



## Strategic Plan, 2023-2027

### MISSION

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

### CURRENT STATE: OPERATION FUEL TODAY

As the only statewide energy assistance organization in the state of Connecticut, Operation Fuel is helping thousands of low- and middle-income residents who cannot afford their electricity, heating oil, or water bills. Its reputation for doing critical work and doing it well is solid and growing. Operation Fuel is recognized for excellence and a strong track record in the area of direct service; the organization truly understands the needs of low-income households and is committed to helping people emerge from energy poverty.

The staff is recognized for extensive expertise and for a keen understanding of the power dynamics connecting major corporate players in the energy sector, communities throughout the state, and rate payers. The data and knowledge Operation Fuel has gathered through its interactions with a statewide network of fuel banks and individual customers over many years are a source of unique insights; these insights are valuable not only to the organization itself, as it decides how to direct its focus and resources, but also to utility companies and elected public officials in an evolving regulatory and public policy landscape.

While helping vulnerable residents reduce energy burden and increase energy security is at the core of Operation Fuel's mission, the organization also embraces with passion its role as an advocate in the public square; it is able to leverage its strong reputation as a credible authority to draw attention to issues relating not only to energy affordability and efficiency, but also to energy equity and sustainability. Operation Fuel is able to identify struggles in the community that may not be obvious for decision makers.

As one external stakeholder whose input was sought during this round of strategic planning put it:

*Operation Fuel has a unique voice, especially compared to environmental groups addressing climate change. It approaches energy issues from the perspective of its clients who are struggling with energy bills; the organization is much more grounded in the lived experience of Connecticut residents, and yet Operation Fuel also is addressing issues comprehensively and incorporating climate change mitigation.*

Operation Fuel's increased visibility and input on legislation at the State Capitol is one area of significant organizational progress in recent years; Operation Fuel, often in coalition with others, is playing a greater role in helping to formulate state energy policy. Significant progress on the policy front—advocating at PURA, building coalitions, passing legislation—is a source of pride at the agency today.

As a result of enhanced marketing and communications efforts, the organization's public profile and visibility have increased well beyond the State Capitol. However, despite better messaging and marketing, the economic benefit Operation Fuel brings not just to the families it helps directly, but also to communities, utility companies, vendors, and even the health care system is not nearly well enough understood.

Awareness of Operation Fuel's mission and impact is still relatively low beyond the Hartford area, but efforts to expand awareness are beginning to bear fruit. It is worth noting that in the Bridgeport area, a higher profile and strategic alliances—with the Bridgeport Regional Energy Partnership, for example—recently yielded a six-figure grant for Operation Fuel from the Public Service Enterprise Group as well as energy grants from Operation Fuel to two large multi-family housing units, one of which, a nonprofit called Bridgeport Neighborhood Trust, was able to avert financial crisis as a result of this assistance. These opportunities to both generate and disseminate funds would not have been possible, according to staff, were it not for “our footwork in the city.”

Reflecting on where progress has been most substantial in the past two to three years, the staff and board cite and celebrate the launch of Operation Fuel's Better Homes and Buildings Program and addition of an apply-from-home application that provides households an alternative way to apply for assistance—in addition to the longstanding option to apply through a fuel bank. Staff and board also point to the professionalism of the staff and financial growth of the organization as additional sources of progress and pride.

Progress comes at a cost, of course. Staff is stretched thin and close to burning out, and staff turnover has been a challenge. Both management and the board are concerned that the scope of work Operation Fuel has taken on in the recent period (moving into new areas and taking on new initiatives) may ultimately dilute mission focus and compromise effectiveness and impact. Acknowledging how critical back-office operations are—while also appreciating that Operation Fuel's team now includes its first marketing director, a grants writer, a policy director, and a deputy director—the board advocates for continued investment in leadership, systems, and operational effectiveness as a necessary precursor—and enabler—of growth.

Investing in anything in a time of financial uncertainty is a challenge of its own. Operation Fuel is currently financially dependent on certain major funding streams. While \$2.1M in annual funding from the Systems Benefit Charge (SBC) has been stable and predictable, awards from the Public Utilities Regulatory Agency (PURA) are unpredictable and cannot be budgeted until they are formally awarded; some PURA awards are restricted to use for specific customers, while others are more open-ended and afford Operation Fuel more flexibility. Looking to the future, Operation Fuel sees a need to secure government funding that is more reliable and flexible while also unlocking the potential of the Add-a-Dollar program and exploring opportunities to increase revenues from both earned income and philanthropic support, including planned giving.

Staffing challenges in the recent period also can be attributed in part to Operation Fuel's evolution from strictly a direct-bill-payment-assistance organization to one that is committed to achieving energy equity. The fact that Operation Fuel today is essentially a hybrid organization—a combination of funder, social services agency, public policy advocate, and increasingly a STEM-fluent authority on energy issues—requires of certain staff more technical savvy and skills than were required previously. Energy work (at the level Operation Fuel aspires to be engaged) is different from social services work, so the type of employee Operation seeks to attract and retain is a bit more specialized than what one typically finds in the nonprofit sector talent pool.

## EXTERNAL TRENDS AND FORCES WITH IMPACT ON OPERATION FUEL—TODAY AND IN THE FUTURE

The price of fuel is rising. Inflation is at a 40-year high, and the cost of living is rising. The housing crisis is getting worse in Connecticut; rents are going up and there is growing housing insecurity. All of these factors mean more families are struggling to cope and to make ends meet.

The effects of climate change are revealing themselves in changing patterns of demand for direct bill payment assistance. Fuel is no longer the primary focus of need among those who reach out to Operation Fuel for support. A shift from Winter to Summer has occurred; 1100 applications in a five-week period (July-August) was powerfully indicative of the environmental shift. We cancelled Ice House, because winter is no longer reliably winter. Our environment is changing, and Operation Fuel must change with it.

The power grid is becoming more dynamic, which may create opportunities; but the private sector continues to rule when it comes to energy and the environment. Climate change is here—with obvious manifestations, as predicted—but climate change policies are unpredictable. Looming mid-term and national elections inject further uncertainty and unpredictability, not just regarding energy-related policies, but also relative to funding streams; a Republican administration could negatively affect Operation Fuel’s ability to secure federal grants through the Department of Energy (“Justice40” initiative) and the Environmental Protection Agency. Changes in the political landscape (political parties or government appointments) in Connecticut could potentially jeopardize funding streams from PURA, which depend upon who sits in seats of decision-making authority, although it should be noted that the idea of allocating funds to Operation Fuel is not controversial and the practice has become essentially embedded at PURA.

The same pressures and worries that affect the families Operation Fuel serves are taking a toll on the physical and mental health of Operation Fuel’s own staff. Pandemic and rising cost of living affect everyone. To some extent these factors have contributed to staff turnover at Operation Fuel, but other factors certainly are in play as well. Staff recruitment and retention represent a more challenging issue in today’s environment than almost any time previously because of staff shortages across essentially all industry sectors; competition for talent is intense. The pandemic had a seismic impact not only the labor market in general (through the “great resignation,” for example), but also on the attitudes and expectations (often unrealistic) of many in the workforce; this has resulted in workplace culture challenges not previously an issue for organizations of all types and sizes.

## KEY QUESTIONS CONFRONTING OPERATION FUEL AS IT PLANS FOR THE FUTURE

Strategic planning affords organizations the opportunity to step back from daily operations and engage “big” questions that typically are not in sharp focus during the daily execution of mission and delivery of programs and services. Such questions begin to shed light on the issues and aspirations that must be addressed in the next strategic plan. Among the questions identified as part of this round of planning for Operation Fuel were these:

- How can we do a better job demonstrating not only the need for our program and organization, but also the value we bring, the impact we are having, and both the social and financial return on an investment in Operation Fuel’s mission?
- With what other organizations might we collaborate in order to support our clients with other services or wraparound support structures that promote energy savings and overall wellbeing?

- What does “energy independence” look like? How might we change the system we operate in— where it takes 20 or so programs to rescue someone from energy poverty?
- What role should Operation Fuel play relative to climate-related policy and climate justice?
- As the energy and equity conversation pivots, this will create opportunities for Operation Fuel to move into additional program areas such as conservation and systems replacements and to take a systems-based approach to energy poverty; will Operation Fuel avoid impact-diluting mission creep, recognize that growth is not always the best goal, and remember that its core purpose is to use its resources to help the most people with the most amount of financial support possible?
- How can we ensure the Operation Fuel remains operationally nimble and retains its ability to shift and adapt as the environment in which it operates shifts unpredictably?
- As the energy and equity conversation pivots, there will be more resources and also more stakeholders vying for a piece of the action (and pie); how will we assure new “players” do not encroach on Operation Fuel’s leadership role or divert current funding streams?
- What is the right niche for us? Who are the right partners?
- Can we include clean energy advocates in a coalition to advocate for equity issues (such as high electricity rates)?
- How could Operation Fuel and utility companies work better together to serve our mutual customers better?
- How can we increase predictable, reliable, sustainable streams of revenue?
- How will we attract *and retain* the best-qualified staff who are committed to our mission?
- How will we plan for staffing and deploy staff resources most strategically?
- How will we constitute, organize and leverage our board of directors so that its impact as a governing body and as a vehicle for connecting to and tapping allies and resources is maximized for organizational benefit?

#### ENVISIONED FUTURE STATE: “OPERATION FUEL 5.0”

Operation Fuel will turn 50 years old in 2027. As we look ahead to this great milestone, we envision an organization that is in some ways the same as it is today and in other ways different, better, or stronger.

By 2027, Operation Fuel will remain focused on energy poverty issues and will still be a critical source of financial assistance to low-income families that do not qualify for state programs but still need help paying their bills because of where they live and what their income levels are. The organization will continue to be a source of peace of mind and hope to the people in our state who too often believe they are at the mercy of a system that in their eyes does not seem to care about them or their plight. The amount of assistance Operation Fuel provides will have increased, and so too will the sense of independence, dignity, and pride on the part of the people we support by helping them navigate a system that at times feels hostile.

Through a combination of improved marketing and expanded community outreach, the organization will be reaching more people who need the support Operation Fuel provides, including people who may not have heard of the organization. Operation Fuel will be thinking of its relationship with clients as a long-term engagement and, as a result of this mindset, will be taking a more holistic approach to helping people overcome their economic vulnerability. The organization will be partnering with other social service organizations to connect shared clients to the wraparound services they need.

In its advocacy role, Operation Fuel will continue to lobby for stronger energy equity and clean energy policy in Connecticut and for expanded access to weatherization and energy-efficiency programs. It will be building an expanded coalition of advocates for energy efficiency and renewability and thus taking a more holistic approach to problem solving around policy issues. Operation Fuel's partnerships will include collaborations with other nonprofit and community-based organizations that share our vision for energy equity and sustainability and that wish to add their voice to ours. More people and the media will be better informed about energy vulnerability and inequities as a result of Operation Fuel's increased attention on public education—targeting fuel banks, community-based organizations, homeowners and renters.

Operation Fuel and utility companies will be taking a more proactive and collaborative approach on issues of concern to our mutual customers. The utility companies will value the service we bring and value we add to a far greater extent than they do currently. Operation Fuel will be helping utility companies reach our populations and audiences with their energy efficiency programs by serving as a facilitator of this sort of connection and communication. Reflecting a shift in mindset and a new sense of shared purpose, utility companies will feel more motivated to partner with Operation Fuel in addressing the energy insecurity and vulnerability of low- and middle-income households in Connecticut.

By 2027 Operation Fuel will be taking a more strategic approach to change management, as reflected in mindset, processes, systems, and staff buy-in. The organization will be doubling down on its core competencies: direct assistance and advocacy. Decisions about whether to pursue new programs or other opportunities that present themselves will be made using a set of clearly established criteria. An inclusive culture of decision making will have been cultivated. Evaluation tools will be stronger, allowing the organization to expand data collection and make a clearer, more compelling case for the value of its direct assistance and Better Homes and Building programs. Enhanced data collection and evaluation capacity will ensure the Operation Fuel remains a credible, scientific voice for the most vulnerable in our state.

Operation Fuel will have built an even stronger and more stable staff team. Through cross-training and professional development, institutional knowledge in the senior ranks will be deep and wide enough to assure any planned or unexpected transitions do not create leadership gaps or crises. Technical expertise on staff relative to energy issues will continue to expand. Marketing and fundraising capacity will have been increased; and the policy department will be adequately staffed and better equipped to manage legislative cycles and deepen relationships with key governmental stakeholders. The staff will embrace a culture of open communication, trust, and shared accountability. The board will have a clearer sense of its distinct and critical role relative to the health and sustainability of Operation Fuel; and individual board members will be more actively and more consistently engaged as effective advocates, ambassadors, friend raisers and fundraisers on Operation Fuel's behalf.

Assuming no change in the political dynamics or power balance in the state, Operation Fuel's funding from three critical sources—Add-a-dollar, System Benefits Charge and PURA fines—will remain substantial and stable. Through potential design tweaks to its direct assistance program models, adapting client segmentation approaches used by peer organizations in other states, Operation Fuel may be making stronger connections between its mission and the philanthropic priorities of foundations and other institutional funders, resulting in new lines of private funding. Its base of individual donors, including planned givers, will have expanded significantly, and it will have found ways to monetize its relationship with energy utility companies in ways that generate sustainable earned income.

## OVERARCHING GOALS

### ***Relating to Our Mission and Its Impact***

1. **Be a lifeline to low- and middle-income households** during home utility emergencies, and help them navigate a path toward more affordable, more efficient, and more environmentally responsible energy and water consumption

#### KEY STRATEGIES:

- a. Remove barriers that block people from accessing utility assistance applications (either at a community-based fuel bank or by via the Internet), and ensure there are no biases in the application process
  - b. Apply a case-management approach to help direct bill assistance clients develop short-term and long-term payment plan strategies and facilitate connections to additional social services that could guide them toward greater financial self-sufficiency
  - c. Expand awareness of and utilization of the Homelessness Intervention and Prevention Program (HIPP) to help families and individuals experiencing or threatened by homelessness pay utility bills and set up payment plans for past bills
  - d. Build on our pilot Better Homes and Buildings Program (BHBP) to connect more low- to moderate-income (LMI) homeowners and renters to qualified, licensed vendors for removal of health and safety hazards, remediation of weatherization barriers, and installation of heat pumps
  - e. Nurture and grow Operation Fuel’s collaboration with private industry and system planners to help vulnerable communities adopt clean energy technologies
  - f. Develop organizational capacity and a plan to address energy burden and serve low- to moderate-income households in adjacent New England states that do not have statewide fuel banks
  - g. Continue to develop and pursue the vision of establishing a “Hartford Green” campus where mission-linked organizations would co-locate as a one-stop center for community education and assistance relating to energy affordability, efficiency, and sustainability
2. **Be a voice in the public square advocating on behalf of economically vulnerable and energy-insecure residents** in our state, and use Operation Fuel’s voice to amplify calls for environmental justice emanating from other organizations

#### KEY STRATEGIES:

- a. Continue to serve as the leading advocate in Connecticut for year-round low-income utility assistance and for reducing energy burden among vulnerable populations
- b. Grow relationships with households, grassroots activists, and community organizers to set policy agendas that reflect priorities and needs of the most vulnerable
- c. Serve as a convener and coalition builder to raise public understanding of structural issues and systemic inequities in utility rates, and to advance proven strategies for reducing energy poverty and environmental injustice
- d. Frame energy insecurity as a health issue, and help decision makers and funders recognize the connection between energy assistance and health

- e. Take a proactive, systems-change approach to combating the rising price of fuel and water and promoting local production of clean energy at scale to reduce its cost to consumers
  - f. Champion public policies that support increased investment in, and target clean energy jobs to, distressed communities
3. **Be visible across Connecticut** raising public awareness of Operation Fuel’s mission, why it matters, the human and community impact it has, and opportunities for allies to engage in supporting it

KEY STRATEGIES:

- a. Improve, streamline, and more widely disseminate educational resources designed to expand the public’s understanding of energy burden and the direct assistance offered by Operation Fuel
- b. Connect with organizations that can help Operation Fuel spread its message to targeted vulnerable populations
- c. Expand our visibility and forge new grassroots connections by participating in events across the state and conducting an increasing number of community “listening” sessions
- d. Continue to gather human-impact stories to ensure regular deposits into the “testimonial bank,” and engage clients as messengers to help spread the word about mission impact
- e. Launch community-based awareness campaigns that engage clean-energy “ambassadors” (i.e., adopters) to educate neighbors about the technology and town-approved offerings
- f. Leverage staff and board member social media platforms strategically to expand awareness of and engagement with Operation Fuel
- g. Change the organization’s name to more clearly reflect its expanded and evolving mission, and launch an associated public relations campaign

***Relating to How We Will Sustain Our Mission***

4. Expand and diversify Operation Fuel’s **funding base** in ways that promote short-term fiscal flexibility and long-term financial stability

KEY STRATEGIES:

- a. Create a comprehensive development plan that establishes goals and strategies for increasing annual giving, major giving, and planned giving
- b. Set and publicize ambitious fundraising targets as part of a multi-year fundraising campaign plan tied to Operation Fuel’s upcoming 50<sup>th</sup> anniversary
- c. Expand corporate partnerships strategically
- d. Leverage Operation Fuel’s recent grant from the Robert Wood Johnson Foundation to seek funding from more regional and national foundations and from organizations whose philanthropic priorities typically include public health issues
- e. Identify and compete for federal resources through the Infrastructure Investment and Jobs Act (IIJA)
- f. Pursue enhancements to the Add-a-Dollar program that will yield incremental revenue for Operation Fuel, including from commercial customers

- g. Continue to explore opportunities for revenue growth through mission-aligned social enterprise ventures that fill an important need in the community
- 5. Recruit and retain experienced, dedicated and diverse **staff and board members** who are deeply committed to Operation Fuel’s mission and personally invested in promoting positive outcomes for both the organization itself and the people it supports

KEY STRATEGIES:

- a. Leverage attractive compensation packages to recruit and retain skilled and diverse staff in a highly competitive labor market
  - b. Mitigate risk of knowledge loss in the event of unanticipated departures through intentional information sharing across teams and cross training with purpose
  - c. Provide staff ongoing opportunities for skills training, professional development, and cultivation of leadership competencies
  - d. Expand market research and data collection capacity in order to buttress public messaging and sustain credibility as a scientific voice on issues relating to energy insecurity and inequities
  - e. Grow and diversify the board of directors to fill strategic gaps in representation, experience, and expertise
  - f. Continue to promote interaction between the staff and board of directors to deepen a sense of common purpose and mutual accountability
- 6. Ensure **policies, processes, management practices and physical infrastructure** promote effectiveness and efficiency in a **work environment** that is supportive, inclusive, and collaborative

KEY STRATEGIES:

- a. Develop internal procedures and policies by department
  - b. Cultivate a workplace culture that prioritizes teamwork, promotes camaraderie and esprit de corps, and encourages employee wellness
  - c. Relocate office to larger space that is more conducive to collaborative teamwork and allows for growth
  - d. Develop a more robust technology infrastructure that adequately supports operational needs while also promoting employee satisfaction, success, and safety
  - e. Align board goals, agendas, and committee structures with identified organizational needs and priorities



## APPENDIX: ILLUSTRATIVE LIST OF ACTION ITEMS AND INITIATIVES

*(Will not be part of final strategic plan document but rather will serve as fodder for year-one (and thereafter annual) implementation/action planning by staff teams and board committees)*

- Ensure OPF's first three-day conference, in partnership with CT Power Energy Society, is a success
- Expand number of people and organizations signed up for Add-a-Dollar; in collaboration with Eversource launch an ad campaign to promote Add-a-Dollar
- Participate in as many mission-related panel discussions as possible
- Take steps to grow OPF's email distribution list
- Make more extensive use of QR codes in communications and outreach efforts
- Create a plan to be more visible on college campuses
- Target and reach a growing population of younger adults struggling to pay their utility bills
- Increase the number of educational sessions focused on weatherization
- Install heat pumps in 10 homes in Bridgeport, helping people reduce energy burden and improve indoor air quality
- Successfully achieve all goals of the Healthy Communities grant (OPF's first federal grant)
- Advocate/lobby for targeting weatherization and clean-energy incentives at low- and middle-income residents
- Partner with the medical establishment, including hospital social workers, to connect people who have been hospitalized for reasons related to limited energy access to information about available assistance and energy-reducing strategies
- Partner with domestic violence shelters to connect victims of utility weaponization with the Homeless Intervention Program
- Partner with social workers and family resource centers at schools and childcare centers across the state to disseminate information about energy assistance and conservation to residents struggling to make ends meet
- Partner with the CT Bureau of Education and Services for the Blind (and possibly CRIS Radio) to help OPF reach members of the blind population who may be struggling with energy burden
- Tap into foodbanks across the state to disseminate information about OPF's payment assistance programs
- Tap into programs for first-time home buyers to offer an educational session on energy efficiency/conservation and Operation Fuel's offerings
- Conduct and publish results of an energy affordability study every three to five years to maintain OPF's role and reputation as the leading scientific voice for the most vulnerable
- Continue to advocate for a low-income discount rate structure that can be approved by the regulators
- Do more contract work, such as identifying qualifying customers for Eversource shared solar, and for Green Bank's battery storage program

- Encourage landlords to conduct energy audits; connect landlords with the Energy Efficiency Board
- Develop and implement Operation Fuel's first branding policy
- Develop a policy and protocols to guide who speaks for the organization officially and is authorized to communicate with the media
- Develop more printed collateral (relating to OPF education, advocacy, direct assistance) for dissemination in community centers, schools, primary care offices, libraries)
- Conduct more "seasonal" marketing (to reinforce that OPF is a year-round program/organization)
- Do more market/donor segmentation to allow more targeted messaging/marketing
- Leverage the customer/communications networks of utility companies to help broadcast OPF's message and reach targeted populations
- Apply for a technical assistance grant from the Hartford Foundation for Public Giving to support hiring of a development (fundraising) consultant
- Spearhead an initiative to encourage medical establishments/hospitals to include questions relating to energy consumption/access in their intake data gathering and discharge paperwork
- Develop a set of organizational core values to unify staff and board members around a common set of guiding principles that also signal to the public what Operation Fuel stands for
- Streamline the board of directors' portal
- Train/self-train all staff in Microsoft basics (Excel, Teams, Outlook)
- Improve our processing speed and communication to our team and external audiences when there are significant developments at PURA that relate to ratepayers and our clients
- Consider interns or policy fellows to focus on specific policy issues (e.g., water, battery storage)
- Do more utility clinics
- Provide more regular legislative, policy updates
- Leverage and continue to promote our generous benefits package as a differentiator and recruitment "hook" in a competitive jobs market
- Partner with Girls for Technology and with community colleges to create a pipeline to future employees
- Through the board's governance committee create a board development/recruitment plan designed to grow the board and fill representation/experience gaps of strategic significance relative to OPF's short-term needs and longer-term goals (e.g., housing advocacy, medical community, environmental justice organizations)