

Winter Warmth

Background and Lessons Learned – Speaking Notes

July 2009

Brief History of Winter Warmth

Winter Warmth has really been a little program that has grown quickly.

- Winter Warmth began in 2003/04 when Enbridge approached UWT to help create a new program for low-income households.
- 2005: Enbridge expands to 12 Uws
- 2006: Enbridge expands to 15 UWs, Union Gas joins + 24 UWs
- 2007: Enbridge expands to 16 Uws
- 2008: total of 10 utilities and 40 UWs involved.

Winter Warmth Model

- Semi-decentralized model. United Way Toronto disburses funds to 40 Uws for Enbridge and Union Gas, which then disburse funds to 40 local agencies.
- Smaller utilities deal directly with local UW. (E.g Ottawa Hydro gives money directly to UW Ottawa, who flows funding to agency).
- We have attempted to centralize the core infrastructure that supports the launch of Winter Warmth. This has been critical to delivering the program as more utilities have come on board.
- All utilities participating have to agree to standard program elements – i.e. common manual and policies, standard logo and branding, standard operating period.
- Prior to this, each company was really responsible for branding, application forms, advertising etc. There was no consistent brand. As more companies have come on, it has been critically important to have a consistent brand for agencies and customers now dealing with more than one utility.
- All utilities pay pro-rated shares of coordination costs. (Based on the customer base as a percentage of total customers served since financial contributions of companies are not comparable).
- All coordination has been through UWT, for example, disbursing funds across Ontario for Union Gas and Enbridge; collecting operating costs and creating funding agreement with Neighbourhood Information Post.

Current Governance Structure:

- WW currently supported by provincial steering committee that was created in 2007 following consultant report. Previously each utility made independent policy decisions which led to separate programs (e.g. different manuals, applications, different start/end dates). This was confusing for agencies and hard to manage for steering committee.
- Committee function originally intended to look at policies and approve new utilities to join Winter Warmth. But since no dedicated staff resources, the committee has really been a working committee – i.e. members have taken on all necessary activities to launch the program (manual, training, templates, translation, marketing as well as policy).
- Neighbourhood Information Post also provides a great deal of support for which they are paid – e.g. reporting and ongoing support for sites.

UW involvement in delivering Winter Warmth

- United Ways in general have played 2 roles:
 - Using knowledge of local agencies to locate and secure agencies to deliver winter warmth in community, and;
 - Flowing funds to agencies.
- A few have been more active in the local program but many have really been a “flow-through” organization that does not provide on-going active oversight to the local program. All Uws would still be involved in any issues that may arise.
- For Enbridge, Toronto Hydro and for Union (Union in 2008 only) United Way Toronto has provided financial oversight for all funds.
- UWT and UW Canada have been lead coordinator for Winter Warmth:
 - UWC has been liaison with provincial UWs and new utilities looking to join WW. After staff changed, UWCC did not renew staff support for WW and the liaison role is vacant and a significant gap.
 - UWT Toronto’s role has varied and we have often stepped in to fill gaps. E.g. in 2006 UWT re-wrote the manual, press materials, delivered training etc.
 - UWT main role is really about financial stewardship over the funds that are disbursed.

Issues and lessons learned

- 1) Need Infrastructure – i.e. dedicated staff responsible for coordinating the program.
 - Currently we have exceeded our capacity to deliver WW. In particular, we are currently unable to deliver the program for any additional large companies like Hydro One.
 - Winter Warmth is currently not sustainable without dedicated staff support. I.e. one agency that will commit (and be funded) to provide all necessary functions for successful launch and operation of program.
 - Steering Committee has tried to do through in-kind contributions but not sustainable. Eg UW London and UWCC have pulled staff support. Currently utilities have expressed they are not able to continue coordinating Winter Warmth and the committee has recognized need to find an agency to deliver program.
- 2) Governance
 - Original intent was this was a policy focused committee that would set standards and policies for Winter Warmth.
 - The provincial steering committee has become a working committee where members commit their staff resources to ensure things are in place to allow WW to launch.
 - Committee is currently over-represented by utilities (10 committee seats) and under represented by agencies/UWs/Consumers (total of 3 seats). We looked at developing a sub-committee or annual survey but did not have resource to coordinate.
 - New structure needs to represent agencies, utilities, consumers at a table.

3) One program

- WW was originally 4 separate programs where each utility operated a little differently. In 2006 we set out to standardize the program e.g. start/end dates, application forms, one manual.
- This has drastically improved the coordination, communication and branding on Winter warmth.
- If LEAP is not developed as one program, OEB runs the risk of having to manage multiple separate programs.

4) \$450 cap needs to be raised

- In a consultation conducted in 2006, UWs and agencies agreed that the \$450 cap needed to be lifted to help families that had special circumstances.
- Recent discussions have reconfirmed desire to raise grant level over \$450.
- Winter Warmth has never spent all its money – even in 2008/09 a small amount remains. If LEAP is going to utilize the funding being recommended, the \$450 cap will likely need to be raised.
- Energy prices have risen greatly since the start of Winter Warmth in 2003/04 but the maximum grant amount has not risen. LEAP should look at grant levels being adjusted periodically to reflect rising prices.

5) Reporting and admin burden

- Each agency required to submit payment with account information every two weeks AND to provide a cumulative report outlining the amount of funds provided, amount remaining, # of households etc. This is duplicate information – in conversations with utilities, the only reason given for maintaining this was that the two departments at utility did not speak. \$\$ goes to finance/accounts payable while statistical report goes to winter warmth company lead – the utility lead staff could not actually get information from their own internal department.
- The agencies delivering WW or LEAP are specialized at one-on-one counselling and support, not in writing reports and we need to simplify and limit requests for information.
- EG in 2008, some sites had funding from 3 utilities, meaning 12 reports were due each month.

6) Financial Stewardship

- Need to simplify who holds the funds and makes payments. Current model of payments to UWT, who sends out 40 cheques to UWs that in turn send out another 40 cheques is not efficient.
- Need to consider a model that looks at intake and funding recommendations that is separate from issuing payments and financial reporting.

Assistance United Ways can provide in delivering a province wide financial assistance program.

Results of consultation from UWs

- Majority of UWs felt Winter Warmth was now redundant with LEAP
 - LEAP will be year round whereas Winter Warmth only operates ½ of year – LEAP is based on Winter Warmth so no benefit in maintaining separate programs.
 - Winter Warmth currently requires staff support – as will LEAP. Consensus was it made sense to adopt one program rather than maintain 2 separate infrastructures, which will maximize funding available to communities and minimize administrative costs.
- UWs felt that one consistent set of rules for dealing with low-income families, as has been proposed by OEB, will result in enhanced services for low-income families.
- Most UWs expressed interest in helping deliver LEAP. The role, I think, remains to be seen and depends on the final model and the needs:
 - Generally speaking, UWs would not be intake/delivery sites. Only a few Uws actually deliver front line programs and currently are involved in local delivery of Winter Warmth.
 - Similar to WW, we could use UW network of member agencies or expertise in assessing agencies to help find local agencies (in Winter Warmth, no utility has had to find their own agencies as local UW has performed this function)
 - UWs could also be involved in financial oversight.

Results of consultation from agencies

- All agencies involved in Winter Warmth were very interested in helping deliver LEAP as intake or lead sites but involvement would depend on the funding to compensate for staff time. Approx 60% of agencies reported they would require additional funding to compensate for year-round program.
- Requested less admin burden and reporting than Winter Warmth.
- Requested more flexibility in grant amounts e.g. grants above \$450
- Agencies felt that consistent rules between utilities would simplify the process and better serve low-income consumers