

NC PARTNERS IN HOME PRESERVATION

Piloting a Collaborative Process to Deliver Home
Repair and Weatherization Services

EXECUTIVE SUMMARY

A collaboration between:



Funded in partnership with:



The Challenge

In many communities in North Carolina, energy efficiency programs, weatherization programs, and home repair and rehabilitation programs are delivered and administered separately and by multiple agencies. Prior to implementing a more collaborative process, homeowners were often unable to access services they were eligible for. Homeowners seeking repairs had to submit separate applications to individual services providers for review and approval by their respective programs. Depending on their eligibility, the applicant would either be considered eligible and placed on the service provider's waitlist or be considered ineligible and subsequently denied. The applicant would only be considered for the eligibility requirements of the service provider they applied for, even though they may be eligible for other services or programs that operate within the same geographic area.

The separation of services and lack of coordination of these programs creates significant inefficiencies, often leaving funds on the table because they are not properly leveraged and costing service provider organizations and applicants time, money, and effort in administering the programs. These inefficiencies hamper the deployment of energy efficiency upgrades, leaving low-income North Carolinians without services that they desperately need and are eligible for.

Our Solution: Partners in Home Preservation

Partners for Home Preservation is a pilot program created to help improve coordination among home repair and weatherization service providers, funders, and referral partners that serve low- and moderate-income homeowners across the Triangle. The pilot program was conducted in Orange County and Chatham County, North Carolina. The pilot created a "no wrong door" approach for homeowners seeking assistance by using a unified screening application and data sharing mechanism to provide collaborative case management. The coordinated approach allows residents to receive all the benefits of home repairs and weatherization, including improved energy efficiency – helping homeowners save money on energy bills, improve household health, and ultimately improve residents' quality of life.

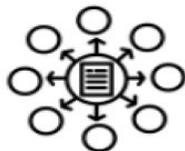
This pilot project was funded by a grant from the Southeastern Energy Efficiency Alliance, Inc. (SEEA) and administered by Triangle J Council of Governments (TJCOG), Rebuilding the Triangle Together (RTT), and the North Carolina Justice Center (NC Justice)

The Collaborative Tools

The primary goal of the Partners for Home Preservation project was to develop customized, collaborative tools for inter-organizational home repair and energy efficiency systems. These tools include:



**Unified
Screening
and Intake
Process**



**Unified
Waiver &
Data Sharing**



**Centralized
Home
Assessment**



**Shared
Online
Database**

Unified Screening Tool and Intake Process: The purpose of the unified screening tool was to determine the eligibility of applicants for as many programs as possible without creating undue burden of extensive documentation. Basic household and income information, ownership status, veteran status, as well as information about special needs and emergency concerns were identified as key questions for the unified screening tool. Partners also intended to collect information about other household needs for referrals to human and social services. The objective was to create a “no wrong door” approach, providing applicants with a universal gateway to the services provided by organizations in the coalition.

Shared Database: Databases were developed to be a repository of information for each applicant, including the unified screening tool responses, home assessments findings, work progress, and other ongoing social or contextual notes about each home’s process. The Comprehensive Home Assessments are integrated into the database so that individual assessments are available and easily accessible to all partners; in aggregate, this creates a library of projects needed across the county. The database is organized such that repairs could be managed and monitored at either the household, organization, or project levels.

Centralized and Comprehensive Home Assessment: Comprehensive Home Assessments, conducted by a Home Assessment Manager, identified a full scope of work, or list of projects needed to bring the home up to health and safety standards; weatherize and improve energy efficiency; or modify for accessibility. The home assessor also recorded pertinent information that may arise during the assessment - previous service attempts; home or land ownership details; utility connections; or availability of financial resources - so that the assessor, occupational therapist, energy efficiency experts, and community partners have a broad view of the needs of both the home *and* the homeowner. Once assessments were completed, the coalitions integrated the findings into specific project needs or tasks within the shared database.

Collaborative Case Management: The collaborating groups in both counties met regularly to identify new applicants, discuss their needs, assist with organizations’ project selection, and monitor their progress through check-ins at these meetings.

Outcomes to Date

When our coordinated approach was applied to the Chatham County Home Repair Collaborative (CCHRC) and Orange County Home Preservation Coalition (OCHPC) in North Carolina some key results were:

1. **Having the ‘right information’ decreased organizational inefficiencies** Understanding repair needs early in the repair process meant that repair jobs were matched to the organization with the best skill set and capacity. This was, in large part, because partners now had the “right information” on homeowner eligibility and service needs at the start of the repair process. For example, Habitat for Humanity explained that, by referring HVAC repairs to Central Piedmont Community Action, Inc. (CPCA) and minor repairs to Orange County Department on Aging (OCDOA), they’ve been able to stretch their budget and invest more in the jobs for which they’re well equipped; for the first time in several years, Habitat met and exceeded its service goals.

- 2. Decreased weatherization and energy efficiency service deferrals** The CPCA representative attributes this accomplishment to having more leads. The Comprehensive Home Assessment not only identified homes that could benefit from weatherization, but the Collaborative Case Management also brought attention to needs that must be addressed before weatherization can be completed. With these projects on the coalition's radar, homes are served first by other organizations before CPCA, reducing the chance for a weatherization service deferral.

"I've been here almost 20 years and last year was the first time we had enough clients in Orange County. I can honestly say that if it wasn't for this process, we probably wouldn't be fulfilling our contract all the way..." - CPCA representative

Recommendations

The collaborative process can and should look different for counties seeking to introduce these processes into their home preservation and repair networks. Still, new partnerships may be served well by mirroring CCHRC's and OCHPC's commitment to cooperation and willingness to adjust throughout the collaboration process. This means:

1. Developing coalitions and cooperative groups from a hyper local approach. Factors to consider in adapting the processes and collaborative tools may include: the nature of the organizations and agencies involved in the process, shared agreements and specific priorities of the collaborative partners, and the importance of utilizing existing resources, skills, and capacities. Shared goals should be built collectively and be context-specific.
2. Adapting the deliverable tools based on collective goals, subtracting unnecessary steps or adding new ones, as needed. This may include modifying screening questions, selecting a different database platform, or developing unique assessment priorities. We recommend considering coalition coordinator, home assessment manager, and shared information system as essential components.
3. Implementing with an eye towards learning and continuous improvement. Changes to the tools and processes are inevitable; new expectations should be agreed upon and clearly communicated to all partners involved, including service providers and grantors or funding agencies. To this end, funding applications should explicitly request flexibility to establish an early expectation that the process to achieving shared goals may evolve along the way.