

# *2006 NCAF Energy Programs Leveraging Conference*

## **Beginners Session: Getting Started – Options, Plans, Fallbacks**

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## **Assessing Your Advocacy and Leveraging Options: Planning Templates, Tools, First Steps**

The development of strategies should be a thoughtful process, and include information that is specific to your organization, your goals, and your ability to oversee such a leveraging goal/project you may visualize. The identification of assets, barriers, stakeholder identification, and resources available, are all very important in order to establish successful short/medium and long term strategies and goals.

### **STEPS:**

#### **1) Defining Success at your desk– YOUR success – this may take time, research, and revisions**

- Write down the project/partnership outcome you wish, concisely but with bulleted bottom line detail (e.g. if a WAP/Utility Partnership: program budget draft, # of units weatherized, outreach and intake responsibility and costs, education, integration with other funding sources if necessary, types of units to be weatherized, timeline for implementation, administrative costs and if included in program design, cost tests used by regulatory commission if any, evaluation requirements)
- List out demographics in the community of those in need.
- Write down a list of the advantages and opportunities present for all the parties.
- Put the above in a draft proposal format

#### **2) Get Your Own Organizational Support- very important~!**

- In order to move forward with your plan, the support of your community based organization's decision makers (Board of Directors, Executive Director, Program Director) should be in place.
  - Determine whether anyone on staff or the board of your organization has a tie in with your project partners, utility commission, utility staff, housing policymakers, legislators, etc.
- Once you are clear on what you hope to accomplish**, organize a strategic planning session within your organization, with leadership. As part of this process, **the group will need to internally identify and list out each of the following bullets** – and once identified, this information could help reveal the best strategies and action plan to undertake for success, and will continue to be good historical reference information:
- group goals/expectations from such a project, or needs and goals for constituency served
  - groups assets: membership, community liaisons, coalition membership, grants/program/financial management track record, current state and federal funding opportunities, etc
  - realistically identify barriers – include lack of office support staff, bureaucracy issues, limited time, limited dollars, lack of legislative support, limited funding for experts/consulting, etc.
  - identify all stakeholders for undertaking your project/partnership – include other programs, clients, agencies, coalitions, contractors, legal services, volunteer groups to provide support (include AmeriCorps, Senior Volunteers, Pro-Bono legal counsel, utilities, etc.)

- identify windows of opportunity, including current political initiatives, census reports released that identify issues, policymakers initiatives or newly elected officials and their agendas, state and federal rulemaking, grant cycle funding, rate cases, etc.
- develop Short Term, Mid-Term, and Long-Term Strategy bullets
- finally, write out an action plan for this leveraging project, and include 1) WHAT it is, 2) WHO is responsible for each step, 3) WHEN it will be done, and 4) NOTES specific to each item

**\*\* ONCE YOU & YOUR AGENCY ARE CLEAR ON YOUR GOALS: \*\***

**3) Find a Champion within the Utility or Your Project Partner –**

- This is a safe way to get your foot in the door and to start garnering support.
- Layout your goals with them. Let them know the overall need for this project/partnership.
- Let them know the support you have from others in the community/network.

**4) Bring in community support for the project/partnership.**

- Obtain letters of support – including:
  - local politicians (mayor, city council, county commission, state reps)
  - Other agencies (seniors, farm workers, league of women voters, local welfare rights, unions, vendors, State Community Development, Housing or Energy offices)

**5) Meet with your Partner/Utility representatives.**

- Request a meeting with the champion in the utility/partnership group (or your goal group) to talk about your issue. If a utility partnership proposal, set up a meeting with Utility Commission staff and/or Utility Commissioner. In these meetings, discuss the need of low-income households and the benefits of your proposal. With weatherization as an example, invite them out to a site demo to see the technical diagnostic approach that is used to assure effectiveness and savings.

**6) The Role of the Media**

- Use the local newspaper(s) to do a piece on your proposal subject – if weatherization, put a human face on the issue. Have them come out to a low-income citizen/ratepayer home to see weatherization technical diagnostics and applications in progress, and to also interview someone that is/has benefited.
- This media exposure puts local pressure on decision makers and also better informs them of the program/proposal.

**7) Bring in other examples of successful programs/partnerships...**

- with utilities: examples of successful utility funded low-income weatherization programs, either in their service areas in other states, or with other utilities in your state.

**8) Participate in the (utility) decision-making process:**

- request time on a utility board meeting agenda for a presentation on the issue – although ultimately it is the utility commission who would make such a decision.
- Have visuals for presentation, perhaps a power point program, that show pre and post weatherization, diagnostic equipment used ... and the human face that demonstrates need.

**9) Be present to answer questions when this issue is discussed or when this issue comes up for a vote.**

- This step, in utility and regulatory venues particularly, may require the attendance at many different meetings. If you are not at the table for most meetings, you may find yourself on the menu.
- Have low-income citizens that stand to directly benefit in the audience, and have someone speak at the public comment period.
- Have some of the stakeholder groups that you have garnered support from there to speak on your behalf.

## **10) Persistence**

- Defending your accomplishments in future challenges brought about by staff changes, financial pressures at your end, or the partnership/utility end. Continue the advocate/watchdog role. Always be alert for opportunities to keep improving the program design and funding levels.

*SOURCE: SOME EXCERPTS TAKEN FROM MICHAEL KARP'S "A TEN-STEP ACTION PROGRAM FOR COMMUNITY BASED ORGANIZATIONS"*

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# ***ADVOCACY IS THE KEY!***

**Advocacy means making your opinion count in the forums where decisions are made. To advocate means to speak in favor of, or recommend something. It means providing active support of strategies to put them into place. It means becoming well-informed about an issue, seeking support of others in your community, and representing your interests in decision-making processes.**

**By becoming involved in affordable residential energy assistance and efficiency issues this way, you play an important role in shaping our nation's energy future – and shaping public policy to assist low-income citizens**

**Active involvement of low-income energy advocates with community groups and decision makers, in regulatory, legislative, and legislative decision-making venues is critical to ensuring that low-income consumers benefit from energy assistance and energy efficiency programs and protections.**