

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

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The development of planning strategies should be a thoughtful process, and include information that is specific to your organization, goals, and ability to oversee such a leveraging goal/project. 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. -- “Your strategies” ultimately will evolve to the group’s strategy. Leveraging strategies are not something that one person in one agency or association or contractor’s office can undertake alone. Effective leveraging requires a group effort and collective long-range commitment.

## **STEPS:**

**1) Defining Success at your desk– YOUR Organization’s success – will take time, research, revisions**

- Write down the project/partnership outcome you/your group would like to achieve, 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; sign off housing partners, finance institutions, etc. Also be familiar with funding available for project: DOE WPN 11-01 Grant Guidance for Leveraging: 1.7 Leveraging and Leveraging Resources – available on WAPTAC)
- 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 organization’s decision makers (Board of Directors, Executive Director, Program Director

– state and local levels) – should be in place. A meeting with all weatherization delivery network members should be in order.

- 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** or sessions 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. Also planning strategically with your state weatherization training center leadership may identify other stakeholders and strengthen the scope, the sustainability of long range plans.

- **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, healthy homes organizations, health clinic leaders, all 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. if proposing a Fee-for-Service business option, a business plan will become necessary

## **KEY TO SUCCESS – must have:**

**A ‘point-person’ identified to lead this leveraging activity forward, coordinate efforts**

## **ONCE YOU & YOUR AGENCY/GROUP COMES TO AGREEMENT ON LEVERAGING PROJECT GOALS:**

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

- This is a safe way to get your foot in the door and to start garnering support.
- Lay out 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 leveraging project/partnership-**

- Obtain letters of support – including:
  - local politicians (mayor, city council, county commission, state reps, State WAP PAC)
  - Other agencies (seniors, farm workers, league of women voters, local welfare rights, unions, vendors, State Community Development, Housing or Energy offices; healthy homes organizations; financial institutions, existing partners with local and state WAP programs)

### **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 audit approach and the technical diagnostics that are used to assure effectiveness and savings.

### **6) The Role of the Media and Social Media-**

- If weatherization-related, put a human face on the issue. Have stakeholders 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. Also always highlight ‘jobs’ and ‘business partners’ involved.

- This media exposure puts local pressure on decision makers and also better informs them of the program/proposal. Use websites and social media as part of information strategy dissemination.

**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 or utility commission staff 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) If at a utility commission, be present to answer questions when this issue is discussed or comes up for vote.**

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

**10) Be Persistent – this may and probably will be a multi-year strategy –**

- 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.

2011 National Weatherization Training Conference – ‘Leveraging Now More Than Ever’ session – handout from Lisa Kesecker presentation