



## Hancock Software Case Study

# City of Baltimore Transforms Weatherization Program

The City of Baltimore ramped up from 360 weatherized units one year, to 3000 the next with Hancock Software

### Key Highlights

**Customer**  
City of Baltimore

**Industry**  
Residential & Multifamily  
Energy Efficiency

**Location**  
Baltimore, MD, USA

**Key Benefit**  
Created a “one-stop shop” for its energy efficiency programs

## Overview

Many states and non-profits continue to execute their low-income Weatherization Assistance Programs using inefficient and antiquated data management solutions. Most clients are engaged with paper forms and the end process is a reporting system where agencies scurry to enter data post-production.

## Results with Hancock Software

The City of Baltimore was already using Hancock Software platform before it received a \$19 million boost from Exelon’s Customer Investment fund. The task at hand was to ramp up production while efficiently and transparently managing the new funds.

## Pipeline Inefficiencies

Pre-Hancock, the weatherization pipeline was inefficient and resource-heavy.

- One day a week there was no field activity across the city’s 7 energy auditors because they were stuck behind their screens entering data.
- Everything was paper-based. The only method of checking on the client’s status, home energy audit, work orders or invoice information was to retrieve the physical folder
- Back-and-forth emails about individual cases would consume inspectors, energy auditors, managers and state monitors
- Measures from handwritten energy audits would be typed in Microsoft Excel. Then, office staff would add in the estimated and actual costs to create work orders

## Introducing Mobile Energy Audits

Present day, the agency has gained 14 audits a week, it takes one press of the button on an auditor’s iPad app to send a completed whole-house energy audit and 30 or so pictures to Hancock’s online system. Before, it would take 1 hour on-site to educate residents about ways to reduce their energy usage, recommend energy savings measures and use the energy model tool to prove cost effectiveness. Today, with the Hancock HEAT iPad app, it takes Baltimore City’s energy auditors about 20 minutes. Mike Lafferty, Division Chief of Energy Conservation at Baltimore City, explains, “I hired a new guy with limited computer skills, never held an iPad before. I told the new auditor, ‘Learn how to use the HEAT app and go do your job.’ I checked in with him after two weeks, he was proficient and glad to not being using paper.”

“  
I told the new auditor ‘Learn how to use the HEAT app and go do your job.’ After 2 weeks he was proficient and glad to not be using paper.

Mike Lafferty  
Division Chief,  
Energy Conservation

## A Typical Day

Mr. Lafferty fluctuates between directing from behind a desk and supporting staff in the field.

“When I’m not in the field I use the iPad’s FaceTime ability. The auditor shows me the issue and asks my advice. It’s like I’m there. When my staff began to energy model on the iPad, I would have never thought FaceTime would be part of it! From behind the desk, using Hancock’s data management system has proven itself to be invaluable as we have forged onto new funding sources.” says Mr. Lafferty.

## Contractor Management

“Before Hancock, it took us 30-45 days to get a customer project completed. Now these are getting turned around in 15-17 days on average,” says Mr. Lafferty. “Hancock allows for the contractors to access the system to upload their prices. This is a huge time-saver to the City as we often feel short staffed and our time is taxed. Before, contractor and invoicing management required a full time person on my staff. Now, we get 20 jobs out the door with internal checks-and-balances completed within 3-4 hours.”

## Reporting & Evaluations

“I experience evaluations from multiple directions. The Public Service Commission, a yearly audit internal finance department audit, and continued monitoring from the State of Maryland’s DHCD office. When the program is evaluated and audited, I give the evaluators read-only access to Hancock and all of the information is there for them to review. I did this for the IG during ARRA, it was very smooth and took very little of my time,” says Mr. Lafferty

“

**From a management standpoint [Hancock] allows me to be anywhere and access all phases of the workflow.**

Mike Lafferty  
Division Chief,  
Energy Conservation

## Quality Control Inspections

“From a management standpoint It allows me to be anywhere and access all phases of the work flow,” Mr. Lafferty explains. QC Inspectors perform inspections on the iPad. With this feature, Hancock users do not need to go outside of the Hancock platform to complete a separate Quality Control Inspection checklist or to pass or fail a measure, “The time spent post-inspecting homes went from 1 hour and 15 mins to 20 minutes,” says Mr. Lafferty. If an inspector runs into an issue during final inspection, they to have access to all phases of the workflow process, including the energy audit and work orders.

## Conclusion

Baltimore City Housing’s participation in city, state and utility energy programs is growing and Hancock Software is helping them push a large amount of data through an otherwise complicated process.

By using Hancock’s cloud-based program management platform, coupled with the integrated mobile HEAT app

- Baltimore City’s energy program has increased its productivity by about 40%, with out increasing staffing levels
- Field staff spend a significant more time in the field and are able to complete more jobs
- Program managers run multiple funding sources and gain transparency into all levels of their programs