2019 COMMUNITY ACTION PARTNERSHIP MANAGEMENT & LEADERSHIP TRAINING CONFERENCE

ENERGY PARTNERSHIPS: INNOVATIVE PARTNERSHIPS BEYOND UTILITIES

North Carolina Community Action Association
America's Poverty Fighting Network
A Helping Hand for Your Home.

DUKE ENERGY HELPING HOME FUND
Duke Energy

- Duke Energy Corporation is headquartered in Charlotte, NC
- Serve ~7.5 million retail electric customers in six states – NC, SC, FL, IN, OH and KY – representing a population of ~24 million people
- Serve ~3.3 million retail electric customers in NC
DUKE ENERGY HELPING HOME FUND OBJECTIVES

- Successfully *Leverage Relationships* with local agencies, non-profit organizations, and state government
- *Improve* the health, safety, and energy efficiency of low-income households, as well as increase their level of *Disposable Income*
- Leverage funding and resources from other federal, state, and local programs to *Maximize Program Benefits* for low-income customers
Duke Energy Helping Home Fund Design

- $20M provided from 2013 rate case in NC
- Assistance for LI <200% of FPG
  - Provide health and safety repairs
    - Up to $3,000 per home
  - Provide Energy Star® appliances
    - Up to $2,000 per home
    - Refrigerators
    - Room A/C units
    - Clothes washers / dryers
- Provide energy efficient HVAC systems
- Weatherization assistance (Duke Energy Progress territory)
Program Results

• Administration of Duke Energy’s Helping Home Fund began in January, 2015 and was completed in June 2017.

• Duke Energy had an interest in understanding the full impact of the program. In 2017 Duke contracted with Advanced Energy to independently evaluate the full program results.

• Advanced Energy reviewed program statistics and surveyed over 900 homeowners as to the impact of the Helping Home Fund services provided.
Overview of Measures Installed

- 3,516 Customers assisted
- 7,096 Measures provided

1,676 appliances
2,731 health & safety repairs
1,878 HVAC systems (1,344 were non-functioning)
811 Weatherization assistance
## Leveraged Funds

In addition to the $20M spend from the Helping Home Fund:

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount Leveraged</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Carolina Weatherization Assistance Program (Includes DOE &amp; LIHEAP)</td>
<td>$17,321,000</td>
</tr>
<tr>
<td>PNC Bank Home Beautification</td>
<td>$250,000</td>
</tr>
<tr>
<td>North Carolina Housing Finance Agency</td>
<td>$234,000*</td>
</tr>
</tbody>
</table>

*Amount reported by NC Housing Finance Agency at the time of the report. Final amount expected to be higher.*
<table>
<thead>
<tr>
<th>Benefit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>Health included measures such as the number of doctor’s visits, decreased asthma symptoms and other homeowner health effects.</td>
</tr>
<tr>
<td>Safety</td>
<td>Safety included homeowner accessibility or ability to move about their homes, as well as electrical and durability issues.</td>
</tr>
<tr>
<td>Comfort</td>
<td>Comfort addressed whether occupants felt that their homes were more comfortable.</td>
</tr>
<tr>
<td>Disposable Income</td>
<td>Disposable Income looked at whether the Helping Home Fund provided homeowners with additional income to spend on other necessities.</td>
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<tr>
<td>Economic Sustainability</td>
<td>Economic sustainability/community impact included effects on service provider employment and home deferrals, among others.</td>
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</tbody>
</table>
Duke Energy Helping Home Evaluation - Homeowner Survey Response:
Question - Have you (or any family members) noticed any positive health impacts due to the upgrades to your home?

- Less medication: 9%
- Fewer doctor visits: 12%
- Decreased asthma symptoms: 13%
- Mental health improvement: 13%
- Other: 14%
- Decreased stress: 36%
- Improvement in sleep: 43%
- Positive impacts to health: 45%
- Overall well-being is better: 54%
<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Benefits (Cost Savings)</td>
<td>$5,115</td>
</tr>
<tr>
<td>Non-Energy Benefits</td>
<td>$10,313</td>
</tr>
<tr>
<td>Economic and Social</td>
<td>$3,883</td>
</tr>
<tr>
<td>Health and Safety</td>
<td>$4,776</td>
</tr>
<tr>
<td>Utility Service</td>
<td>$473</td>
</tr>
<tr>
<td>Environmental</td>
<td>$1,181</td>
</tr>
<tr>
<td>Total Benefits</td>
<td>$15,428</td>
</tr>
<tr>
<td>Total Costs</td>
<td>$10,124</td>
</tr>
<tr>
<td>Helping Home Fund</td>
<td>$5,152</td>
</tr>
<tr>
<td>Leveraged Funds</td>
<td>$4,972</td>
</tr>
</tbody>
</table>

SUMMARY OF COST VS. BENEFIT OF EXPENDITURES FROM DUKE ENERGY HELPING HOME FUND
The Challenge

How to use the non-energy program results from the Helping Home Fund to develop innovative partnerships for Health & Safety dollars beyond funding provided by utilities
Social Determinants of Health

The social determinants of health are the economic and social conditions that influence individual and group differences in health status. They are the health promoting factors found in one's living and working conditions, rather than individual risk factors that influence the risk for a disease, or vulnerability to disease or injury.

source: The World Health Organization
Blue Cross NC to invest $2 million in North Carolina Community Action Association

Blue Cross and Blue Shield of North Carolina (Blue Cross NC) is investing $2 Million in the North Carolina Community Action Association (NCCAA), a statewide organization serving disadvantaged communities in our state. The partnership will help nearly 700 households make vital home repairs – improving the health of these families and in turn our entire state.

Source: Mountain Express, Asheville, NC
Service Territory

The service territory is 56 rural NC counties served by 10 Community Action Agencies. Rural counties were targeted since most are underserved by not having access to city/county resources available in urban communities.
Eligible Repairs Focused on Health & Safety:

- Replacement of carpet with hard surface flooring (includes floor repair and clean-up service)
- Interior pest control
- General cleaning of home, including debris removal
- Interior ventilation issues – including venting/replacement of unvented heat/cooking sources (outside of other funding available)
- Air purifiers
- Carbon monoxide & smoke detectors (including battery change-out)
- Handicap accessibility/ fall prevention
- Moisture control
- Duct cleaning
- Filter change out, plus one-year replacement supply
Customer Eligibility

The Healthy Home Initiative (HHI) targets income-qualified NC residents. Customers are eligible to participate if their household income is at or below the Federal Poverty Guideline of 200% of poverty income qualification. HHI is available to owner and renter-occupied residences with landlord approval.
Allowed Spending

Combined spending on measures installed are capped at $2,500 per home. Participating agencies are reimbursed for all direct costs attributable to the installation of allowed measures and are paid a 7% administrative fee.
Program Data Collection

A custom, web-based data collection system was designed for the program, and information on health conditions present in the home is being collected. While the presence of a health condition is not a requirement for participation, NCCAA will show improvements in health conditions following home improvements. This will then demonstrate the impact on the social determinants of health. NCCAA believes that this program will be the first step of going to other health care providers for additional funding to help the families we serve.
A SUCCESS STORY!
THE WEATHERIZATION ASSISTANCE PROGRAM IN ROWAN COUNTY
JUST IMAGINE...

- **She lives on $1134.00 per month.**
- **Had a stroke in February, 2017 and hasn’t worked since.**
- **The mobile home she lives in is more than 30 years old.**
- **The roof has leaks. The floor has holes. Windows are broken and taped.**
- **The heating system is over 30 years old as is the water heater and refrigerator.**
HOLES IN THE FLOOR...
INSULATION UNDER THE HOME WAS FALLING DOWN
...AND A 30 YEAR-OLD ELECTRIC HEAT FURNACE WITH UTILITY BILLS OF $299.00 PER MONTH IN WINTER.
THE NEW HVAC IS...

- A Trane Heat Pump
- SEER = 15
- HSPF ≥ 9.2
• Cut blower door cubic foot/minute of air leakage down from 2,945 to 1,095
• Sealed all ducts
• Repaired the subflooring
• Put down a vapor barrier on floor and then laid vinyl plank overtop
• Insulated under the mobile home and the flat ends of the mobile home
• Caulked all windows
• Replaced the back door (which was sealed shut)
• Installed a bathroom fan on automatic timer
• Sealed the roof and installed vent caps
• Installed new, energy efficient refrigerator and HVAC system
ANOTHER LIFE CHANGED…
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