

Better Buildings Residential Network Marketing & Outreach Peer Exchange Call Series: Stakeholder Mapping

June 26, 2014

Call Slides and Discussion Summary



Agenda

- Welcome
- Call Logistics and Introductions
- Opening Polls
- Residential Network and Peer Exchange Call Overview
- Stakeholder Engagement:
 - Terms and definitions
 - Stakeholder engagement strategy
- Stakeholder Mapping:
 - What it is
 - Why it's important
 - Scenarios
- Better Buildings Residential Network Voluntary Initiative: Partnerships
- Closing Poll





Call Participants

- Boulder County, Colorado
- Build It Green
- Center for Energy and Environment
- City of Farmington Hills, Michigan
- City of Milwaukee, Wisconsin Sustainability Office
- Ecolibrium3
- Efficiency Nova Scotia
- Elevate Energy (Chicago, Illinois)
- Greater Cincinnati Energy Alliance

- Green Coast Enterprises (New Orleans, Louisiana)
- International Center for Appropriate and Sustainable Technology
- NeighborWorks of Western Vermont
- Retrofit Baltimore
- Solar and Energy Loan Fund (St. Lucie County, Florida)
- StopWaste





Better Buildings Residential Network

- Better Buildings Residential Network: Connects energy efficiency programs and partners to share best practices to increase the number of American homes that are energy efficient.
 - Membership: Open to organizations committed to accelerating the pace of existing residential upgrades. Commit to providing DOE with annual number of residential upgrades, and information about benefits associated with them.
 - Benefits:
 - Peer Exchange Calls
 - Tools, templates, & resources
 - Newsletter updates on trends
- Recognition: Media, materials
- Optional benchmarking
- Residential Solution Center

For more information & to join, email bbresidentialnetwork@ee.doe.gov.

- Better Buildings Residential Network Group on Home Energy Pros
 - Join to access:
 - Peer exchange call summaries and calendar
 - Discussion threads with energy efficiency programs and partners
 - Resources and documents for energy efficiency programs and partners

http://homeenergypros.lbl.gov/group/better-buildings-residential-network





Better Buildings Residential Network Group on Home Energy Pros Website





Peer Exchange Call Series

- There are currently 6 Peer Exchange call series:
 - Data & Evaluation
 - Financing & Revenue
 - Marketing & Outreach
- Multifamily/ Low-Income Housing
- Program Sustainability
- Workforce/ Business Partners
- Calls are held the 2nd and 4th Thursday of every month at 12:30 and 3:00 ET
- Upcoming calls:
 - July 10: Program Sustainability Incorporating Behavior Change Efforts into Energy Efficiency Programs
 - July 10: No second call due to summer vacations
 - July 24: Data & Evaluation Cost-Effective, Customer-Focused and Contractor-Focused
 Data Tracking Systems
 - July 24: Financing Effective Loan Program Design and Integration with Contractors
- Send call topic ideas or requests to be added to additional call series distribution lists to <u>peerexchange@rossstrategic.com</u>.





Poll Results: Familiarity with Stakeholder Mapping

- On a range of 1 to 5, how familiar are you with stakeholder mapping?
 - 1 (not at all familiar): 27%
 - **2**: 55%
 - **3**: 9%
 - **4**: 9%
 - 5 (very familiar): 0%





Poll Results: Engagement in Stakeholder Mapping

- What is your program's current engagement in stakeholder mapping activities?
 - Do not currently conduct any stakeholder mapping: 20%
 - Individual staff have a subjective idea of stakeholders that are more or less important, but it's not written down: 30%
 - Staff collectively discuss stakeholders that are more or less important, but in a subjective and informal way: 30%
 - My institution formally prioritizes stakeholders based on a set of criteria in a database or other organized method: 20%





Stakeholder Overview



Stakeholder Engagement

Terms and Definitions:

- Stakeholders: Those groups who affect and/or could be affected by an organization's activities, products or services and associated performance.
- Stakeholder engagement: The process used by an organization to engage relevant stakeholders for a purpose to achieve accepted outcomes.
- Stakeholder mapping: A process to clarify and categorize stakeholders by visualizing which interests they represent, the amount of power they possess, whether they represent inhibiting or supporting factors for an organization to realize its objectives, or methods in which they can be engaged.





Stakeholder Strategy

Successful engagement depends on understanding:

- Why: The strategic objective you want to accomplish by engaging stakeholders
- What: The scope of the engagement
- Who: Which stakeholders need to be involved in the engagement (contractors, utilities, state/local governments, nonprofits, etc.)





Stakeholder Mapping



What It Is

Four Phases:

- 1) <u>Identification</u>: Listing relevant groups, organizations, and people
- **Mapping:** Visualizing stakeholder type, capacity, and interests
- 3) <u>Analysis</u>: Understanding relationship to strategic objectives and other stakeholders
- 4) Prioritizing: Ranking stakeholder relevance and identifying material issues

Engagement Strategy

Stakeholder Mapping

Preparation

Engagement

Action Plan



Why It's Important

Benefits:

- Basis for stakeholder engagement
- Improve planning
- Risk management
- Identify new opportunities
- Strengthen strategic position in market
- Partnership preparation
- Improve organizational performance

Engagement Strategy

Stakeholder Mapping

Preparation

Engagement

Action Plan



Stakeholder Mapping Process

Quality characteristics:

- Process: The stakeholder mapping process is as important as the result
- <u>People</u>: The quality of the process depends heavily on the knowledge of the people participating
- <u>Diversity</u>: Gather a cross-functional group of internal participants
- Insularity: Identify knowledgeable sources external to the organization, and reach out for input and participation
- <u>Facilitation</u>: Identify a resource to facilitate your work, and capture your work in writing to help with future engagement





Stakeholder Identification



Stakeholder Mapping







Columns:

- Organization name
- Organization type
- City
- State
- Priority
- Members/Affiliates

- Information dissemination
- Policy
- Research
- Workforce
- Health





| Organization/Stakeholder Name | Organization Type | City | State | Priority v | Program Administrat mplement | DOE Progra | Members/ Affiliates | Information dissemination | Policy | Research | Workforce | Health |
|-------------------------------|-------------------|--------------------------|----------|-------------|------------------------------------|------------|------------------------|------------------------------|--------|----------|-----------|--------|
| A | Non-Profit | Washington | DC | Uber Tier | | | | | | | | |
| 8 | Non-Profit | Pittsburgh | PA | Uber Tier | | | | | | | | |
| c | Non-Profit | Arlington | VA | Uber Tier | | | | | | | | |
| D | Utility | Phoenix | AZ | First Tier | | | | | | | | |
| 3 | Government | Thousand Oaks | CA | First Tier | | | | | | | | |
| F | Non-Profit | Somerville | MA | First Tier | | | | | | | | |
| G | Trade Association | Washington | DC | Second Tier | | | | | | | | |
| Н | Business | Indianapolis | IN | Second Tier | | | | | | | | |
| 1 | Non-Profit | Atlanta | GA | Second Tier | | | | | | | | |
| 1 | Government | San Francisco | CA | Second Tier | | | | | | | | |
| K | Academia | Lexington | KY | Third Tier | | | | | | | | |
| ι | | | | Third Tier | | | | | | | | |
| М | MISC Business | Springfield Las Vegas | MI NV | Third Tier | | | | | | | | |





| 1 | Organization/Stakeholder Name | Organization Type | City | State | Priority v 1 | Program Administrat mplement | DOE Progra | Members/ Affiliates | Information dissemination | Policy | Research | Workforce | Health |
|---|-------------------------------|-------------------|---------------|-------|--------------|------------------------------|------------|------------------------|---------------------------|--------|----------|-----------|------------|
| | Α | Non-Profit | Washington | DC | Uber Tier | | | | | | | | |
| | 8 | Non-Profit | Pittsburgh | PA | Uber Tier | | | | | | | | |
| | c | Non-Profit | Arlington | VA | Uber Tier | | | | | | | | |
| | D | Utility | Phoenix | AZ | First Tier | | | | | | | | |
| | E | Government | Thousand Oaks | CA | First Tier | | | | | | | | |
| | F | Non-Profit | Somerville | MA | First Tier | | | | | | | | |
| | G | Trade Association | Washington | DC | Second Tier | | | | | | | | |
| | Н | Business | Indianapolis | IN | Second Tier | | | | | | | | |
| | ı | Non-Profit | Atlanta | GA | Second Tier | | | | | | | | |
| | J | Government | San Francisco | CA | Second Tier | | | | | | | | |
| | К | Academia | Lexington | KY | Third Tier | | | | | | | | |
| | L. | MISC | Springfield | MI | Third Tier | | | | | | | | |
| | М | Business | Las Vegas | NV | Third Tier | | | | | | | | |
| | Organiza | tion/Stakeholo | der Name | • | Or | ganizatio | on Type | ~ | City | State | • | Priority | ₽ ↑ |







| Organization/Stakeholder Name | Organization Type | City | State | Priority v 1 | Program Administrat mplement | DI |
|-------------------------------|-------------------|---------------|-------|--------------|------------------------------------|----|
| А | Non-Profit | Washington | DC | Uber Tier | | |
| В | Non-Profit | Pittsburgh | PA | Uber Tier | | |
| c | Non-Profit | Arlington | VA | Uber Tier | | |
| D | Utility | Phoenix | AZ | First Tier | | - |
| E | Government | Thousand Oaks | CA | First Tier | | |
| F | Non-Profit | Somerville | MA | First Tier | | |
| G | Trade Association | Washington | DC | Second Tier | | |
| Н | Business | Indianapolis | IN | Second Tier | | |
| I | Non-Profit | Atlanta | GA | Second Tier | | |
| J | Government | San Francisco | CA | Second Tier | | |
| К | Academia | Lexington | KY | Third Tier | | |
| Ĺ | MISC | Springfield | MI | Third Tier | | |
| M | | | | \ | | |

| Priority | | | |
|-------------|----------|-----------|--------|
| Uber Tier | | | |
| Uber Tier | Research | Workforce | Health |
| Uber Tier | | | |
| First Tier | | | |
| First Tier | | | |
| First Tier | | | |
| Second Tier | | | |
| Second Tier | | | |
| Second Tier | | | |
| Second Tier | | | |
| Third Tier | - | | |

Third Tier

Third Tier





Key:

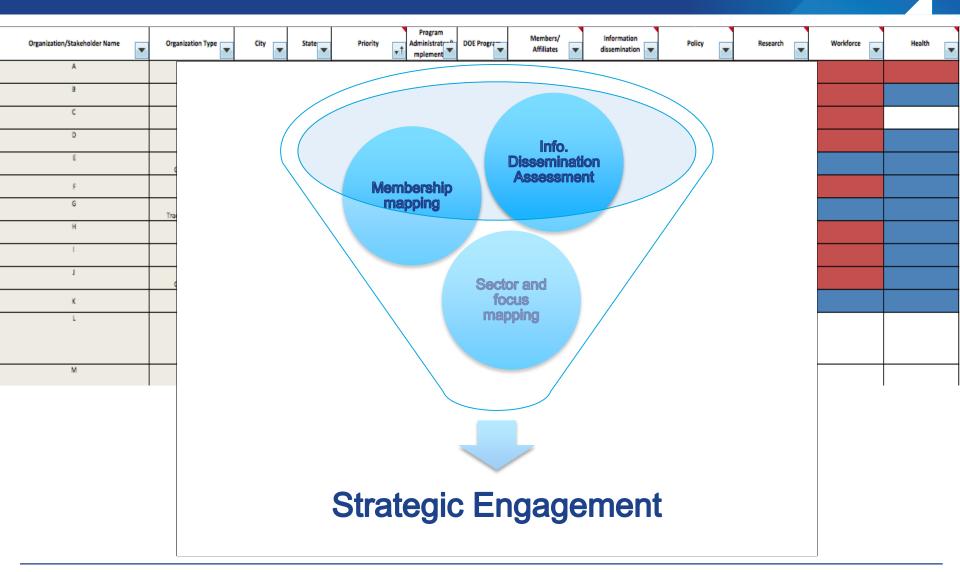
- <u>Uber</u>: Absolutely vital to organization's success; high profile; politically influential; squeaky wheel;
- First: Very important to organization's success; large sphere of influence; Depth of expertise; Breadth of capacity
- <u>Second</u>: Facilitator (Gladwell); important, but not necessarily in organization at this time
- Third: General interest; new player in field





Scenario 1: Strengthen Information Dissemination





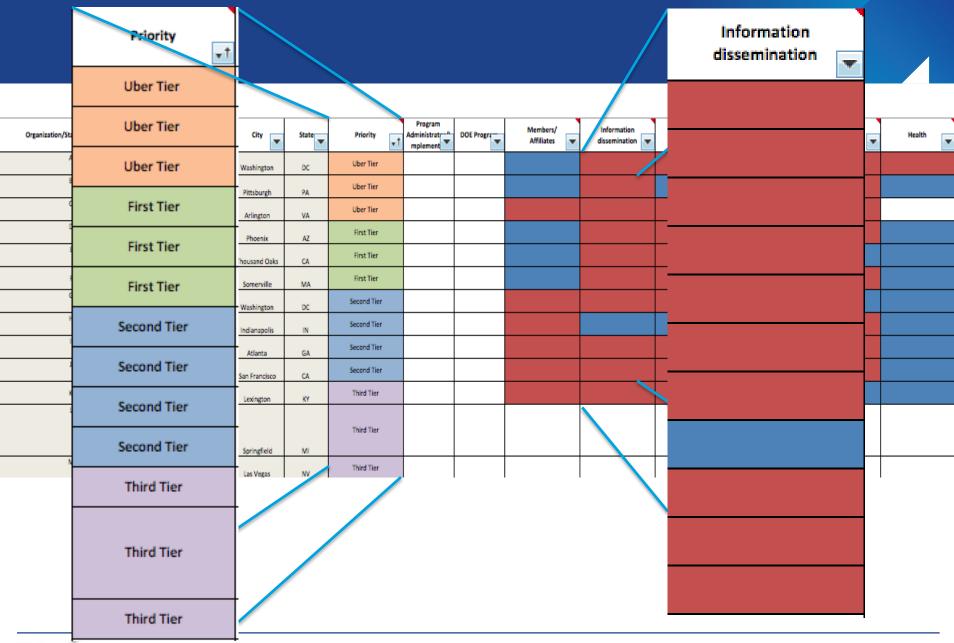




City State Priority Mapping Criteria $\overline{}$ ΨÎ **Uber Tier** Washington DC **Uber Tier** Pittsburgh PA Organization Type State Administrat ** mplement Health Organization/Stakeholder Name City Priority v **Uber Tier** Arlington VA **Uber Tier** Non-Profit Washington DC First Tier **Uber Tier** PA Non-Profit Pittsburgh Phoenix ΑZ **Uber Tier** Non-Profit Arlington First Tier D First Tier Thousand Oaks CA Utility Phoenix ΑZ First Tier Thousand Oaks CA Government First Tier Somerville MA First Tier MA Non-Profit Somerville Second Tier Second Tier DC Trade Association Washington DC Washington Second Tier Indianapolis IN Second Tier Second Tier Non-Profit Atlanta GA Indianapolis IN Second Tier CA Government San Francisco Second Tier Third Tier Academia Lexington KY Atlanta GA Second Tier Third Tier CA San Francisco MISC Springfield Third Tier Third Tier Business ns Vegas KY Lexington Third Tier Springfield MI Third Tier Las Vegas NV

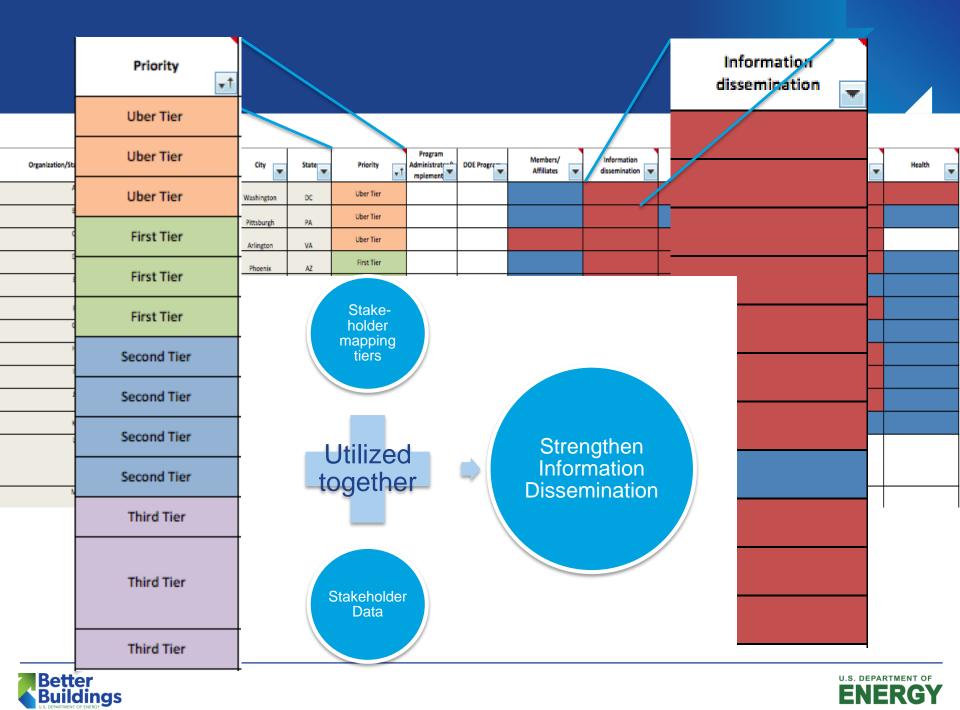






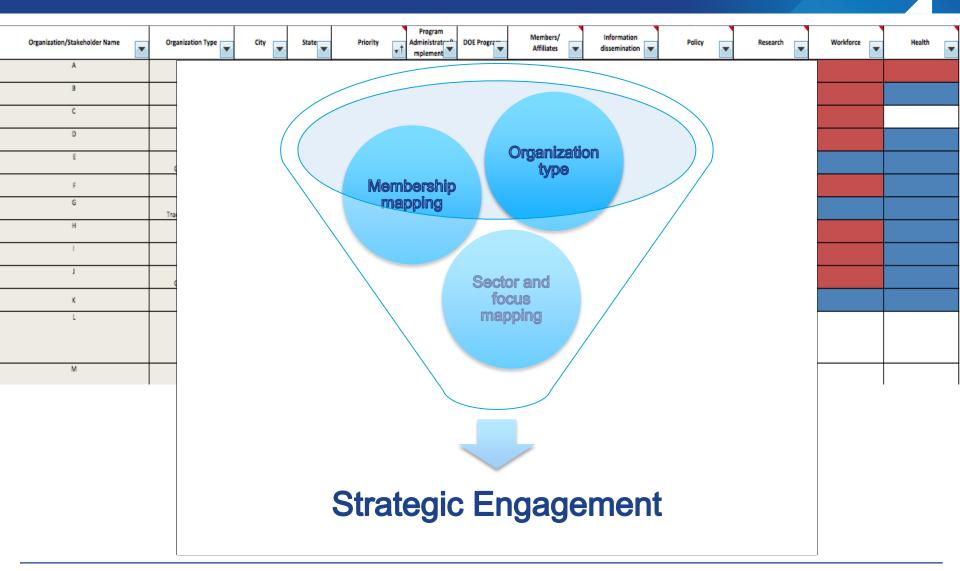


U.S. DEPARTMENT OF ENERGY



Scenario 2: Fill Stakeholder Gap









City State Priority Mapping Criteria V $\overline{}$ ΨÎ **Uber Tier** Washington DC **Uber Tier** Pittsburgh PA Organization Type State Administrat ** mplement Health Organization/Stakeholder Name City Priority v **Uber Tier** Arlington VA **Uber Tier** Non-Profit Washington DC First Tier **Uber Tier** PA Non-Profit Pittsburgh Phoenix ΑZ **Uber Tier** Non-Profit Arlington First Tier D First Tier Thousand Oaks CA Utility Phoenix ΑZ First Tier Thousand Oaks CA Government First Tier Somerville MA First Tier MA Non-Profit Somerville Second Tier Second Tier DC Trade Association Washington DC Washington Second Tier Indianapolis IN Second Tier Second Tier Non-Profit Atlanta GA Indianapolis IN Second Tier CA Government San Francisco Second Tier Third Tier Academia Lexington KY Atlanta GA Second Tier Third Tier CA San Francisco MISC Springfield Third Tier Third Tier ns Vegas Business KY Lexington Third Tier Springfield MI

Las Vegas

NV





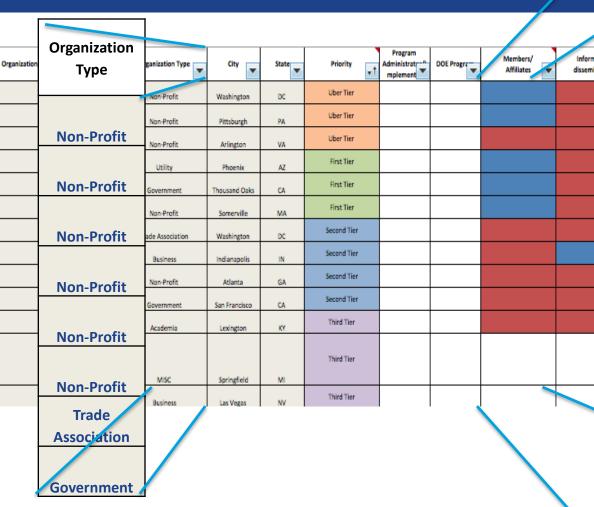
Third Tie:

Mapping Criteria **Organization Type** Health Organization/Stakeholder Name Organization Type Policy Research Workforce State emination w Non-Profit Uber Non-Profit Washington DC Uber PA Non-Profit Pittsburgh Uber Non-Profit Arlington **Non-Profit** D First Phoenix ΑZ Thousand Oaks CA Government First ' MA **Non-Profit** Non-Profit Somerville Trade Association DC Washington Indianapolis Non-Profit Non-Profit Atlanta GA CA Government San Francisco Third 1 Academia Lexington KY Non-Profit Third MISC Springfield Third Business Las Vegas **Non-Profit Trade Association**

Government













Mapping Criteria Members/ **Affiliates** Organization DOE Progra Members/ State Organization Administrat ** mplement ganization Type City Priority Type Affiliates **Uber Tier** von-Profit Washington DC **Uber Tier** Non-Profit PA Pittsburgh Non-Profit **Uber Tier** Non-Profit Arlington First Tier Utility **Non-Profit** Government Stake-Non-Profit holder Non-Profit ade Association mapping tiers Non-Profit Non-Profit Government Academia Strengthen Non-Profit Utilized stakeholder together MISC Non-Profit reach Business **Trade** Association Government Stakeholder Data





Scenario 3: New Focus Area



| | | | | | | | | | | | | _ | _ | | | |
|-------------------------------|-------------------|---------------|-------|-------------|----|------------------------------------|------------|------------------------|---|---------------------------|--------|----------|-----------|---|--------|---|
| Organization/Stakeholder Name | Organization Type | City | State | Priority | ΨŤ | Program Administrat mplement | DOE Progra | Members/ Affiliates | • | Information dissemination | Policy | Research | Workforce | • | Health | • |
| A | Non-Profit | Washington | DC | Uber Tier | | | | | | | | | | | | |
| 8 | Non-Profit | Pittsburgh | PA | Uber Tier | | | | | | | | | | | | |
| С | Non-Profit | Arlington | VA | Uber Tier | | | | | | | | | | | | |
| D | Utility | Phoenix | AZ | First Tier | | | | | | | | | | | | |
| E | Government | Thousand Oaks | CA | First Tier | | | | | | | | | | | | |
| F | Non-Profit | Somerville | MA | First Tier | | | | | | | | | | | | |
| G | Trade Association | Washington | DC | Second Tier | | | | | | | | | | | | |
| Н | Business | Indianapolis | IN | Second Tier | | | | | | | | | | | | |
| 1 | Non-Profit | Atlanta | GA | Second Tier | | | | | | | | | | | | |
| 1 | Government | San Francisco | CA | Second Tier | | | | | | | | | | | | |
| K | Academia | Lexington | ку | Third Tier | | | | | | | | | | | | |
| L | | | | Third Tier | | | | | | | | | | | | |
| | MISC | Springfield | MI | | | | | | | | | | | | | |
| М | Business | Las Vegas | NV | Third Tier | | | | | | | | | | | | |



Strategic Engagement





City State Priority Mapping Criteria V $\overline{}$ ΨÎ **Uber Tier** Washington DC **Uber Tier** Pittsburgh PA Organization Type State Administrat ** mplement Health Organization/Stakeholder Name City Priority v **Uber Tier** Arlington VA **Uber Tier** Non-Profit Washington DC First Tier **Uber Tier** Non-Profit PA Pittsburgh Phoenix ΑZ **Uber Tier** Non-Profit Arlington First Tier D First Tier Thousand Oaks CA Utility Phoenix ΑZ First Tier Thousand Oaks CA Government First Tier Somerville MA First Tier MA Non-Profit Somerville Second Tier Second Tier DC Trade Association Washington DC Washington Second Tier Indianapolis IN Second Tier Second Tier Non-Profit Atlanta GA Indianapolis IN Second Tier CA Government San Francisco Second Tier Third Tier Academia Lexington KY Atlanta GA Second Tier Third Tier CA San Francisco MISC Springfield Third Tier Third Tier Business ns Vegas KY Lexington Third Tier Springfield MI Third Tier Las Vegas NV

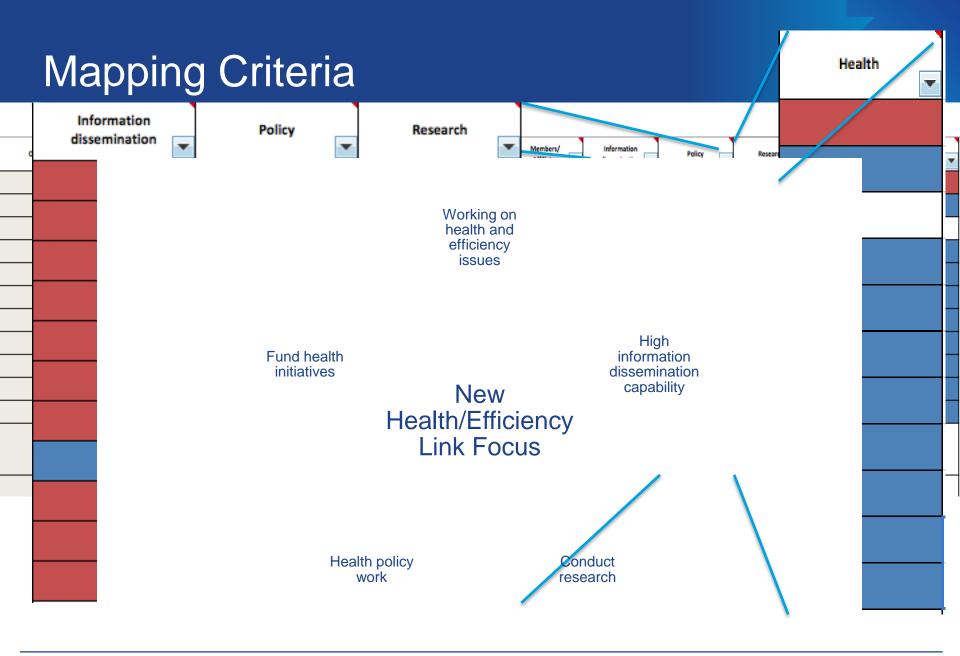
















Stakeholder Analysis



Stakeholder Analysis

- Knowledge of issues related to the purpose and scope of the engagement
- Existing relationship with the organization (close or distant; formal or informal; positive or negative)
- Dependence on the organization
- Willingness to engage
- Type (Utility, contractor, government, nonprofit, etc.)
- Geographical scale of operation
- Capacity to engage
- Legitimacy
- Relationships with other stakeholders

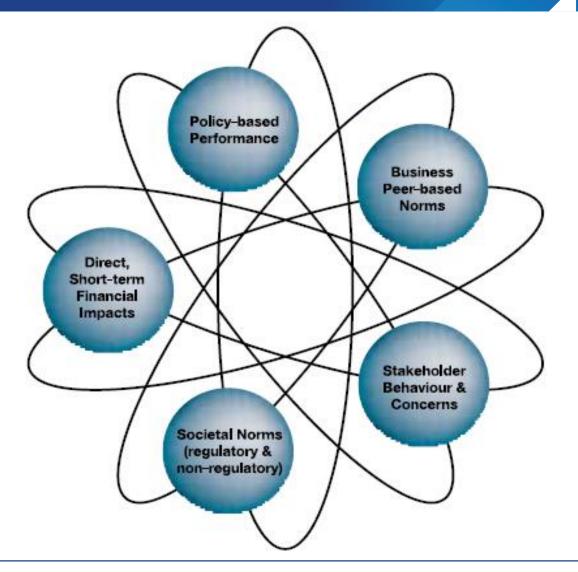




Stakeholder Analysis Cont.

Consider:

- Policy
- Direct, short-term
- Regulation
- Stakeholder concerns
- Peer norms



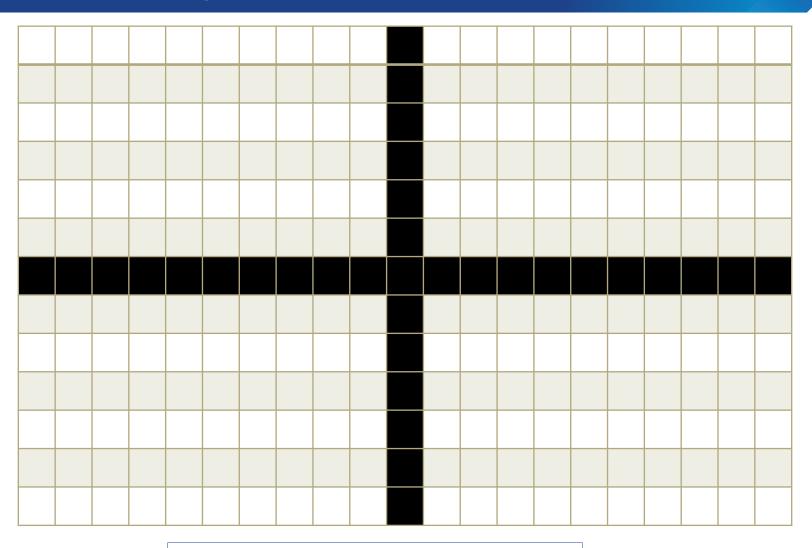




Stakeholder Prioritization



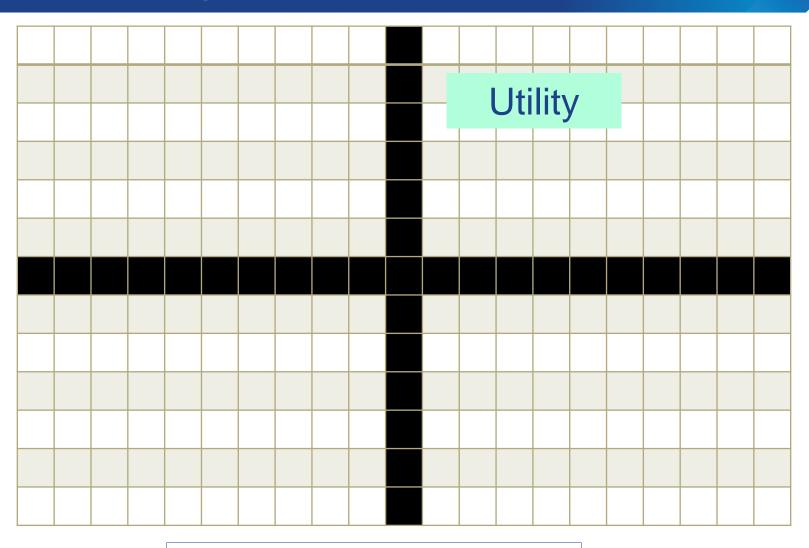
INFLUENCE







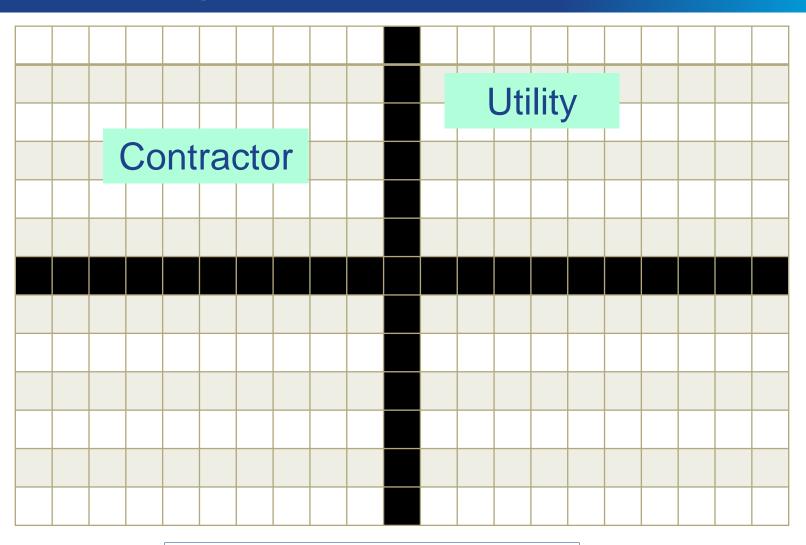
INFLUENCE







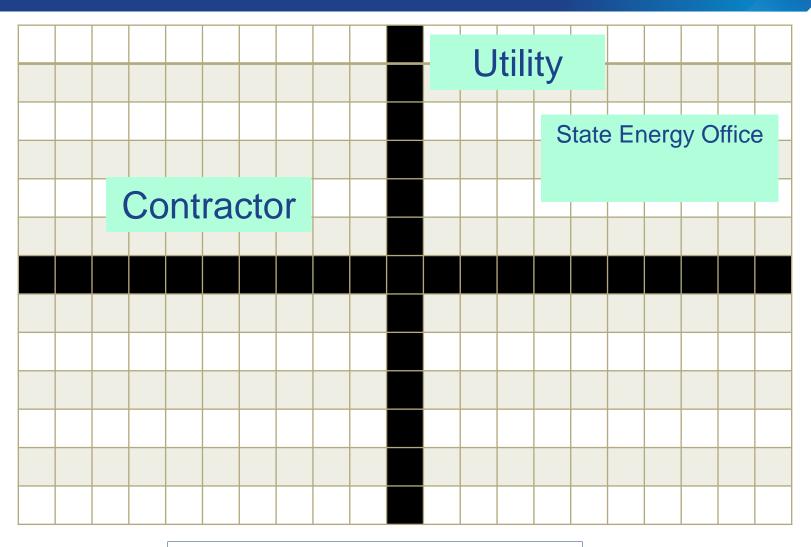
INFLUENCE







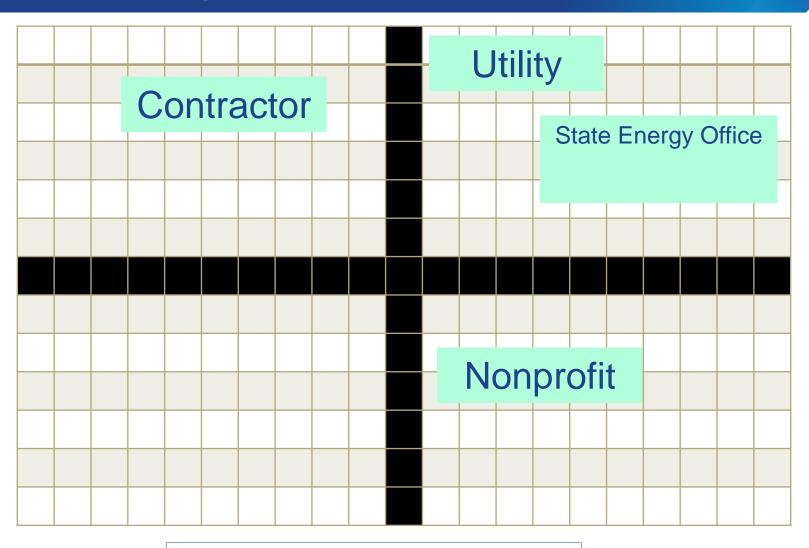
INFLUENCE







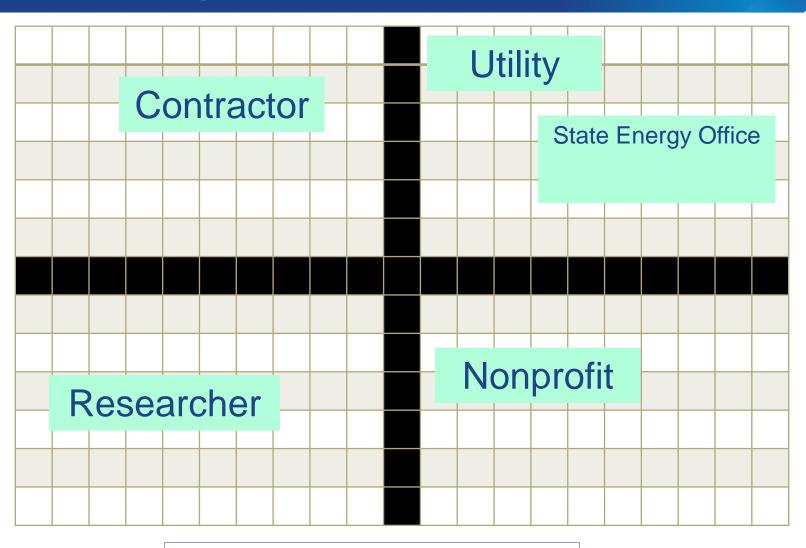
INFLUENCE







INFLUENCE







Better Buildings Residential Network Voluntary Initiative: Partnerships



Partnership Purpose

Build capacity:

 Increase the effectiveness of a small program and/or limited staff through partners

Expand reach:

- Partners can have experience and communications capability to reach audiences your program or organization is not yet reaching, such as:
 - Different industries (e.g., real estate industry)
 - Different sectors (e.g., non-profits)
 - Different geographic scope





Partnership Outputs

- Partnership Toolkit
- How-to resources
- Lessons learned from energy efficiency programs
- Templates and examples
- Scenarios for engagement (e.g., real estate industry)
- Training Peer Exchange Call





Partnership Participation

Call for Residential Network members:

Limited number of participants

Benefits:

- Recognition in Partnership Toolkit
- Opportunity to be featured in materials
- Input to development of how-to resources
- Feedback on lessons learned from energy efficiency programs
- Shape scenarios for use with different industries (e.g., real estate industry)





Presentation Highlights

- Stakeholder mapping and engagement creates value for everyone involved
- Engagement and mapping are important because:
 - You can't engage until you have a sense of who is involved
 - By engaging stakeholders, you tap new markets, which brings potential for innovation and getting new ideas
 - If you have a nice conversation but don't capture in writing to create institutional knowledge, it's no use
- Stakeholder mapping tiers and stakeholder data leads to greater information dissemination capability
- What you get out of stakeholder mapping is what you put into it
- It is important to have transparent, trusting stakeholder engagement
- You do not have to agree with all stakeholders but you must have a way to engage them, hear them, respond to them, and let them know they are heard





Discussion Highlights

- Strategies for stakeholder prioritization include:
 - Detailed databases with information on each stakeholder
 - Weighted formulas to quantify priorities
 - A simple staff conversation on what is important, and who is important to engage
- Consider new markets, opportunities, and innovations as you decide who to engage
- Maintain your stakeholder database
- Engagement should be an ongoing dialogue
- To establish effective partnerships, you must map your stakeholders





Poll Results: Additional Activities

- After this call, which activities will you undertake?(pick all that apply)
 - Seek out additional information on stakeholder mapping: 0%
 - Start conducting stakeholder mapping informally, if had not been doing so previously: 60%
 - Start conducting stakeholder mapping formally, using tools and a database: 40%
 - Participate in the Residential Network voluntary initiative on partnerships: 20%
 - No change in current activities: 20%



