**Invest in the success of your fellowship.**

Take some time to draft a workplan before the fellowship begins. This is an important first step to ensuring a successful EDF Climate Corps fellowship. The making of the workplan explores both what fellows will accomplish in their fellowship, as well as identifies the supervisor’s role in facilitating the fellowship.

**Collaborate with your host supervisor to develop this workplan and upload a completed version to the** [Fellow Portal](https://edfcommunity.force.com/EDFCCFellowPortal/s/login/) **by Friday, May 19th, then reach out to your Engagement Manager to plan a kick-off call.**

Note the following considerations as you draft your workplan:

* Climate Corps suggests the workplan be a living document, approximately 1-2 pages that provides an overview of the steps of the project.
* Data access & data collection often cause major delays in fellow’s work every year. Climate Corps highly suggests that supervisors consider any of the following actions to expedite fellows’ acclimation to the work:
  + Ensure fellows will have access to key databases upon starting fellowship
  + Compile a list of key data sources & how to access each
  + Schedule meetings with stakeholders & data managers for the fellow’s first week
  + Collate preliminary data where possible (e.g., utility bills, previous GHG inventories, etc.)
* Taking time now to define the form of the final deliverable sets a clear goal for the work of the fellowship. Final deliverables might consist of a research paper, an Excel toolkit plus explanatory documentation, a comprehensive strategy roadmap, policy briefs, or otherwise—consider what format will fit the work you’ll undertake this summer. Please note that Environmental Defense Fund requires certain deliverables as outlined on the following page, including a copy of the final deliverables to be kept internal to EDF. For details, please see the confidentiality section of the host agreement.

EDF Climate Corps Fellowship Workplan

[Organization Name]

[Fellow Name]

# Project Objective

[Describe the primary objective(s) of the summer fellowship. What questions or challenges will the fellowship address?]

# Scope (Timing and Location)

[List the start and end dates of the fellowship, as well as the location(s), buildings the projects will examine, or other relevant geographic/logistic details.]

# Data Collection Strategy

[Begin to strategize what data will be needed for the project. Supervisors can begin laying the groundwork for fellows, perhaps by engaging stakeholders, or setting up meet-and-greets with key parties. Strategizing this will expedite the first weeks of the fellowship.]

# What Does Success Look Like at the End of the Summer?

[Consider outcomes that will define success; both for the fellow & for the host organization.]

# Approach

[Determine a timeline for the summer and identify the major tasks associated with the projects. Required components to this section include:

* Uncover needed data, engage stakeholders, learn organizational structures, and identify action steps (Weeks 1-2).
* Complete analysis/research/outreach (weeks 3-6).
* Draft Public Summary for EDF website (Weeks 7-8).
* Submit all final deliverables to EDF (Weeks 9-10).
* Complete end-of-fellowship meeting with EDF Engagement Manager (Week 9).]

# Deliverables

[List the final deliverables that will be provided to EDF and the host organization. Required components for EDF include:

* **FINAL DELIVERABLE**- Note potential confidentiality restrictions here to avoid last minute complications.
* **COMPLETED ACTIVITIES REPORT**- Submission to EDF of information about each project worked on, including financial and environmental impact where estimates are relevant and available
* **PUBLIC SUMMARY**- High-level project summary – EDF will obtain written approval from host prior to publishing to the web
* **FINAL PRESENTATION**- 15-minute presentation during end-of-fellowship meeting for EDF Engagement Manager and host supervisor on the project objectives, findings, and recommendations (An additional, lengthier presentation to host organization is highly recommended).]
* **PORTAL QUESTIONS** - Brief questions about the project found in the Fellow Portal.

SAMPLE A: Carbon Accounting

Salzberg Portfolios

Emma Shuns

Project Objective

Salzberg Portfolios will hire their third Climate Corps fellow to assist the firm in carbon accounting. The fellow will work directly with the Director of ESG to complete a carbon inventory of the firm. The fellow will also identify ways for Salzberg Portfolios to reach carbon neutrality through improvements. Additionally, the fellow will develop strategies to engage the firm's portfolio companies in similar carbon accounting and setting GHG targets.

What Does Success Look Like at the End of the Summer?

There are two ideal outcomes at the end of the fellowship:

1. The fellow produces a comprehensive Scope I, II, & III GHG Inventory, with supporting documents to enable Salzberg Portfolios to maintain the Inventory moving forward.
2. The fellow can engage the Salzberg Portfolios network for professional growth opportunities.

Scope (Timing and Location)

The official time commitment will be June 5th – August 25th. The organization is based in New York, NY, but the fellowship will be taking place remotely. The scope of the project will focus on developing initiatives that can be scaled across the organization and in different locations.

Approach

Phase 1: Research and Data Gathering (Weeks 1-4)

* Engage key stakeholders to review current GHG emission trends per portfolio company
* Conduct interviews with stakeholders to compile a qualitative/quantitative review of current GHG footprint
* Gather quantitative data from interviews, utility bills, receipts, etc. about office building waste, energy management, and employee habits (i.e. commuting, recycling, etc.) for Scope I, II, and III
* Prepare a rough GHG assessment based on the interviews and develop Salzberg Portfolio’s GHG emissions plan
* Research carbon neutrality best practices, particularly within the organization’s sector.

Phase 2: Analysis (Weeks 5-10)

* Determine carbon footprint from a Scope I, II, and III perspective
* Identify strategic initiatives to help Salzberg Portfolios achieve carbon neutrality
* Benchmark carbon footprint within portfolio companies and benchmark against industry trends
* Draft public summary and send to host supervisor to begin approval process.
* Draft final presentation and report.

Phase 3: Present Business Case (Weeks 11-12)

* Organize analysis and develop list of next steps and suggestions for implementation.
* Deliver final report, presentation, and supporting data to stakeholders.
* Submit all final deliverables to Environmental Defense Fund and complete end-of-fellowship meeting with host supervisor and Engagement Manager.

Data Collection Strategy

Needed data includes the contact lists of stakeholders, any pre-existing GHG inventory or utility bill analysis from portfolio companies, and industry trends. Salzberg Portfolios commits to scheduling stakeholder interviews for fellow’s first week ahead of time.

Deliverables

As a result of the above activities, I will provide Salzberg Portfolios and Environmental Defense Fund with the following:

* **FINAL REPORT**- Final written report with key recommendations for identifying and implementing short-, medium-, and long-term sustainability strategies
* **COMPLETED ACTIVITIES REPORT** - Submission to Environmental Defense Fund of descriptive information about each project worked on including financial and environmental impact where estimates are relevant and available
* **PUBLIC SUMMARY**- High-level project summary for the Environmental Defense Fund website
* **FINAL PRESENTATION**- 15-minute presentation on project objectives, findings, and recommendations.
* **PORTAL QUESTIONS** - Brief questions about the project found in the Fellow Portal.
* Blog to post on organization website

SAMPLE B: Fleet Electrification

City of Salzberg

Evie Hickle

Project Objective

The primary objective of the 2021 Climate Corps Fellowship at City of Salzberg to develop a fleet electrification plan. This will include prioritizing actions for electrification based on the quickest to implement, most significant cost savings, and most significant emissions reductions. As part of the analysis, the fellow will also explore other low-carbon vehicle alternatives for vehicles where there is little to no electric vehicle technology available.

What Does Success Look Like at the End of the Summer?

Ideally, fellow will have a comprehensive list of suppliers for medium & heavy-duty electric vehicles with guidance for the City of Salzberg Sustainability Team to move ahead with procurement.

Scope (Timing and Location)

The official time commitment will be June 5th – August 11th. City of Salzberg is in Josh, USA but the fellowship will be taking place remotely.

Approach

Phase 1: Research and Data Gathering (Weeks 1-4)

* Survey the current electric vehicles fleet and existing electric vehicle infrastructure.
* Meet with members of the city’s departments to understand the logistical needs for each department.
* Gather data from fleet including mileage, fuel use, usage patterns, vehicle-related costs and fees (such as fueling/charging costs and vehicle maintenance), charging infrastructure related costs (such as grid upgrades, installation), and entity budget for fleets.
* Research rebates and incentives offered by city, county, state, and federal government.
* Research electric fleet plans from other entities and municipalities.
* Identify upcoming needs for vehicles and other vehicle-related goals and policies.
* Identify key criteria for analysis, including analytics necessary to achieve maximum health, equity and climate benefit.

Phase 2: Analysis (Weeks 5-8)

* Identify vehicle options that are consistent with logistical needs of the city.
* Develop potential vehicle transition strategies with suggested timeline. Strategies will consider how locations and routes for EV fleet deployment can prioritize the needs of vulnerable communities.
* Conduct environmental and financial analysis on strategies identified including returns on investments, health impacts, and needs of vulnerable communities.
* Draft public summary and send to host supervisor to begin approval process.
* Draft final presentation and report.

Phase 3: Present Business Case (Weeks 9-10)

* Develop list of next steps for implementation.
* Deliver final report, presentation, and supporting data to stakeholders.
* Submit all final deliverables to Environmental Defense Fund and complete end-of-fellowship meeting with host supervisor and Engagement Manager.

Data Collection Strategy

City of Salzberg commits to gathering current fleet list for fellow ahead of fellowship. Fellow will need to create models for projecting costs and procurement strategies.

Deliverables

As a result of the above activities, I will provide City of Salzberg and Environmental Defense Fund with the following:

* **FINAL REPORT**- Final written report with key findings and implementation strategies for fleet and infrastructure electrification
* **Completed Activities Report** - Submission to Environmental Defense Fund of descriptive information about each project worked on including financial and environmental impact where estimates are relevant and available
* **FINANCIAL ANALYSIS** - Total Cost of Ownership financial analysis of projects
* **PUBLIC SUMMARY**- High-level project summary for the Environmental Defense Fund website
* **FINAL PRESENTATION**- 15-minute presentation on project objectives, findings, and recommendations.
* **PORTAL QUESTIONS** - Brief questions about the project found in the Fellow Portal.
* Additional supporting materials including presentation decks, memos, etc.