

# Welcome!

The webinar will begin at 3:30 pm EST.

Attendees will be muted during the presentation.  
Please submit questions through the “Questions”  
feature in GoToWebinar

If you have not received the supplemental  
documents for this webinar, please visit  
[www.weatherizationplus.org](http://www.weatherizationplus.org) and download them.



# Leveraging: *Now More Than Ever*

*Get Funding to Develop Leveraged Re\$ource\$*

*[Start with W.A.P. Program Funds]*

Meg Power, Economic Opportunity Studies, Washington, DC

[megpower@opportunitystudies.org](mailto:megpower@opportunitystudies.org)

202-628-4900

Lisa Kesecker, Energy Design and Services, Moorefield WV

[lisa.eds@hardynet.com](mailto:lisa.eds@hardynet.com)

Webinar

Jan. 11 and 12 , 2012



# What is "Leveraging"?

- In Weatherization-speak it means *using the current resources of the program and its organizations, such as*
  - *people with skills*
  - *a whole-house approach and equipment*
  - *Transparent finances*
  - *access to homes and*
  - *good reputation*
- *to attract additional complementary resources*

# Weatherization Leveraged Partnerships Project

DOE  
Program  
Guidance re:  
Leveraging  
Expenditures  
of WAP  
program  
funds

- DOE Weatherization Program Notice or WPN(WPN 2011-01 12-28-2010)
  - “1.7 Leveraging & Leveraged Resources
- *“Other allowable leveraging includes: holding leveraging meetings; preparing technical materials/briefs; or facilitating voluntary match funds from a non-Federal source”*

[www.weatherizationplus.org](http://www.weatherizationplus.org)



# Weatherization Leveraged Partnerships Project

Leveraging  
in Your  
WAP  
Annual  
State Plan:  
*There's still  
time!*

Critically important for any DOE WAP funded/supported leveraging project:

- the Leveraging Project narrative and budget must be written into the “DOE State Plan” and
- This year, that includes
  - Re-written PY 2011 plan due March/ Apr or later
  - PY 2012 plan IF \$\$ Allocated (later!)

# Weatherization Leveraged Partnerships Project

Getting  
the State  
and the  
local  
network in  
harmony  
on a plan.

- State Leveraging Plans are not detailed
- DOE rarely questions a consensus approach
- A thoughtful approach has
  - Shared goals among locals
  - Appeal to the state management
  - Probability of performance if achieved
  - Clear roles and responsibilities
  - A Plan for development phases

# Weatherization Leveraged Partnerships Project

What Does  
it Take to  
Develop  
Good  
W.A.P.  
Partnerships  
and Steady  
Resource  
Streams?

- ❑ Thought and Imagination [**Dream!**]
- ❑ Time (to plan, to organize)
- ❑ Capacity = time for staff = \$\$\$
- ❑ A village! HAVE A CORE WORKING GROUP
- ❑ Concentration/Perseverance
- ❑ Performance

# Weatherization Leveraged Partnerships Project

Most State  
Plans  
DESCRIBE  
and FUND a  
Process

BUT

REFLECT a  
shared goal  
& approach

- Define Your Goals & Success
  - Think thru/write down desired leveraging outcomes
  - ID your goal for services & participants
  - ID potential partners/ funders
  - ID opportunities/advantages for all stakeholders
  - ID accountability systems

# Weatherization Leveraged Partnerships Project

Work  
(fast) with  
a small  
strategy  
team with  
good  
access

## □ Internal (WAP 'Family') Support

### ■ Essentials:

- Executive Directors and their
- Boards of Directors
- State Association Leaders
- Policy Advisory Council
- WAP State Office Manager

### ■ Good to Have

- Housing Program Directors –
- WAP Contractors –
- Current Partners

[www.weatherizationplus.org](http://www.weatherizationplus.org)



# Weatherization Leveraging Partnerships Project

## Finding Champions/ Persuading Essential Interests

- **Organize** a Strategy Session to Agree on the Initiative's Framework
- **Consider**
  - ▣ Goals (more homes? Program income?)
  - ▣ WAP Assets and opportunities
  - ▣ Responsibilities and transparency
  - ▣ Stakeholders

# Weatherization Leveraging Partnerships Project

When Your  
Funding  
Plan is  
Approved:  
Foundations  
for Success

- A Thoughtful, Patient Process
  - Do a Project outline and timeline in proposal format to share/tweak with your project team
  - Be flexible & prepared for revisions
  - Make Time! developing new leveraging partnerships requires patience
  - Invest in developing/updating references & data library

# Weatherization Leveraging Partnerships Project

When Your  
Funding  
Plan is  
Approved:  
Foundations  
for Success  
#2

- **Choose a Project Manager to**
  - ▣ lead the charge,
  - ▣ herd the cats,
  - ▣ keep initiative moving.
- **Have/add depth** within your work group to work all phases of plan
- **Get a firm public draft** agreed to for circulation



# Weatherization Leveraging Partnerships Project

When Your  
Funding  
Plan is  
Approved:  
Foundations  
for Success  
#3

- Identify & Find Champion(s)
- **Support: Meet with Potential Partners**
  - ▣ **Education/Site Demos**
- **Use Social Media/Video: strategic resource**

# Weatherization Leveraging Partnerships Project

Build On  
others'  
Experience:  
20 Years of  
WAP  
Leveraging



- The Weatherization PLUS Site
- Technical Assistance – people!
  - linkages! networking!
  - *DOE-Supported & FREE ('til 3/2012)*
  - EOS team serves as leveragers' 'staff' in the start-up stages
    - Supports the staff you have when you get going
  - Your needs develop our agenda

[www.weatherizationplus.org](http://www.weatherizationplus.org)



# Weatherization Leveraging Partnerships Project

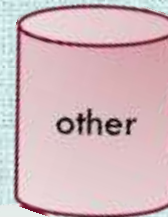
Why Do We  
Call it  
“Leverage”?

WAP is an  
Asset!

*This is Your  
Program  
Delivering  
Value*



**Lever**



*This is the  
value you  
add*

# Contact Us for Follow-up Info/Help

## The Weatherization Leveraged Partnerships Project

- Meg Power, Project Manager, [megpower@opportunitystudies.org](mailto:megpower@opportunitystudies.org)
- Fred Stratton, Program Coordinator, [fredstratton@opportunitystudies.org](mailto:fredstratton@opportunitystudies.org)
- Eli Nesson, Communications Manager, [e\\_nesson@opportunitystudies.org](mailto:e_nesson@opportunitystudies.org)

202 628 4900

**Disclaimer:** “This report was prepared as an account of work sponsored by an agency of the United States Government. Neither the United States Government nor any agency thereof, nor any of their employees, makes any warranty, express or implied, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, apparatus, product, or process disclosed, or represents that its use would not infringe privately owned rights. Reference herein to any specific commercial product, process, or service by trade name, trademark, manufacturer, or otherwise does not necessarily constitute or imply its endorsement, recommendation, or favoring by the United States Government or any agency thereof. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof.”

[www.weatherizationplus.org](http://www.weatherizationplus.org)

