we track progress?
65–75 min	Access to Data & Resources	• Share who has access to what (metrics, financials, vendor info) • Assign any initial follow-up to gather missing data
75–90 min	Next Steps + Closing Round	• Confirm next meeting date • Assign first 2–3 action items • Round-robin: “One word to describe how you're feeling about this work”

Kickoff Meeting Materials

Document/Tool	Purpose
Team Role Matrix	Clarifies who's who and what they do
Leadership Support Letter/Slide	Shows management is backing the team
Metrics Snapshot (if available)	Baseline data for discussion
Sustainability Vision Statement	Anchors the team to a common goal
Project Ideas Brainstorm Worksheet	Captures team input for priority-setting
Team Charter Template (optional)	Formalizes scope, membership, and authority

Kickoff Follow-Up Checklist

- Send meeting notes to team and leadership
- Finalize and distribute team contact list
- Confirm data access with Finance, Facilities, etc.
- Upload Role Matrix and Charter to shared folder
- Schedule next 3 recurring meetings

Optional Icebreaker Alternatives:

- “If your department were a type of renewable energy, what would it be and why?”
- “What’s the weirdest thing you’ve ever recycled or reused?”
- “Name one thing your workplace wastes, and how it could be improved.”

Team Leader Focus Guide

Weekly & Monthly Leader Task Checklist

Weekly Tasks

- ▣ Review team progress toward goals (KPIs, milestones)
- ▣ Hold team stand-up or sync meeting
- ▣ Follow up on action items and blockers
- ▣ Recognize contributions or progress
- ▣ Check in 1:1 with rotating team members
- ▣ Review dashboards or reports
- ▣ Communicate key updates from leadership

Monthly Tasks

- ▣ Conduct full team meeting or learning session
- ▣ Review monthly performance metrics
- ▣ Submit reporting or updates to leadership
- ▣ Update project timelines or adjust priorities
- ▣ Refresh goals or objectives as needed
- ▣ Plan training, development, or team-building
- ▣ Conduct monthly 1:1 with each direct report

Special Focus: Team Leader Duties

Task Area	What the Team Leader Should Do
Management Liaison	Hold regular meetings with leadership; communicate goals and progress; request access to data and authority as needed
Team Building	Select team members thoughtfully (skills + perspective balance); onboard new members; handle team dynamics proactively
Program Oversight	Track progress of initiatives; keep momentum; flag delays or barriers; adjust plans and reassign roles as needed
Metrics & Reporting	Access utility and sustainability metrics (waste, energy, water); monitor ROI; report wins and lessons learned to leadership
Adaptability	Reconfigure the team if members are disengaged, disruptive, or ill-matched; always be shaping the team to match evolving project goals

Checklist: Meeting with Management

Use this checklist when preparing for leadership check-ins.

Suggested Topics

- ▣ Project updates and blockers
- ▣ Team morale and capacity
- ▣ Talent or resourcing gaps
- ▣ Innovation opportunities
- ▣ Customer feedback (if applicable)

Key Metrics and Reports ❑ KPI dashboards ❑ Risk logs or issue summaries ❑ Milestone progress ❑ Budget or resource utilization ❑ Quality, cycle time, or customer satisfaction data	Be Ready to Answer... ❑ “What’s working well?” ❑ “What do you need to keep things on track?” ❑ “What support can we provide?” ❑ “What is at risk or behind schedule?”
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Empowerment Strategies: How to Advocate for Support

Great leaders know when and how to ask for help. Consider these strategies:

- **Be specific:** Request tools, systems access, or budget—not just “support.”
- **Back it with data:** Use metrics or impact examples to justify needs.
- **Frame it as enablement:** “With [X], my team can deliver [Y].”
- **Escalate strategically:** If you hit a wall, outline what’s at stake and propose a solution.
- **Document the ask:** Put it in writing to clarify expectations and timelines.

Common Pitfalls & How to Mitigate Them

Pitfall	Risk	Mitigation
Lack of access to timely data	Delays in decision-making	Partner with data team to set up dashboards or alerts
Overloaded team	Burnout, missed deadlines	Use workload planning tools; escalate staffing needs
Unclear priorities	Wasted effort	Review OKRs monthly; align with leadership
Scope creep	Time/budget overrun	Implement clear goals that are well defined
Poor visibility with leadership	Under-recognition, missed support	Send regular updates; invite leaders to key meetings

Sustainability Team Role Matrix

Team Role	Key Qualities	Primary Responsibilities	Small Org. Notes	Large Org. Notes
Team Leader	Respected, organized, strong communicator, empowered by leadership	Organize meetings, assign tasks, liaise with leadership, ensure access to metrics, reconfigure team if necessary	Likely wears multiple hats—may also be project manager or department lead	Should have dedicated time and high-level visibility with leadership
Project Manager	Action-oriented, systems thinker, knowledgeable about org operations, creative problem-solver	Create and manage project plans, timelines, coordinate tasks, troubleshoot implementation barriers	Could be a dual role (e.g., operations manager)	Likely a standalone role focused on cross-department coordination
Finance Representative	Analytical, detail-focused, understands budgets and metrics	Provide access to utility bills, calculate ROI, assist with justifying budget requests	May need help from utility vendors or outside accountant	Should lead all ROI and financial trend analyses
Maintenance Manager	Detail-oriented, supplier-savvy, safety-conscious	Provide input on equipment/materials, manage MSDS, identify greener alternatives, prevent chemical mishandling	Could be a jack-of-all-trades; will need time and support	Will be critical to facility-level audits and procurement

Sustainability Team Role Matrix (cont.)

Team Role	Key Qualities	Primary Responsibilities	Small Org. Notes	Large Org. Notes
Sales & Marketing	Customer-focused, creative communicator, brand-aware	Communicate sustainability wins, align messages with brand story, connect supplier/product sustainability info	Can help frame internal successes for staff motivation	Should develop outward-facing case studies, help shape public perception
Facility Manager	Data-driven, building systems knowledge, proactive problem-solver	Track energy/water/waste usage, detect anomalies, suggest building and system upgrades	May be the same person as maintenance in small orgs	May manage dashboards, BAS (building automation systems), or submetering
Passionate Employee(s)	Curious, enthusiastic, persuasive	Offer creative ideas, advocate for initiatives, inspire peers	Often the heart of the team, especially in grassroots efforts	May act as internal champions and pilot testers
Skeptical/Neutral Employee(s)	Pragmatic, inquisitive, grounded	Provide healthy critique, represent average employee mindset, pressure-test ideas	Essential to ensure programs aren't just for the "choir"	May help predict/mitigate organizational resistance

Team Self-Assessment: Are We Ready?

Instructions for Use

Rate each area using the traffic light scale:



Green Light – We are confident and fully prepared



Yellow Flag – We are somewhat ready, but need improvement



Red Flag – We are not ready; this is a significant barrier

Section 1: Access to Key Data

1.1 Do we have access to accurate, up-to-date data on:

- Energy consumption?
- Water usage?
- Waste generation and diversion rates?

Rating:   

Suggested Improvements:

- Contact your facilities manager or utility provider for data access
- Start with monthly bills or request interval data if possible
- Assign a team member to centralize and track data

Section 2: Leadership Support

2.1 Does leadership attend or actively support team meetings?

2.2 Has leadership communicated a clear commitment to sustainability?

2.3 Are leaders willing to help remove barriers or approve resources?

Rating:   

Suggested Improvements:

- Invite leadership to present at a kickoff or quarterly meeting
- Ask for a short video or written statement of support
- Share specific requests (e.g., meeting time, access to systems)

Section 3: Team Representation & Capacity

3.1 Are all major departments represented (e.g., HR, operations, facilities, marketing)?

3.2 Do we have members with authority or strong connections in their departments?

3.3 Do team members have time allocated to this work?

Rating:   

Suggested Improvements:

- Use a Team Role Matrix to identify gaps
- Ask department heads to nominate participants
- Clarify expectations with supervisors so team time is protected

Section 4: Resources & Tools

4.1 Do we have access to a shared drive or project management tool?

4.2 Do we have communication channels (e.g., Slack, Teams, newsletters)?

4.3 Do we have a budget or in-kind support for initiatives?

Rating:   

Suggested Improvements:

- Request a shared folder or workspace
- Set up a recurring meeting and communication cadence
- Identify low-cost or no-cost actions to get started

Section 5: Organizational Readiness

5.1 Is sustainability already part of our strategic goals or culture?

5.2 Have we completed a past green initiative or campaign?

5.3 Are employees likely to engage with sustainability efforts?

Rating:   

Suggested Improvements:

- Highlight quick wins to build momentum
- Share success stories from other departments
- Conduct a brief employee interest survey

Final Assessment Summary:

After completing all sections:

Count your Green Lights

Identify Yellow and Red Flags

Use the results to guide early conversations and kickoff planning
