

Executive Summary

Purpose of Partners in Home Preservation

Partners for Home Preservation was designed to respond to the lack of coordination among service providers and funders in delivering home repair and energy efficiency services. This disjointed system creates funding inefficiencies and a difficult landscape for homeowners to navigate. Two coalitions, Chatham County Home Repair Collaborative (CCHRC) and Orange County Home Preservation Coalition (OCHPC) in North Carolina, developed and leveraged collaborative tools to the following ends:

Objective #1: Increase access to and comprehensiveness of home repair and energy-efficiency

Objective #2: Decrease the administrative burden of applying for service

Objective #3: Decrease organizational inefficiencies

Objective #4: Decrease weatherization and energy efficiency service deferrals

Objective #5: Improve quality of life for applicants

The Intervention

The primary aim 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:

- streamlined intake
- centralized home assessment processes
- coordinated case management
- collaborative data sharing mechanisms
- unified data collection and evaluation processes

Evaluation Methodologies

The purpose of this evaluation was to understand how collaborative tools were developed and utilized, and identify their benefits for both homeowners and partners in the home repair system. The evaluation team used mixed-methods approaches. Focus groups with partners and direct observation by the evaluators informed lessons on development and utilization. An analysis of administrative data from the shared database also provided insight on organizations' use of the tools. Finally, homeowners shared their experiences through a researcher conducted phone survey.

What We Learned About Developing Tools to Facilitate and Support Collaboration

The development process was underpinned by an existing commitment to partnership among coalition members. This established culture of collaboration and trust fostered flexibility and a willingness to adapt. Partners in the coalitions had a range of diverse needs — and strengths — and customizing tools for these contexts encouraged coalition engagement. This was particularly true in developing the home assessor's and coalition coordinator's roles. A unique set of skills was integral to the role of the home assessor: expertise in construction, accessibility modifications, environmental safety, and energy-efficiency measures. Likewise, development and management of the shared database was facilitated by a coalition coordinator with strong skills in: communication and organization; assessing organizational readiness; adapting tasks to meet capacities; and systems thinking.

The development process was iterative, but prioritizing appropriateness rather than speed was rewarding: tools that were useful *were used* and supported collective infrastructure for success.

What We Learned About Utilizing Collaborative Tools

Successes

In Orange County, over 90% of homeowners utilized the unified screening tool and received a comprehensive home assessment, which provided coalition partners with the “right information” about both the home and homeowner. Partners used this extensive information to make appropriate referrals *within* the coalition and to services outside of home repair. In fact, nearly three-quarters of applicants to OCHPC received collaborative home repair services; 100% received collaborative case coordination. Information exchange, creative problem solving, and coordinated case management happened through the shared database and at regular coalition meetings.

In Chatham County, data limitations constrained the ability to quantify use of collaborative tools. Partners in CCHRC favored informal communication to structured communication over the database. Still frequent communication positioned the organizations to collaborate when necessary. Notably, the division of responsibility in repair provision is more straightforward in Chatham County than in Orange with fewer participating service providers. Moreover, limited municipal resources warranted focus on creatively leveraging funding rather than coordinated case management. Instead of expecting rigid and exact implementation of the collaborative tools, the project manager and grantor provided CCHRC with flexibility to prioritize its own shared goal and use the tools as partners see fit to that end.

Ongoing Challenges

Obstacles to using collaborative tools were aligned with previously reported challenges including disparate funding, complicated eligibility requirements, and limited staff capacity. Staff capacity was particularly relevant to an emergent challenge of navigating dual work flows of the independent organization and the collective, as well as managing frequent updates to the database. Organizations that identified a database point person were best equipped to cope with this challenge, but having a coalition coordinator, as OCHPC did, facilitated smooth communication and information sharing.

What We Learned About the Benefits of Collaborative Tools

For Service Providers

By sharing intake and assessment responsibilities, coalition partners had access to the “right information,” which facilitated divisions of repairs across organizations and funding sources. Focusing their attention on repairs they are best equipped to address, organizations were able to stretch their budgets and increase service provision. Additionally, partners in both OCHPC and CCHRC spoke to the role of Partners in Home Preservation in leveraging external funds, and creating aggregate knowledge for equitable policy advocacy at the local level.

In these ways, the coalitions were successful at reaching anticipated objectives, and additional benefits emerged. With strong collaborative infrastructure, OCHPC welcomed a new repair organization to the table and helped it identify an appropriate work scope. Moreover, collaboration made use of organizational strengths, like the Orange County Department on Aging’s social service referrals, and unencumbered the Jackson Center, a community based organization, from the challenges of navigating repair referrals, allowing it to focus on its mission and purpose in housing justice advocacy.

For Homeowners

Overall, homeowners in both Chatham and Orange Counties were highly satisfied with the collaborative repair process. The majority reported improvements in quality of life, safety, and ease of daily activities. While the application process can still be confusing in some instances, homeowners were connected

with the right organizations and were well served. Survey participants agreed that the coalitions reduced financial barriers to home repairs and completed projects in a timely manner. In fact, applicants waited an average of 1.5 months for a home assessment and those with at least one repair complete waited an average of 6 months for their first repair, representing early contact with service providers.

For Energy Efficiency Services

The overall benefits that all partners experienced applied to CPCA, the major energy efficiency and weatherization service provider. Participating in a strong collaborative system, CPCA was better able to identify homes that were eligible for these repairs and upgrades: for the first time in decades, CPCA reached its service goal. Nearly 30% of all homeowners surveyed — regardless of the repair service received — reported improvements in energy efficiency and ability to manage utility costs, as well. Still, this evaluation was unable to quantitatively assess improvements in energy efficiency. Obstacles to this analysis included: limited availability of household level utility data; inconsistencies in data provided by various utility providers; and small sample size.

Recommendations

For Continuation of OCHPC and CCHRC

1. Support lynchpin roles of the Home Assessment and Coalition Coordination for ongoing communication, data collection, and cooperation.
2. Continue to utilize the newly developed collaborative tools, while maintaining flexibility to adapt as coalition needs evolve.
3. Strengthen the integration of energy efficiency services into the home repair and preservation system through continued education and referrals.
4. Expand capacity of the coalitions to influence funding and policies structure that advance equity, preserve community, and rectify disparities in home quality.

For Others

1. For future coalitions, building flexibility and adaptation into the collaborative processes in order to achieve unique shared goals is key.
2. For future funders, expecting grantees to customize both the development and utilization of collaborative tools, and to make adjustments along the way, is invaluable.

Conclusion

Using a partnership model that focuses on abundance and building capacity — rather than managing scarcity and competition — benefited both home repair organizations and homeowners. The partners involved and SEEA, as a grantor, demonstrated flexibility and a willingness to adapt the process of achieving shared goals; maintaining this commitment, organizations operated beyond their own boundaries in service of the collective. By investing in coalition infrastructure and collaborative tools, the benefits of efficiency and comprehensiveness are positioned to outlast the initial investment in the Partners in Home Preservation program.