



IN-HOME SERVICES

Weatherization Program

2010-2011 Fourth Quarter Report

April 1, 2011—June 30, 2011



CEP Volunteers weatherizing a client's window with an internally-mounted, reusable storm window kit.

Client Demographics (Self-Identity)

- ◆ 70% in 0-30% Median Family Income; average household income \$1,379 with 2.4 people per household
- ◆ 72% female; with 66% female head of household
- ◆ 45% minorities served (4% declined to respond to question)
- ◆ 56% elderly head of household, with average client age of 64
- ◆ 70% disabled/special needs households served
- ◆ 69% residents of NE and SE Portland
- ◆ 59% own homes or mobile homes, with 62% living in single-family homes
- ◆ 40% heat with electricity; with 61% PGE and 25% Pacific Power customers
- ◆ 37% natural gas, and 11% oil heated

Program Highlights

CEP's In-Home Weatherization Program serves low-income senior citizens and people with disabilities by installing energy-saving materials in clients' homes.

Service Goals: Complete 200 weatherization services, help increase home comfort, and lower utility bills with the help of community volunteers.

Fourth Quarter Progress

- ◆ Completed 75 projects, with a year-end total of and 188 completed this year
- ◆ Continued to conduct targeted neighborhood outreach for residents in Interstate & Lents Urban Renewal Areas
- ◆ Provided over 6,235 referrals this year to partner organizations
- ◆ Coordinated 218 volunteers who provided over 1,283 hours of weatherization service assistance
- ◆ Conducted Follow-up Surveys with 48 (25%) of clients served; exceeded goals for savings, comfort, and materials usage

Follow-up Survey Results





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PORTLAND HOUSING BUREAU PROJECT PROGRESS REPORT-- APPENDIX

In-Home Weatherization Program 2010-2011

Fourth Quarter Report: April 1, 2011 – June 30, 2011

Prepared by: Chaun MacQueen, Program Director

Reviewed by: Sherry Burbach, Executive Director

Program Goal	200 In-Home Weatherization Services			
Completed Jobs	Year-to-Date	188 (68 CDBG; 59 TIFL; 61 TIFN)	4th Quarter	75

1. Gender	Total for Reporting Period	Total for Fiscal Year
Female	52	136 (72%)
Male	23	52 (28%)
Declined/No Response	0	0
Total	75	188

2. Race/Ethnicity	Total for Reporting Period	Total for Reporting Period	Total for Fiscal Year	Total for Fiscal Year**
Ethnicity	Hispanic	Non Hispanic	Hispanic	Non Hispanic
White/European American	0	42	0	99 (54%)
Black/African American	1	22	1 (0.5%)	61 (34%)
Asian	0	2	0	4 (2%)
American Indian/Alaskan Native	0	1	0	6 (3%)
Native Hawaiian/Other Pacific Islander	0	1	0	2 (1%)
Am. Indian/Alaskan Native & White	0	1	0	2 (1%)
Asian & White	0	2	0	3 (2%)
Black/African American & White	0	0	0	0
American Indian/Alaskan Native & Black/African American	0	1	0	1 (0.5%)
Other/Declined/No Response*	1	1	1 (0.5%)	8 (4%)
Total	2	73	2	186

* Year-to-date “other/declined/no response” include: 1 Hispanic/Latino(a) only, 1 “other,” 5 “no response”, and 2 “declined”

** Percentages for Year-to-Date do not include declined/no response



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3. Income	Total for Reporting Period	Total for Fiscal Year
Over 80% Median Income	0	0
51-80% Median Income	6	11 (6%)
31-50% Median Income	18	45 (24%)
0-30% Median Income	51	131 (70%)
Total Low-Mid Income (0-80% Median Income)	75	188

4. Residence	Total for Reporting Period	Total for Fiscal Year
NE Portland	4	47 (25%)
SE Portland	43	83 (44%)
NW Portland	0	0
SW Portland	0	1 (0.5%)
N Portland	28	57 (30%)
Total	75	188

5. Other	Total for Reporting Period	Total for Fiscal Year**
Female Head of Household	46	124 (66%)
Elderly Head of Household (62 and over)	41	105 (56%)
Disabled/Special Needs Household	42	131 (70%)
Total	--	--

** Percentages for Year-to-Date do not include declined/no response



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Additional Statistical Information (Not required by PHB)

The following statistics are collected for other funders supporting CEP In-Home Weatherization for qualified households of seniors and people with disabilities.

Home Ownership Status	Quarter Total	Total for Fiscal Year
Owner	55	111 (59%)
Renter	16	54 (29%)
Declined /No response	4	23 (12%)
Total	75	188

Housing Type	Quarter Total	Total for Fiscal Year
Single-Family House	64	118 (62%)
Apartment/Duplex	5	45 (24%)
Mobile Home/Other	6	24 (13%)
Declined /No response	0	1 (0.5%)
Total	75	188

Primary Heat Source	Quarter Total	Total for Fiscal Year
Electricity	22	76 (40%)
Natural Gas	37	69 (37%)
Oil	8	21 (11%)
Wood	1	1 (0.5%)
Both Gas and Electric	0	2 (1%)
Don't know/no response	7	19 (10%)
Total	75	188

Electric Utility Company	Quarter Total	Total for Fiscal Year
PGE	54	115 (61%)
Pacific Power	13	47 (25%)
Don't know/no response	8	26 (14%)
Total	75	188



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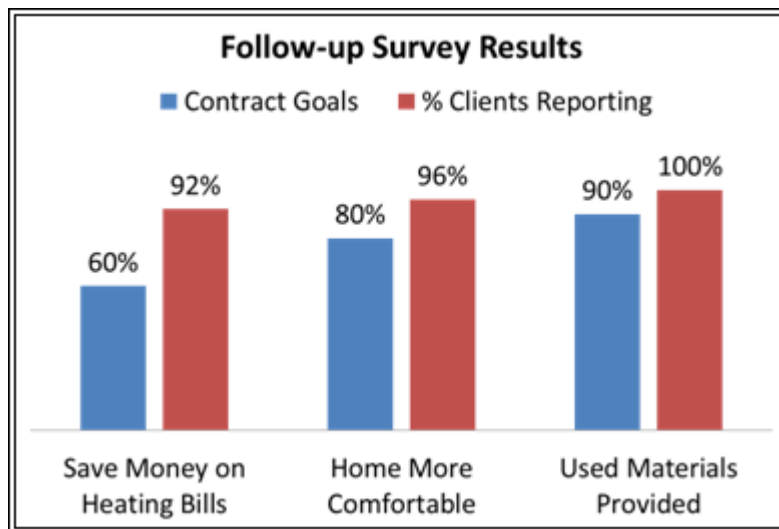
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In-Home Weatherization Client Follow-up Results

Follow-up calls and visits are a critical part of our programs. We obtain vital information and statistics used in the development and improvement of our programs. Surveys are conducted by someone other than the person who delivered the service, meaning CEP staff and interns are cross-trained to support all programs. The goals of our follow-up with clients include:

- checking in with participants to get their feedback on the service,
- determining the effectiveness of the service, and
- answering questions and making additional referrals as needed.

We received very positive feedback from our clients, exceeding all of our follow-up goals for heating bill savings, home comfort, and usage of materials provided (below).



We conducted follow up surveys with 48 (26%) of the 188 clients served in the program. Most people (92%) reported saving up to \$50/month on their heating bills, and nearly everyone (96%) surveyed reported that their homes were more comfortable and all participants (100%) reported that they used the materials we installed and/or provided. We also learned that:

- 100% of clients surveyed reported our staff arrived in a timely manner and were courteous to them and their homes
- 98% of clients surveyed reported CEP volunteers were courteous and helpful to them and respectful of their homes
- 31% of clients surveyed reported heating their homes with natural gas furnaces, while 52% heated with electricity and 8% heated with oil



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- 22% of clients surveyed received referrals from CEP staff to other agencies, and of those clients, half (50%) have successfully connected with these agencies, and 66% of those were successful referrals.
- At the time of the survey, we provided additional (some repeat) referrals to 63% of survey participants to: Reach, Unlimited Choices, Multnomah County Weatherization, Rebuilding Together, Energy Trust of Oregon, and 211info
- 100% of clients surveyed reported that they would recommend our services to family and friends

At the end of the survey, clients had an opportunity to provide additional comments and suggestions, which are summarized below:

- Great experience and program; give volunteers a good thanks
- Really appreciate what CEP is doing
- Nice to have program available to seniors
- Doing wonderful helping people
- Did a considerably good job keeping the most of the air out
- Thank you for coming out and to Danielle

Outreach and Referral Summary

Provided by: Sherrie Smith, Outreach and Marketing Supervisor

Lents and Interstate Urban Renewal Areas

This is the first year we are focusing outreach on the Lents Urban Renewal Area (LURA) and the Interstate Corridor Urban Renewal Area (ICURA). We are working with community partners such as REACH and the MHAC partners (PCRI, NAYA etc.) to conduct effective outreach for our programs. This quarter we:

Neighborhood outreach efforts this quarter include:

- Distributed materials:
 - Worked with Senior Recreation – distributed 50 flyers at Sunday Parkways
 - 50 LURA flyers to Project Linkage
- Gave Presentations:
 - LURA 7th Day Adventist church
 - LURA Senior Advisory Council (in partnership with SE IRCO)
- Contacted potential new partners
 - Called Lents-area elementary school – grandparents raising grandchildren
 - Contacted Project Linkage
- Used grassroots outreach methods
 - Canvassed homes in LURA, made contact with 318 residents, distributed 168 flyers (in person) and signed up 24 clients
 - Participated in two LURA outreach events



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- Worked with local media
 - Wrote a guest article in the East Portland Neighborhood Association News – to be distributed to 25,000 households in July 2011.

Earlier in the year we:

- Distributed Materials:
 - Mailed 249 postcards to past participants in LURA and ICURA
 - 250 flyers as requested by Economic Fairness of Oregon
 - 250 ICURA flyers to two Loaves and Fishes branches in North Portland
 - 125 LURA flyers to Lents Loaves and Fishes
 - Distributed flyers to 41 SE businesses and community centers
 - Emailed the North East Coalition of Neighborhoods electronic versions of the ICURA flyer
 - Two North Portland Loaves and Fishes – ICURA
 - Posted information on ICURA to the East Portland Action Plan website.
 - Dropped off 80 ICURA flyers at the Economic Fairness office for distribution
 - Posted new flyers on website
- Contacted potential new partners
 - Called seven LURA churches
 - Contacted ten LURA neighborhood associations
 - Contacted a City of Portland Inspector and explained our services. Emailed ICURA flyer and In-Home Services brochures. CEP is to be added to the Inspector Resource Guide.
 - Contacted Community Housing Resource Center and talked to a Reverse Mortgage Councilor about reaching seniors in danger of foreclosure. Their lists are confidential, but we emailed them the ICURA flyer for referrals.
 - Contacted Flavel RV & Mobile Home Park to ask about help with outreach. We faxed them the LURA flyer for distribution
- Used grassroots outreach methods
 - Canvassed homes in LURA, made contact with 94 residents, distributed 65 flyers (in person) and signed up 13 clients (with one who wants to spread the word more) and conducted 4 audits on the spot.
 - Participated in two LURA outreach events
 - The Fix-it-Fair on 11/20/10 was in the Lents neighborhood
 - CEP Volunteer Workshop leaders talked about the programs and have flyers available for interested parties
- Gave presentations
 - Impact North West caseworkers and reception staff
 - IRCO South East caseworkers and staff
 - Elders in Action volunteers
 - Lents and SE Tabor Neighborhood Associations
 - African American Senior Forum – Senior Homeowners



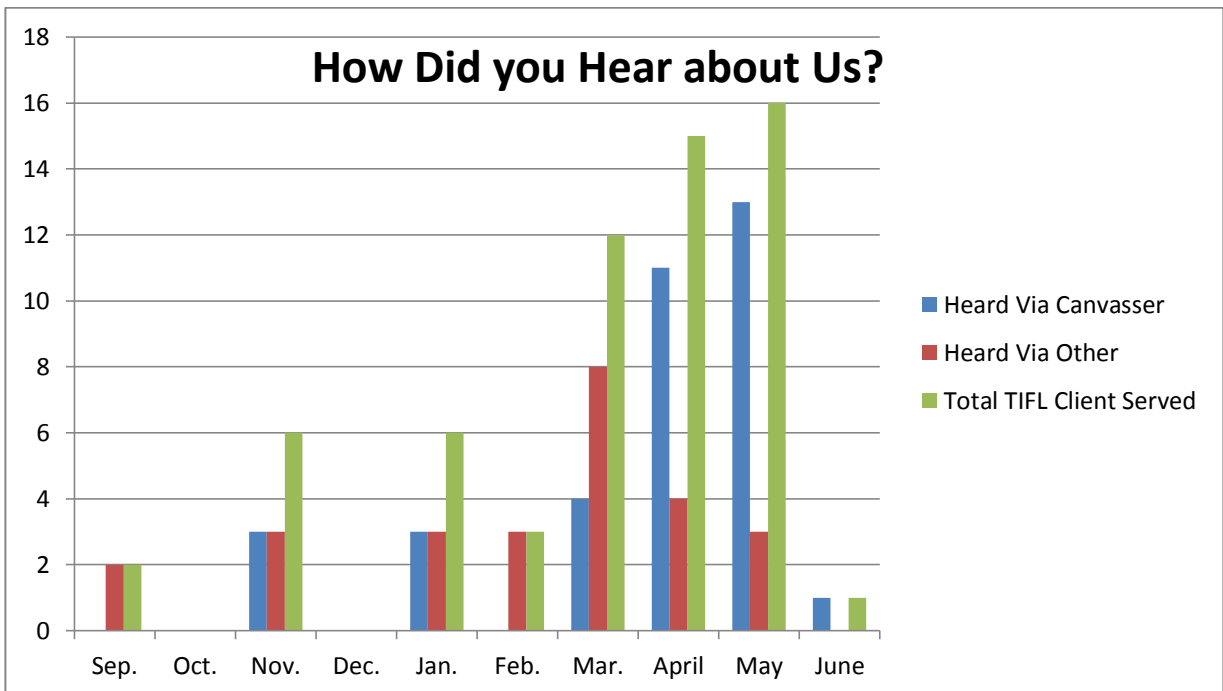
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- Two presentations to African American Chamber of Commerce – board member Harvey Rice continues to attend meetings and distribute flyers
- Worked with local media
 - Had interview with Senior and Boomer Newspaper, publication currently unconfirmed
 - Had an interview with The Oregonian on ICURA programs, which led to a small article on oregonlive.com
- Created outreach materials
 - Downloaded a Portland Development Commission map of the Lents neighborhood, darkened the borders, labeled the streets with large fonts, and created a LURA-specific flyer.
 - Created a legal-size informative flyer with detailed map of service area
 - Created an insert for the In-Home Services brochure

Canvassing in LURA

This was the first time in at least 5 years that we have conducted door-to-door canvassing for outreach. We did not leave flyers at doors, but focused on face-to-face conversation. Despite very extensive outreach (listed above), we were struggling to reach the underserved seniors and people with disabilities living in the LURA. We began heavily canvassing in January, and had almost instantaneous turnaround. In March, Meals on Wheels generously sent 125 flyers out with their drivers, causing another increase. The chart below compares the number of TIFL clients served compared to how they heard about us.

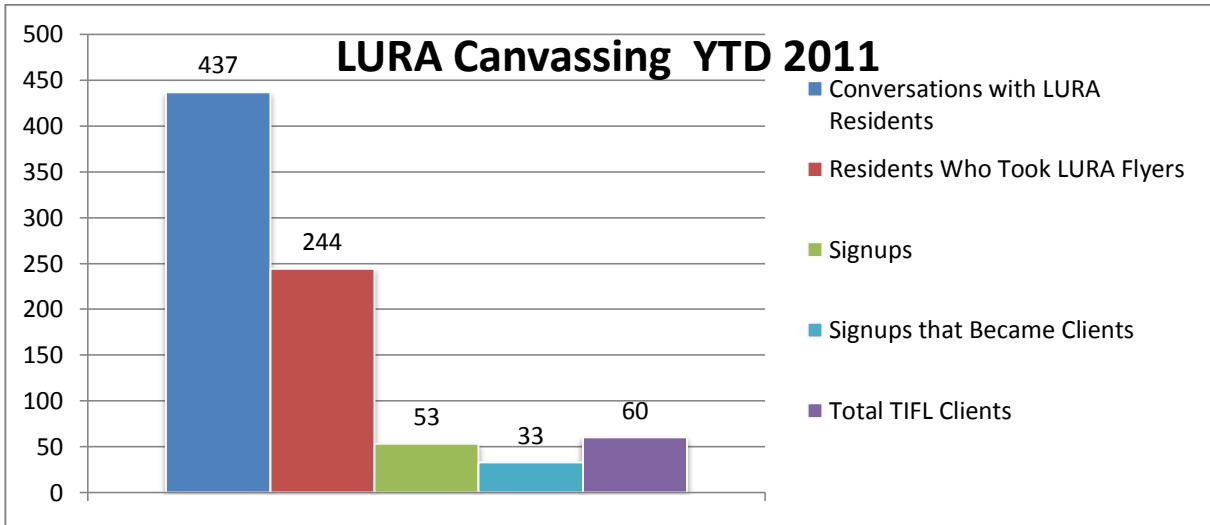




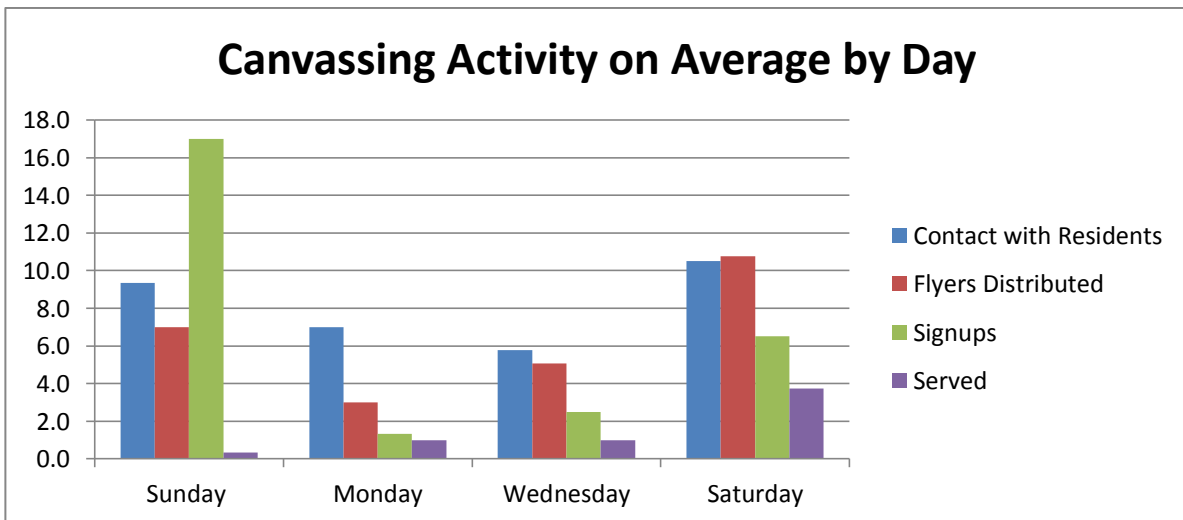
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Below is a visual representation of our contact with LURA residents. It details the number of people we spoke with, how many took our information, signed up, and the number of signups who became clients. Of the 60 total TIFL clients served, 33 of learned about us through canvassing efforts.



Most of our canvassing days were during the week, and we had several weekend days when staff and intern time allowed. We cut 20 pieces of turf (the area to be canvassed) and had 2-3 people in each turf site for safety. Turf was chosen based on googlemaps street views (to prioritize neighborhoods visibly struggling) and by census data (to find higher concentrations of seniors). Canvassing was typically conducted in two-hour pieces, each staff, volunteer, intern, and AmeriCorps member having received a training regarding safety and language to be used with residents.





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Referrals to In-Home Weatherization and Small Repair Services

For low-income seniors and people with disabilities, we provide both In-Home Safety Repairs and Weatherization Services. Because there is so much overlap between programs in clients and staff, this information is combined into one column. The data is for clients who had a work completed in their home.

Because ICURA was a new program, and LURA-specific restrictions required different outreach methods, we separated them in this table to see which methods were most effective.

Info Source – In-Home Services Fiscal Year	CDBG, TIFN, and ECO WX & Small Repairs	N/NE ICURA Large Repairs	TIFL WX and Small Repairs	Total
Neighbor	3	0	2	5 (2%)
Word of Mouth	13	2	2	17 (8%)
Community Partner	34	11	7	52 (24%)
Past Participant	34	2	5	41 (18%)
Caseworker / Advocate	10	2	2	14 (6%)
Utility Company	1	0	2	3 (1%)
Signage/Walk by	4	3	1	8 (3%)
Newspaper	1	1	0	2 (1%)
Internet	0	0	1	1 (0%)
Other CEP programs	7	0	0	7 (3%)
Event, Flyer, Mailing	4	12	4	20 (9%)
Canvassing	0	0	29	29 (13%)
No Response / Other	11	4	4	19 (9%)
Total	122	37	59	218

We can see here that we used different methods for different contracts. For TIFN, East County, and CDBG we are established enough to rely on word of mouth, partners, and caseworkers. For ICURA we worked closely with community partners and distributed flyers through Meals on Wheels and at presentations. For LURA, most of our clients came through canvassing and through Meals on Wheels.

Many In-Home Weatherization clients for the year were past participants, but may need updating in materials (as tracking and plastic gets older) or clients move into a new home. The vast majority of our repair clients come from caseworkers/advocates from organizations such as Portland Impact and Human Solutions. Numerous clients for both programs come from



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community partner referrals like Multnomah County Aging and Disabilities Services, Providence, 211 info, and other social service agencies.

External Referral

CEP functions as a large referral source for many clients. We’ve created a referral database to track how often and to whom we refer community members who contact us. This quarter we have added In-Home Referrals to our Active Referrals data. Information is available to community partners about how many referrals we’ve made to their specific organizations by request. Below are the overall statistics in this report. Referrals are divided into four categories:

A. “Active Office Referrals” occur when a person who calls, emails, or walks in the door requests a service we do not offer and we refer them to the appropriate resource. Each member of CEP staff tracks the referrals they make, and the data is collected quarterly.

B. “In-Home Referrals” – occur when a staff member or volunteers gives information to an In-Home Services client for a needed service.

C. “Active Outreach Events” where we track which brochures are taken at an event by bundling and pre-counting each quarter.

D. “Passive Referrals” include the resources automatically given to our clients through workshops and the In-Home program, as well as how many people visit our website.

Active Referrals were made to more than 30 organizations, three of which (LeadLine, 211-info, and Senior Hotline) are resource hotlines that lead to thousands of other resources. The majority of office referrals (55%) for the year were to agencies that provide energy assistance, mostly until CEP ran received Oregon HEAT funds. In a busy office it is difficult to track each referral made to another agency so **these results may be underreported**. The most common In-Home Service active referrals were to Multnomah County Weatherization, 211 info, REACH, Unlimited Choices, and Gatekeepers.

	Quarter Total	Year to Date Total
Office Referrals	291	900
In-Home Referrals	66	159
Outreach Events	80	240
<i>Total Active Referrals</i>	<i>437</i>	<i>1299</i>

In the table below, “participants” includes the number of clients who have received a package through a workshop, In-home services, or a unique visitor our website. “Resources” refers to how many resources a participant can access through the program. For example – if 100 people attended a lead workshop, each participant would receive 20 resources automatically,



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and that would mean that 2,000 pieces of information with phone numbers, addresses, organization information, etc. were distributed for the quarter.

Program	Participants Quarter	Resources	Quarter Total	YTD Total
Basic Lead Poisoning	36	20	720	10,860
Lead Safe Home Project	14	22	308	1,628
DIY Weatherization WS	34	45	1,530	37,260
In-Home Services	78	28	2,184	6,076
CEP Website	2,208	36	79,488	403,812
<i>Total Passive Referrals:</i>			84,230	459,636

Volunteer Support Summary

Provided by: Danielle Bartolomucci, VISTA Volunteer Coordinator

A total of 2184 community volunteers donated over 1,282 hours of their time to help weatherize homes and help with phones and data entry for In-Home Services department.

Independent Sector is a Federal program that measures the value of volunteer time. Oregon's dollar value for volunteer time is \$18.47 per hour, which would total over \$60,000 in in-kind donations for the year. At the Federal rate of \$21.36 per hour it would total over \$70,000. In the past few years, CEP has had a combination of a small number of interns who volunteer a large number of hours, and a large number of volunteers who participate in groups that come once or twice a year. Volunteers donated an average of 21 hours per individual this quarter.

Program	Number of Volunteers Quarter	Number of Volunteers Year	Volunteer Hours Quarter	Total Hours Fiscal Year
Weatherization Workshop	11	20	287.25	816 (25%)
Lead Poisoning Prevention	8	15	92	217.75 (7%)
In-Home Services	12	218	76.50	1282.75 (39%)
Vision Into Action/Oregon Heat	3	5	12.5	75.25 (2%)
Water Conservation	0	4	0	21.5 (1%)
Training and Consulting	0	3	0	25.75 (1%)
Administration/Other	20	20	136	840.25 (26%)
Total	*29	*233	604.25	3279.75

*Number of non-duplicated volunteers (as some volunteers work within more than one program)