project cohere

designing a streamlined process for energy assistance in michigan

2020

project credits

Project Cohere documents the work of Civilla to research and redesign the enrollment process for energy assistance in Michigan. This project is one piece of a larger body of work to create a more human-centered experience for Michigan residents as they interact with public assistance programs.

Civilla
Civilla is a nonprofit organization dedicated to changing the way our public-serving institutions work through human-centered design.

Consumers Energy
Consumers Energy is a gas and electricity public utility committed to serving its customers, and making Michigan a great place to live.

DTE Energy
DTE Energy is a Detroit-based energy company that works to provide affordable, reliable service to its customers.

MDHHS
The Michigan Department of Health and Human Services provides opportunities, services, and programs that promote a healthy, safe, and stable environment for residents to be self-sufficient.

Michigan Public Service Commission
Michigan Public Service Commission protects the public by ensuring safe, reliable, and accessible energy and telecommunications services at reasonable rates for Michigan's residents.

Wayne Metro Community Action Agency
Wayne Metro is a nonprofit organization that serves low and moderate income residents throughout Wayne County, Michigan.

contents

executive summary

In the Fall of 2019, leaders from for-profit, non-profit, and Michigan government agencies met to discuss how their organizations could collectively improve the administration of more than $150 million in energy assistance funds distributed annually across the state. Out of these meetings, Civilla and its partners designed and launched Project Cohere, a pilot that tested new ways to streamline access to energy assistance based on the needs of residents and frontline staff. The pilot focused on the Michigan Energy Assistance Program (MEAP), a statewide utility bill payment program that low-income households often apply for in order to access the State Emergency Relief (SER) program.

The project was launched because of widespread recognition that applying for energy assistance was an overly burdensome process both for customers and frontline staff. The 2018 MEAP application was over 1500 words long, requiring applicants to complete more than 150 questions. Frontline staff processing these applications were flooded with paperwork, reducing their ability to provide quality case management supports. The application and approval process was too long, placing low-income households in a vulnerable position. And, as a result of the burdensome application processes, more than half of all SER applicants were denied assistance.

Project Cohere sought to redesign this onerous process to better serve both financially vulnerable Michigan residents as well as frontline staff. Through in-depth analysis, cross-sector collaboration, and human-centered design, the Project Cohere pilot launched a text message-based application process built on data sharing across agencies and minimum viable data collection.

The results of the Project Cohere pilot were striking:

→   After simplifying policy and data requirements, Project Cohere **reduced the number of questions on the MEAP application from 150 to just four.**

→   While accessing energy assistance usually took over a month to complete, **97% of Project Cohere participants received a determination the *very same day they applied.***

→   And while less than half of eligible applicants were typically approved for energy assistance, **85% of pilot participants were successfully pre-approved and enrolled in assistance.**

In short, the pilot didn't make small improvements on the existing process, but completely redesigned the experience of applying for energy assistance, providing relief for frontline staff while helping residents access assistance and build momentum towards financial stability.

This report outlines the process by which Project Cohere was created, details the successes of the pilot, and makes recommendations for taking this work to scale. These recommendations include:

→   **Bringing together cross-sector executive leadership** to enable decision-making across silos

→   **Simplifying policy and data requirements** for energy assistance programs

→   **Prioritizing a vital few** energy assistance programs

→   **Leveraging data-sharing and cross-training across agencies** to reduce applicant and administrative burden

→   **Using text message technologies** to facilitate the application process

We believe Project Cohere represents a first step in building a more seamless, user-centered public assistance system, which has the opportunity to transform how Michigan residents receive assistance and move towards greater stability with dignity.

the challenge

overview

Each year in Michigan, more than 975,000 low income households have to make difficult decisions about whether they can afford to pay their utility bills[1].

Losing heat or electricity for any period of time can destabilize families and negatively impact their health and wellbeing[2]. Fortunately, Michigan households struggling to pay their energy bills may be able to access one or more of Michigan's six different energy assistance programs. These programs are supported by a mixture of federal, state, local, and philanthropic funding. The primary programs for utility assistance in Michigan include:

State Emergency Relief (SER) Program
The SER program is primarily designed to support low-income households who need help paying a utility bill when unexpected emergency situations arise. This crisis assistance is available for households below 151% of the federal poverty threshold who meet eligibility criteria. SER is administered by the Michigan Department of Health and Human Services (MDHHS) and funding is provided by the Low Income Home Energy Assistance Program (LIHEAP).

Michigan Energy Assistance Program (MEAP)
MEAP funds help low-income households pay energy bills, and also support programs that provide case management, energy education, and energy waste reduction services to low-income residents. MEAP applicants commonly seek financial assistance to make a 'copayment' to their utilities, a prerequisite for completing enrollment in SER. Assistance is available for households below 151% of the federal poverty threshold that meet eligibility criteria. MEAP is overseen by MDHHS and the Michigan Public Service Commission (MPSC). Eligibility is determined by

[1] https://www.liheap.org/state-fact-sheets
[2] Diana Hernández, Understanding 'energy insecurity' and why it matters to health, Social Science & Medicine, Volume 167, 2016, Pages 1-10

10-15 nonprofit partners in Michigan who administer funds. The program distributes more than $50 million in annual funding from Michigan's Low Income Energy Assistance Fund (LIEAF).

Assurance 16
Assurance 16 is a provision of LIHEAP that is intended to help households reach energy self-sufficiency through a variety of activities. These activities are geared towards reducing home energy consumption and reducing the need for ongoing financial assistance. It is administered to households enrolled in MEAP and is available for households below 151% of the federal poverty level that meet eligibility criteria. Assurance 16 is overseen by MDHHS, MPSC, and the MEAP nonprofit partners throughout Michigan.

Weatherization Assistance Program (WAP)
WAP is a federally funded, residential energy program that provides free home energy conservation services to low-income Michigan homeowners and renters. These services reduce energy use and lower utility bills, thus creating more self-sufficient households. MDHHS, the Bureau of Community Action and Economic Opportunity (BCAEO) and 25+ nonprofit partners in Michigan oversee and administer WAP to households below 151% of the federal poverty level. This program's funding comes from the U.S. Department of Energy and LIHEAP.

Home Heating Credit (HHC)
The HHC is designed to assist low-income Michigan families in heating their homes. Under provisions set forth in the State Income Tax Act, the Michigan Department of Treasury processes the Home Heating Credit claim and issues payments. HHC has both income and residential requirements and is funded by LIHEAP.

Utility payment plans
Michigan utilities are mandated by the MPSC to establish programs that enable customers to make payment arrangements on overdue accounts. Several utilities have developed affordable payment plans (APPs) that aim to prevent residential shutoffs. These plans include: LSP (DTE Energy), CARE (Consumers Energy), MAP (Semco), EASE (UPPCO) and the winter protection plan. The amount of the benefit varies by three different household Federal Poverty Level (FPL) ranges: 20-75%, 76-110%, and 111-150%. Households are subject to a range of eligibility requirements including consumption limits, arrears limits, and account status.

user journey

In the summer of 2019, Civilla convened a group of leaders in the Michigan energy assistance community to identify ways to streamline service delivery. The research was focused on MEAP and SER—the two programs that offer low-income households assistance in paying their energy bills—with a particular focus on the needs of applicants and frontline staff.

Civilla began by mapping out the typical user journey for Michigan residents enrolling in energy assistance:

The start of an energy crisis
Residents often experience personal hardship or a moment of crisis (such as losing their job, falling sick, or getting injured) prior to needing energy assistance. As a result, residents are unable to pay their energy bill in full. Over time, the account balance increases.

Exploring a payment plan
Individuals receive a shutoff notice from their utility company which asks them to make payment arrangements. Utility companies often promote a payment plan that requires an upfront payment. Residents that are unable to make the required payment are advised to seek assistance from the State and local nonprofit organizations.

Applying for state assistance
Residents seeking assistance are often referred to apply for State Emergency Relief (SER), an assistance program administered by the Michigan Department of Health and Human Services (MDHHS). To apply, residents must establish an online account with MDHHS, navigate a digital application, upload a set of required verification documents, and complete a phone interview. This process can take up to ten days.

Searching for a copayment
Most residents who are approved for SER are designated quasi-enrolled until they are able to make a 'copayment' to their utility company, which is a sizable payment (often several hundred dollars) against their past due balance. Residents are given 28 days to make their copayment. If they aren't able to make the payment their SER application is denied. Since most residents do not have enough money to make their copayment, they are referred to a nonprofit organization that can enroll them in MEAP. By enrolling in MEAP, the nonprofit organization will make a qualifying copayment on their behalf. Residents must schedule an appointment to meet with a social worker, complete an application, provide verification documents, and participate in a subsequent interview. If their MEAP application is approved, the nonprofit organization will alert the state that a copayment is being made on behalf of the resident and they will be enrolled in SER.

user
needs

resident needs

Through hundreds of hours of research, Civilla heard directly from residents about the challenges they face while trying to enroll in energy assistance programs. When Michigan residents seek energy assistance, they are not just looking to keep the lights on. They are in a state of emergency and trying to keep their families healthy and safe. Their account balance is high and they have either received a shut-off notice or had their services cancelled altogether. In that moment, a confusing and arduous enrollment process leaves families feeling anxious and unsure of how to provide for their family's basic needs. Between the complex enrollment requirements and the time required to complete the process, residents have roughly a 50% chance of receiving the support they seek. Civilla identified three primary needs for residents who seek assistance.

1.
anytime, anywhere

As a resident, I need to be able to complete the enrollment process on my own time so that I don't have to choose between my job or my family and applying for benefits.

In order for residents to enroll in MEAP they are often required to visit a non-profit organization's office in person during regular business hours. This means that residents take time off work and can lose pay in order to make their appointments. Without a car and easy access to child care, individuals often spend 2-3 hours riding public transportation with their children. If they arrive without all the paperwork they need, they're sent home and asked to return at a later time. These requirements put an undue burden on residents in a moment of crisis.

Fortunately, since the beginning of the COVID-19 pandemic, non-profit organizations have reported a transition to telephone-based appointments rather than requiring in-person appointments.

"If I could have filled the application out on my phone during a break at work there is no way I would have dragged my children down to this office. But this was the only way."

—Michigan resident

2. streamlined enrollment process

As a resident, I need to be able to successfully navigate the enrollment process so that it doesn't prevent me from receiving benefits I am eligible for.

Confusing and complex enrollment requirements prevent many residents from getting the benefits they are qualified for. In 2019, more than 60% of applicants for Michigan's SER program – the state's primary energy assistance program – were denied, often due to procedural reasons. This is a significant problem because access to other energy assistance benefits is contingent upon a successful enrollment in SER. When enrollment procedures create an undue burden on applicants, the legitimate needs of many low-income residents who apply for assistance go unmet. Sometimes households end up applying several times in their attempt to enroll.

"I've been down to this office three times already. It looks like I'm going to need to come down a fourth time. Come what may, I will be enrolling in this program."

—Michigan resident

3. universal access

As a resident, I need to be able to enroll in more than one program at a time so that I can build momentum towards financial stability.

Fulfilling program enrollment requirements is often an exhausting experience for individuals applying for energy assistance in Michigan. The primary cause? Each social service agency utilizes their own distinct application and enrollment process, even as other nearby institutions are requesting identical information. This practice asks residents to establish relationships with multiple institutions, balance different program timelines, and verify duplicative program requirements at the cost of wasted time, financial resources, and emotional energy. For residents, the ability to use the data they provide for energy assistance to enroll in additional programs would enable them to build momentum towards financial health and wellbeing.

"Isn't there a way for me to just apply for all the programs available at the same time? Or do I really need to start from scratch over and over again?"
—Michigan resident
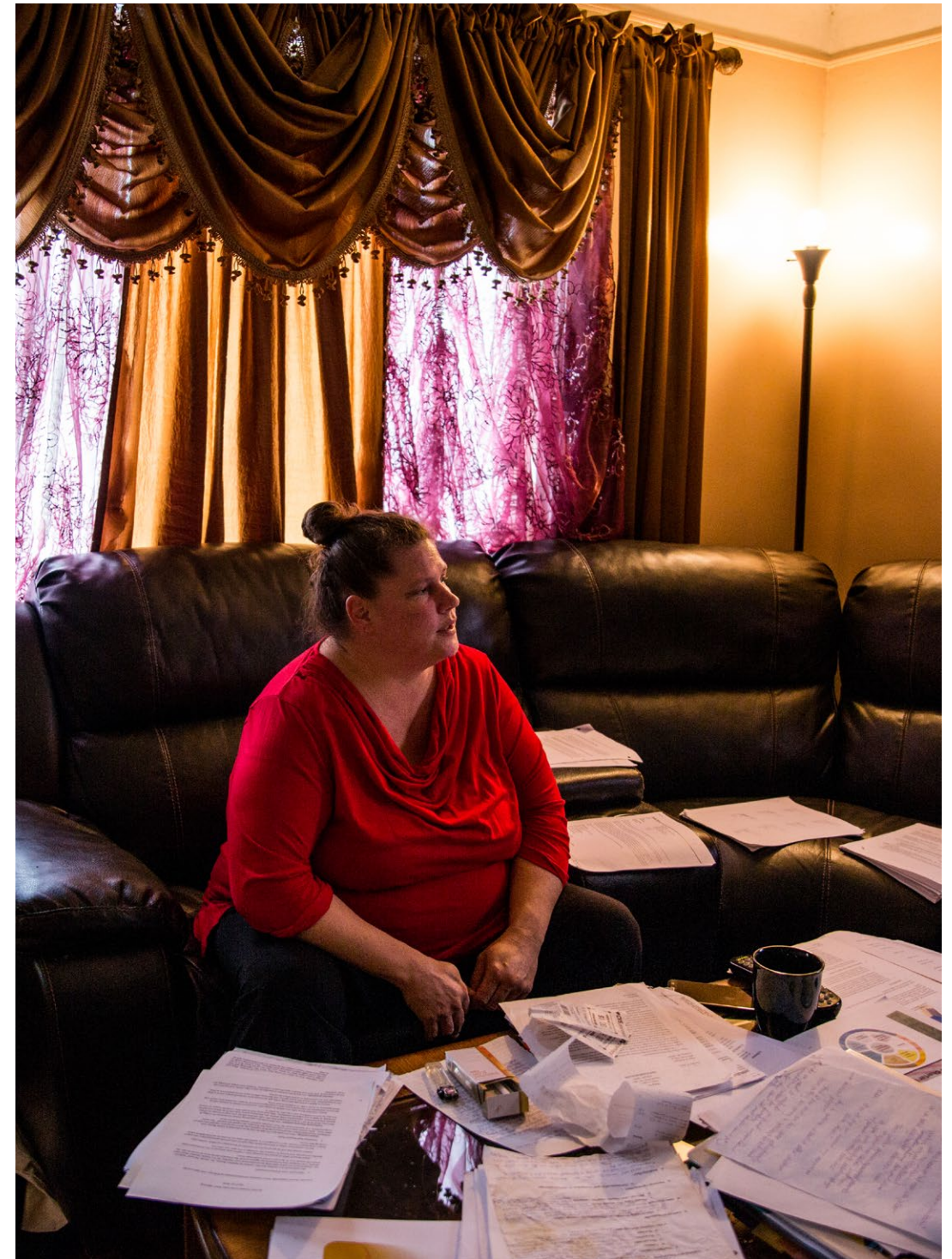
frontline staff needs

Frontline staff are a crucial part of the enrollment process, determining eligibility and ensuring that applicants fulfill the administrative requirements for the benefits they seek. Over the course of the pilot, Civilla interviewed and shadowed three different types of frontline staff: Customer Service Representatives at DTE Energy and Consumers Energy, caseworkers working for the Michigan Department of Health and Human Services, and Direct Service Specialists working at the Wayne Metro Community Action Agency. While frontline staff consistently describe entering their profession with the intention of having a positive impact in their community, the administrative burden of today's systems makes it challenging for them to focus on the very people they wish to support. Civilla identified three primary needs for frontline staff that were addressed in the pilot.

1.
paperwork vs social work

As frontline staff, I need a streamlined enrollment process so that I can spend my time responding to residents' needs instead of processing paperwork.

Many frontline staff come into the job through higher education, professional development programs, or years of relevant training in fields such as customer service or social work. They get engaged in benefits delivery because they want to make a positive impact in their community. However, due to the complex administrative requirements of social safety net programs, they find themselves spending more time processing paperwork and doing data entry than cultivating a human connection with their clients. As a result, they are rarely able to leverage the breadth of their capabilities to support residents' underlying needs. Over time the administrative burdens they face diminish the sense of purpose they initially found in their work and lead to professional burnout.

"When I started here I thought this job would be really different but it ended up being a conveyor belt of forms, documents, and data entry that you feed into old fashioned software programs. Not exactly the human touch I'd originally imagined."
—Michigan caseworker

2.
simple and flexible requirements

As frontline staff, I need simple and flexible eligibility requirements so that I don't have to worry about breaking the rules in order to help someone.

Today, assistance programs only support residents when they provide the right pieces of evidence to prove their needs. This evidence includes a variety of personal information and documents that are each subjected to thorough scrutiny. Even small infractions like the inconsistent use of a maiden name, a recently expired identification, or a pay stub for the wrong pay period can initiate follow up procedures or require further investigation. Consequently, frontline staff find themselves having to uphold rules that they know have little to do with the applicant's need or eligibility. When forced to pick between playing the role of an enforcer or a helper, they err on the side of caution for fear of being held accountable for an erroneous enrollment.

"The worst is when you know someone is qualified for a program but doesn't have quite the right documentation. In those moments you want to fudge it but you know it could come back to haunt you so you enforce the rule. That's what we do."
—Michigan caseworker
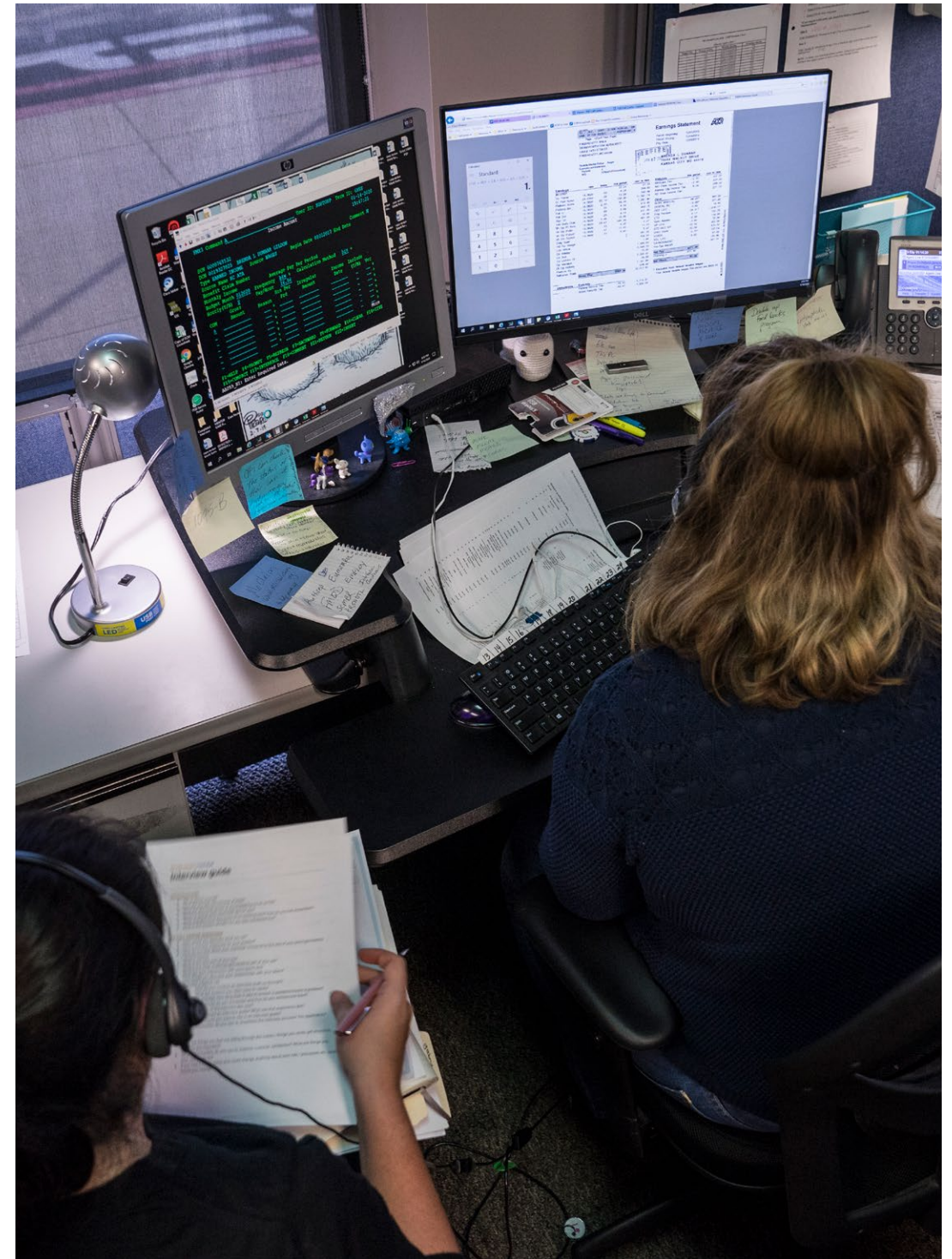
3. multiple enrollments

As frontline staff, I need to be able to enroll a resident in more than one benefit program at a time.

Even when residents are eligible for multiple programs, frontline staff are typically only able to enroll them in one program at a time. Frontline staff must uphold each program's distinct eligibility requirements, policy interpretations, enrollment procedures, and technical systems. They rarely have the ability to make multiple enrollments due to the time consuming nature of the policies and process. This not only prevents frontline staff from feeling like they can holistically support residents but also prevents residents from receiving all of the assistance that they are qualified for.

"I try to end each appointment by sharing at least one other program that they (clients) can enroll in. But then I have to follow up with directions about how they would actually enroll in that program and it's like, damn we just lost 'em. There's no way that they're going to start from the beginning, figure out all of the details, and actually make it to the end again."
—Michigan caseworker

the
pilot

pilot overview

In Fall of 2019, Civilla and its partners designed and launched the Project Cohere pilot. The purpose of the pilot was to test new ways to streamline access to energy assistance based on the needs of residents and frontline staff.

The pilot focused on the Michigan Energy Assistance Program (MEAP) and was designed in three successive stages. This enabled the team to make improvements to the policy, business process, and technology based on learnings between each phase.

The Team
The pilot was conducted by a cohort of organizations in the Michigan energy assistance community including: the Michigan Department of Health and Human Services, Consumers Energy, DTE Energy, Wayne Metro Community Action Agency, the Michigan Public Service Commission, and Civilla.

The pilot was overseen and governed by the Project Cohere Council, a group made up of the top executives from each participating organization, which was responsible for providing strategic guidance for the pilot.

The day-to-day operations of the pilot were guided by the Working Team, composed of senior leaders from each participating organization. The Working Team met every two weeks to plan and execute the pilot's operations, strategy, and logistics.

Pilot Location
Wayne Metro played a central role throughout the pilot. At their offices, Wayne Metro's Direct Service Specialists (DSS) reviewed all case information, ensured that applications were complete, conducted eligibility determinations, and completed record keeping requirements associated with MEAP enrolment.

guiding principles

The team used three design principles to guide decisions on policy, business process, and technology:

1. Minimum viable data collection—Only collect information that is required and actively used to make accurate determinations on each case.

2. Balance competing needs—Redesign data and documentation requirements to be reasonable for residents, light for frontline staff, and confidence-inspiring for policy makers and leaders.

3. Behind-the-scenes support—Minimize the burden of applying for benefits by leveraging existing data and completing as many procedures on the backend as possible.

policy analysis

To streamline the energy assistance process in Michigan, the team conducted a policy analysis that compared legislative and administrative policy with the activities carried out by frontline staff.

Although policy language emphasized the importance of efficient administration, enrollment procedures for energy assistance in Michigan had become very cumbersome. For example, MEAP applications from 2018 were more than 1,500 words in length and required applicants to complete more than 150 questions.

The pilot team determined that much of the data that was collected was not required by policy. In many cases, additional data was being requested out of an abundance of caution or because certain fields were required in the case management software.

The team concluded that in practice there were only ten pieces of applicant information that were actually required to satisfy the MEAP policy requirements. They were:

1. Full name
2. Address
3. Utility account number
4. Phone number
5. Household size
6. Household definition
7. Monthly household income
8. MDHHS case number
9. Photo identification
10. Signed contract

Furthermore, between the cohort of participating organizations, seven of the ten pieces of information for each pilot participant were already known.

The team wrote new policy language that clarified the parameters for each data requirement to avoid inconsistencies across different organizations. The result was a policy framework that aligned program requirements across the ecosystem and minimized the need for unnecessary data collection.

business process

After streamlining the policy requirements, the team worked to reduce and redistribute the burden of collecting and verifying application data and documents.

Throughout the pilot, the team analyzed all administrative tasks that were required to make a determination and explored which organization was best suited to handle each part of the process. The team designed a new business process that enabled pilot partners to share data and collaboratively complete applications.

Initiate a case
The pilot's business process began when residents called their utility company's customer service center to seek help with their bill. Customer service representatives invited qualified callers to join the Project Cohere pilot. Customer service representatives entered their contact information and utility account details into Project Cohere's software and initiated a new application.

Collect information
Once an application was initiated, Project Cohere alerted caseworkers at MDHHS and prompted them to add verified household and income data. This data was available in the state's case management system from previous enrollments in benefit programs such as SNAP, Medicaid, or TANF. Meanwhile, applicants began interacting by text message with a Project Cohere operator. Applicants provided legal consent, answered additional questions, and sent a photo of their identification. At this point, Project Cohere's software compiled all of the data and documentation requirements into a complete application.

Process enrollment
Once an application was complete, Project Cohere's software notified a specialist at Wayne Metro. They reviewed the application to make sure that all data and documentation requirements had been met. Then, Wayne Metro specialists made an eligibility determination to either enroll or deny the applicant. This determination was communicated directly to the applicant by text message.

technology

To efficiently share information across organizations, the team created software that allowed all participants to appropriately access and contribute information to each application.

The web application was built on the cybersecurity principle of "roles-based access control" – ensuring that each organization only had access to information that was necessary for them to fulfil their responsibilities. The Project Cohere technology was designed around each role in the pilot: the applicant, call center staff, state caseworker, and nonprofit specialist.

Applicants— Applicants opted in to enroll in MEAP using text messaging (SMS). Applicants granted legal consent by typing their name, and answered questions using short responses. Project Cohere's plain language and visual cues helped them understand how to complete the application. When additional documents were required, applicants used their phones to take photos and sent them as a message. Applicants received an eligibility determination by text message.

Call Center Representatives—Call center representatives at utility companies used Project Cohere's technology to screen for qualified applicants and initiate new cases. Call center staff had their own view of the software and were able to securely sign in using their organizational email. After logging in, call center representatives initiated new applications for available benefit programs. They input client information to the application, adding details such as name, phone number, date of birth, and utility account number. Once they saved the case, the system triggered a request for State caseworkers to add additional data to the application.

State Caseworkers—State caseworkers used Project Cohere's software to add verified household and income data to each application. State caseworkers were alerted about new applications and input state data on the household size and monthly income. The Project Cohere software then automatically calculated the Federal Poverty Level (FPL) for each applicant.

Nonprofit Specialist—Nonprofit specialists used Project Cohere's software to review applications and make accurate case determinations. Nonprofit specialists could self-assign cases from a shared inbox and view/edit all applicant information that had been compiled. Nonprofit specialists used a web chat interface to communicate with applicants using preset messages ("macros"). After reviewing each application, Nonprofit specialists made determinations to approve or deny applications. Then, they used the software to recommend additional benefit programs to clients in the Project Cohere network.

Project Cohere also streamlined work for nonprofit administrators. All documents that applicants submitted were stored in a single location in the cloud. Project Cohere automatically populated contracts with applicant signatures. System administrators could easily generate program reports to meet their organization's needs.

For a live demo of the Project Cohere software, visit projectcohere.com. The software is open source and available for free at github.com/projectcohere.
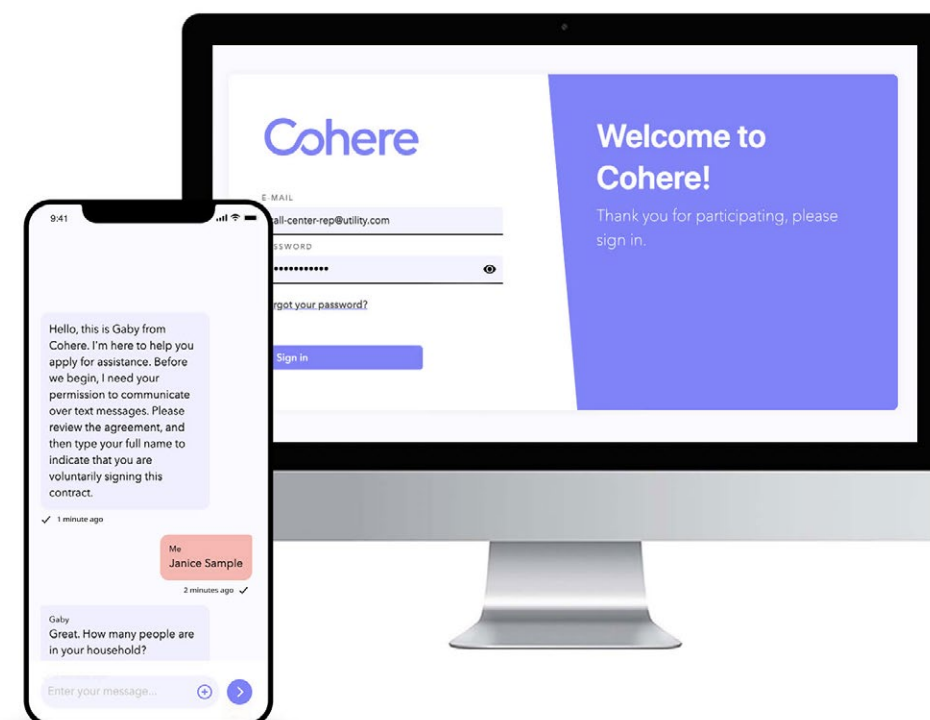
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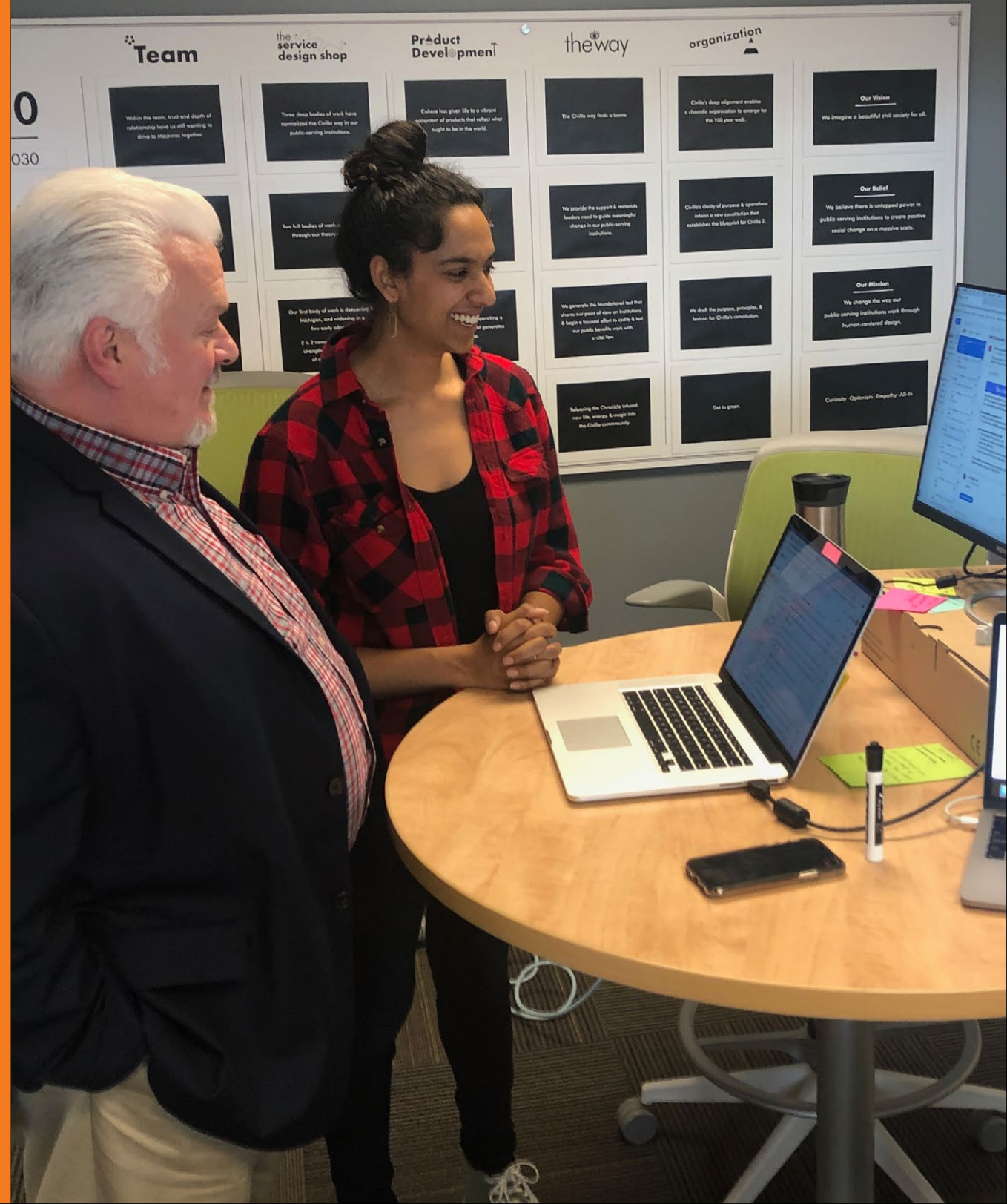
measuring the impact

By Spring 2020, Project Cohere had completed energy assistance eligibility determinations for 104 households across the state of Michigan, with the average household facing an average of $891 in arrears on their utility bill. Overall, the pilot demonstrated that applications processed through Project Cohere were completed far more quickly and successfully than traditional applications. The streamlined process provided relief for frontline staff while helping residents build momentum towards financial stability.
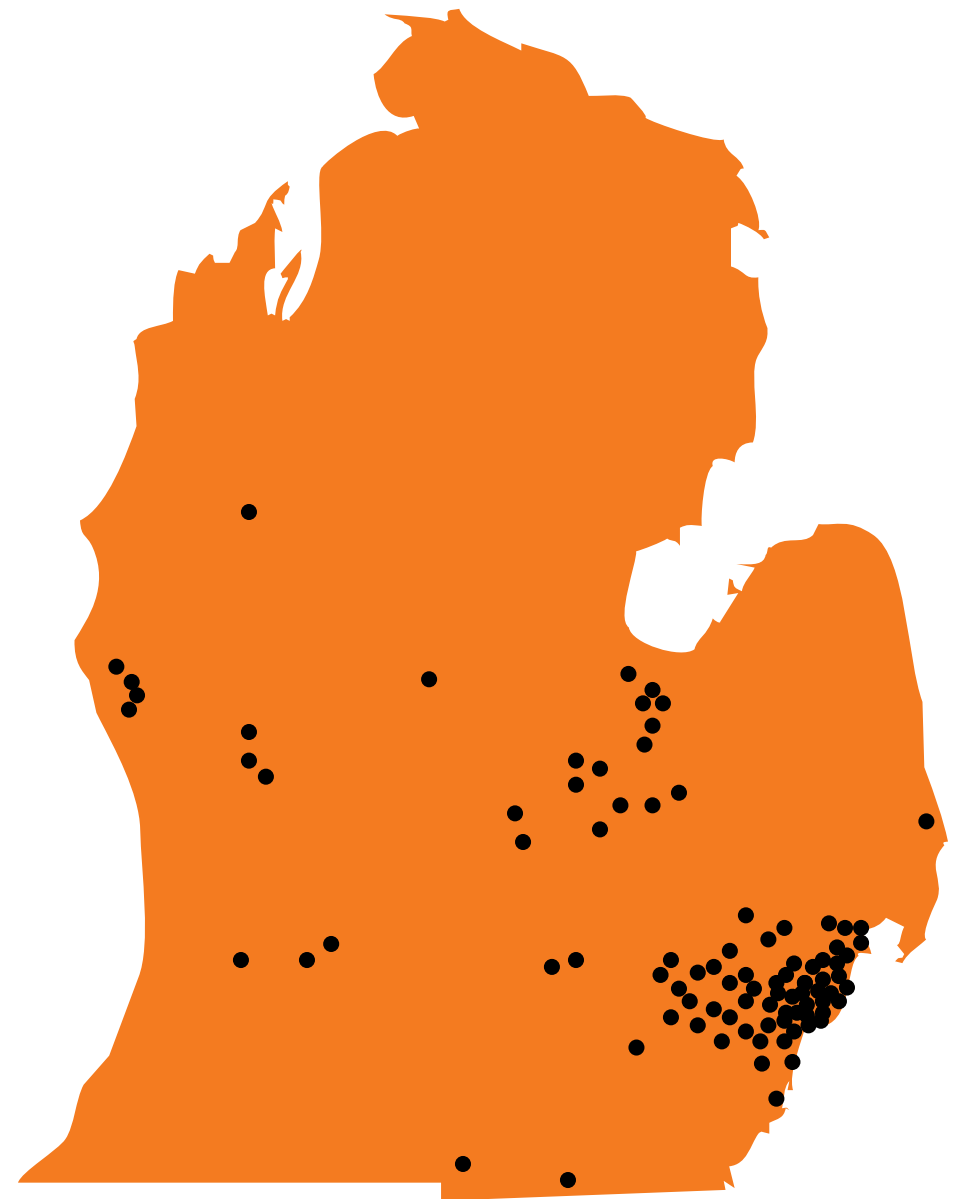

Figure 1: Project Cohere pilot participants.

application length

The number of questions decreased by 97%

Project Cohere decreased the number of application questions for MEAP by 97% – from 159 questions in 2018 to 4 questions in the Project Cohere pilot.
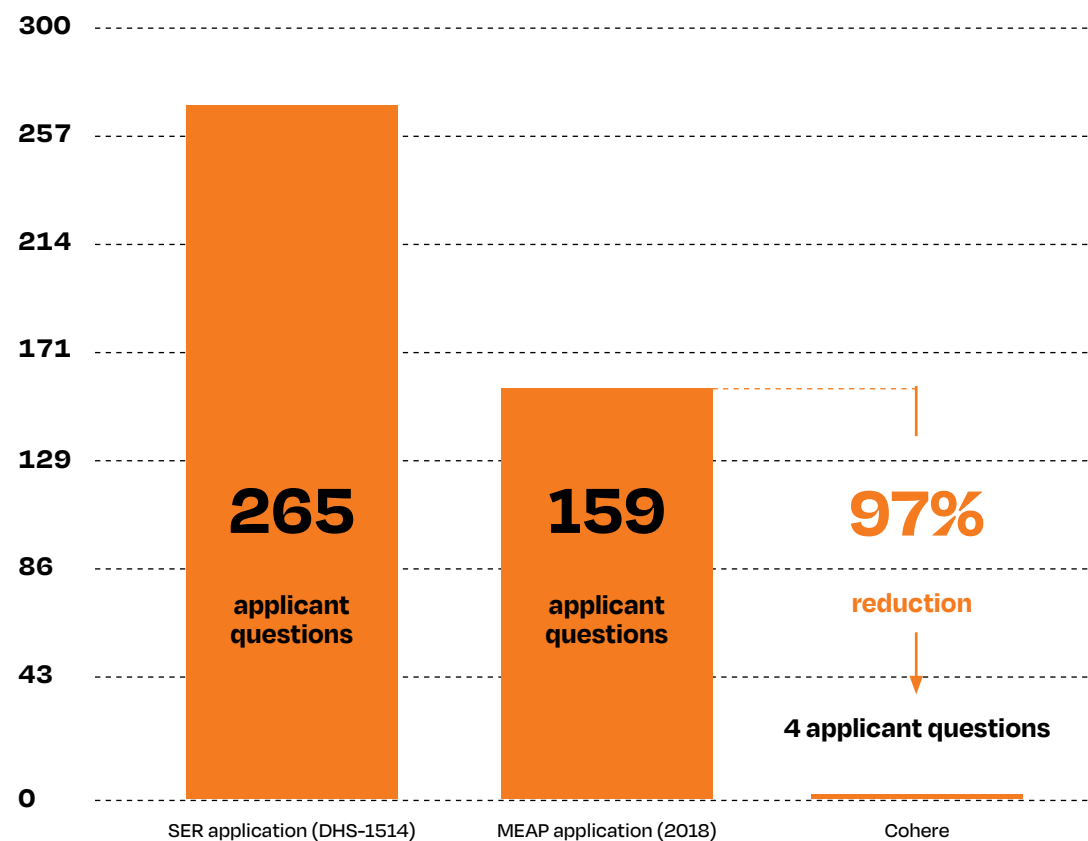

Figure 2: Applicant Questions. Data based on the DHS-1514 and the 2018 MEAP application.

"I've never applied for energy assistance before but it was so simple, step by step. I took a pic on my phone and sent it directly. They even gave me directions for how to submit my documents. It was all very helpful."

—Project Cohere applicant

application complexity

The number of words decreased by 61%

More words leads to more complexity. Compared to the 2018 MEAP applications, Project Cohere represented a 61% decrease in the number of words. Further gains could be made by streamlining legal text for the consent agreement.
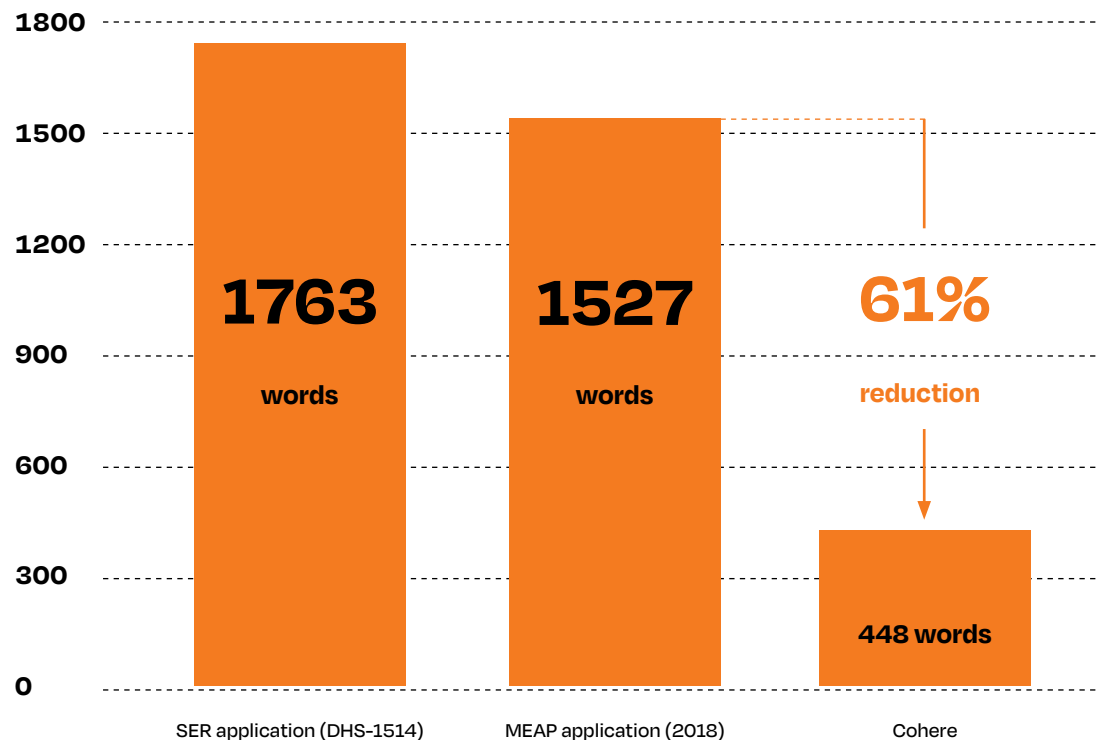

1800			
1500			
1200	**1763** words	**1527** words	**61%** reduction
900			
600			
300			448 words
0	SER application (DHS-1514)	MEAP application (2018)	Cohere

Figure 3: Words on Application. Data based on the DHS-1514 and the 2018 MEAP application.

"There's absolutely no one who won't understand this—complete and plain directions. They even sent me an (instructional) image! I've never seen that before. For people who aren't tech savvy it was so helpful. I had a great experience: very simple and very plain."

—Project Cohere Applicant

processing times

Processing time dropped to less than 10 minutes on average

By streamlining the program requirements and enabling data sharing across each organization, Project Cohere decreased processing times for all parties. Prior to the Project Cohere pilot, it was not uncommon for a state caseworker and a nonprofit specialist to each spend 45—60 minutes processing a case. During the pilot, processing time was reduced to less than 10 minutes for each party on average.
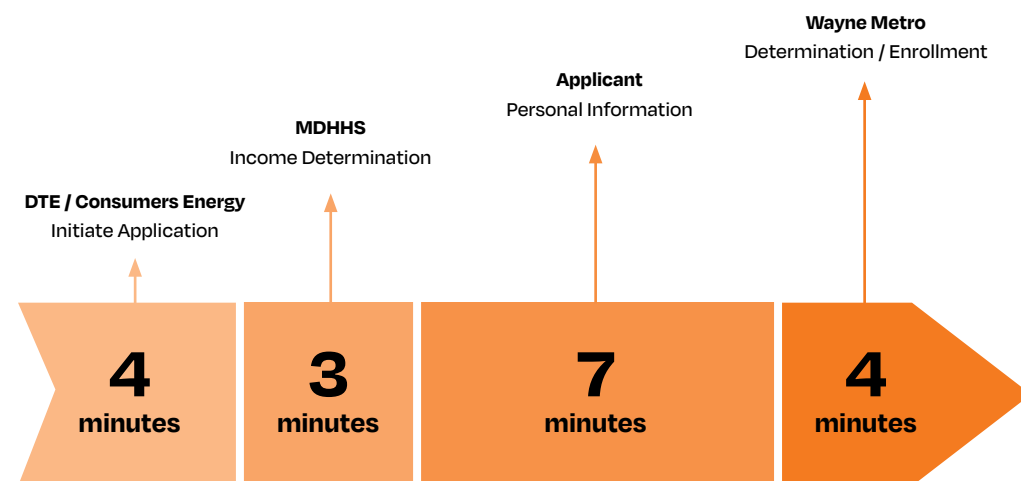
Wayne Metro
Determination / Enrollment

Applicant
Personal Information

MDHHS
Income Determination

DTE / Consumers Energy
Initiate Application

| 4 minutes | 3 minutes | 7 minutes | 4 minutes |

Figure 4: Cohere processing time example

In this example, the state caseworker spent just 3 minutes determining the applicants eligibility. The nonprofit specialist spent 4 minutes to complete the enrollment. From start to finish the total processing time was 18 minutes.

The fastest total time to enrollment during the pilot was 7 minutes.

"I'm so thankful I called today. I'm serious—this is such a blessing. I can't even begin to figure out how to express my gratitude. This has changed my life."

—Project Cohere applicant

same day enrollments

97% of cases were determined same day

Today's energy assistance enrollments commonly require 30 days or longer to complete. Same-day determinations and enrollments are virtually unheard of. However, 97% of Project Cohere participants received a same-day determination.
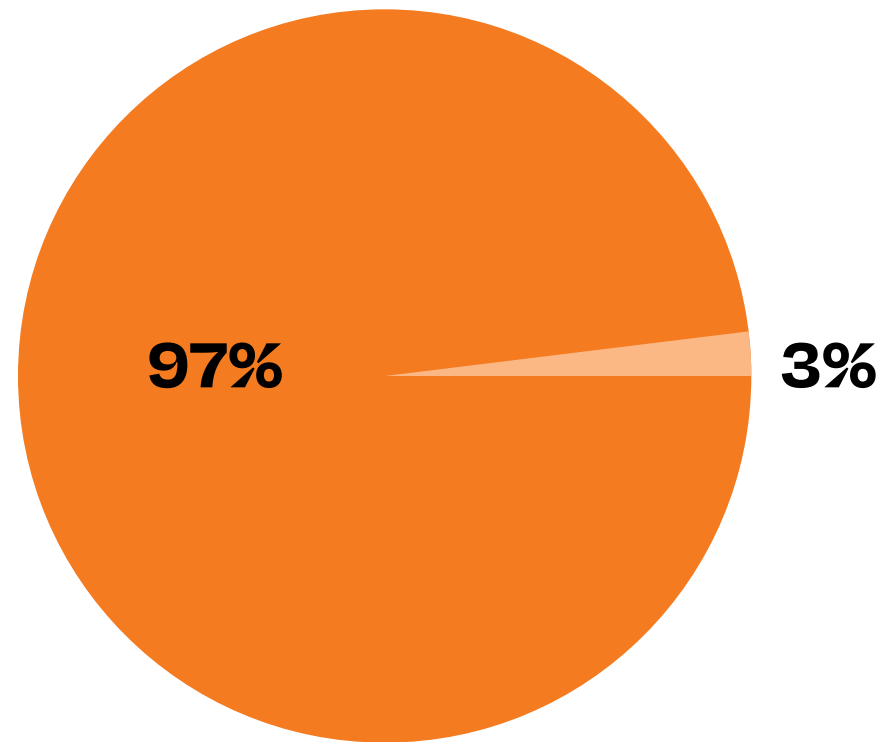

97%   **3%**

Figure 5: Percentage of same-day enrollments during the Project Cohere pilot

"I'm barely able to pay my bills or feed my kids. I got a shutoff notice in January because I didn't have $400 to spare. This was fast, easy, and was no hassle. A response came in 10 minutes and I was done. It felt pretty awesome."

—Project Cohere applicant

approval rates

Approval rates were 87% on average

The Project Cohere pilot approval rates were 87% on average: 60% in the first round, 81% in the second round, and 90% in the third round. In contrast, MDHHS internal data shows that in 2019, SER had an approval rate of just 47%. The improvement in success rates demonstrates that streamlining the enrollment process has a significant impact on people's ability to access energy assistance.
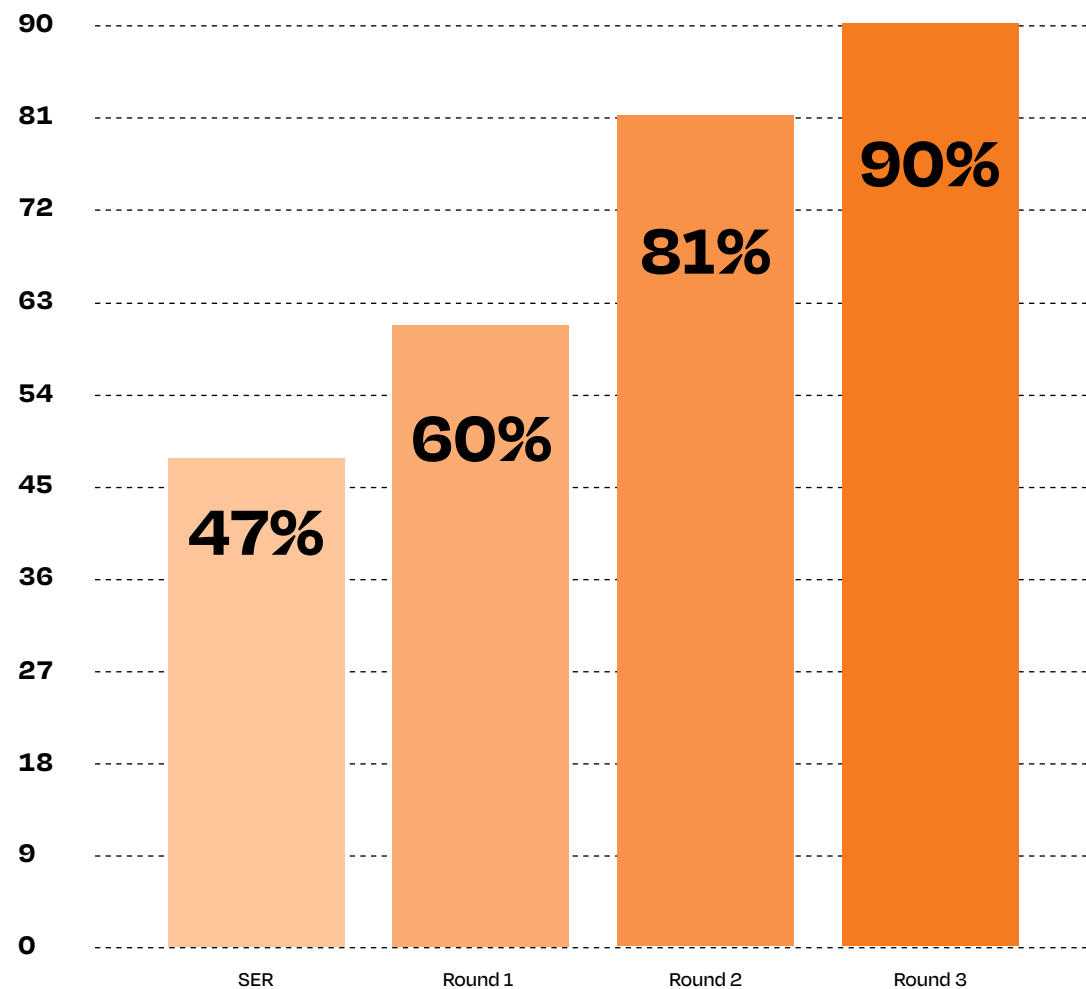

Figure 6: Approval rates. Based on MDHHS statewide data for SER in 2019 and Project Cohere pilot data (rounds 1-3).

"I was really shocked. Really shocked. Really shocked! I'm still shocked. It literally only took a few minutes. I didn't have to answer 50,000 questions and send over 20,000 documents. I mean, I know that's an exaggeration but it feels like that. I didn't have to repeat the same information over and over. That's the most frustrating thing when you have to go through stuff like this – having to send the same info over and over. I called about ten minutes before my job fair and was approved before I walked in. I was so relieved! I could focus on what I was there for versus trying to figure out what we were gonna do. I walked out with four potential jobs."

—Project Cohere applicant

conclusion
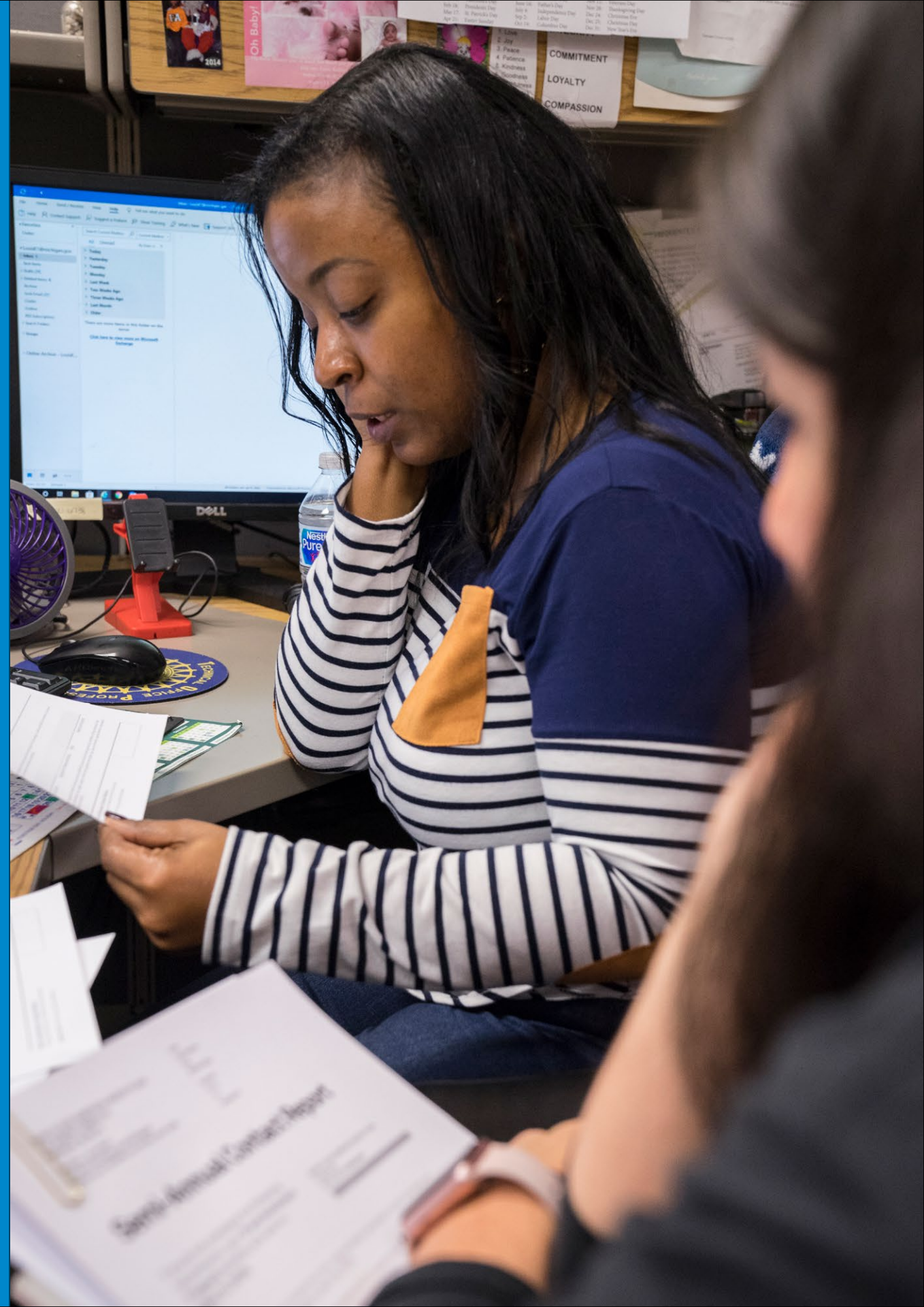
next steps

Project Cohere had a significant impact on the efficiency and effectiveness of energy assistance enrollment.

Residents seeking assistance found it simpler to access assistance while frontline staff were able to process cases much faster than ever before, freeing them up to solve problems instead of just process paper. For administrative leaders, the Project Cohere pilot asks important questions about the future of administering energy assistance programs in Michigan.

The Project Cohere pilot uncovered several important lessons that are relevant to administrators interested in streamlining enrollment for Michigan's energy assistance programs. Below are a series of recommendations that can guide operational efficiencies while improving the user experience.

Governance

→ **Convene a council of executive leaders:** The Project Cohere pilot demonstrated the importance of convening the top leadership from energy assistance organizations in Michigan to enable collaboration and shared decision making. The effectiveness of this group rested in the executives' unique power to steward inter-organizational initiatives and grant permission to explore new policies and procedures for enrollment. Michigan's energy assistance community should form a leadership council that meets throughout the calendar year to pursue discrete efforts aimed at improving coordination and eliminating barriers to benefit access in Michigan.

→ **Simplify benefit programs:** Throughout the Project Cohere pilot there was widespread confusion about the differences between various energy assistance programs available in Michigan. Residents and administrators both struggled to keep track of the many structural changes made to these programs in recent years. Michigan's energy assistance leaders should align around a vital few energy assistance programs that are clearly thought out and easily understood. These benefit programs should be consistently available, easily accessed, and valuable to residents in need.

Policy

→ **Revise policy language to minimize data collection:** The success of the Project Cohere pilot was in part the result of streamlining the policy and data collection that underpins energy assistance. The team focused on identifying and eliminating several unnecessary administrative tasks associated with the enrollment process. These types of changes should be universally applied and mandated in public policy documents. Two areas for policy revision that stand out include: 1) clarifying ambiguous policy language 2) limiting data and document requirements to only those that are most readily available for applicants. These revisions are well within the authority of state and industry policy offices. They offer a critical point of leverage to improve the efficiency of energy assistance administration in Michigan.

Business Process

→ **Conduct cross-training with staff across all relevant organizations:** The Project Cohere pilot engaged a group of cross-trained operators that understood not only their organization's role in administering energy assistance, but the role of every organization relevant to end-to-end service delivery. The practice of cross-training staff should be adopted as an annual activity to equip operators with the knowledge they need to effectively problem solve and meet the needs of the people they serve. With cross-training, staff can help identify and address moments in the user experience that are poorly coordinated between organizations. New communication channels should be established to enable operators to stay in contact and resolve issues as they arise rather than relying on managers, which can create unnecessary bottlenecks.

Technology

→ **Reuse existing application data:** Project Cohere's high rate of complete applications demonstrated the importance of re-using existing data. Since organizations already have a majority of the data that is required for an energy assistance application, the pilot eliminated the risks of procedural errors and reduced the administrative burden on applicants. Michigan's energy assistance leadership should adopt legal and technical frameworks that enable them to use existing client data. This approach can support cross enrollment where categorical eligibility has been established.

→ **Apply using a two-way messaging platform:** In the Project Cohere pilot applicants could directly communicate with, and submit information to, a live operator using only their cell phone. This approach was central to achieving high rates of same day determinations and approvals. Fortunately, modern software can enable organizations to securely transmit applicant data through two-way messaging. Michigan's energy assistance leadership should commission this software and mandate its adoption among all parties.

Pursuing a Universal Application

Addressing the challenges of administrative burden and ineffective service delivery are not unique to Michigan, or the energy assistance sector. As Civilla conducted this work, important questions arose about whether there was a more universal way for solving these kinds of issues. The team began to imagine a universal application that could not only be used for the energy assistance sector, but also for other programs that low income households would likely be eligible for and interested in enrolling in. Project Cohere represents a first step in the journey towards realizing this vision.

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