

# **Ensuring a Holistic Approach to Emergency Financial Assistance (EFA) Delivery**

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# The Ideal Service Delivery Model

- In 2009, the OEB appointed a Financial Assistance Working Group (FAWG) to develop a manual, based on best practices for the service delivery model for the EFA program
- Two ways of delivering the program:
  - 1) One agency;
  - 2) A network of intake agencies and a Lead agency

# The Ideal Service Delivery Model cont'd

## **Role of Intake Agencies:**

- Screen for eligibility;
- Complete and process applications, collect client documentation as well as verify all information with the utility company;
- Communicate with utility company to ensure applicant remains connected to energy;
- Comprehensive assessment on applicant's situation;

# The Ideal Service Delivery Model cont'd

## **Role of Intake Agencies (cont'd):**

- Offer a wide range of referrals, supports and assistance;
- Holistic approach.
- If the intake agency also acts as the lead agency--approve or deny the applications; communicate decisions to applicants;
- If there is a lead agency, make recommendations to the lead agency;
- Collect statistics.

# The Ideal Service Delivery Model cont'd

## **Role of the Lead agency:**

- Review applications submitted by intake agencies and make final decisions;
- Track EFA funds;
- Remit funds back to utility companies;
- Appeals/internal review;
- Collect statistics and complete reports;
- Provide oversight of intake agency administration, including training and ongoing support.

# The Ideal Service Delivery Model cont'd

## Strengths of this model:

- Holistic Approach;
- Applicant's first point of contact is the local intake agency with expertise and skills in providing housing help and social supports;
- Full assessment and creation of an effective plan;
- Intake staff identify root causes of utility arrears and help applicants find solutions to resolve their issues;

# The Ideal Service Delivery Model cont'd

## Strengths of this model (cont'd):

- Negotiation and mediation;
- Assess Low-Income Customer Service Rule eligibility;
- Leverage all other emergency energy funding to best meet the needs of the applicants;

# The Ideal Service Delivery Model cont'd

## Strengths of this model (cont'd):

- Provide comprehensive support services to applicants, including those not qualified for EFA;
- Personal interactions and follow-up supports;
- High efficiency - one-stop access; seamless application process;
- Client-centered;
- Proven track record.



# Hydro One and Enbridge Gas model

- All applicants must first call a toll free number;
- Applicants can no longer apply by calling or walking into a local intake agency;
- Intake is done by the “lead agency” on the phone, then directed to visit a local intake agency to submit their required documentation;
- “Lead agency” sends the “pre-filled intake form” to local intake agencies for information verification;

# Hydro One and Enbridge Gas model (cont'd)

- One Lead agency for the entire province;
- Applicants that meet initial eligibility are then referred to a local intake agency;
- The Lead agency places applicant's account on hold to allow for verification interview;
- Intake agency meets with client to verify & collect information which is sent to the Lead agency by fax;
- The Lead agency then makes sole decision on eligibility;

# Hydro One and Enbridge Gas model (cont'd)

- The applicant is required to call the Lead agency to receive grant decision;
- Lead agency sends all required payments to the utility company and completes all reporting requirements.

# Problems with a new model adopted by Hydro One and Enbridge Gas

## Problems reported to LIEN by several Intake agencies:

- If an applicant does not “pass” pre-screening, no further supports are provided;
- Local agencies do not receive sufficient compensation for full needs assessment;
- Applicants are hesitant to do a duplicate intake process;

# **Problems with a new model adopted by Hydro One and Enbridge Gas (cont'd)**

## **Problems reported to LIEN by several Intake agencies (cont'd):**

- Lack of information about applicant's utility account makes it difficult to assess their energy needs;
- Intake agencies' lack of information on EFA funds available and application approval creates barriers to leveraging other funds;
- The lead agency not placed to make local referrals;

# Problems with a new model adopted by Hydro One and Enbridge Gas (cont'd)

## Problems reported to LIEN by several Intake agencies (cont'd):

- Toll-free line is difficult to get through--for those who do not have a land line, there are further difficulties;
- The toll free system also creates obstacles for some applicants;
- Incorrect referrals;
- Local intake agencies do not have the authority to contact utility company;

# Problems with a new model adopted by Hydro One and Enbridge Gas (cont'd)

## Problems reported to LIEN by several Intake agencies (cont'd):

- Local intake agencies cannot make a decision on approval even in circumstances where discretion is warranted;
- Lack of communication;
- If an applicant is denied LEAP EFA or if they are eligible but have outstanding arrears, there is currently no adequate process in place to assist that client in resolving their arrears. The client is left on their own to try to resolve them.

# Problems with a new model adopted by Hydro One and Enbridge Gas (cont'd)

## Problems reported to LIEN by several Intake agencies (cont'd):

- Local intake agencies cannot make a decision on approval even in circumstances where discretion is warranted;
- By-passing local intake agencies;
- LEAP funds are first come first serve instead of having a fair portion allocated to each municipality.



# Our recommendation

- Eliminate toll free number and have intake done locally;
- Adequate compensation for local intake agencies to conduct a thorough needs assessment for the applicants;
- Provide local intake agencies the ability to connect with utility companies and advocate on behalf of clients;

# Our recommendation (cont'd)

- Ensure an adequate process is in place to assist applicants who are denied LEAP EFA or eligible clients who have outstanding arrears;
- Local intake agencies have access to information on fund level remaining;
- Ensure that applicants and intake agencies are immediately advised of final decision on eligibility.

# Looking forward to a positive solution

- These concerns have been shared with the OEB and the utility companies, and we are looking forward to a meeting to resolve these issues.