

**June 2011 –A California Tale about ...**



***A Fuel Fund  
Extravaganza: Utilizing  
Private Resources with  
LIHEAP and Leveraging  
Strategies for Success....***



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# California - A WARM WEATHER STATE!

**The Perception:** California (aka: The Golden State) has a “Mediterranean” climate with no extremes in temperature. It is always sunny and mild. No need for air conditioners or heaters! Just wear shorts and flip flops everyday like here in Fort Lauderdale, right?

## **The Reality:**

California is huge! The third largest state in land area with over 840 miles of coast (north to south) from Oregon to Mexico, along the Pacific Ocean. And, west to east, it is about 400 miles at its widest point stretching from Point Conception to the Colorado River, Arizona and Nevada; 160,000 square miles!

Its **eclectic topography** includes Sierra Nevada Mountain Cascades; Mt Whitney at almost 15,000 ft.; coastal beaches (sea level) and Death Valley below sea level. This unique mix of arid high and low deserts, snow capped mountains, lush central valleys, vast plains and pasture lands, winding rivers, rolling hills and sandy beach cliffs all along very low lying coasts is both beautiful and extreme!

**Winter and Summer Temperatures:** Deserts: 15 to 130+; Beaches/Coasts: 30+ to 90+; Valleys: 20+ to 100+; inland Cities: 40's to 110's. Pacific winters can be **dry (La Nina)** or **wet (El Nino)**. Cold Winter **Rain Storms** and **high winds** bring widespread damage, mudslides and flooding. Coastal **summers are balmy/warm** due to offshore sea breezes yet very hot and dry in the valleys, inland cities, low deserts and high mountains. The **Santa Ana's (high dry winds)** in summer can bring extremely hot temperatures and **Wildfires** especially after a very dry prior winter. For example, here's a “typical day's forecast” in **June:** (extreme north) **Eureka: 58;** (central valley) **Sacramento: 98,** (inland desert) **Palm Springs: 108;** (coastal city) “Disneyland” **Anaheim: 88** and (beach city) **Huntington Beach: 78.**

# Welcome to California!



# CA.-- A WARM WEATHER STATE. (Cont'd)

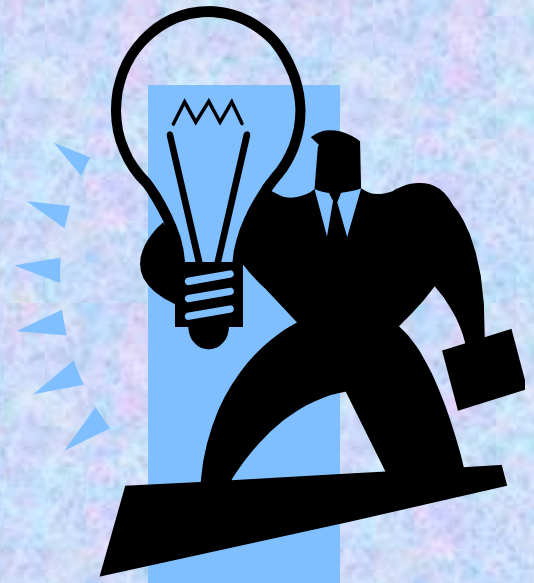
## The Problem:

**One size does not fit all!** How did State of CA, Dept. C.S. & D. ensure that Liheap serves the most in need across the State (e.g.; that we follow our State Plan) given our diverse needs, extreme differences in temperatures, climate and topography and severe natural disasters and challenges that happen in summer and winter?

**The Solution:** A few years ago, the **CSD Director** created a **Statewide Liheap Energy Council (EC) of 8 representatives** formed from **4 Energy Associations** that could advise, create, discuss, train and then help implement a variety of strategies agreed upon to address immediate and long term issues. **Solutions included** legislation, regulatory changes, using financial rebates & incentives, flexible Liheap Contractual additions/changes and Leveraging (infusion of money or other resources from private sources). The **EC helped CSD** and our **Statewide Network of 100** Service Agencies implement **SWEATS, DOE-ARRA & expand Liheap** to help those affected by disaster or an energy need. **EC and Key Partners** work to resolve local, regional and statewide challenges and problems. In December, the EC was disbanded (we hope, temporarily) but, the **4 State Energy Associations continue to work together and advocate** for our most vulnerable and needy populations regardless of Federal & State economic policies and decisions.

# How to get started?

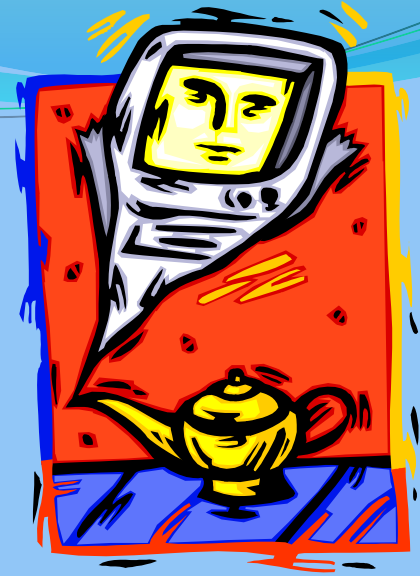
- **Good Communication is Key!**
  - Listen, Assess, then Act!
  - Don't be afraid to move out of your Comfort Zone.
  - Trust in your Experts!



# How to Target Services to Vulnerable Populations, Low-Income Households in Need and/or High Energy Users

- **In Ca., we offer a special fund for very high bills/high energy users: FT Supplemental Fund provides up to \$1,000 per bill.**
- **Leverage other Fuel Funding (GAF, EAF, REACH) with Liheap Heap or FT to help reduce/resolve the client's energy crisis.**
- **During Energy Education or Budget/financial counseling, offer booklets with tips on how to save energy and money: energy saving bill plans, weatherization, old appliance replacement.**
- **Offer monthly discount programs: CARE, LTS-Lifeline Telephone Services, level pay plans and Medical Baseline.**
- **Coordinate with 211 & other local service providers that offer other help (rental assistance, food, school supplies, clothes). Convene qtrly or semi-annual meetings with your local partners.**
- **On a State level, the CA., Dept C.P.U.C. (Ca. Public Utilities Commission and the Ca., Dept. C.S.D. (Community Services & Development) signed an MOU so that IOU's (Investor Owned Utility Co. Reps (SCE, SCG, PG&E, SDG&E) and LIHEAP Service Providers (Energy Council) could meet and jointly create a plan for Leveraging and Statewide Program Coordination. LIHEAP clients would automatically qualify "categorically" for all CPUC-low income energy efficiency Weatherization programs through its newly named Energy Services Assistance Program (ESAP).**

# *Is it Magic or Just a Good Plan for Success? 5 Tips!*



**Diversity:** Obtain feedback from various ethnic groups, seniors, disabled, homeless, working families, youths and other populations in your area that make up your community

**Inclusiveness:** Remember Urban, Rural, Large and small agencies

**Innovation:** Try something new; think out of the box! Changes help.

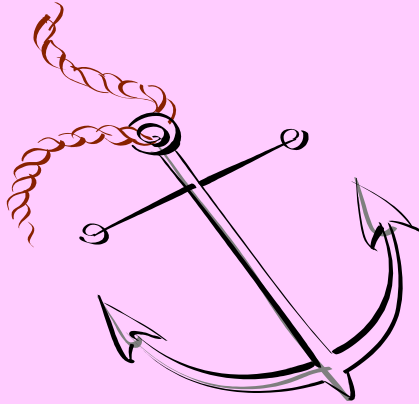
**Team Players:** Identify and Contact important Stakeholders, Potential Public, Private, Social and Faith Based Partners to help you Plan, Create and Implement programs needed in your community.

**Leadership:** Have your key leaders/role models commit to work together; develop trust and then move forward!

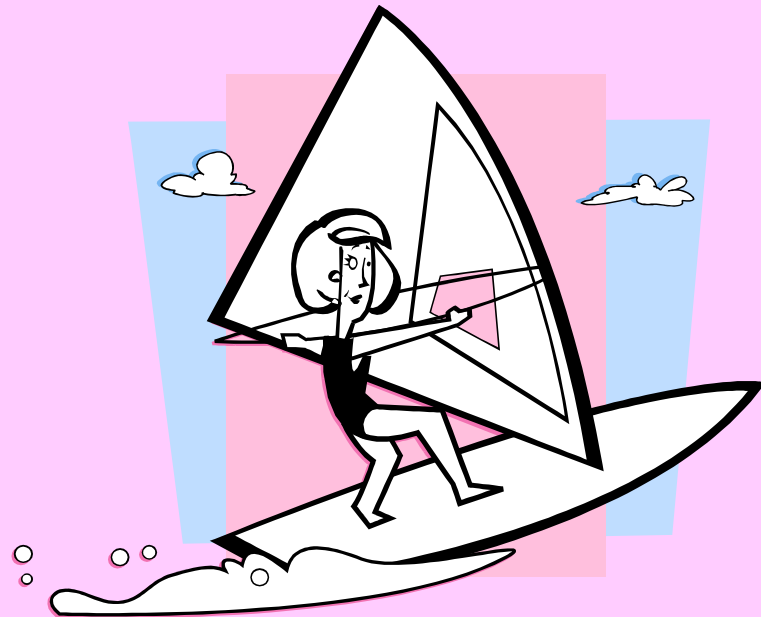
## Planned Responses and Solutions : Immediate yet Sustainable and Yet Varied in Approach/Strategy

- Agency: Identify your strengths and weaknesses; assess internal needs first.
- Seek input/help from local, state or regional collaboratives, key partners or other “Mentors”
- Enhance/increase your local capacity: utilize volunteers, interns, students, private resources/donors;
- Create Subcontracts, Sub-Site Agreements, non-monetary MOU’S (memorandum of understanding) with local providers to help process clients in many locales.
- Identify, Create and Leverage Resources when possible,
- Watch your Budget! Multiple Funding Sources is best!

# Is “Leveraging” the Anchor around your Neck or the Wind at your Sails?



- **Perception is everything! But nothing comes from nothing. It takes hard work to make a great Leveraging plan work well. It needs to be integrated into operations; a part of your way of doing business or it won't be successful. So let's try to be positive and look for ways to make it work.....**



# Tips on finding New Resources! Leveraging can help fill the GAP and minimize Duplication of Services!



- *What is Leveraging?*

*Some examples: Utility Programs: GAF, EAF, WX funding*

- *How are these new resources structured? (sources)*
- *Is it Cash or In-Kind?*
- *Is Legislative action involved?*
- *How do you implement these programs?*
- *Need an Executed Contract or an informal handshake?*
- *Can you identify and track it? Is it quantifiable?*
- *So, how do you get a handle on what to do first?*

# Set Your Priorities--Create Your Program

- **Identify the Problem:** What is the Impact? Statewide, Regional or Local? Does it encompass your city, county, region, state?
- **Partners:** Is it your primary responsibility? Are there Partners? What is their role and responsibility? Are you the sole agent/prime contractor or is it in conjunction with a coalition or collaborative?
- **Written Plan:** Describe purpose and operational aspects. Identify problem, targets, resources, relationships, budget (MOU's, Subcontractors or Sub-delegate Agencies).
- **Timeframe and Budget:** Assess dollars and resources (staffing, facilities, equipment, supplies) needed. Are there in-kind resources (donors, supplies, volunteers)? Create a task completion timeline to follow to stay on track.
- **In-kind Resources:** Students/Interns, Volunteers from Schools, AMERICORPS, ROP, STEP, Cal-Works, WIBS-One Stop Centers or other "Job Training" Programs.
- **Identify Goals and Objectives:** Target areas, populations, groups to be served.

# *To Develop a Leveraging Plan*

- *Key points to consider*
  - Time frame (how and when to implement)
  - Price and fiscal impact (compare budgets)
  - Link or join similar Activities (integration of services)
  - Maximize efficiency & effectiveness (staffing, etc)
- List and compare alternatives by cost
  - free vs. fee (staffing, office space, flyers, media ads)
- Join local community collaborations, faith based and/or social service organizational networks or create one if needed. Use or modify what is already in place but don't re-invent the wheel.
- Evaluate your staffing/facilities' capacity to handle more volume
  - volunteers vs. paid staff ; money for new hires? In-kind help?
- Identify Space Concerns--key community locations
  - negotiate free offsite office space and create outstations
  - Use local community groups that offer similar services but could offer more help with additional operational dollars.

# ***Mobilize Your Community***



- Know the area(s) to be served (your community).
- Identify and target any under-served populations, cities or communities.
- Introduce new outreach and intake methods:
  - mail applications, public service announcements, ethnic media contacts (newspaper, radio), community sites, marketing via INTERNET, web sites, downloaded applications,
- Try new locations: local hospitals, banks, schools, churches, swap meets, shopping centers, cash checking outlets, government/public offices, local politicians, utility payment centers, and malls!
- Develop rapport with your utility company reps! Jointly sponsor neighborhood fairs or focus groups.

## **Economic Challenges: When Liheap Funds “Dry Up” — Find New Outreach & Marketing Resources to Leverage**

- **Contact local banks, Business Groups, Fraternal Organizations, Food Chains, Office Supply outlets, Copy or Print stops, Utility Companies to become Sponsors of Your Company, Program or Clients. Save a bundle--Reduce E-Waste!**
- **Ask for Give-a-ways/Promo items: pens, pencils, fridge magnets, stress balls, mirror/comb set, posters, door hangers,**
- **Ask for in-kind printing, postage, marketing or brochures, educational videos, free multi-lingual newspaper ads, radio spots or Public TV interview.**
- **Tell Your Story! Attend area business networking meetings, join local city collaboratives. Get Involved with Politicians!**
- **Do presentations at churches, schools, Community and, Faith Based organizations, government welfare/social security offices, foreign consulates, WIB/One Stop Centers, local Universities, Community Colleges and attend Realtor Association meetings.**

# Need Resources? Join or Create Local Coalitions, Collaborations & Partnerships



- Identify the Stakeholders in your community; convene an emergency advisory task force.
- Contact utility companies, public government, community, political and private resources
- Use media (local cable TV, public TV stations, telephone companies). Send PSA'S, faxes. Make phone calls. Mail or deliver posters and flyers.
- Get business sponsors on your board or advisory.
- Obtain local sponsors for money, goods, discounts
- Identify other resources that can be coupled with yours to help. Track service gaps/needs within your community. Know the Statistics! Write proposals to local or other interested foundations.
- Obtain assistance and cooperation from your local 211 Call Center or I&R provider.

## **Last Resort! How to Reduce Capacity due to drastically Cut Budgets...**



- **Compare your old budget to the new anticipated budget.**
- **Work with CFO to prepare a new but reduced “Staffing Plan & Program Budget” Create Emergency Contingency Plan A, B and C based on dollars—the “if we get this, then” scenario.**
- **Research Different Business Models used by similar companies to find a new and perhaps “better fit” for your downsized program and/or Company.**
- **Create a Transition Plan and Timeframe with your HR dept. Have your Board and legal counsel review and Approve. Adjust your staffing and service levels accordingly.**
- **Review your community’s needs; prioritize services/delivery based on what your reduced program budget will allow.**
- **Alert the Community via your local partners, collaborations , networks, politicians and media.**
- **Develop a new Comprehensive Strategic Business Plan with financial and logistical implications for your Company**
- **Ask for help from Collaborative Partners, Funders, Experts!**

# *Agency Preparation, Anticipation, Self Monitoring & Evaluation = Success*

- Know your company and community's strengths and weaknesses.
- Staff, Board and Stakeholders should always be in the loop. Share problems, successes and plans for change. Give all affected a voice in how the business is run and services are delivered and reasons when change(s) is/are needed.
- Keep up staff morale. Use visuals to track progress or setbacks... Give awards; recognize initiative, loyalty and dedication. Supervise and Manage in a fair and consistent manner. Resolve small problems quickly before they get blown out of proportion!
- Share project's goals and progress with Board and staff. Small "bites" are less scary and easier to handle! Make needed changes quickly! Don't hesitate too long. The longer a problem lingers, the harder it is to fix!
- Staff's cooperation is crucial to the success of any Company. Treat all as important team members. Show respect to your clients. Expect the same in return.
- Agency Partners are very critical to a successful service delivery system.
- Always ask for feedback and suggestions. You have many experts at your disposal. Put their wealth of knowledge to good work.
- Tell Your Story Well! Show Your Pride but always take Responsibility for Mistakes as well! Never be ashamed of failure; it helps you succeed!
- **Good Luck with your Self Evaluations and Plans for Success!**