

ESALEN BEYOND GREEN 2016
Sustainability Action Guide

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EXECUTIVE SUMMARY

For nearly 50 years, Esalen's vision has been to be "a major catalyst in the transformation of humankind, working with individuals and institutions to integrate body, mind, heart, spirit, and community in a nurturing relationship with the environment." Underlying and elevating this vision has been the deeply held value that human possibilities vastly exceed our imagination. Without even using the word "sustainability," Esalen's vision and values capture the spirit of sustainability as an integral component in the human potential movement.

Today, sustainability at Esalen is growing beyond traditional definitions focused primarily on environmental concerns ("being green") to a more holistic and integrated approach. By applying the ethics and principles of permaculture, and integrating economic, environmental, and social value in how we fulfill our mission and operate, Esalen embraces sustainable transformation as both a living-learning community and a conscious business that strives to ensure the quality of experience at Esalen and for humankind for current and future generations.

The ambition of this strategy and action guide is to catalyze action throughout Esalen. It is a path to transform Esalen's foundations into healthy fertile soil that will create the conditions for health, growth, and prosperity for all.

It is dynamic and should change and evolve over time. It is meant to support the many people who are already working with diligence, intelligence, and passion, and it is meant to attract and to invite new voices and new partnerships to the journey. It aims to focus and clarify, and to align and activate.

HOW TO READ THIS GUIDE

This Action Guide is intended to be a framework for guiding future action in a changing world. ***It offers an approach for applying the principles of sustainability to find organizational opportunities.***

While this general approach will remain consistent in the future, the lists of specific goals and initiatives in the following pages are just a snapshot of the kinds of actions that make sense today and illustrations of the current possibilities. Recommendations and promising practices will change as conditions change — in fact, they *must* change if we are to have an adaptive, resilient organization.

This Guide is a dynamic work in progress. It should be updated continually between now and 2016.

WHAT IS SUSTAINABILITY TO ESALEN?

Sustainability represents a way of thinking, living, and acting to ensure that our choices do not negatively impact future generations' ability to enjoy a high quality of life. It integrates the goals of economic prosperity, environmental health, and social vitality. Esalen's commitment to sustainability encompasses environmental progress, social equality, cultural preservation, and economic savings and growth.

Amidst the organizational changes and restructuring that we are experiencing as a community, a wellspring of renewed interest and a commitment to sustainability practices has emerged as a core part of our collective vision.

Esalen aspires to be a leader of sustainable practices and to provide transformational experiences that encourage individuals to carry those practices into the world. Sustainable development is a lens through which to see new opportunities in the challenges we face as a community, as a nation, and as a planet.

By seeking new ways to sustainably steward this beautiful land, property, and community, we want to demonstrate what is possible for other organizations and communities and share our innovations and developments.

We believe that sustainability is a journey, not a destination. We have been on this journey for almost fifty years, and yet in some ways are only just beginning. We are humbled to remember that long before the Esalen Institute existed, this land was stewarded sustainably by the Esselen Indians for thousands of years.

THE PURPOSE OF THE SUSTAINABILITY ACTION GUIDE

The core purpose of this guide is to support and empower leaders and community members from across Esalen to make tangible progress on matters that are of interest and importance to them. It provides a framework in which conversations and actions can take place in a way that aligns with a greater vision of a sustainable Esalen.

In essence, it is a road map. A map gives an abstract picture and overview of the landscape, but doesn't capture the actual experience of the journey or the adventures and challenges along the way.

Additionally, this guide intends to:

- Describe the **context** of sustainability at Esalen, including Esalen's philosophy in approaching issues of sustainability
- Clarify a **vision** for sustainability at Esalen
- Highlight a variety of sustainability **issues and implications** for Esalen
- Establish quantitative and qualitative **objectives** for tracking and demonstrating progress
- Identify **potential action initiatives** Esalen can take to meet objectives

WHAT HAS LED ESALEN TO THIS GUIDE?

Land stewardship, ecological awareness, and environmental care have been a core part of Esalen's culture from its start in the 1960s. The organization's first commitment to sustainability as a role within the community evolved out of its long-term development planning that started in 2002. Two years later, Juliet Johnson, a talented water engineer, stepped in as project manager of the Long-Term Development Plan and its subsequent projects, including the design and building of Esalen's award-winning Tidal Wetlands Living Machine.

In December 2008, Esalen hired Kat Steele, with a background in sustainable permaculture design, community development, and education to continue Juliet's work as the Sustainable Projects Manager.

In November 2010, Esalen initiated the process to become a Certified Green Business through the County of Monterey and received the certification in April 2011. This guide was originally conceptualized to meet the County's requirement for a 3-year Climate Action Plan and evolved under the leadership of Esalen CEO Tricia McEntee and Kat Steele to serve as framework and tool that could be used to

achieve better alignment and collaboration across departments and throughout the community for ideas generated by the Green Business Certification process and other strategic initiatives underway in the organization.

Additionally, there are already other great development and strategic plans at Esalen that have embedded the principles of sustainable development. This Action Guide is aligned with these plans, and is not meant to replace or to change them, but rather to provide another arrow in the quiver and a point of connection. The Esalen Beyond Green Initiative will be a hub of information about all activities that are accelerating Esalen's sustainability transformation.

Esalen has reached a tipping point and is ready to implement a type of strategic development that has the principles of sustainability woven into the fabric of our actions.

METHODOLOGY

The process of developing this Action Guide has involved many months, the contributions of many community members, and the collective experience of thought leaders in sustainability from around the world and a diverse cross-section of institutions and organizations.

Esalen History

Valuable work, research, and strategy development has already been created over the past 10 years or more and has been leveraged heavily to inform the vision and content of this Action Guide. Previous energy plans, long-term development plans, experience and experiments from staff, seminarians, and external coaches and sustainability leaders have and will continue to inform the goals and specific initiatives undertaken to support Esalen Beyond Green 2016.

Research

There is no need to recreate the wheel when promising frameworks and practices have been developed by sustainability leaders around the world. This Action Guide has borrowed heavily from widely-respected and -used frameworks such as Biomimicry, The Transition Movement, Permaculture, and The Natural Step, as well as plans and guides developed by other leading institutions.

Community Input and Feedback

The Action Guide has been produced and reviewed through a process that elicited input from a wide variety of institute stakeholders, including staff, trustees, donors, and seminarians. This process gave the community the opportunity to voice their ideas, concerns, and priorities. The following events, groups, and programs played a key role in the development of this Action Guide:

- **Sustainability Leadership Team (SLT)** This group of staff and community members provides oversight of Esalen's sustainability-related efforts, including this Action Guide. The SLT generated and/or provided input on most of the content for and discussed every element, including the Guiding Principles and Goals, the Vision for Sustainability at Esalen, and all of the objectives and implementation mechanisms.
- **Sustainability Office (SO)** Kat Steele (Sustainability Development Manager), with the support of contract staff, has been responsible for identifying, researching, and presenting the content of this Guide and opportunities for action to the SLT and for the final compilation of this document. The SO stewards the hand off to management who will have the primary implementation responsibility for most actions in this plan.
- **Board Meetings** The Board of Trustees meetings occur three times a year at Esalen, with additional conference call meetings in between. This group will provide input on the final draft of the plan, with specific focus on the Guiding Principles, Goals, and Vision, and will receive at least annual progress reports on sustainability efforts.
- **Directors and Managers** The Directors and Managers are responsible for integrating this Guide's vision and goals into their departments' decision-making, goal-setting, and day-to-day operations, and for supporting staff. This group has had an opportunity to provide feedback on most of the content in this Guide, including the Guiding Principles and Goals, the Vision for Sustainability at Esalen, and all of the objectives and implementation mechanisms. The SO conducted 1:1 review meetings with the individuals in this group to capture feedback, priorities, budget and resource needs, and other concerns. Additionally, a brief sustainability progress report will be given regularly in the group's weekly meeting.
- **Staff and Community Meetings** The SO presents brief sustainability progress report at least once a quarter. Staff and community members are responsible for upholding policies and employing practices implemented as part of the Sustainability Action Guide.
- **Sustainability Action Circle (SAC)** This group is an interest group open to all staff and seminarians who want to share ideas and inspiration related to sustainability, with activities that include educational films, guest speakers, group discussions, and volunteer action projects. This group may be involved in helping to implement some of the plan's action-initiatives.

A VISION FOR SUSTAINABILITY

The Esalen community has articulated its commitment to sustainability, as well as guiding principles and goals supporting the vision for Esalen Beyond Green 2016.

| | | |
|---|--|--|
| <p>Purpose Mission Our goals, priorities, and measures for success align with Esalen's vision, mission, values, and practices to be a catalyst for personal and social transformation.</p> <p><i>We will integrate sustainability concepts and practices into Esalen's educational offerings and public outreach including workshops, residential education, partnerships, eco-tours, special events, communications, and new, innovative technology.</i></p> | | |
| <p>Planet Earth Care Esalen recognizes the effects our actions may have on other communities and believes it has a moral obligation to respect, preserve, and restore our natural environment and resources.</p> <p><i>We will provide stewardship of the land and property in sustainable, regenerative, energy-efficient, and eco-friendly ways that demonstrate what is possible for other organizations, businesses, and residential communities of Esalen's scale.</i></p> | <p>People People Care Esalen is dedicated to ensuring the quality of life for both current and future generations. This includes caring for our beloved community of staff, guests, and humankind.</p> <p><i>We will support a healthy, ethical, and spiritually-based culture that enhances community engagement and well-being. Esalen aspires to increase the sustainability of the organization, Big Sur, and our home planet.</i></p> | <p>Provision Future Care Esalen relies on sustainable business and community practices to provide for and share economic prosperity for the care of our future.</p> <p><i>We will employ sustainable business practices including purchasing, business models, and operations, and will generate income through fundraising and business development by establishing ongoing systems for research, funding, and implementing of sustainability-focused projects.</i></p> |

ESALEN'S COMMITMENT TO SUSTAINABILITY

- **We are an active part of the solution.** Esalen is **committed to the principles of sustainability** and to taking an active role in addressing and solving the urgent environmental, social, and economic challenges facing the planet.
- **We are an international practice leader.** Esalen **aspires to be a leader of sustainable practices** among educational institutions and to provide transformational opportunities that prepare individuals to carry those practices into the world.
- **We follow a deep moral imperative.** Esalen recognizes the effects our actions may have on other communities and believes we have a **moral obligation to reduce our environmental footprint.**
- **We care for current and future generations.** Esalen is dedicated to **ensuring the quality of life and environment** for both current and future generations.
- **We are committed to long-term financial viability.** Sustainability programs and projects are **prudent financial investments** of Esalen funds.
- **We live into our vision in times of dynamic change.** Esalen is well positioned to deepen our mission to catalyze “a nurturing relationship with the environment” at many levels.
- **We build strong relationships based on shared values.** Esalen has strong networks and relationships with local and global communities which we can harness to spread knowledge and experiences broadly, and to affect sustainable practices on a large scale.
- **We support a culture of curiosity, learning, and experimentation.** Esalen **has the means to explore new technologies and advanced techniques for sustainability**, as well as to pursue sustainable investment strategies. We also **have the means to take a long-term perspective** in analyzing opportunities, making decisions, and allocating resources.
- **We create the conditions for residents to live in a nourishing relationship with the environment.** As a living-learning residential community, Esalen **can create systems that support lifestyles which embody our deepest values.**

GUIDING PRINCIPLES

These principles are closely derived from the Transition Movement, which has leveraged the intelligence and experience of tens of thousands of participants over the last five years to refine basic principles that will enable conditions for transformation. We are a part of the urgent imperative to move from ‘business as usual’ to cultural and societal norms that embody environmental sustainability and intergenerational equity.

1. Create Positive Visioning and Alignment

We can only create what we can first vision. If we can't imagine a positive future, we won't be able to create it. A positive message helps people engage with the challenges of these times. Change is happening – our choice is between a future we want and one which happens to us. Our primary focus is not campaigning against things, but rather on positive, empowering possibilities and opportunities. New stories and myths are central to this visioning work.

2. Help People Access Good Information and Trust Them to Make Good Decisions

We accept the responsibility to present this information in ways which are playful, articulate, accessible, and engaging, and which enable people to feel enthused and empowered rather than powerless. At times the information available is deeply contradictory, but we will focus on telling people the closest version of the truth that we know. Often the important messages are non-directive, respecting each person's ability to make a response that is appropriate to their situation. This principle also includes the concept of subsidiary or self-organization and decision-making at the appropriate level. Decision-making should be practiced at the most appropriate, practical, and empowering level, and in such a way that it models the ability of natural systems to self-organize. This creates ways of working that are easy to copy and spread quickly

3. Emphasize Inclusion and Transparency

In order to actualize successful projects, a diversity of skills and perspectives are often needed. We need good listeners, gardeners, people who like to make and fix everything, good parties, discussions, energy engineers, inspiring art and music, builders, planners, project managers. We also need transparency up, down, and across the organization for how projects are prioritized, managed, and measured to achieve better cross-organizational learning, collaboration, and efficiencies of effort.

4. Enable Sharing, Collaboration, Cross-Pollination and Networking

We must share successes, failures, insights and connections at the various scales our organization and local and global community, so as to more widely build up a collective body of experience. Collaboration across silos and cross-pollination builds strong community connections and enables actions that are not possible within limited resource spheres.

5. Build Resilience and Organizational Intelligence through Structures and a Culture of Experimentation

Good work and learning shouldn't be lost by transition and high turnover. Careful documentation of processes and experimentation makes lessons learned easily accessible to our community and preserves organizational intelligence and ensures a continuity of effort and resilient trajectory of transformation over time.

6. Focus on Both Inner and Outer Transformation

Culture eats strategy for breakfast. The challenges we face are not just caused by a mistake in our technologies but as a direct result of our world view and belief system. If intellect-based regulations and strategies do not align with cultural beliefs and practices, the cultural will always find a way around even the most “logical” directives.

The impact of the information about the state of our planet can generate fear and grief, which may underlie the state of denial that many people are caught in. Psychological models can help us understand what is really happening and avoid unconscious processes sabotaging change, e.g. addictions models, models for behavioral change. This principle also honors the fact that transformation thrives because it enables and supports people to do what they are passionate about, what they feel called to do.

GOALS FOR ESALEN BEYOND GREEN 2016

These goals will be used to measure outcomes of specific Action Initiatives:

Goal 1: Ecological Regeneration

This goal is focused specifically on reducing our greenhouse gas emissions, resource impacts, pollution, and toxins, and taking steps to regenerate the ecological footprint of Esalen.¹

Goal 2: Health and Well-Being

A variety of Esalen activities can have potentially harmful impacts on human health and the health of non-human members of our community, including the use of chemicals found in cleaning products, fertilizers, and refrigerants, off-gassing of volatile organic compounds from facility furnishings and finishes, and the food served. Additionally, social and cultural issues are part of our environment and have the potential to affect human health and happiness.

Goal 3: Learning and Experimentation towards Sustainability

Every community member who passes through Esalen leaves with a greater awareness about sustainable solutions to the economic, environmental, social, and personal issues facing our planet. Creating educational or co-learning opportunities is central to any sustainability program or project, and the goal is to cultivate a culture of curiosity, co-learning, and co-creation about sustainable solutions to issues of all stripes.

Goal 4: Supportive Structures for Sustainability

Sustainability itself must be sustainable, meaning physical and organizational infrastructure must be in place to provide the support, resources, and motivation for sustainability efforts to continue. Whether financial (staffing and funding), procedural (policies and processes), or social (inclusion in public reports, speeches, conversations about Esalen's priorities, and celebrating successes), resources and support are necessary for these efforts to continue and be successful.

Goal 5: Embodiment and Leadership

Esalen strives to be a leader in sustainability. In most cases, leadership takes the form of public declarations of sustainability commitments in internal and external communication outlets and this Guide is a valuable source of information for this type of communication. However, to truly be a leader in sustainability with full integrity, Esalen must walk the talk and model the way across all aspects, levels, and activities of the community and operations.

¹ Greenhouse gas emissions are the driving cause of global climate change and are implicated in a wide variety of Esalen's activities, including energy use and energy sources, solid waste management, water use, transportation, and the use of refrigerants and fertilizers. Reduced resource impact means consuming materials and generating wastes that can be fully integrated into natural systems as much as possible; in other words consuming as few non-renewable resources as possible and generating as little non-compostable or -recyclable waste as possible. This includes issues such as energy use, water use, waste generation, and purchasing, as well as reducing the amount of contaminants and toxins released into the environment, which occurs from a wide variety of activities including transportation, chemical use (cleaning products, fertilizers, refrigerants, etc.), and waste disposal methods.

THE 11 FOCUS AREAS

This Guide outlines the main issues, objectives, and potential Action Initiatives for 11 focus areas. There is much overlap and synergy across the focus areas, as well as the umbrella categories. Greenhouse gas reduction and financial sustainability have been included in this conceptual framework as core issues cutting across all focus areas.

| ORGANIZATIONAL ENVIRONMENT | NATURAL ENVIRONMENT | BUILT & MATERIAL ENVIRONMENT |
|---|--|---|
| <p><u>Administration and Sustainable Business Operations</u> To accomplish the wide variety of actions and meet the ambitious goals described in this plan, Esalen must have an effective and well-supported organization infrastructure.</p> | <p><u>Land Stewardship</u> Esalen’s physical and aesthetic environment are unique and important and must be respected, preserved, and restored for both current and future generations through responsible land and wildlife care, use, and restoration.</p> | <p><u>Facilities</u> Incorporating sustainability goals and expectations into standards for building design, operations, and maintenance practices has the potential to significantly alter and improve Esalen’s environmental impact.</p> |
| <p><u>Education, Culture, and Community Well-Being</u> As Esalen strives to become a more sustainable institution, the effort should include all aspects of its activities from daily operations to the educational mission to how it supports the community’s health and happiness.</p> | <p><u>Water</u> Although Esalen has access to its own natural water source, we should set a positive example and decrease environmental impacts by reducing consumption of potable water, increasing sustainable storm water management techniques, and increasing awareness of water issues on campus.</p> | <p><u>Energy</u> If Esalen is to become an environmentally sustainable institution, we must reduce our overall energy consumption and consumption of fossil fuels, including coal, oil, and natural gas.</p> |
| <p><u>Food and Agriculture</u> Our food system can have a significant incremental impact on emissions not only because of reduced energy consumption but also through purchasing decisions and opportunities to educate the community about food choices.</p> | <p><u>Pollution</u> It is extremely important that Esalen works to minimize the use of hazardous materials and to ensure their proper disposal.</p> | <p><u>Waste</u> Esalen’s management of waste has consequences for climate change, local communities, local ecosystems, future generations, and our overall sustainability</p> |
| <p><u>Purchasing</u> The goal is two-fold: to reduce the volume of products purchased, and to improve the environmental quality of the products purchased.</p> | | <p><u>Transportation</u> Transportation is a necessary part of Esalen’s operations, but we are committed to reducing the impact on air, water, and soil pollution, resource use, and the emissions of greenhouse gases.</p> |
| GREENHOUSE GAS REDUCTION | | |
| FINANCIAL SUSTAINABILITY | | |

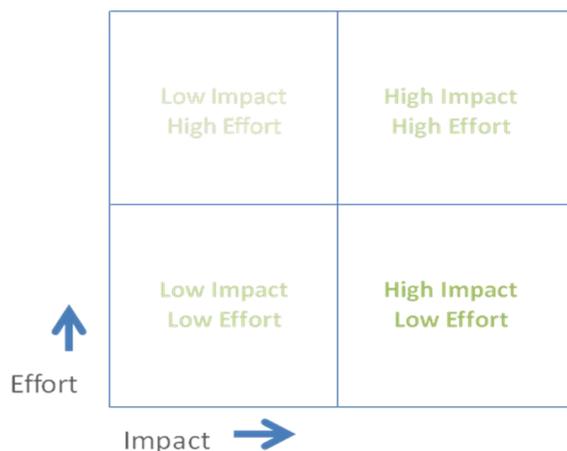
WHAT ARE ACTION INITIATIVES?

Each focus area includes a sample list of potential Action Initiatives. A more comprehensive list of Action Initiatives — suggested as ideas or already underway as projects — is available as an Excel database from the Sustainability Office.

Prioritization Framework

Esalen's ongoing journey towards its vision of living in a "nourishing relationship with the environment" will unfold over many years and will involve countless small steps along the way. In order to prioritize our time and energy spent on broader projects (such as a general transportation plan) and on specific action initiatives (such as installing artistic bike-racks), the Sustainability Office has created a Prioritization Framework to be used for 2012 and going forward. (See [Appendix C – Prioritization Criteria for 2011 Projects](#).)

This framework consists of a two-level decision-making process and can be applied either in the context of an informal discussion, or a formalized group process of weighing criteria and voting. The first level is a general screening that takes into account the ratio of impact to effort so we can determine the right mix of low-hanging fruit (low-effort, low to high impact) with more complex and transformational projects (medium to high effort, high impact).



The second level analyzes and prioritizes initiatives based on the following criteria:

- **Doable.** Does the initiative have a high probability of success based on our current context and available resources?
- **Visible.** Does it have a level of visibility that communicates clearly to staff and to seminarians that Esalen is a leading-edge practitioner of sustainable business practices and that we are also proactive about both personal and planetary wellness.
- **Considerate.** Is the initiative sensitive to the context and workload of staff? Does it add to a sense of ease, support, and progress within the organization or does it lead to a feeling of overwhelm and increased workload? For example, can it be integrated into existing institutional structures or do new systems need to be developed and institutionalized?
- **Opportune.** Does the initiative take advantage of an existing opportunity? For example, is it dependent on a policy window or does it have a synergetic symbiosis with other projects or events both at Esalen and in the greater community? Does it leverage existing community momentum and passion?
- **Catalytic.** Does the initiative create the foundation for further actions or does it create ripple effects that could have a larger impact than the specific parameters of the project?
- **Stacking Functionality.** Does this project or initiative "feed two birds with one scone"? Can it serve several functions at the same time, or can it be easily reformulated to increase momentum towards multiple sustainability- or Esalen-wide objectives?

At this current phase of broad strategic planning and implementation of the Sustainability Action Guide, the prioritization process has been applied in a relatively informal process of discussion with the SLT and key managers and stakeholders.

Over the next few years, as this Guide becomes increasingly integrated into Esalen-wide and departmental planning, this process can be formalized and institutionalized in facilitated and participatory processes at a variety of scales. Although the formal process has the benefit of rigor and transparency, it must be weighed against the pitfall of process capture and a realistic assessment of workload and bandwidth available. In the meantime, this framework provides a common sense, pragmatic checklist for prioritization.

Action Initiative Development and Toolkit

The Sustainability Office, with the support of the Sustainability Leadership Team, has created a toolkit for developing specific Action Initiatives. The templates in this toolkit will act as a planning tool, a project management tool, and an accountability tool.

An Action Initiative is a specific project that will leverage a cross-organizational team for implementation. The team will use the RASCI framework to establish clear lines of responsibility for the project/initiative to mitigate risks and model good management practices. See [Appendix B - RASCI Project Management Framework](#) for more information.

Initiatives will align with Esalen's core vision and mission, and will support Esalen's progress towards specific sustainability objectives. Initiatives will also align with specific departmental goals or overall development goals for Esalen. Essentially, as initiatives are implemented, each action taken will lead us closer to accomplishing specific objectives, which in turn will manifest our broad goals.

Each initiative will be championed by a passionate advocate, or the "Responsible" party according to our RASCI designation. This person will spearhead the initiative and, with the support of the SO and the SLT, will create a support team that will define specific objectives, action-steps, resources needed, and milestones.

Creating such a specific format for initiative development is not intended to create more work, but rather to create the time and space for thoughtful strategic planning. Over time, we hope that departments will allot designated time for Action Initiative planning which will be a part of a broader culture change from reactive damage-control to proactive and conscious creation. Additionally, this process will leave a transparent record of initiative ideas and efforts, so that even if projects are not implemented at a given time, or on the first try, institutional memory of the process and planning will be preserved as a basis for future iterations.

Templates for this toolkit will be made available on a shared network folder. This is the list of the basic elements included in the Action-Initiative template:

- Summary (RASCI)
- Goals/Objectives
- Outcomes
- Steps of Action
- Project Duration
- Key Milestones
- Budget Request
- Critical Factors of Success
- Open Issues/Questions
- Resources & Responsibilities

The SLT has been engaged in fine-tuning the template and creating sample Action-Initiatives that can serve as models for future projects. By becoming familiar with the process and wrestling with the details, the SLT will be able to mentor future teams in the initiative creation process. In order to seed and fertilize this new institution, the first batch of initiatives will be carefully stewarded by the SO and the SLT.

ADMINISTRATION AND SUSTAINABLE BUSINESS OPERATIONS

To accomplish the wide variety of actions and meet the goals described in this guide, Esalen must have an effective and well-supported organization infrastructure. The Sustainability Office and its director (Sustainability Development Manager) are the first front in moving forward many of the Action Initiatives, but a critical success factor will be substantial engagement by different departments and groups, both on- and off-campus. The following administrative efforts are meant to fortify Esalen's current efforts and provide a stronger, more cohesive effort in moving forward.

MAIN ISSUES

- Improve organizational infrastructure and financial support for sustainability
- Engagement with surrounding community and political environment regarding sustainability matters
- Maintain Green Business Certification with Monterey County

OBJECTIVES FOR 2016

- Existence of Sustainability Leadership Team for collaboration and information-sharing
- Sufficient staffing and resources for sustainability programs
- Existence of partnerships with local off-campus sustainability efforts and programs
- Engagement with relevant sustainability-related policy issues (including local, regional, national, etc.)

POTENTIAL ACTION INITIATIVES

- Develop a Sustainability Action Guide that articulates Esalen's commitment to sustainability and specific objectives to be tracked through 2016.
- Complete greenhouse gas (GHG) inventory (e.g. carbon footprint report).
- Implement equipment and processes to measure and track carbon footprint metrics.
- Create Sustainability Leadership Team and identify processes and participants for cross-departmental sustainability projects.
- Develop project management tools and processes for cross-departmental projects.
- Facilitate an integrated approach to planning and budgeting for sustainability projects across Esalen.
- Create and adopt a Sustainability Policy.
- Develop a Beyond Green Development/Incubation Fund.

EDUCATION, CULTURE, AND COMMUNITY WELL-BEING

As Esalen strives to become a more sustainable institution, the effort should include all aspects of its culture and activities from daily operations to the educational mission to community health and happiness. Beyond the obligation to reduce its own negative environmental impact, Esalen has an important role to play in contributing to society's long-term well-being as an evolution of the human potential movement. Leading by example, Esalen must both strive for environmental sustainability and further create positive value by educating staff, residents, seminarians, and other members of the community to develop sustainable societal practices and to be environmental stewards. In order to stand behind its commitment to be "a major catalyst in the transformation of humankind, working with individuals and institutions to integrate body, mind, heart, spirit, and community in nurturing relationships with the environment," Esalen must serve as a model for how to do that within its own environment and community.

MAIN ISSUES

- Increase availability, variety, and enrollment in sustainability-focused and sustainability-related workshops and educational programs
- Increase use of property as a living laboratory for sustainability
- Increase staff/resident-focused educational programs and ongoing professional development towards sustainability
- Increase community opportunities for participation in governance and stakeholder engagement

OBJECTIVES 2016

- General increase in variety, quantity, and enrollment of sustainability-focused and -related workshops, educational programs, and events
- General increase in use of institute sustainability issues and facilities as topics of educational learning
- Increase opportunity for staff to develop professional skills in sustainability-related competencies.

POTENTIAL ACTION INITIATIVES

- Create and implement **Sustainable Business Promising Practices (PPs)** training and policies that address goal-setting, purchasing, energy/water conservation, pollution prevention, waste reduction, etc. and that is tailored for each department.
- Create Sustainability Annual Progress Report (e.g. Sustainability Dashboard).
- Develop Campus-Wide Signage Plan.
- Approve a definition of sustainability in the curriculum as a means of tracking relevant workshops.
- Maintain a current list of sustainability-focused and -related workshops.
- Maintain a current list of sustainability topics, projects, and opportunities appropriate for workshop or ES projects.
- Host an annual sustainability film festival/series.
- Start sustainability awards program.
- Create Professional Development Plan for each department.

ENERGY

Energy use and energy sources are central to almost any discussion about environmental issues, sustainability, and climate change. Energy use, particularly its general dependence on the burning of fossil fuels, causes a wide variety of environmental damage including air, water, and soil pollution, negative economic and health impacts for communities, and the generation of climate change-causing greenhouse gasses. These impacts are caused not only by using these resources, but also by extracting them, which often occurs at the expense of natural landscapes and ecosystems. If Esalen is to become an environmentally sustainable institution, we must reduce our overall energy consumption and consumption of fossil fuels, including coal, oil, and natural gas.

Conservation and increasing efficiency comprise the best initial strategy for reducing carbon emissions. Nothing is cleaner than the kWh or BTU we don't need and don't use. Existing strategies, technologies, and products for improving energy efficiency are already making significant contributions to reducing emissions levels for many institutions. Embracing these technologies will help us take full advantage of the renewable and clean energy sources we produce or purchase. Even if we have recently engaged in facilities and system retrofits, it's not too soon to go back and do another round. Consider new tactics, deeper cuts in energy use, and longer paybacks that factor in lifecycle costs. This Guide establishes a general prioritized strategy for moving forward with energy efficiency and conservation strategies:

- Building metering and sub-metering (benchmarking and monitoring)
- Retro-commissioning, monitoring based-commissioning, and/or full-scale energy audits (identification of opportunities)
- Implementation of feasible efficiency projects
- Ongoing benchmarking and monitoring

MAIN ISSUES

- Development of organizational infrastructure to support energy tracking, reporting, and generation
- Improvement of physical infrastructure
- Reduce energy use through conservation and efficiency
- Increase energy from renewable sources
- Better energy-related data and information
- Increase awareness of issue

OBJECTIVES 2016

- Reduce energy use (not including emergency generators)
- Increase energy use from on-property renewable sources
- Reduce diesel generator fuel use
- All buildings individually metered for gas and electricity
- Increase property built square-feet operating with EnergyStar score of at least 69
- Retro-commissioning or monitoring-based commissioning completed on every major building
- Energy audits completed for all property buildings

POTENTIAL ACTION INITIATIVES

- Implement first stage investment in solar energy with reliable ROI.
- Create **Energy Conservation and Renewal Plan** with specific strategies and action steps.
- Implement equipment and processes to measure and report energy usage and savings.
- Retrofit lights and other energy outputs.
- Complete operations profile for every Esalen building and conduct monthly and annual review of building-level performance.
- Initiate energy management program by hiring a part-time energy coordinator.
- Launch energy conservation campaign.

FACILITIES

While behavior and education programs and the installation of innovative technologies often constitute the "showier" side of sustainability efforts, the design of new buildings and renovation projects and the ongoing operation and maintenance of existing facilities constitute the largest resource and environmental impact of Esalen. Incorporating sustainability goals and expectations into standards for building design and operations and maintenance practices has the potential to significantly alter and improve the property's performance.

MAIN ISSUES

- Older buildings in need of renovations or replacement
- Limited staff resources and knowledge dedicated to sustainable building practices

OBJECTIVES 2016

- Compliance with Green Building Standards and Sustainable Operations and Maintenance Standards
- Increase square-footage certified under LEED-EBOM (Existing Buildings Operation and Maintenance)
- Significantly increase staff competence in green building, energy efficiency, water management, and maintenance.

POTENTIAL ACTION INITIATIVES

- Develop, adopt, and implement Esalen's Green Remodeling and Building Standards.
- Develop, adopt, and implement Sustainable Operations and Maintenance Standards.
- Pursue LEED certification for new facilities in development.
- Explore opportunities to pursue LEED-EBOM certification for one or two existing facilities.
- Support staff in green-building and maintenance training and industry networking.

FOOD AND AGRICULTURE

Esalen's goal is to serve food that is healthy, fresh and delicious, and that is produced in a just and sustainable manner. Food should be produced in a way that is fair to farmers, that supports the (ideally local) communities from which it comes, that cares for the environment and that treats animals humanely. The food climate at Esalen should be one in which food is not simply food that energizes the community, but also one that creates an environment of awareness and fosters an understanding about where food comes from, who produces it, how this is achieved, and the implications of food choices we make every day.

Food systems are among the daily activities that can have a significant incremental impact on emissions not only because of reduced energy consumption but also indirectly through purchasing decisions and opportunities to educate the community and raise awareness about food choices.

MAIN ISSUES

- Definition of "sustainable food"
- Effective implementation infrastructure
- Increased purchases of sustainable food
- Better food-related data and information
- Programs, activities, and guest engagement
- Increased diversity within the farm apprenticeship program

Actions and goals concerning dining-related waste, water use, energy use, and other issues are included in those sections; this section focuses on food purchasing activities alone.

OBJECTIVES FOR 2016

- Increase total food purchases qualified as organic
- Increase total food purchases qualified as fair trade
- Increase total food purchases qualified as sustainable in more than one category
- Increase volume of produce purchased local
- 100% seafood purchases are Marine Stewardship Council certified, Aquaculture Certification Council certified, and/or Seafood Watch Guide "Best Choices" or "Good Alternatives"

POTENTIAL ACTION INITIATIVES

- Develop and adopt definition of "sustainable food."
- Establish part-time ES or staff position to focus on issues of sustainability and nutrition.
- Coordinate growing/processing of food items that would otherwise be purchased.
- Identify opportunities to use distributors of locally-produced foods, to purchase products with specific animal welfare-related standards, to purchase more fair trade products, and to reduce hazardous food additives.
- Develop and implement Integrated Food System Plan.

POLLUTION

The use and disposal of hazardous materials is inevitable at Esalen--workshops and facilities require the use of chemicals, and disposal of batteries, electronics, and waste is unavoidable. However, it is extremely important that Esalen works to minimize use of these materials and to ensure their proper disposal. These materials can cause substantial air, water, and soil pollution and irreversible health effects when used (particularly if used in excess) or if not properly processed and disposed of or reused where possible.

MAIN ISSUES

- Reduce use of toxic materials
- Appropriate disposal of hazardous waste
- Increase awareness of issue

OBJECTIVES FOR 2016

- Reduce emissions from refrigerant use
- No use of synthetic fertilizer
- Full compliance with Green Cleaning Procedures
- No non-essential use of chemicals determined hazardous (see actions below)
- Full compliance with Sustainable Operations and Maintenance Standards

POTENTIAL ACTION INITIATIVES

- Redesign/clean up fueling station.
- Assess current methods of disposal/cleanup of hazardous waste and create cleanup protocol.
- Review campus-wide draining practices and infrastructure for recommendations to improve.
- Identify and implement alternatives to chemical fertilizers.
- Comprehensively review use of chemicals determined to be hazardous to human health and develop an action plan for reducing their use.
- Conduct an educational campaign specifically about hazardous wastes and appropriate disposal.
- Review pest control practices and herbicide usage and adopt more sustainable and humane practices. *(Cross-listed under Land Stewardship)*

PURCHASING

Esalen purchases a broad array of items as part of its everyday operations—from staples and printer paper to furniture and light fixtures to the stock of goods available in the Bookstore. It is important to realize that every single one of these purchased goods has an environmental impact associated with its manufacturing, transportation, and disposal, and that the collective impact of all of our purchases could be substantial. Seeking to be a leader in sustainability, we seek to reduce the significant impacts of its consumption behavior. The goal is two-fold: to reduce the volume of products purchased, and to improve the environmental quality of the products purchased.

MAIN ISSUES

- Better purchasing-related data and information
- Reduce consumption
- Improve impacts of consumption
- Increase awareness of issue

OBJECTIVES FOR 2016

- 100% of departments participating in Green Office Program
- Training for Finance department and other key staff in triple bottom line accounting
- Increase ease of making sustainable purchasing options

POTENTIAL ACTION INITIATIVES

- Create and approve new **Environmental Purchasing Policy**.
- Place labeled recycling and trash bins in all rooms, plus compost bins in all staff housing.
- Assess opportunities to move printed items to electronic formats. *(Cross-listed on Waste)*
- Create and distribute sustainable purchasing guide to staff.
- Continue exploring centralized purchasing options and eco-friendly options to incorporate.
- Launch Green Office Program.
- Establish purchasing training program for controller and other key staff.
- Identify purchasing options with less landfill impact (e.g. soap). *(Cross-listed on Waste)*

TRANSPORTATION

Transportation is a necessary part of Esalen's operations--from seminarians and leaders travelling to our beautiful, yet remote location from their homes all over the world for workshops, to the staff who travel for work almost every day, to the trucks and carts used to carry people, food, waste, and maintenance materials from one side of the property to the other. Each of these transportation activities has an environmental impact that varies based on the distance traveled and the mode of transportation used, and these individual impacts can build quickly to have a substantial impact on air, water, and soil pollution, resource use, and the emissions of greenhouse gases.

MAIN ISSUES

- Improve transportation modes
- Reduce transportation miles
- Voluntary offsets
- Better transportation-related data and information

OBJECTIVES FOR 2016

- Reduce use of campus fleet gas
- Reduce single occupancy vehicle commuting
- Convert 50% of fleet to alternatively fueled vehicles (including solar charging for carts, biodiesel for Grounds vehicles, and hybrids for automobiles)
- Starting now, follow these standards for automobile purchases:
 - Large automobiles (vans, trucks, SUVs): Global Warming Score of at least 5
 - Small automobiles (everything else.): Global Warming Score of at least 7
 - Vehicles with special needs (e.g. larger chassis for hauling): Global Warming Score of at least 5 when possible
 - All automobile purchases: if special circumstances apply where the Global Warming Score standard cannot be met, consultation with the Sustainability Office is required

POTENTIAL ACTION INITIATIVES

- Require consultation from Sustainability Office in vehicle purchasing process.
- Develop and implement **Transportation Plan**.
- Create carpooling website for staff, ES, and seminarians and improve system for rideshare opportunities.
- Create incentive program for carpoolers, ride sharers, and no car residents.
- Start Green Bikes Program.
- Build bike racks.

WASTE

Esalen's management of waste has consequences for climate change, local communities, local ecosystems, future generations, and our overall sustainability. As landfills fill up and related pollution and land use issues increase, it is more important than ever for Esalen to engage in alternative waste management strategies, including reuse, recycling, and composting. Education and awareness issues are also particularly implicated in waste management, because personal decision-making and everyday behaviors have a direct impact on waste generation and diversion.

MAIN ISSUES

- Increase diversion of wastes from landfill disposal
- Reduce total wastes generated by the property (including landfill, recycling, and other disposal methods)
- Better waste-related data and information
- Increased awareness of issue

OBJECTIVES FOR 2016

- Diversion of 75% waste from landfills
- Construction and renovation waste diversion rate of 90%
- Reduction of total waste by 10%

POTENTIAL ACTION INITIATIVES

- Conduct regular and comprehensive campus waste audit to better understand campus waste.
- Create targeted education campaigns based on waste audit.
- Develop new waste management techniques and programs.
- Develop ways to better continuously assess property waste streams and provide data publicly.
- Assess opportunities to move printed items to electronic formats. *(Cross-listed on Purchasing)*
- Start bi-annual campus-wide audit of trash, recycling, and compost bins.
- Expand composting program to all rooms.
- Improve recycling system.
- Establish waste management training program for key staff.
- Identify purchasing options with less landfill impact (e.g. soap). *(Cross-listed on Purchasing)*

WATER

While Esalen is blessed to have access to our own natural water source that produces millions of gallons of water annually, it is not unlimited and should be preserved. Esalen should set a positive example and decrease its environmental impacts by reducing consumption of potable water, increasing sustainable stormwater management techniques, implementing sustainable solutions to address overburdened on-site waste water and drinking water treatment systems, and increasing awareness of water issues on campus.

MAIN ISSUES

- Reduce water use
- Increase capacity of sustainable stormwater management infrastructure
- Overburdened on-site waste water and drinking water treatment systems
- Energy used to heat water
- Better water-related data and information
- Increase awareness of issue

OBJECTIVES FOR 2016

- Complete metering of buildings for water use
- Reduce average water use, adjusted for cooling degree days
- Use of reclaimed/gray water (if possible)
- No net increase in impermeable surfaces (except where runoff is channeled into natural treatment infrastructure)
- Increase use of sustainable stormwater management techniques
- Improve on-site waste water and drinking water treatment systems
- Install back-up water storage and pumps for emergency fire response on all properties

POTENTIAL ACTION INITIATIVES

- Install building-level water metering and conduct annual assessment.
- Provide user-friendly public access to water use data and tracking.
- Create **Water Conservation Plan**.
- Create educational signage and programs for domestic water use. (Campus-Wide Signage Plan)
- Retrofit plumbing fixtures.
- Create training program for staff on maintenance of sustainable landscapes.
- Examine opportunities for water re-use on property, including using reclaimed water for landscaping.
- Identify and move forward with turf removal projects.
- Identify and move forward with sustainable stormwater management opportunities.
- Develop interpretive program for sustainable landscaping efforts.
- Develop sustainability demonstration garden.
- Identify and move forward with innovative solutions for on-site waste water and drinking water treatment systems that can be showcased to guests and the public.
- Identify and move forward with solution to reduce non-renewable energy used to heat water.

LAND STEWARDSHIP

Situated on the Central Coast of California with a climate, ecosystem, and biodiversity that are all unique and precious, Esalen's physical and aesthetic environment is essential and must be respected, preserved, and restored for both current and future generations through responsible land and wildlife care, use, and restoration.

MAIN ISSUES

- Minimize soil erosion
- Reduce invasive species
- Reduce land use impact
- Integrate restoration and care practices into long-term development plans and ongoing maintenance and use practices for the property
- Increase awareness of landscape, biodiversity, and wild animals

OBJECTIVES FOR 2016

- Establish land restoration and care policy and commitments that honor heritage and Murphy Family Trust

POTENTIAL ACTION INITIATIVES

- Develop interdisciplinary **Land Restoration and Care Plan**.
- Review pest control practices and herbicide usage and adopt more sustainable and humane practices. *(Cross-listed under Pollution)*
- Develop plan and protocol for wildlife and domestic animals on the land.

APPENDIX A – GREEN BUSINESS CERTIFICATION AND GREENHOUSE GAS INVENTORY

As part of the requirements for obtaining and maintaining compliance with the Monterey County Green Business Certification, Esalen must prepare a greenhouse gas inventory that establishes a baseline for greenhouse gas emissions and a Climate Action Plan that identifies specific organizational objectives and tactics for reducing its greenhouse gas emissions (also commonly referred to as our carbon footprint) over the next 3-10 years. This Sustainability Action Guide fulfills the purpose of a Climate Action Plan.

CLIMATE PLANNING PRINCIPLES

In discussing the community's preferences in how we move forward, the following principles have been established:

- **Prioritization of efforts** In order to emphasize personal responsibility and stewardship, educational opportunities, and the other sustainability values to be covered in the Esalen's Statement of Environmental Policy, Esalen plans to take action on climate change with the following priorities:
 - **Conservation** (behavior modification and elimination of use)
 - **Efficiency** (technology improvements)
 - **Renewables** (purchase and development of alternative energy sources)
 - **Offsets** (third-party or off-campus offsetting of emissions).

Prioritizing conservation and efficiency emphasizes providing educational and behavior-modifying opportunities, which Esalen views as central to our sustainability goals and as a means of extending positive influence beyond campus and into the rest of the world. Conservation and efficiency efforts reduce energy and other resources used by Esalen, eliminating need for relatively less cost-effective renewable energy technology (the production of which inevitably uses some resources and generates greenhouse gases). Offsets are discussed below.

- **Purchases of offsets** Esalen does not plan to purchase offsets. While purchase of these offsets would likely be necessary to eventually "neutralize" all sources of carbon emissions, Esalen is committed to prioritizing behavior modification, conservation, efficiency, and renewable sources as methods of emissions reduction. While these methods provide opportunities to increase awareness, change behavior, and invest in innovative new technologies, offsets must be purchased annually and send the message that our negative environmental impacts can be "bought away." Also, the offset market is relatively new, and Esalen does not see them as a reliable and proven method of reducing global emissions. With time and further development of the offset market, Esalen may consider purchasing offsets in the future. If offsets are purchased, Esalen will prioritize options that provide demonstrable benefit to localized communities. Esalen will also explore opportunities for "local carbon offsets," meaning investments of time, money, and/or effort that directly reduce the carbon emissions of other community entities (for instance, hosting workshops to engage in efficiency upgrades for local organizations and homeowners).
- **Use of "carbon neutrality"** While "carbon neutrality" has become a common term when talking about climate change, this term is often used in a misleading way. Because there are currently no tools available to sufficiently measure the entirety of emissions caused by any entity, understanding complete "neutrality" is impossible. For instance, we have no way of determining the emissions for the thousands of items purchased by Esalen every year or emissions accrued by seminarians and workshop facilitators travelling to and from our campus. Without a more accurate inventory, it is impossible to determine what "carbon neutrality" means or to use it as a planning goal. The use of such a concrete term can mislead an institution and its community by implying that complete elimination of their negative environmental impacts is achievable by fully implementing their Climate Action Plan.

While many institutions have admitted that neutrality is more of an aspirational than literal goal, we are committed to exploring our options comprehensively and to determining possible reduction or neutralization goals for specific categories of emissions.

GREENHOUSE GAS INVENTORY

The Sustainability Office is currently working to identify and hire a consultant to complete a comprehensive greenhouse gas inventory for Esalen by the end of 2011. Data from that inventory will be added to this Action Guide when it is available.

APPENDIX B – RASCI PROJECT MANAGEMENT FRAMEWORK²

The RASCI framework is used to establish clear lines of responsibility for the project/initiative to mitigate risks and model good management practices. It:

- Determines ownership of a particular project or task.
- Promotes teamwork by clarifying roles and responsibilities.
- Improves communication by getting the right groups involved.
- Increases efficiency by eliminating duplication of effort.
- Reduces misunderstanding between and across employees and key stakeholder groups.
- Improves decision-making by ensuring the correct people are involved.
- Provides the foundation for future alignment around a given project or initiative.

DEFINITION OF RASCI ACRONYM

For every step of a project, teams should define the following:

- **R = Responsible** The person who is ultimately responsible for delivering the project and/or task successfully.
- **A = Accountable** The person who has ultimate accountability and authority; they are the person to whom “R” is accountable.
- **S = Supportive** The person or team of individuals who are needed to do “the real work.”
- **C = Consulted** Someone whose input adds value and/or buy-in is essential for ultimate implementation.
- **I = Informed** The person or groups of individuals who need to be notified of results or actions taken but don’t need to be involved in the decision-making process

SIX STEPS TO CREATING A SUCCESSFUL RASCI CHART

1. Introduce/review RASCI definitions with team/organization.
2. Identify all of the activities/tasks involved in the project and list them down the vertical axis of a chart or spreadsheet.
3. Identify all of the people/roles involved in the project and list them across the horizontal axis of a chart or spreadsheet.
4. Identify the R, A, S, C, I for each activity/task.
5. Review and discuss gaps and overlaps in your work. Gaps exist when an activity/task that doesn’t have an “R.” Overlaps can occur when multiple “R”s exist for any given task and can be more difficult to resolve. Frequently, this can be accomplished by breaking the identified task into sub-tasks.
6. Share your RASCI chart with a broader group for feedback, make final revisions, and get started on your project!

² Source: <http://www.thecanoegroup.com>

APPENDIX C – PRIORITIZATION CRITERIA FOR 2011 PROJECTS

In parallel with finalizing this Action Guide and a broader Prioritization Framework for Action Initiatives, the Sustainability Office adopted this short-term list of prioritization criteria to use for 2011 budget and projects:

- **Doable and Budget Friendly.** Do we have the budget, staff resources, and cross-organizational support to get the work done?
- **Visible and Inspiring.** Will the project visibly highlight sustainability efforts at Esalen and get people excited?
- **Timely.** Are we taking advantage of community momentum and/or a specific window of opportunity for the project?
- **Considerate.** Are we being sensitive to people feeling overwhelmed with meetings and organizational change?
- **Modular.** Does the project have the potential to be a catalytic initiation phase of a cumulative long-term process, and also to be flexible in the face of potentially dynamic structural changes?