



2018 - 2021 Strategic Plan

Operation Fuel

January 2018

Developed by Fio Partners, LLC

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Developing the Plan

In June of 2017, Operation Fuel partnered with Fio Partners, a consulting firm that works with nonprofit organizations to support the development of a three-year strategic plan.

A Design Team comprised of Board members, executive leadership and staff was designated to work directly with Fio Partners and oversee the process. Members of the Design Team were Nancy H. Bulkeley, Charles Anderson, Camilla Hillian, Allan Smith, Kim O'Brien Green, Rebecca Scorso, and Brenda Watson.

A process of information gathering was undertaken to capture observations of the organization from a variety of perspectives, including community partners, clients, fuel banks, and industry experts. An internal analysis of the organization's infrastructure was also conducted.

Activities undertaken or developed over the course of the process included:

- Board survey and analysis
- Staff climate survey and analysis
- Stakeholder and industry expert interviews and summary report
- Stakeholders surveys and analysis – fuel bank partners, community partners, small business clients, fuel bank clients
- Management assessment and analysis report
- Programmatic assessments
- MacMillan Matrix
- Organization-wide logic model

Transparent communication was a key component of the strategic planning process. A communication portal was set up in Basecamp and the draft survey reports and analyses were posted online for the Design Team's review and comment. The Design Team also convened every four to six weeks to review and discuss the activities and completed analyses and to oversee current and proposed activities relative to the information gathering. Once the information had been approved by the Design Team, it was distributed to the entire Board for their review and comment.

The Board of Directors, along with the Design Team members, met in late November of 2017 to provide feedback on the results, offer input into the strategic vision and to identify and recommend organizational priorities for the next three years. Output from this retreat served as the basis of the strategic plan.

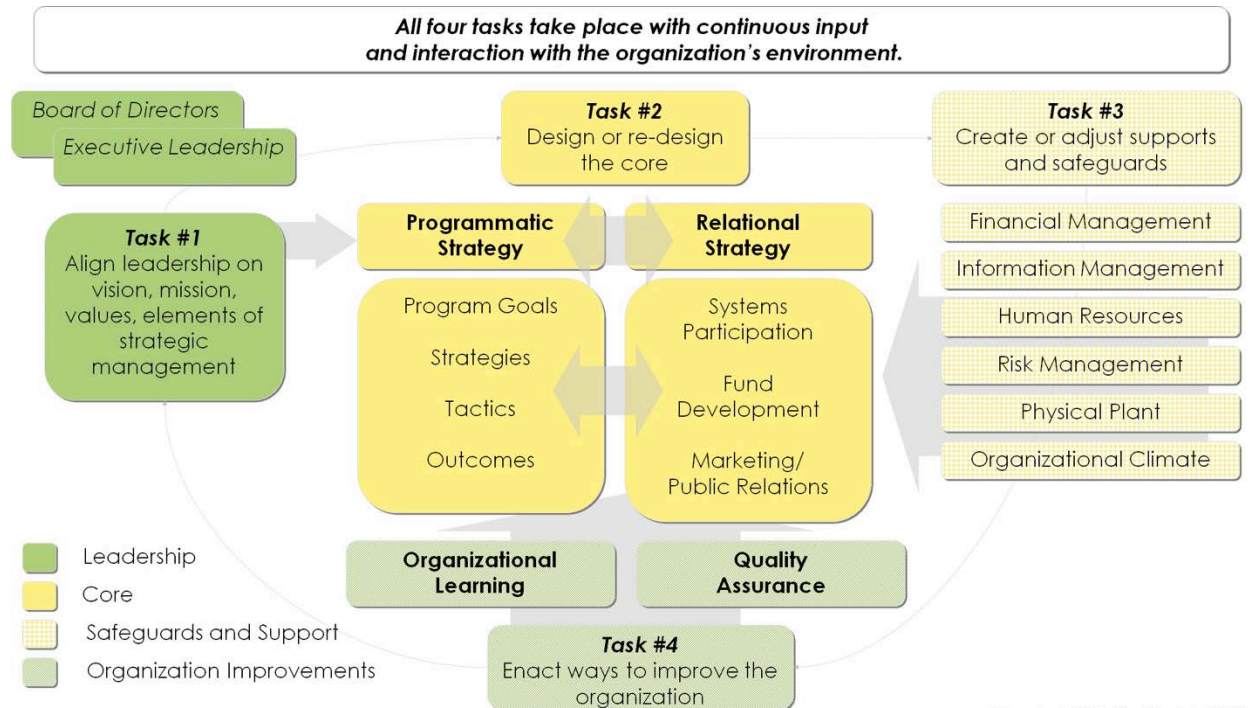
What We Learned

- **Building the Board of the Future:** The Board of Directors of Operation Fuel recognized the opportunity to increase the clarity of their role in helping to advance the mission of the organization. The clarity of role and the development of annual goals in support of the strategic plan will help the Board of Directors consider how its membership, key initiatives, and processes should evolve over the next three years.
- **Ensuring Leadership Continuity:** The leadership challenges of the last year, including the unexpected departure of the Executive Director, took an immense toll on Operation Fuel leadership and staff. Despite these challenges, staff persevered setting aside their personal stressors to ensure that Operation Fuel programming was not impacted or suffered during this period of uncertainty. The Board, with input from staff, will establish leadership transition and succession policies and procedures, which take into account and address concerns voiced by staff in the climate survey.
- **Opportunity to Strengthen Our Internal Team and Culture:** The information gathering effort yielded concerns in regard to the internal staff dynamics. As the implementation of the strategic plan moves forward, key areas of attention include team building, creating a culture of high team performance, and ensuring a positive workplace environment.
- **Fueled for Success:** Operation Fuel has built a strong relational model in our partnership with our local fuel banks. Ninety-six percent, or 105 of our 109 fuel banks, responded to our online survey. This is a remarkable response rate and reflects a deep level of trust and commitment on the part of our fuel bank partners, who voiced overwhelming support and appreciation for Operation Fuel's programming and personal touch. Replication of this model could serve to assist us in expanding and building capacity with other key constituent groups.
- **High Brand Recognition:** Our stakeholders resoundingly view our organization's name and brand as highly respected, credible, and broadly recognized. We also learned that beyond our energy assistance programs, which are well-known, we have the opportunity to increase the awareness of the range of services that we offer.

The Plan's Components

The purpose of the strategic plan is to guide the future growth, improvement and development of the organization. As a tool, it helps all who are involved with the organization, as supporters, volunteers, Board members, and staff, understand the direction in which the organization will be developing over the next three years. The plan is the roadmap to shape the future for the organization.

The structure of the plan correlates to Fio Partners Strategic Management Framework.



Source: FIO Partners, LLC

The foundation of the strategic plan is the mission, vision, and values of our organization. The plan also establishes overarching strategic goals and supporting strategies for five key areas:

1. **Programmatic Strategy:** How will our services to our community evolve?
2. **Relationships:** How should our relationships – from those in our community, to our donors and funders, to the general public – evolve?
3. **Supports & Safeguards:** What investments should be made in our infrastructure to support our evolution, from our physical space to our workplace climate?
4. **Improving the Organization:** How will we continue to learn from and improve our work?
5. **Board Development:** How should our Board continue to evolve to best support the future of the organization?

The plan also proposes the strategies that should be priorities for the first-year of implementation, denoted by a **bold typeface**. The plan also includes strategies for monitoring progress and identifies a set of key results to monitor measurable improvements.

Mission, Vision, & Values

Our Mission: Operation Fuel ensures equitable access to energy for all by providing year-round energy assistance, promoting energy independence, and advocating for affordable energy.

Our Vision for Our State: **Equitable Access to Energy for All**

- **Point of Impact:** Operation Fuel recognizes that when a family is in crisis reliable energy assistance is a vital component to fostering household stability. We will continue to strengthen our ability to support our clients and track their progress and success. Ensuring that our most vulnerable residents are safe in their homes is the immediate first step in our efforts to create systemic change that supports and sustains affordable energy for all.
- **Knowledge is Power:** Education is a key component of our mission. We are committed to providing residents, communities, and decision-makers with relevant, timely, data-based research and information about energy assistance, usage and efficiencies, as well as innovative developments in the field, in our ongoing commitment to make energy more affordable and efficient for all Connecticut residents.
- **Evolution of Change:** Operation Fuel believes that **Energy Assistance** sets the stage for **Education** which leads to **Energy Efficiency** and **Independence** creating opportunities to **Advocate** for **Systemic Change**. At each stage along this trajectory of evolution, both in our programming and communication, we remain committed to providing our clients with the resources and education needed to take control of their personal energy costs and to advocate for systemic changes in support of safe and affordable energy initiatives and policies at the state and national level. We will not stop until equitable access to year round energy is available for all of Connecticut.

Our Vision for Our Organization

- **A Positive, Thriving Work Environment** – We value our staff and are committed to a work environment that acknowledges, supports and sustains them by investing in their professional development and monitoring the capacity of our staff resources necessary to maintain a quality and high functioning work environment.
- **Interconnected Array of Programmatic Efforts** - We view our efforts in assistance, education, and advocacy as interconnected. We envision strengthening the connections across all areas of our work.
- **Diversification of Funding Support** - Our organization will be supported by a diverse array of sources including government, private, and corporate sources.
- **Visible, Engaged, Leadership** - Our Board of Directors are our greatest ambassadors and partners for our mission.

- **Advocates for Systemic Change** - We believe that the key to successful advocacy rests in nurturing our connectedness as a statewide community and strengthening our collective commitment to one another.

Our Values

- **Equitable Access to Energy** -- We believe equitable access to year round energy is a right not a privilege.
- **Respect** –We believe that our interactions with each other are a reflection of our organizational character and as such are committed to fostering interactions that honor and acknowledge the individual dignity of our staff, Board, constituents and partners.
- **Responsiveness** – We understand the need to be flexible and responsive to the immediate energy needs of our consumers in crisis.
- **Knowledge** – We are committed to gathering, codifying and disseminating evaluation data and research which demonstrates and promotes understanding of the energy needs of low and moderate income residents.
- **Power of the Collective** - We believe that the key to successful advocacy rests in nurturing our connectedness as a statewide community and strengthening our collective commitment to one another.
- **Stewardship** – We are committed to spending wisely to maximize value to those we serve and our community partners.

Our Three-Year Goals

Goal #1: Strengthen Our Board of Directors

Goal #2: Improve Sustainability and Invest in our Internal Capacity

Goal #3: Strengthen Our Program Portfolio

Goal #1: Strengthen Our Board of Directors

Strategy A: Build our Board Engagement and Participation

- **Identify networks of community members (philanthropic, civic organizations, community organizations, religious organizations) that would be aligned and supportive of the organization.**
 - **Cultivate and develop a pipeline of potential Board candidates.**
- Explore opportunities to engage potential Board members in committee and/or organizational activities.
- **Develop Board member recruitment plan to garner access and support from these networks as well as linked to the achievement of strategies in the strategic plan.**
 - **Strengthen board orientation process to ensure that new board members have a complete understanding of Operation Fuel programming, organizational goals, and mission.**
 - **Support marketing efforts through recruitment of additional marketing expertise and supports on a volunteer basis or at the Board level.**
 - **Consider recruiting board member or advisor with expertise in targeted professional areas.**

Strategy B: Strengthen and formalize Board processes and structure

- Develop succession plans for Board leadership to ensure smooth and coordinated transition of leadership both planned and unexpected.
- **Conduct annual performance review of Executive Director.**
- Improve accountability of the Board for Board-driven efforts through the creation of annual Board goals linked to strategies in the strategic plan.
 - Link Board goals directly to Board-level committees who will be responsible for moving work forward in-between Board meetings.
- **Provide Board training on Board processes, policies, responsibilities, and fund development.**
 - **Strengthen the Board as Ambassadors.**
 - **Use Board meetings to create mini-trainings on key topics relevant to the work of the Board.**

Goal #2: Improve Sustainability and Invest in our Internal Capacity

The ability for Operation Fuel to sustain its program in light of potential state and federal shifts is contingent on its ability to expand the array and range of supporters of its efforts. From the general public to specific funders, the Board of Directors and staff of the organization must work to activate and amplify the range of relationships that support the organization.

Strategy A: Improve organizational and board visibility through marketing and seasonal campaigns

- **Develop a marketing plan, inclusive of an updated overall brand update, based on input gathered through the strategic planning process.**
 - **Revise the organizational tagline to better reflect the work and vision of Operation Fuel.**
 - Solicit consumer input to design collateral materials that target specific underserved or isolated consumer groups and to identify non-traditional methods and media to outreach to these populations.
- **Explore opportunities to expand and leverage the “Add a Dollar” funding campaign:**
 - Develop a Public Service Announcement.
 - Identify cross promotional opportunities that illustrate the impact of the Add a Dollar campaign.
 - Explore cost and feasibility of a commercial advertising campaign on public transportation.
 - Revisit possibility of developing a small insert to be included in the monthly utility bills.
 - Create a direct and highly visible link to information on the Add a Dollar campaign and the impact of a “dollar” on the front page of the Operation Fuel website.
- Leverage GAP findings to develop modified, targeted collateral materials and talking points for constituency groups, (i.e. fuel banks, legislators) that engage them in Operation Fuel’s overarching mission to create systemic/culture change which values and supports equitable access to affordable energy for all.
- **Create a robust repository of client stories which embody our mission.**
 - **Develop simplified methods for Fuel Banks to record/document client stories.**

Strategy B: Strengthen and expand fund development efforts

Foundations and Corporate Support/Grant Writing

- **Research and evaluate opportunities for leveraging existing grant funds to support Operation Fuel programming.**
- **Monitor shift in federal funding to states and how that funding is being allocated across sectors to identify and pursue allocations in line with Operation Fuel programming.**
- **Continue efforts to research and identify grant opportunities (local, state, national)**
- **Scrutinize current and future grant applications for opportunities to include or augment indirect funding to support general operations.**
- **As opportunities emerge, consider securing aligned contracted development support with specific expertise.**

Individual Giving

- **Develop a Planned Giving/Bequest program.**
- **Develop strategic relationship cultivation approaches for corporations and major donors throughout the state**
- Host on-site “friendraiser”(s) in which individuals are invited to learn more about Operation Fuel and its diversified array of services.
- Follow-up with stakeholders engaged in strategic planning process to review plan and engage in supporting the organization.
- Develop and codify a robust stewardship program leveraging staff and board to cultivate and nurture established and new donors alike.

Special Events

- **Cultivate and organize a group of volunteer leaders specifically tasked and engaged in Operation Fuel fundraising activities.**
- **Establish ad-hoc committees to focus on themed fundraising events (i.e. Annual Signature event, Radio-thon)**

Infrastructure

- **In-service trainings for Board and staff on being Operation Fuel Ambassadors.**
- Create increased opportunities for Board members and key staff to support and engage as active partners with the Executive Director in fundraising and donor cultivation efforts.

Strategy C: Maintain and cultivate a range of partnerships to support our efforts

- Seek and secure collaborative partners that make Operation Fuel’s mission more powerful and visible in the community.
 - Provide executive leadership with training in negotiation, system design and managing a collaborative structure.
- Facilitate open discussions with staff and board around current organizational and individual relationships to identify opportunities to cultivate, strengthen and leverage in advance of the mission. (Appendix A includes a list of established, developing and future organizational relationships identified by board and staff at the 2017 November retreat)

Strategy D: Strengthen human resources and monitor organizational climate and morale

- **To monitor staff morale, conduct an annual staff climate survey; develop additional methods for ongoing staff feedback**
- **Review job roles and responsibilities.**
 - **Codify a list of major responsibilities specific to each job.**
 - **Clarify responsibilities specific to supervision and decision-making within and across departments.**
 - **Revise the staff orientation materials to reflect any programmatic changes.**
- **Monitor and adjust compensation and personal development opportunities to maintain competitive position.**
 - **Obtain comparative salary range and benefit package information from organizations with like positions or from professional associations.**
 - **Evaluate current salary ranges based on market rates and determine benefit package based on available resources and comparable benefits.**
 - **Re-bid contracts for each specific benefit product (i.e. health insurance, disability, worker's comp) every three to five years. Obtain bids from a minimum of three vendors for each.**
- **Explore additional avenues for posting and advertising job openings to ensure a range of qualified and diverse candidates.**
- **Develop and conduct annual performance appraisal process**
 - **Incorporate a description of the appraisal process in Personnel Policies**
- **Establish a formalized system for cataloguing and maintaining personnel files**
 - **Set up individual personnel files for each employee.**
 - **Develop and include a hiring commitment letter, copies of performance appraisals, commendations and any records of disciplinary action.**

Strategy E: Foster a learning culture

- **Seek out learning opportunities to reinforce and build leadership and key skill-sets.**
- **Arrange opportunities for staff to share and learn from one another on topics relevant to energy assistance and efficiency, i.e. monthly lunch & learn session.**

Strategy F: Reinforce our infrastructure and operational systems and safeguards

Financial Management

- **Review internal controls and financial policies annually and update as needed**
- **Diversify accounting system to better track individual program funding**
 - **Set up system so individual programs can be tracked separately.**
 - **Develop a consistent formula for allocating overhead across programs.**
 - **Develop business plans for new and current programming to scrutinize projected cost and benefits and establish benchmarks to gauge progress and efficacy.**

- **Increase input and transparency in the budget development process.**
 - **Involve program directors in the budget development process.**
 - **Communicate consistently program directors' responsibilities and accountabilities for budget compliance relative to their programming.**
- Re-bid contract for annual financial audit in year two or three. Obtain bids from a minimum of three auditors.
- Institute procedures for conducting an annual inventory of physical assets/equipment by persons independent of custody and processing functions.
 - Periodically conduct independent appraisals of fixed assets for insurance purposes.
- **Reinforce investment management strategy**
 - **Set goals for return on investment for various investment vehicles.**
 - **Educate Board on overall investment strategy.**

Physical Plant

- Review and update standards for safety and conduct staff trainings to ensure understanding and implementation of the standards.
 - Periodically review physical space from an accident prevention aspect and adjust safety standards as needed.
- **Annually review lease vs. own options to ensure space and equipment costs are appropriate and in the long-term interest of the organization.**

Risk Management

- **Augment and/or maintain Executive Director's broad knowledge of nonprofit accounting practices.**
- **Augment and/or maintain Executive Director's broad knowledge of legal issues.**
- **Establish formal spokesperson protocols by identifying who among staff and volunteers is authorized to speak on behalf of Operation Fuel.**
- **Review insurance coverage annually to assure that the level of risk and types of insurance needed grow with the organization and its programming.**
- **Review written contract procedures and update accordingly as well as establish and disseminate policy as to who among staff and volunteers is authorized to bind Operation Fuel to legal, financial and other obligations.**
- Review fundraising procedures to prevent fraud
- Establish and implement health and safety measures including:
 - Conduct annual staff training on safety issues, i.e. evacuation protocols, etc.
 - Evaluate relative risk return and benefits for installation of a formal security system.
 - Develop policies for reporting on-the-job accidents and unsafe working conditions.
- **Review personnel policies and procedures from a liability prevention perspective.**
 - **Have legal counsel annually review policies and procedures to assure compliance with current law and regulations.**
 - **Formalize notification, rectification, including goals and deadlines, monitorization and documentation procedures for inadequate employee performance management.**

Information Management

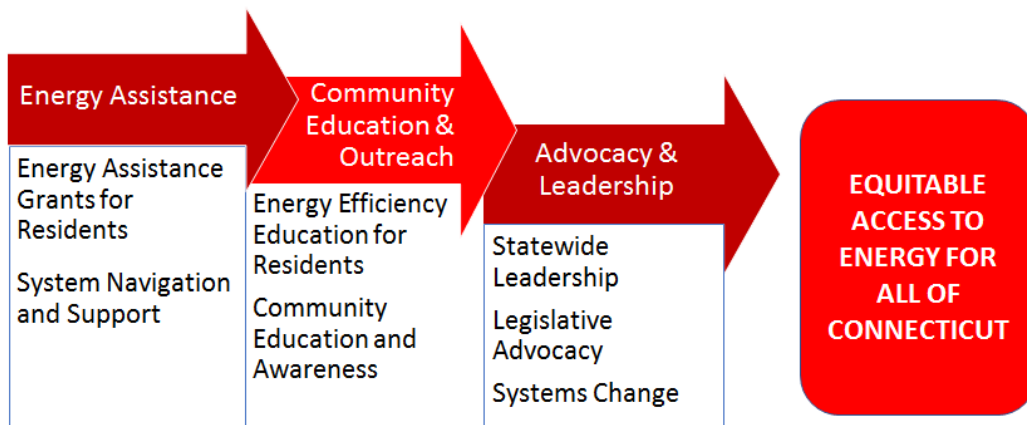
- Develop an organization-wide Information Management Plan
 - Identify all organizational elements that are supported by data collection, analysis, and reporting
 - Review relevance and effectiveness from the perspective of the decision-makers who use the information and the staff who interact with the system and input the information.
- Develop protocols for data entry, analysis and reporting to ensure consistency and accuracy of resulting reports.
- Assess Operation Fuel’s website for accessibility issues for consumers
- Ensure that the capital budget includes investment in Information Management infrastructure routinely to maintain currency.
 - Review adequacy of communications equipment, hardware and software annually.
 - Review any leases annually to ensure that leasing remains cost effective.
 - Identify and cost out needs and include in annual budget development.

Goal #3: Strengthen Program Portfolio

The staff and Board of Directors utilized the MacMillan Matrix to review and assess current program positioning in the areas of Energy Assistance, to determine the recommended actions for optimizing the Operation Fuel program portfolio. Programs were assessed in the areas of mission fit, market competitiveness, fundability, and alternative consumer coverage.

Strategy A: Reorganize program areas

- **Programs will be incorporated and are envisioned as: Energy and Utility Grants Assistance and Energy Outreach and Education, which is inclusive of advocacy and leadership efforts**



Strategy B: Enact specific tactics by area to improve impact

ENERGY AND UTILITY GRANTS ASSISTANCE PROGRAM

- **Expand Fuel Bank program guidelines to be inclusive of the HIPP eligibility requirements enabling Operation Fuel to address the need to provide financial assistance to pay arrearages for those in crisis.**
- **Develop online web application to allow for consumer self-service and include Heating & Water System Repair and Replacement grant assistance in application**
- **Review feasibility and funding options for developing a water assistance program to include water reduction education and water heating measures**
- **Develop process of evaluation and vetting of fuel bank locales for establishing additional fuel bank sites and/or to enhance advocacy and outreach efforts in areas of need.**
- **Integrate HIPP (Homeless Intervention and Prevention Program) into the Energy Assistance Program.**
- **Integrate heating and water system repair and replacement assistance into broader Energy Assistance Program.**
- **Seek to identify additional funding source(s) to underwrite the program costs to repair and replace heating and water heater systems.**
- **Develop methodology for tracking cost benefits and impact of the program and disseminating findings to funders and community at large.**

ENERGY OUTREACH AND EDUCATION

- **Develop education curriculum and materials to include information about basic energy reduction methods and usage.**
- **Systemize training materials related to conservation and renewable energy programs.**
 - **In partnership with industry experts, develop Wise Water Use education curriculum.**
- **Seek opportunities to partner with other outreach channels (i.e. VITA, religious community/churches) to host a series of community education events on conservation and renewable energy.**
- **Develop a statewide annual outreach plan for distribution of training materials, leveraging network of Fuel Bank sites and partners.**
- **Establish role for promoting energy conservation in the Multi-Family sector.**
- **Strengthen means to cultivate key policy makers and decision makers as well as clarify our legislative agenda.**
- **Develop capacity to engage constituents, including board members, staff, and residents in the legislative process.**
- **Build municipal partnerships to influence enforcement of standing legislation relative to energy efficiency.**
- **Continue to provide leadership to the statewide collective of organizations and other stakeholders invested in advocating for energy affordability and efficiency state and federal policies.**
- **Continue to fund industry/sector studies and explore opportunities to disseminate and leverage the findings to support advocacy efforts.**
- **Incorporate advocacy and information about legislative agenda and resources into our website.**

Strategy D: Embed quality assurance activities into our programmatic efforts

- **Evaluate program participation recruitment strategies**
 - **Conduct staff training on Operation Fuel’s quality assurance measures to ensure consistency of implementation.**
 - **Focus on consistency of implementation when introducing a pilot program and making any programmatic changes.**
- Analyze consumer feedback from surveys, interviews, etc. to identify and track any patterns.
 - Monitor program operations to isolate activities that seem to contribute to any areas of concern on the part of consumers.
 - Collect feedback from consumers and analyze it to make sure that concerns are identified and addressed in a timely manner.

MONITORING OUR PROGRESS

The Strategic Plan is a living document that is a road map by which the Executive Director and Board of Directors should be held accountable. The Plan should be utilized to create annual goals for the Executive Director and for the Board of Directors. Progress against goals can be monitored by ensuring regular updates on plan progress at Board of Directors meetings and consistent reporting on desired key results, noted below.

KEY RESULTS

The implementation of the Strategic Plan is envisioned to enact the following key results:

- Increase in financial sustainability (increase in number of donors, increase in number of new public or private funders)
- Increase in visibility (rise in website traffic, i.e. number of unique visits, number of media inquiries, increase in number of public presentations)
- Improvement in client stabilization measures and energy efficiency measures (decrease in number of recurring EA grant requests,)
- Complete program feasibility studies
- Increase new partnerships
- Monitoring of online application requests
- Increase in number of clients in communities underserved by Operation Fuel
- Influence policy response to energy affordability
- Increase in Board engagement and development (increase in diversity of seated board members, development of a pipeline of potential board candidates, increase in amount of Board donations, rise in event participation and meeting attendance.)

Appendix A: Organizational Relationships

Established Organizational Relationships with:

- United Way – ALICE
- LIHEAP
- Chamber of Commerce/Rotary
- Legislators
- Utility Companies
- Fuel Providers
- National Energy Conferences

Developing Organizational Relationships with:

- CDFI – Community Development Financial Institutions
- NRZ – New Residential Investment Corporations
- CT Housing Coalition
- Neighborhood Housing Services
- Municipalities
 - Senior Centers
 - Health
 - Outreach/Education
 - Housing Code Enforcement
- Education Associations
- CREC – Capitol Region Education Councils
- Teacher Organizations – Outreach to student (family giving campaign)
- Faith Communities

New Opportunities

- Applicants
- State Corporate and Foundation Leaders
- NACA/Homeowners – Neighborhood Assistance Corp of America
- Press Conference – Energy, Water Study
- Power Summit
- Convene stakeholders and plan action
 - PURA – Public Utilities Regulatory Authority
 - AARP
 - Utilities
 - CEMA – CT Energy Marketers Association
 - CAAS – CT Academy of Arts and Science