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AGENDA COVER MEMO

AGENDA DATE: July 12, 2006
TO: Board of County Commissioners
DEPT: Health & Human Services
PRESENTED BY: Rob Rockstroh, Director



AGENDA ITEM TITLE: IN THE MATTER OF APPROVING THE SUBMISSION OF TWO PROPOSALS TO OREGON HOUSING AND COMMUNITY SERVICES (OHCS) IN THE COMBINED AMOUNT OF \$135,000 FOR THE PERIOD OF JULY 1, 2006 THROUGH JUNE 30, 2008.

I. MOTION

To Approve The Submission Of Two Proposals To Oregon Housing And Community Services (OHCS) In The Combined Amount Of \$135,000 For The Period Of July 1, 2006 Through June 30, 2008.

II. DISCUSSION

A. BACKGROUND

The Lane County Department of Health & Human Services, Human Services Commission Program (HSC), is requesting approval to submit two proposals with a combined amount of \$135,000 to Oregon Housing and Community Services (OHCS). OHCS has made funding available to Community Action Agencies (CAAs) such as HSC for the provision of Energy Education and Case Management services. This is not a formal Request for Proposal (RFP) process, but OHCS has requested proposals for the receipt of these funds and proposals are due July 15, 2006.

The HSC operates a number of energy education and case management programs, funded through OHCS and other sources. One of these programs is a federal REACH grant, funded through OHCS. This grant ends during FY 07. Fortunately, OHCS is making new funding available to continue these energy education and case management activities.

B. ANALYSIS

With the current federal REACH Grant, HSC is able to provide energy education

and case management services to low-income households throughout Lane County. This new funding allows HSC to continue these activities and to increase these activities at an enhanced level. HSC will blend the new funds with existing funds to fully fund a spectrum of activities throughout the County and for low-income customers of all Lane County electric utilities. OHCS is providing funding for this service continuation and service expansion through two sets of funds. The first set is from weatherization funding dedicated to energy education activities. The second set of funds is from settlement funding that is for case management activities. OHCS has requested a separate proposal for each source of funding, with the contingency that the two proposals and resulting programs work closely together. Attached are drafts of the proposals.

Administrative Policies and Procedures Required Questions

- 1. What is the match requirement, if any, and how is it to be covered for the duration of the grant?**

There is no match requirement.

- 2. Will the grant require expenditures for Materials and Services or capital not fully paid for by the grant?**

No.

- 3. Will the grant funds be fully expended before the county funds need to be spent?**

There is no expectation or requirement that county funds will be spent.

- 4. How will the administrative work of the grant be covered if the grant funds don't cover it?**

The administrative costs are included in the total budget paid for by OHCS.

- 5. Have grant stakeholders been informed of the grant sunset policy so there is no misunderstanding when the funding ends? Describe the plan for services if funding does not continue.**

The stakeholders will be energy assistance agencies that receive energy education training through this grant, and local utility companies that benefit from the services provided through these funds to their low-income customers. No services are planned to be purchased or contracted as a result of receiving these funds. If funding does not continue there will be no legal obligation to continue services.

6. What accounting, auditing and evaluation obligations are imposed by the grant conditions?

The accounting, auditing and evaluation obligations resulting from these two funding proposals will be the same as the current obligations imposed by the current REACH Grant. Lane County must meet mandatory requirements of each of these proposals including the submission of an Annual Work Plan, each of which is attached. OHCS requires all fiscal records to be maintained pursuant to generally accepted accounting standards, and OHCS shall have the right to direct access to all documents and records related to this contract for the purpose of conducting audits and examinations. No additional accounting or auditing requirements are specified for these funds. Evaluation is provided through standard quarterly and annual reports submitted to EWEB.

7. How will the department cover the accounting, auditing and evaluation obligations? How are the costs for these obligations covered, regardless whether they are in the department submitting the grant or a support service department?

Existing HSC and H&HS administrative staff fulfills accounting, contracting, auditing, and evaluation obligations. Funds are budgeted for grant administration as described previously. The department acknowledges that the costs are appropriate and the county will need to cover these costs. The department covers the cost to support service departments through indirect costs charged to Fund 285.

8. Are there any restrictions against applying the county full cost indirect charge?

There are no restrictions against applying the county full cost indirect charge.

9. Are there unique or unusual conditions that trigger additional county work effort, or liability, i.e., maintenance of effort requirements or supplanting prohibitions or indemnity obligations?

The proposals do not discuss Lane County's ability to supplant existing county funds. OHCS does not require maintenance of effort beyond the period under contract. The services contemplated in the proposals do not require a future maintenance of effort, nor do they supplant existing funding.

C. Alternatives / Options

1. To approve the submission of two proposals to OHCS totaling \$135,000 over a period of July 1, 2006 through June 30, 2008 for the provision of

energy conservation education and case management services to low-income households in Lane County.

2. Not approve the submission of two proposals to OHCS totaling \$135,000 over a period of July 1, 2006 through June 30, 2008 for the provision of energy conservation education and case management services to low-income households in Lane County.

D. Recommendation

H&HS recommends that the Board of County Commissioners approve the submission of two proposals to OHCS totaling \$135,000 over a period of July 1, 2006 through June 30, 2008 for the provision of energy conservation education and case management to low-income households in Lane County.

E. Timing

Upon Board approval, the proposals will be submitted to OHCS by July 15, 2006. Services will begin during FY 07.

III. IMPLEMENTATION

Upon the Board Order being approved and signed, the department will submit the proposals to OHCS by July 15, 2006.

The current drafts of these proposals are attached.

IV. ATTACHMENTS

Board Order

THE BOARD OF COUNTY COMMISSIONERS, LANE COUNTY, OREGON

ORDER:) IN THE MATTER OF APPROVING THE SUBMISSION OF TWO
) PROPOSALS TO OREGON HOUSING AND COMMUNITY
) SERVICES (OHCS) IN THE AMOUNT OF \$135,000 FOR THE
) PERIOD OF JULY 1, 2006 THROUGH JUNE 30, 2008.

WHEREAS, Lane County Department of Health & Human Services, Human Services Commission, administers energy education and case management programs in Lane County; and

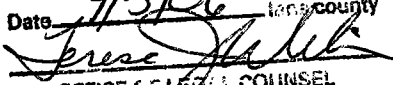
WHEREAS, Oregon Housing and Community Services (OHCS) has made available to Lane County \$135,000 to provide energy education and case management services contingent upon the submission of two proposals.

NOW THEREFORE, IT IS HEREBY ORDERED, that the Lane County Department of Health & Human Services is approved to submit two proposals to Oregon Housing and Community Services (OHCS) in the amount of \$135,000 for the period of July 1, 2006 through June 30, 2008.

IT IS FURTHER ORDERED that the County Administrator is delegated authority to sign the grant application documents and the grant acceptance documents should Lane County be successful with this proposal.

DATED this _____ day of July 12, 2006.

Bill Dwyer, Chair
Lane County Board of Commissioners

APPROVED AS TO FORM
Date 7/5/06 lane county

OFFICE OF LEGAL COUNSEL

Draft Lane County E2C2 CASE MANAGEMENT WORK PLAN

ENERGY EDUCATION

1. Has an Energy Education proposal been submitted to OHCS? Has it been approved?

An energy education proposal is being submitted concurrently with this Case Management proposal. At this time it is unapproved.

The activities of both proposals will be implemented concurrently as the activities of the federal REACH Grant, administered by OHCS, decline during FY 07. As the REACH Grant activities decrease during FY 07, then the E2C2 Case Management activities from this proposal and the energy education activities from the Energy Education proposals will begin and will increase until they are both fully implemented during FY 07.

2. Describe how the case management program will coordinate with energy education to assure clients are appropriately referred between the two programs and provided with respective services, when identified as a need.

The case manager and the energy educator will work closely together (both in physical proximity and with shared clientele) to assure clients are being correctly identified and served between the two programs. Having a division of labor and yet a shared mission will help to keep programs fluid and relevant to identified client need. They will participate in regularly scheduled meetings to staff clients and to exchange relevant information.

INTAKE PROCESS

1. How will you identify potential case managed clients from LIEAP, OEAP and Weatherization?

Referrals will come from:

- a) Social service agencies (SVdP, Community Sharing, Siuslaw Outreach Center, etc) where clients are given an intake for energy assistance and can be signed up for an energy education workshop on a designated day/location/time. Upon completion of the workshop, attendees will be invited to participate in an extended assessment for case management services. (ROMA Comprehensive Assessment Tool). Anyone who volunteers for this would be scheduled for a visit by the energy educator. This could occur in office or in the home.
- b) Another way to be referred to case management is via an agency intake, with one who might skip the workshop and receive energy education in a home visit. Once in the home, an extensive assessment can be completed and determined if further case management services are required.

- c) If a client receives energy education from an EWEB ESP funded one-on-one appointment and is deemed to require more extensive case management than can reasonably be provided by an ESP Energy Advocate, they can be referred on to case management service in E2C2. This would entail having the Energy Advocate complete a quick assessment and handing off the file to the case manager.
- d) In addition, Weatherization auditors could refer clients to case management services as they see the need arise during home audits. A simple inter-agency referral form could be completed and sent to the case manager for follow-up.

2. What process will you use to enroll new clients?

Enrollment would be entered into the OPUS E2C2 module and tracked using OPUS reporting tools.

3. How will you assure linkage to other services of the CAA?

Linkages with other services of the Human Services Commission would occur as they do currently, with interagency referrals with Home TBA, LCOG Senior Services, various city home repair programs, HACSA, and a multitude of other agencies with which we've established a track record of service.

ASSESSMENT

1. Describe when and how the assessment tool will be used.

There are three assessment forms that can be used:

- A) the energy assessment
- B) the quick assessment
- C) the comprehensive assessment

The energy assessment could be used in the workshop or at the time an energy assistance appointment occurs to get a picture of payment patterns and overall financial stability of the family.

2. Will the Quick Assessment be used also, or only the comprehensive tool? If so, under what circumstances?

The quick assessment is useful if the energy assessment indicates a pattern of insufficient funds for utility payments or a lack of resources. If a participant indicates other issues of instability, these could be noted by the energy advocate or intake worker and referred on to case management.

3. How will the assessment tools be utilized as part of the intake process?

The comprehensive assessment is appropriate if there is time and opportunity for more extensive conversation, during a home visit or an appointment with privacy and safety assured.

4. For case managed clients, the comprehensive assessment tool is to be used at entry and exit to case management. In addition, it is to be periodically updated as the client demonstrates progress in accomplishing their identified goals. Describe the frequency for which assessment will be updated to document the progress made.

The comprehensive assessment would be used at the initial visit by the case manager and then at time of exit. Other progress notes will be recorded to make sure clients goals and actions are on track and to clarify actions that need to be taken by the case manager. See Progress notes NCR form attached.

GOAL SETTING

1. Describe the process a case manager will use to move from the comprehensive assessment and any other intake process to identifying goals and action plans.

Having completed a comprehensive assessment with each case managed client, several areas should surface as priorities in working toward and achieving self-sufficiency. The job of the case manager is to help identify and respectfully assist the client to commit to taking some small action steps toward achieving a goal, helping to set realistic timelines and asking for some accountability. Incentives like bill payment assistance could be incorporated if goals are met and to increase the likelihood of meeting the goals.

2. Describe the process a case manager will use to move from the comprehensive assessment and any other intake process to identifying goals and action plans.

Contact with the clients would occur monthly, or bi-monthly, as needed. These contacts would occur in person or over the phone. They also may occur at an appointment with another case manager or service provider.

3. How will you gauge success and measure results?

Success will be determined by outcomes identified in the performance measures, and achieved by the client/case manager and in accordance with case plan and progress notes. Progress notes will occur monthly and will determine the actions and direction of the household. This will be jointly created by case manager, participant and any other party that the participant/client wants to include.

In addition, Program Outputs would be evaluated for success, i.e., total numbers served during reporting period, number referred and served via energy assistance and weatherization; movement on comprehensive assessment scale from entry to exit;

leveraged dollars and services per households in case management; change in energy burden from entry to exit of program.

4. How often will you review goals and action plans to determine if they are still appropriate?

Participants' goals and action plans will be reviewed for appropriateness and relevancy with each goal and action plan review (monthly or bi-monthly).

CASELOAD

1. Maintain a caseload of approximately 20 households in comprehensive case management for a total of 40-50 households per year.

The Case Manager will maintain a caseload of at least 20 households at any given time with an overall annual case load of 40-50 households.

2. Serve each active household for 6 – 12 months.

Case managed households will be retained in case management services for a period of 6-12 months.

3. Meet at least once per month with each active household.

The Case Manager will meet with the case managed household at least once per month, and may have more frequent contacts by phone or with office visits if necessary.

4. Provide Level 2 services to identify short-term support services to meet needs of clients.

The Case Manager will identify those households that are appropriate for Level 2 services only and can be served effectively with short-term support services.

COORDINATION

1. Describe how this additional case manager will integrate into the agency's current case management efforts, (preferred) or if not, then how this case management effort will coordinate with the agency's other case management services.

Because HSC subcontracts its case management service delivery to community private non-profits, case management efforts will be to link participants to existing agencies and partners identified in the above "Intake" section of this work plan.

2. Describe how clients will be served by the agency through a team approach, making available to clients the internal and external resources of the agency to meet multiple and diverse needs of each client.

The Energy Educator from the energy education proposal will work closely with the Case Manager from this proposal to identify households that need case management and to ensure that the education resources available from all HSC energy sources are provided to case managed households. Many HSC energy staff are co-located at sub-recipient agencies that provide a variety resources to energy clients. These agencies, for example, St Vincent de Paul and Celeste Campbell Senior Center are natural partners in offering non-energy services to case managed households. Also, the HSC Energy Team staffs households regularly to identify the best mix of services available to high needs households.

3. Describe the emergency short-term and long-term stabilization resources and funds that will be available to help clients be successful in this case management program.

The HSC funds a continuum of services throughout Lane County with a variety of social service funders, contractors and sub-recipients. The Case Manager in this program will work closely with the HSC partner agencies that provide these services to ensure access to appropriate services which include:

- food resources
- shelter
- housing stabilization, including weatherization
- senior and disabled services
- medical services to the under insured and uninsured
- budgeting and financial counseling
- employment, training and educational opportunities
- and other services as the resources are available

MONITORING

1. Describe how the case manager will fit into the CAA's organizational structure.

Lane County has a Department of Health and Human Services (H&HS). Within H&HS is the Division of Human Services Commission (HSC). The HSC has a Program Manager, Steve Manela, and a Supervisor, Pearl Wolfe. The Case Manager will be a member of the HSC Energy Team and will be supervised by Pearl Wolfe.

2. Describe how results will be measured.

The Case Manager will data enter information gathered from case managed households into the Quick Assessment and Comprehensive Assessment tools provided by OHCS in the OPUS data base. The assessments will be administered at the beginning and the

ending of the case management term and an automated comparison of these will indicate changes made by case managed households on a variety of life areas i.e. finances, education, housing, employment, etc. The OPUS database will also track numbers served to assure we are meeting the household number expectation indicated in the CASELOAD Question #1 of this proposal.

3. Describe how you will provide oversight and assure quality control.

The Case Manager will be supervised by the HSC Supervisor, Pearl Wolfe. This supervisor will monitor this position for performance. Also, the HSC Energy Team has a quarterly file review quality assurance process, which will include the client files from this project.

REPORTING

1. Describe how you will train case managers in use of the OPUS modules.

The Lane County Energy Team currently employs a Data Entry Operator to train new OPUS users. This OPUS trainer will work with the Case Manager in general OPUS data entry and the OPUS modules related to this project.

CONFIDENTIALITY

1. Provide an assurance that agency procedures related to confidentiality will be applied to all staff members who have access to case management records, clientele and OPUS data.

The Case Manager will be required to sign the following forms related to confidentiality:

Energy Confidentiality statement from OHCS LIEAP/OEAP manual
OPUS User Policy, Responsibility and Code of Ethics
Lane County Confidentiality statement

The Case Manager will receive training in confidentiality through annual energy assistance training process provided by the Energy Program Coordinator.

The HSC Supervisor monitors energy staff for adherence to confidentiality requirements i.e. desk top sweep after hours, providing locking file cabinets for confidential material storage.

DRAFT Lane County Energy Education Proposal

In the following pages, please give detailed descriptions to address each of the minimum requirements:

Program Overview

Lane County will devote 1.0 FTE to a variety of energy education activities through a professional Energy Educator. These activities will include training sub-recipient volunteers and intake staff to provide energy education, teaching energy education in workshops, and in-home settings.

Level 1 (Energy Education through Volunteers and Intake Workers)

The Energy Educator will provide 10 hours of in-depth energy conservation training to committed volunteers and intake staff. These volunteers and staff will then provide energy conservation education in conjunction with energy assistance appointments.

For example, the Florence energy assistance agency, Siuslaw Outreach Services (SOS), has a committed group of senior retired volunteers who return each year to assist with energy assistance intakes. Those interested in energy conservation will be trained to provide energy conservation education during energy assistance appointments and will be encouraged to conduct energy conservation in the community at-large.

Level 2 (Energy Education in workshops)

The Energy Educator will conduct energy conservation workshops to households expressing interest on the mail out application, and to households receiving education during energy assistance that would like more conservation education. In addition, so called “natural communities” such as low income housing projects, senior centers and mobile home communities will be targeted for energy education workshops. All income qualified households will receive a kit of energy-saving devices to install in their home, or will have an in-home visit if assistance is required to install the kit items.

The Energy Educator will provide energy education in the home for households that are unable to attend a workshop due to scheduling conflicts or accessibility issues, or who have unusually high energy use that requires more intensive and tailored education.

Level 3

See E2C2 Case Management proposal

1. Provide your procedure for sending mail outs to seniors and disabled populations

Lane County has always included energy conservation tips with energy assistance mail out applications and will continue to do so. With the new energy education program funded by this proposal, Lane County will also insert an invitation for energy education services, in the form of a workshop or home visit.

2. Provide your procedure for delivery of client education at initial point of intake (in office) *Identify what kits you will provide. List the kit items and project the energy savings of each item per year of use.*

Sub-recipient intake agencies will provide quality energy education to households during energy assistance intakes through highly trained volunteers and/or through intake staff. In either case the volunteers and the intake workers will receive intensive training in order to ensure the education is meaningful and relevant to the household. The education will be in a one-on-one format before or after the intake appointment and will be tailored to the household's heating system and energy usage history, as available from intake materials (usually current utility bill).

Kits will not be given to households at intake energy education, but these households will be invited to participate in an energy education workshop, where kits will be available.

3. Provide your procedure for delivery of client education through energy education group sessions *These sessions should be tied to: fuel type or heating type; household demographics (ie. households with small children, teenager, mixed generations, etc.) or a common element (ie. apartment or other homogenous housing type or neighborhood, etc.)*

The Lane County Energy Educator will offer energy education through group sessions, or workshops, to a variety of populations. LIEAP senior and disabled mail outs will offer energy education workshops. Lane County will also continue to offer energy education workshops to residents in "natural communities" in the style of the current REACH grant. These will be coordinated with mass weatherization efforts in these communities, and will be targeted mainly towards manufactured dwelling parks.

Workshop attendees will be offered a kit of energy conservation materials and a \$25 incentive payment towards their energy bill. The kit materials and incentive payments will be funded through Lane County's LIEAP Leverage funds. Kits will cost approximately \$40 and include:

- 2 CFLs (15 and 20 watts)
- 6 outlet covers
- 1 refrigerator thermometer
- 1 showerhead
- 1 hot water thermometer
- 1 (or 2) switch plate thermometer
- 2 aerators (kitchen and bath)
- 1 water leak detector kit
- 1 canvas bag

4. Provide your procedure for delivery of client education through a home visit by energy educator

The Energy Educator will reserve a portion of her time for in-home energy education for households with a high interest in energy education who are unable to attend a workshop, and for households that have received energy education with an intake or in a workshop but have very high usage patterns. These households will be identified by volunteers and intake staff who are screening for these households and refer them to the Energy Educator.

These in-home energy education visits will follow the style of the REACH home visits for energy education. The Energy Educator will gather data on the household's pattern of energy usage and bill payment history prior to the visit.

5. Provide your procedure for delivery of client education through a home audit for weatherization (during audit/inspection)

HACSA weatherization auditors provide energy education to household members during each home weatherization audit and will continue to do so. HACSA auditors will also identify households that need more intensive energy education and will refer those households to the Energy Educator.

6. Provide a management information system to track client progress toward completing their case management plan

See E2C2 Case Management Work Plan proposal submitted in conjunction with this proposal.

7. Provide your qualification criteria for participation in your Energy Education Program

- Community workshops by volunteers - There will be no qualification criteria
- Natural community workshops by Energy Educator – energy assistance and/or weatherization eligibility
- Workshops to households recruited from energy assistance and/or weatherization – Energy assistance and/or weatherization eligibility

8. Provide your program service priorities

- Community workshops by volunteers - No priorities
- Natural community workshops by Energy Educator – low-income, willingness of park or apartment management to allow access and help distribute program information, weatherization services pending, seniors, disabled and families with children.
- Workshops to households recruited from energy assistance and weatherization – participant interest and motivation, high energy usage, lack of access to energy education through other programs or through utility i.e. CLPUD, SUB customers

9. Provide a plan on data collection
Include how you will administer pre testing to establish their level of knowledge and understanding of energy efficiency issues.

Data collection

All of the households receiving energy education through energy assistance and weatherization services will be data entered into OPUS E2C2 module, which captures form of education i.e. workshop, home visit, and any kit items received, and client characteristics of all household members.

Pre and Post Testing

Lane County has an energy pre-post quiz developed through the REACH Grant, which provides valuable feedback to the Energy Educator on the effectiveness of the energy education workshops. These pre and post tests will be used in workshops for this project as well.

10. Provide a proposal on how you will provide case management (Energy Education is not Case Management)

Please refer to the E2C2 Case Management Proposal from Lane County submitted in conjunction with this proposal.

11. Provide information on what population type and number of people you intend to serve

Lane County will serve a broad variety of population types and a large number of people through this Energy Education program. Energy education materials will be sent to senior and disabled LIEAP mail out households, along with an invitation to attend an energy conservation workshop. In-home education will be offered to home bound senior and disabled households.

Lane County plans to provide meaningful energy education to a large percentage of households receiving energy assistance through intake appointments, as described in question #2 above. This will reach a broad cross section of Lane County households of various population types, as evidenced through LIEAP Client Characteristics report.

12. Provide a timeline for implementing your energy education program giving start and end dates

Lane County is currently delivering the federal REACH Grant. The Energy Educator delivering the REACH Grant services is the same person who will coordinate and deliver the energy education services through this project. The REACH Grant activities continue through December 2006. However, the activity level of the REACH Grant will subside during the final months of 2006. As REACH Grant activities decline during July – Dec 2006, the Energy Educator will begin to implement the energy education activities in this proposal. By February 1 2007 she will be fully dedicated to the activities in this proposal. Funding for this program is available through June 30, 2008, as communicated by OHCS, which is the time this program will end, unless or until renewal funding or additional funding is made available.

13. Identify how long it takes for an applicant to pass through the energy education program.

- Volunteer community workshop – workshop only
- Education at intake – intake only with follow up call within 30 days
- Workshop taught by Energy Educator – follow up call within 30 days to review kit install and action plan item completion
- Home Visit by Energy Educator – follow up call with 30 days to review kit install and action plan item completion

14. Provide a budget that includes administrative and program delivery costs.

See attached budget

15. Identify the funding resources that you will use to deliver energy education

See attached budget

16. Provide projections on energy savings and return on investment (ROI)

Cost savings are shown below, illustrating an average household's potential energy savings, as adapted from materials provided by Quantec, the current REACH Program evaluators. It should also be noted that similar energy education projects have shown a *very* positive impact in previous studies. Some of the benefits include:

- Increased knowledge of energy efficiency and ability to make home more energy efficient
- Reduced energy consumption
- Increased health and safety

Estimated Kwh savings per kit is deemed to be 873 kwh.

Potential Cost Savings with kit items and behavior changes in energy use:

<u>Install</u>	<u>Electric Heat</u>	<u>Gas Heat</u>
CFL—1	\$5.97	\$5.97
CFL—2	\$5.96	\$5.96
Showerhead	\$62.44	\$68.34
Kitchen Aerator	\$29.02	\$25.42
Bathroom Aerator	\$14.46	\$12.67
Turn down hot water heater	\$15.20	\$14.95
Turn down thermostat	\$72.96	\$104.00
Use less air conditioning	\$11.55	\$0.00
Reduce hot water use	\$9.03	\$7.91
<u>Change furnace filter</u>	<u>\$18.24</u>	<u>\$26.00</u>
Bill Savings	\$244.83	\$271.22
Water Savings	\$29.47	\$29.47
Total Savings	\$274.30	\$300.69

17. Provide information on how you will report, follow up, verify and evaluate your program.

Lane County will data enter all intake, workshop and home visit energy education sessions into the OPUS database, along with kit items dispersed. This will allow Lane County to track numbers served and items dispersed, as well as generate client characteristic reports about the people served.

Each household receiving energy education in an intake, workshop or home visit setting will receive a follow up call within 30 – 45 days to review the household's action plan, installation of kit items and follow up on referrals.

Lane County has a pre-post test that will be administered before and after workshops to determine the amount of knowledge gained from the workshop.

Lane County has close working relationships with many of the local electric companies in Lane County and is able to partner with them in gathering pre/post data on participants in various Lane County energy conservation programs to measure program impacts. Lane County will do this in relation to this energy conservation program as well.