

## **OPERATION FUEL, INC. STRATEGIC PLAN, 2013-2017**

### **MISSION**

Operation Fuel partners with communities, businesses, government and individuals to ensure people in need have access to year-round energy assistance. Since its founding in 1977, Operation Fuel has been devoted to caring for the most vulnerable members of Connecticut's population. We are devoted to responding to the energy needs of the communities we operate in and to providing warmth and light on the coldest, darkest nights of the year.

### **OPERATION FUEL TODAY**

Operation Fuel embarked on its latest round of strategic planning with a sense of pride over what it has accomplished in recent years and the positive impact it has in communities and families across the state. At the same time, the planning process departed from a sense of urgency, because the energy affordability gap in Connecticut is still too large, and too many residents struggle to stay cool in summer and warm in winter. Operation Fuel is vital to many low-income and/or marginalized people in Connecticut and is needed more than ever.

In meeting the challenges of today and performing its mission, Operation Fuel is able to draw on many well established and respected strengths, among them a caring, committed, competent staff that is passionate about the mission; a leadership team that is invested in Operation Fuel's success; a board that shares the staff's passion for the mission; solid reputation for integrity and for being both non-partisan and energy-blind; strong relationships with social service agencies and key legislators, resulting in considerable political support; a well-developed network of partner fuel banks; close and productive relationships with and support from energy suppliers and public utilities. The organization is well managed and fiscally sound.

While the need for energy assistance is growing, resources with which to meet the need and serve distressed residents are becoming scarcer and more difficult than ever to access. The budget crisis at all levels of government in Connecticut is making it difficult to focus on energy issues. The agency's staff is small and overtaxed, and funding is insufficient to permit the organization to cover its statewide mandate. In this environment, Operation Fuel faces many challenges and tough choices. Among the questions considered during the strategic planning process were these:

- Can we afford to continue a year-round operation?
- At what point are our grants so insufficient that we should serve fewer clients and provide more to each of them?
- What do the data say about our clients and Operation Fuel's impact?
- How can we work to eliminate silos and truly function collaboratively and as a team with other organizations and agencies?
- How can Operation Fuel be more effective in the advocacy and public policy realm?
- How can we build support for energy assistance and related programs among leading stakeholders?
- How will the organization proceed toward financial sustainability?
- Do we have the right staff and board in place to meet goals?

The planning process made clear to Operation Fuel's staff and board that near-term success and long-term sustainability will depend on several critical factors, including strong leadership and a smooth executive transition, spreading the word and educating the public about the need for year-round energy assistance, providing more than just energy assistance grants, exploring and deploying alternative approaches to closing the energy affordability gap, partnerships with other organizations and state agencies, excellent relations with fuel banks, a steady and diverse funding stream, and an engaged board.

**STRATEGIC IMPERATIVES:**

*In collaboration with our member fuel banks and others who share our commitment to ensuring people in need have access to year-round energy assistance, we will strive to:*

1. **Increase total annual funding available** to meet the immediate fuel assistance needs of families who turn to the fuel banks in our network in a time of crisis
2. **Bridge the affordability gap** through innovative programs that serve and empower residents who cannot afford to heat their homes in winter or cool them in summer
3. **Play a more active role in shaping energy policy** and effecting systemic change in Connecticut and at the national level

**ENVISIONING OPERATION FUEL IN FIVE YEARS:**

Guided and inspired by those strategic imperatives, we envision that within five years Operation Fuel's efforts to increase the amount of support available to households receiving energy assistance will be successful. In five years, our education outreach program will have been taken to scale and will reach statewide, helping the agency connect with hard-to-reach communities and effect behavior change relating to energy consumption.

Project BEST will be well established within the business community and stable as an ongoing program of Operation Fuel, and we will be partnering with the state and/or energy companies to take pursue a similar energy audit and upgrade program for the residential sector. At the same time, Operation Fuel will be recognized and sought after as a resource and collaborator by other organizations and stakeholders pursuing similar objectives.

Increasingly Operation Fuel will be recognized not only for emergency assistance but also for its commitment to comprehensive clean energy strategies and solutions. The agency will be connecting with new community-based partners while continuing to engage fuel banks as full partners to help raise visibility and funds in local communities. We will be working with community partners to address client needs in a more holistic, coordinated way to promote long-term, sustainable solutions rather than isolated and unconnected quick fixes.

More residents throughout the state will understand the energy affordability gap and appreciate Operation Fuel's critical role in closing it. Our role as an advocate for legislative policies and administrative practices that reduce the energy burden on Connecticut residents while also reducing energy consumption in general will yield positive results.

Operation Fuel's relationship with public utility companies will be based on common interests and mutual respect. They will think of their support for Operation Fuel as a sound investment that yields a good return. Funding from utility companies and the General Fund will be larger and more stable, funding more of the agency's overhead while continuing to support essential mission-related programs. Funding from private (non-utility, non-government) sources also will have increased.

Data collection and evaluation capability will be built into all programs and inform decision making. Staff size will be sufficient to maintain high-quality mission-related programs and perform critical administrative functions, particularly those relating to resource development. The board will be actively embracing and engaging in friend-raising and fundraising.

**GOALS AND STRATEGIES:**

**INTERVENTION AND PREVENTION**

- **Maximize the amount of year-round support available** to residents in need in order to deepen our impact and broaden our reach
- **Educate Connecticut residents about opportunities to reduce their fuel usage** and their dependence on financial support through conservation and conversion
- **Facilitate access to energy audits and encourage energy-efficiency upgrades** to lower homeowners' energy bills
- **Develop creative, cost-effective strategies to help energy companies** help small businesses, the elderly and anyone struggling financially increase their energy efficiency
- **Work with municipalities and like-minded organizations to develop an integrated approach** to addressing the health and safety issues as well as opportunities for clean energy and energy efficiency in homes
- **Take a more systematic approach to program evaluation** in order to demonstrate more effectively the impact of Operation Fuel interventions and prevention initiatives

*Key Initiatives:*

- Collaborate with utility companies to make it easier for the general public to contribute dollars in support of fuel assistance grants to households in need
- Develop additional performance-based subcontractor relationships with utility companies to facilitate their efforts to help households and businesses increase energy efficiency
- Leverage energy usage data provided by energy companies to take a targeted approach to offering customers assistance or weatherization
- Encourage member fuel banks to engage with town-based clean energy task forces and to connect client families with information and resources they need
- Encourage landlords to weatherize dwellings in order to assist fuel assistance clients in their efforts to reduce energy costs
- Seek grant funding for development of a new program to educate low- and moderate-income residents on weatherization, energy efficiency and financial literacy
- Build data collection and evaluation capacity into all programs and initiatives, and seek to collect data in a way that allows us to “humanize” our impact

**VOICE AND VISIBILITY**

- **Heighten efforts to raise public awareness** of Operation Fuel's mission, its community impact, and its vital role as a primary source of funds that fuel banks make available to clients
- **Raise awareness of the growing energy affordability gap in our state** and the growing number of families forced to make a “heat or eat” choice
- **Be more visible as a voice for affordability and access in all energy policy-related debates** affecting residential consumers and as an advocate for legislation and administrative policies that address the energy needs of those struggling to make ends meet
- **Play a vocal leadership role in national efforts and networks** aiming to reform energy policy with the needs of struggling individuals and families in mind

Key Initiatives:

- Leverage our current tag line more effectively, making more clear what “the operation” is and how people can become engaged, or choose a different tag line
- Turn up the volume on messages that emphasize access (i.e., affordable energy for all!)
- Be much more visible during the warm season
  - Consider a warm-weather PR campaign
  - Explore opportunities for joint marketing and messaging with organizations concerned about chronic heat-related health issues (e.g., the MS Society and the Agency on Aging)
  - Partner with local towns with cooling centers for the elderly to raise our visibility
- More aggressively leverage the Affordability Gap Study to raise awareness about the affordability challenge and de-stigmatize those who need energy assistance
  - Personalize the gap study locally, drawing attention to the sacrifices people (O-F clients and non-clients as well) are making in order to be able to pay their utility bills
- Collaborate with community action agencies and other grassroots organizations to expand and enhance advocacy efforts
- Speak on behalf of social service organizations at budget hearings to raise awareness and support among town council members
- In partnership with others so as not to duplicate efforts, undertake a comprehensive review of existing energy efficiency and weatherization programs to identify where low-income folks are falling through the cracks, and use the findings to inform public policy advocacy efforts
- Engage clients and fuel banks in our strategic communications efforts, putting a face to the issue and injecting personal stories even more compelling than statistics

**LEADERSHIP AND PARTNERSHIP**

- **Maintain strong relationship with fuel banks** and maximize their role as expert resources and as conduits to the communities and families we serve
- **Cultivate and share best practices** that connect families with energy conservation resources and affordable clean energy solutions
- **Collaborate with other nonprofits in the human services sector** to address client needs comprehensively and holistically in ways that promote family economic security
- **Draw attention to the connection between energy efficiency and the issues of health and safety** in homes throughout our state by taking a proactive role in advocating for integrated solutions
- **Continue to strengthen Operation Fuel’s state-mandated partnerships with regulated utility companies** and cultivate new partnerships within the corporate sector

Key Initiatives:

- Engage fuel banks in media, advocacy and gap study training
- Evaluate the technology needs of fuel banks and seek to leverage funds to enhance their IT capabilities
- Help fuel banks to develop, report, and leverage strategic data to support of Operation Fuel advocacy efforts, bolster their own fundraising efforts, and inform policymakers in the towns they serve
- More creatively and proactively use data to tell a big-picture story and humanize the impact of our mission
- Work with CAFCA and other community-based organizations to link health and safety with weatherization and collaborate with organizations involved in the Livable Cities initiative
- Study and where feasible replicate model programs in other states (e.g., Colorado) that successfully demonstrate innovative approaches to reducing energy consumption

**STABILITY AND SUSTAINABILITY**

- **Develop long-term funding relationships** with state and municipal governments and with the utility companies to secure a predictable, sustainable flow of support to fund both fuel assistance grants and operational infrastructure
- **Increase unrestricted giving** to fund operations while continuing to seek targeted corporate and foundation grants to fund key initiatives
- **Generate earned income** through fee-for-service programs that are mission aligned and have a positive impact on the communities we serve
- **Prepare for smooth executive leadership transition** and continue to invest in professional development for staff
- **Grow staff capacity strategically** while retaining commitment to lean, efficient operations that maximize use of limited administrative resources
- **Strengthen board engagement and support** so that the board as a body and board members as individuals are more effective as advocates, ambassadors and stewards of the organization

Key Initiatives:

- Drawing on examples from other states where fuel banks enjoy long-term relationships with utility companies, develop a compelling case (value proposition and ROI) in favor of such a relationship between Connecticut's utility companies and Operation Fuel
- Strategically expand Project BEST to increase the number of businesses undertaking retrofit on a fee-for-service basis, and then enter the residential market with the same revenue-generating services, potentially in collaboration with other organizations and stakeholders
- Cross-train staff to maximize current resources and deploy them effectively during "down time" in the annual energy use cycle
- Develop organizational capacity in and devote resources to marketing, advocacy and community education/prevention initiatives
- Establish a "message and money" committee (to focus on marketing and fundraising) and a strategic initiatives task force of the board
- Cultivate and sustain strong relationships with senior management at all the major utility companies
- Take appropriate steps relating to leadership transition by implementing the previously developed transition/succession plan as circumstances warrant