

- Enter the number of minutes or hours spent on the specific task being described. If the task involves 10 staff for an hour, say that in the description and identify the time as 10 hours.
- If the task has an identifiable cost other than staff time, please enter it here. An example is hiring a consultant to work with staff on eliciting client needs.

Documentation of Advocacy Activities

Each advocacy activity should be documented. A best practice is to document the activity as it occurs, to maintain an accurate record of activities and time spent. To document advocacy activities identify one of the following:

- Resolve energy crisis:** Working with the energy vendor and the household, get fuel delivered or service reconnected through coordination of community resources (such as County Economic Assistance or HeatShare.)
- Access services:** Helping the household access services the household cannot access alone. Activities include making calls on the household's behalf, helping the household complete an application, helping the household manage a series of events needed to access services, etc.
- Build self-sufficiency skills:** Helping the household build self-sufficiency skills using methods such as classes, financial counseling, or case management. Energy self-sufficiency must be a key component of the activity to qualify for A16 funding.
- Stabilize household situation:** Helping the household manage a series of crises that have the potential to spin out of control. This is a case management activity for households in crisis. The crisis must have an energy component to qualify for A16 funding.
 - Enter a description of the task/activity being documented. Be specific. There may be several entries for advocacy with one household, with the same or different tasks. Each should have a new description. If program money resolves the energy crisis, please say so here.
 - Enter the number of minutes or hours spent on the specific task being described. If the task involves 10 staff for an hour, say that in the description and identify the time as 10 hours. Do not count household time.
 - If the counseling is energy related, put a check mark in the box. For example, if the household has a shut-off notice, it is energy related. If they have an eviction notice for non-payment of rent, it is not energy related, though EAP resources may be used to help resolve the crisis.
 - If the household receives an active referral to another organization, enter the name here. In an active referral, the referring worker will help make contact and follow up as part of a case plan for assisting the household in resolving or improving their emergency situation.

Outreach, Collaboration and Coordination

Outreach to eligible populations is a major EAP activity. A continuum of outreach activities is necessary to target those households most vulnerable to the effects of cold, especially young children, the elderly and disabled, those for whom access to assistance programs is especially difficult, and the lowest income households with the highest energy burdens. Outreach activities must be conducted at both the state and local level. Effective outreach requires state leadership to develop the consistent message in conjunction with Service Providers and other low income based programs and energy vendors.

Outreach definitions and division of responsibilities are as follows:

State role in outreach	Local role in outreach
<ul style="list-style-type: none"> ▪ Develop a message to promote universal recognition and 	<ul style="list-style-type: none"> ▪ Encourage income eligible households to apply for the program ▪ Assist households to apply

acceptance of the program	<ul style="list-style-type: none"> ▪ Reinforce DOC outreach efforts ▪ Maintain local program identity
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The following are typical outreach activities:

- Publish articles in local newspapers or broadcast media announcements.
- Inserts in energy vendor billings to inform individuals.
- Execution of interagency agreements with other low income program offices to provide outreach to targeted populations.
- Providing intake service via home visits or by telephone for the seniors or people with disabilities.
- Placing posters, flyers or applications in local and county social service offices, clinics, offices of aging, Social Security offices, and VA offices.
- Mailing reminders to past recipients of EAP.
- Informing applicants of the availability of other types of assistance as requested.
- Accepting applications for energy crisis assistance at sites geographically accessible to all households in the area to be served (required by the LIHEAP Act).

State Outreach Activities

State outreach activities include:

- Preparing and distributing a statewide application form for EAP.
- Putting the EAP application on the DOC Web site.
- Maintaining a toll-free referral telephone line at 1-800-657-3710.
- Coordinating with fuel funds including Heat Share.
- Providing Service Providers with census data for locating specific populations within their service delivery area.
- Providing Language Line Services to Service Providers through the Minnesota Department of Administration, MN.IT Services (formerly the Minnesota Office of Enterprise Technology) (see [Appendix 2A - Language Line](#)).

Local Outreach

Service Providers must do local outreach to applicants and potential applicants and make EAP services accessible and responsive. Service Providers should:

- Complete Service Provider-wide community assessments.
- Provide outreach services to targeted population groups, high-risk households, and households that include children under age six, elderly and disabled members.
- Assure all applicants, including non-English speaking applicants, have access to services
- Publicize eligibility requirements, where and when to apply, and other appropriate information assisting households to apply.
- Publicize the availability of heating assistance, emergency assistance, and energy related repair.
- Supply application materials to community organizations and other high traffic areas.
- Publicize the availability of home visits to assist homebound applicants in completing an application.
- Publicize the availability of appointments and face to face application services to households.
- Provide for voter registration as required by Minnesota Statutes §256.925.

Outreach to Targeted Populations and Collaboration

Service Providers must assure that all community groups and other local stakeholders receive updated information on policy changes and on any additional emergency funds or contingency funds that become available during the program year.

Documenting Local Outreach Activities

Document each outreach activity in eHEAT. A best practice is to keep up on daily documentation to maintain an accurate record of activities and time spent. The same task can be recorded several times, if the task takes several steps. For example, setting local targets may take several meetings, research time, document preparation, and approval of the Board of Directors. Each would be a task to be documented. To document an outreach activity, select the task (required). Outreach tasks in eHEAT are:

- a) **Complete Goals.** Complete goals established by Service Provider to provide Outreach.
- b) **Cross Train in Service Provider.** All training activities for non-EAP local service provider staff, including preparation time, go in this category.
- c) **Cross Train outside Service Provider.** Any training or education activities, including preparation time, for any outside individual, group, or service provider, goes in this category.
- d) **Make Applications Available.** Include activities to plan, prepare and distribute applications. If time is spent explaining the program to other service provider staff, please record it in "Cross Train."
- e) **Build Energy Vendor Relationships.** Include any activities spent strengthening energy vendor relationships, but not actual negotiations for a specific household.
- g) **Cultural and Diversity Training.** Include time meeting with staff that is spent emphasizing, learning or discussing cultural diversity and problem solving.
- h) **Information Brochures.** Include all planning, preparation and distribution activities.
- i) **Cataloging Case Histories.** Include time spent on eHEAT documenting advocacy activities.
- j) **Customer Service Training.** Include time, including staff meetings, spent emphasizing, learning or discussing customer service and problem solving.
- k) **Public Official Education.** Include activities related to educating public officials about EAP.
 - Describe (required). Enter a description of the task/activity being documented. Be specific. If the task is a big one, such as Information brochures, there may be several entries for the task, each with a different description, such as, "Met with the printer to identify printing options such as colors, paper, folds, etc."
 - Enter the amount of time spent in minutes on the specific task being described (required).
 - If the task has an identifiable cost, not staff time, please enter it here. An example is printing costs for printing brochures.
 - Count is not required because eHEAT counts it.

Collaboration and Coordination

Service Providers should collaborate with other energy related service providers and relevant community resources to outreach and facilitate EAP and provide referral services to target groups. Coordination and collaboration must be designed to meet program and local needs, and service providers should have an on-going process for evaluating and improving their approaches to these activities. Collaboration may focus with community agencies providing:

- Children service programs.
- Family service programs.
- Elderly service Programs.
- Educational programs.

- Energy programs.
- Housing programs.
- Neighborhood programs.
- Human service programs.
- Emergency programs.
- Workforce programs.

Coordination

Coordination and collaboration with other energy related service providers and community resources is essential to maximizing services and to the vision of a universally recognized and accepted program.

Coordination and collaboration must be designed to meet program and local needs, and service providers should have an on-going process for evaluating and improving their approaches to these activities.

Service Providers must maintain system partnerships with:

- Community organizations serving low income persons.
- Community Action Agencies.
- Service Providers providing weatherization services.
- Agencies on aging, housing authorities and special purpose agencies providing services to low income persons.
- Utility programs providing services to low income persons.
- Energy vendors, fuel suppliers and others who have signed energy vendor agreements.
- Outreach such as media partners.
- Fiscal partners.
- Referral network.
- Other EAP Service Providers.

Cooperation between EAP Service Providers

Service Providers are encouraged to share resources to maximize services available to applicants. Shared resources could include:

- Assisting non-English speaking households to access energy programs.
- Sharing outreach materials and resource information among Service Providers in neighboring geographical areas.
- Cost-sharing of 1-800 referral services.
- Sharing cost of program application materials (especially those printed in an alternate format).
- Periodic meetings between neighboring Service Providers to discuss mutual concerns.
- Carpooling to statewide meetings.

Community Coordination

In July 2000, the FCC assigned telephone number 2-1-1 for human services information and referral nationwide. 2-1-1 service is available in Minnesota statewide. In Minnesota, 2-1-1 is answered by First Call for Help Minnesota. This service provides Service Providers an efficient and convenient way to refer households to services. Service Providers must be included on the First Call Minnesota web site as an energy assistance provider for each county in their service area and assure information regarding local services is correct (see [Appendix 2B - Statewide Information and Referral Services](#)). The Service Provider must provide by mail or in person a community resource list to each applicant.

The written plan addressing coordination, cooperation and referrals to other community organizations and businesses is included in the Local Plan. This plan should include:

- A list of community organizations to receive application materials.
- A list of community groups that will receive updated information on policy changes and the availability of EAP, EAP Crisis, ERR and any additional emergency or contingency funds that may become available during the program year. This includes the availability of ERR funds during the summer months.
- Methods of coordinating with emergency services and other service organizations to implement a crisis procedure.
- Methods of offering applicants the opportunity to register to vote.

Examples of Interagency Cooperation

- Meeting with agencies before the program begins to plan service integration and implementation.
- Formalizing cooperative agreements in writing.
- Providing partner agencies with current program information including income guidelines and applications.
- Providing partner agencies with regular funding updates.
- Developing methods for referral.
- Identifying a staff person to act as a liaison between your Service Provider and other providers.
- Developing a list of agencies. Include a telephone number and name of contact person. Include at a minimum the following providers:
 - Basic Subsistence – Food, housing, transportation, medical, telephone.
 - Income Maintenance – DWP, General Assistance, Emergency Assistance, Employment Services, SSI, MSA, SS, and VA.
- Establishing follow-up procedures to be used to evaluate successful partnerships.
- Ensuring partner agencies are able to respond effectively to needs.

Weatherization Assistance Program Coordination

Coordination with local Weatherization Assistance Program (WAP) staff is necessary for smooth operation of both programs. By policy, a household that is income eligible for EAP is also income eligible for WAP. WAP may have additional eligibility criteria. To identify the details of the local coordination, local EAP Service Providers must execute a coordination agreement with the WAP programs serving their area.

These are the programs' responsibilities to accomplish coordination:

WAP Applications

The EAP Service Providers will:

- Determine income based on EAP policies.

The WAP Service Provider will:

- Identify one or two individuals who are authorized to access EAP files.
- Agree to pay the EAP Service Provider the costs of duplicating documents and records.

Energy Related Repair

If EAP does ERR:

- WAP agrees to identify and refer eligible households and fax or e-mail the Energy Related Repair (ERR) Tracking and Referral Form the same day the problem is identified.

If WAP does ERR:

- WAP agrees to:
 - Document ERR services on eHEAT.
 - Follow crisis timelines when providing ERR services.
 - Ensure a certified EAP application is on file before proceeding with the work using the list sent by EAP (see preceding section, Applications, above) or by calling the EAP Service Provider.
- EAP Agrees to:
 - Fax or e-mail the ERR Tracking and Referral Form immediately upon WAP request.
 - Identify and refer eligible households and fax or e-mail the ERR Tracking and Referral Form the same day the problem is identified.

Appendices

9A - [Reasonable Payment Worksheet \(RPWS\)](#)