

## Beginner's Leveraging Session: Getting Started – Options, Resources, Strategies

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

The development of leveraging and partnership strategies should be a thoughtful process, and include information that is specific to your organization, your goals, and your ability to oversee such leveraging goals/projects you may visualize. The identification your group's assets, barriers, stakeholder identification, and resources available, are all very important preliminary steps to work through and identify in order to establish successful short/medium and long term strategies and goals. It is critical that early on in the development of your project a key staff person is either hired or designated to be responsible for your leveraging project; to be the point person assigned to orchestrate this undertaking.

### STEPS:

**1) Defining Success at your desk– YOUR success** – this may take time, research, and revisions. Always think strategically.

- 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.
- Organize a reference library that you can use with your work in the future. The library may include your state's legislative law for your utility commission; current contact lists/director for your state legislature; low-income energy advocates testimony from past regulatory participation; reference material or understanding on legislative processes, how bills become laws, etc. **The NCAF Energy Programs Leveraging Conference "Resource Materials CD" is an invaluable reference.**

It is also useful to have websites bookmarked for state and national data and reference:

- [www.weatherizationplus.org](http://www.weatherizationplus.org) – leveraging resources and tools, etc.
- [www.census.gov](http://www.census.gov) - census data including poverty and energy data - looking at people and household data, state area profiles, economic indicator profiles, etc.
- [www.eia.doe.gov](http://www.eia.doe.gov) - DOE Energy Information Administration (EIA)
- [www.opportunitystudies.org](http://www.opportunitystudies.org) - Economic Opportunity Studies (EOS)
- [www.homeenergyaffordabilitygap.com](http://www.homeenergyaffordabilitygap.com) - Fisher, Sheehan & Colton has developed a model that estimates the "home energy affordability gap" for the entire country, with state specific data
- <http://weatherization.ornl.gov> - state energy program and weatherization evaluation metrics low-income advocacy and efficiency from national perspective
- [www.democracyandregulation.com](http://www.democracyandregulation.com) – low-income advocacy reports and examples from Democracy and Regulation
- [http://www.consumerlaw.org/issues/energy\\_and\\_utility/otherissues.shtml](http://www.consumerlaw.org/issues/energy_and_utility/otherissues.shtml) - the National Consumer Law Center's Low-Income Utility Issues portion of website
- Finally, after organization and homework, write down your advocacy and/or project outline in a draft proposal format.

## 2) Secure Your Own Internal 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 any staff or Board members of your organization has a tie with your project partners, utility commission, utility staff, housing policymakers, legislators, coalitions, etc.

**Once you are clear on what you hope to accomplish, organize a strategic planning session within your organization, with leadership. This may need to be a two-step process, first with an educational meeting to bring participants up to speed on the issues, and then second with an actual planning session. As part of this process, **the group will need to internally identify and list out each of the bullets below** – 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
- barriers realistically identified– 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
- identify funding strategies for advocacy/leveraging work – may include LIHEAP leveraging, weatherization leveraging, fuel funds and other partners, foundations, etc.
- **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, be sure to include notes specific to each item.

### **ONCE CLEAR ON YOUR LEVERAGING GOALS, HERE ARE THE NEXT STEPS:**

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

- Strengthen existing agency relationships with utilities (LIHEAP, Fuel Fund, Volunteers, etc.)
- If you have an existing relationship, they may be willing to help you with policymakers.
- If you do not have an existing relationship, this may be 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 – very powerful:**

**Market your outcomes and accountability- Publicize your success**

- Utilize successful monitoring reports, audits, ROMA data, program evaluations, etc..
- Use the local newspaper(s) to do a piece on your proposal subject – if weatherization, put a human face on the issue. “Site Demonstration for policymakers.” Have the paper/reporter/assignment editor, etc. 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 – this may require research and homework (again) on your part.

**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.
- Providing general information presentations to utility commission staff may also be useful

**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 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 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.