Opinion Dynamics

CHANGES: CBO Staff Interview Guide

August 16, 2022

Instrument Information

Table 1 includes key characteristics about the instrument.

Table 1. Overview of Data Collection Activity

Descriptor	This Instrument
Instrument Type	In-depth interview
Estimated Time to Complete	45-60 minutes
Population Description	Staff at CBOs partnering with SHE on CHANGES
Population Size	27
Contact List Size	27
Completion Goal(s)	10
Contact Sought	Senior staff member involved in CHANGES
Fielding Firm	Opinion Dynamics

Research Objectives Information

Table 2 maps the research objectives and questions to specific questions in the instrument.

Table 2. Research Objectives and Associated Questions

Research Objective/Question	Associated Instrument Questions
Respondent and Organization Information	Q1 – Q3
CHANGES Clients and Client Experience	Q4 – Q7
CHANGES Goals and Experience	Q8 - Q18
Key Metrics and Data Collection Processes	Q19 – Q25
Budget and Funding of CHANGES	Q26 – Q32
Program Performance and Effectiveness	Q33– Q36
Spatial Analysis	Q2 – Q3
Survey Needs	Q37 –Q39

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Interviewer Information

Program Description

The Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program delivers in-language services to limited-English proficient (LEP) customers of the four main investor-owned utilities (IOUs) in California. The program is implemented by Self-Help for the Elderly (SHE) through a network of participating community-based organizations (CBOs) and aims to help LEP clients manage their natural gas and electricity services. The CHANGES program offers individualized case assistance (needs assistance and dispute resolution), education, and outreach. The goal of these interviews is to support the assessments of evaluability of the program and program costs and benefits, as well as to help inform the spatiotemporal distribution analysis.

Email Scheduling Script

Subject line: Scheduling a time to talk about CHANGES program

Hi [FIRST NAME],

I'm contacting you on behalf of the California Public Utilities Commission (CPUC). My firm is working with the CPUC to assess the CHANGES program from 2019-2021. We understand your organization helps the CHANGES program connect with the clients you serve. As part of this evaluation, we're contacting organizations like yours to learn what the CHANGES program can do to improve the customer experience and to help identify any gaps that program may not be addressing.

I'd like to schedule a time to talk in the next week or two. We'll need about 45-60 minutes to cover all the questions. The questions allow me to learn more about your organization and the clientele you serve, learn about your activities in the CHANGES program, and hear your thoughts on what's working well and what might be improved. Everything you say is confidential and not tied to your name or organization name in what we report.

To schedule a time that works well for you or if there's any questions I can answer for you about this research, please either reply to this email or give me a call at 617-301-4636. If you are not the best person to provide feedback on the CHANGES program, I would very much appreciate a reply letting me know who is.

I look forward to hearing from you soon,

Hannah Merriam

Instrument

Introduction

Hi [FIRST NAME]. This is _______ from Opinion Dynamics, calling to chat about your involvement with the CHANGES program. Is now still a good time to talk?

Great. As I mentioned, my firm is working with the CPUC to assess the CHANGES program. My questions cover the program goals, the metrics tracked, and any opportunities for improvement. Any feedback you have about the program, and/or working with SHE, the utilities, or CPUC would be valuable. I want to assure you that your answers are confidential and will not be tied to your name or organization name in anything we report.

I'll be taking notes as we talk, but I'd like to record the conversation to help with my notetaking. Is that okay with you? [CONFIRM RECORDING HAS BEGUN]

Do you have any questions for me before we begin?

Organization and Involvement Background

Q1. **To start, I'd like a little information about you and your organization. What is your role at [ORGANIZATION]?

1. How long have you been there?
2. How long have you been involved with the CHANGES program?
3. Please briefly describe what your organization does in general, and what goals you strive to meet.

Q2. **How would you describe your organization's service territory? [PROBE: counties; geographic region, etc.]

1. Of those counties do you serve the entire county or just a portion of it? If a portion, what part?
2. Does the service territory for CHANGES differ from your general service territory? If so, how?
3. From how far away do the **majority** of your clients come for services?

Q3. Our understanding is that [ORGANIZATION] is located at [ADDRESS], is this the site where you are offering CHANGES assistance?

1. Do you offer similar CHANGES services at other locations?

Q3A. [IF SERVICES MORE THAN ONE UTILITY] It looks like you provide services in [XXX & XXXX] territories. Does your work differ much between those territories? If so, how?

Q3B. Can you speak to your work in both those territories? [If no] Who can we speak with to hear about the other territory? *If respondent cannot speak to all utility territories served, ask for contact who can speak to other territory.*]

CHANGES program activities and goals

Q4. How would you describe the clients you serve through the CHANGES program?

- **Their situations? (Limited English, learning disabilities, elderly, newly arrive to country)
- Income? How do you define low-income?
- Age?
- Gender?
- Ethnicity?
- Language?

Q5. What is the main type of assistance clients are seeking when they reach out to you?

1. [If unclear] What other types of assistance do you typically provide to clients?
2. **Roughly how often do the **clients** solicit assistance with energy related needs versus, **you offering** energy-related services to clients?
3. **[If unclear] How is it identified that the client has a need that can be served through CHANGES?

Q6. **Prior to COVID, roughly what percent of your clients did you assist in person vs assist over the phone or remotely?

Q7. **What is the current status, in terms of the percent of clients, seeking services in person vs phone/remote?

1. [If both] Have you noticed if the type of assistance CHANGES's participants are requesting varies across the two engagement channels (phone/online vs in-person)? [IF NEEDED: Do participants tend to come in the office for a certain type of assistance and tend to call-in for another type?]

Q8. **In your own words, what do you see as the primary goal of the CHANGES program?

Q9. **We understand there are four main activities the program offers: 1) outreach activities, 2) educational activities, 3) needs assistance, and 4) dispute resolution activities. I'd like to learn a little more about how you do each of these. First, when a client has a dispute, what is your first step and second step, etc?

1. When would you need to call into the utility?
2. How do you conduct educational events to help your clients learn about their energy bills and saving energy?
3. How do you conduct outreach to inform your clients about energy programs they may be eligible for?
4. How do you assist with needs your clients have?
5. [If unclear] what are some of the needs?

Q9A. [If unclear] How does your organization get physical materials to provide to the clients – do you translate and develop them yourself? Does your organization use the fact-sheets the CPUC provides on topics like "understanding your energy bill," "Core gas aggregation services," and "avoiding disconnection?"

1. [If aware of these] How useful are these factsheets to your clients?
2. Are there topics you'd like to have materials from the utilities or CPUC on that you don't currently have?

Q10. **Are there certain CHANGES activities your organization does more, or less often? Why?

1. Which activity would you say is least needed by your clients?
2. Which service is most helpful or critical for your clients? Why?
3. Would you say the program services are well-aligned with customer needs?

Q11. **Are there energy-related needs among your clients that are not currently addressed by the program? If yes, what are they?

Q12. Are there any issues or barriers in trying to meet client's needs? What? [IF NEEDED: Is there anything about those activities that aren't fully meeting the needs of the customers

Q13. Are there certain types of customers who benefit more from CHANGES based on the needs you're able to address? [Probe: LEP, elderly, disabled, newly arrived immigrants] Please describe.

Q14. **How would you describe the value of the program to the clients you serve? [PROBE: What is the value you provide that the clients cannot get from the utility themselves?]

Role of and Relationship with Utility, Implementer and Commission

Let's talk a bit about your organization's relationship with other groups involved in the CHANGES program.

Q15. What types of interactions do you have with the utilities as part of your CHANGES work, if any?

Q15A. **What are some reasons your clients might not go directly to the utility or don't call themselves? [If needed: is it because they culturally don't know how to engage with a big organization, or are they scared for some reason, or physically/mentally unable to engage?]

Q16. How would you describe the role of the utilities as it relates to supporting the CHANGES Program and serving CHANGES customers?

1. Any suggestions for how the utilities can make a more effective relationship with you or other CBOs in the CHANGES network?

Q17. How would you describe the role of Self Help for the Elderly (SHE) as it relates to supporting the CHANGES program?

1. Do you have any suggestions for SHE about how they can make a more effective relationship with you or the other CBOs?

Q18. How would you describe the role of Milestone Consulting as it relates to supporting the CHANGES program and serving CHANGES customers?

1. Do you have any suggestions for Milestone Consulting about how they can make a more effective relationship with you or the other CBOs?

CHANGES Metrics Data Collection & Tracking

Now let's talk about the type of information and data you collect as part of working with CHANGES.

Q19. **What training do you receive on data collection and tracking? [If needed: our understanding is that Milestone Consulting does an orientation and training on data tracking]

Q20. **Walk me through your data collection and reporting process.

1. Who on your staff tracks and inputs the metrics? [role, not name. Are there support staff, is it the person we're interviewing?]

Q21. [If unclear] What data do you track and report?

1. Do you track other data that are not required by the CHANGES program? If yes, what are they?

Q22. What data are difficult for you to track and report, if any?

1. What are the barriers or what makes it difficult?
2. [If unclear] how user-friendly is the program database for inputting data and generating reports?
3. Are there important database limitations that you would like to see addressed?
4. Are you providing assistance that you are unable to report in the current process?
5. Is there some data you are collecting now that does not feel very useful?

Q23. **Are there any cost-related challenges with data tracking, such as database management? If yes, please describe.

Q24. How do you use the data you track, if at all? [If needed, to what extent to you review the data to inform improvements?]

Q25. **How would you feel about including more details on the need you resolved in your reporting? [If needed: the utilities might like to learn more about what needs the customers have so they could improve things on their end. Would it be difficult to provide a description of the issue?]

Reporting and Reimbursement

Let's talk about funding a little bit.

Q26. **Walk me through the funding and reimbursement process. [If needed, for a given month, or year]

Q27. Do you incur any costs implementing the program that you are not reimbursed for?

1. If yes, what are they?

2. If yes, why are they not covered under the current reimbursement process?

Q28. **Which energy-related services are most costly or time-consuming for you to provide? Why are they more costly?

Q29. **What (approximate) percentage of your funding comes from CHANGES versus from other sources?

Q30. How much of your funding goes to meeting your reporting requirements to the CPUC?

Q31. Do you feel that you have sufficient staff to fulfill the needs of CHANGES customers?

Q32. Are there changes that could be made the current reimbursement model that would enable you to better serve target customers? If yes, what?

Program Performance and Effectiveness

We talked a bit earlier about specific program services and now I'd like to hear more about overall program benefits.

Q33. **I'd like to know how much benefit and value your clients get from each of the program's four main services. Please use a 1 to 5 scale where 5 is "extremely valuable" and 1 is "not at all valuable". How valuable do you think each of the program services have been to your clients:?

- Dispute resolution
- Need assistance
- Education
- Outreach

1. [If any are a 1 or 2] How could the program better serve its target population in this area?

Q34. What are your thoughts on expanding or contracting the program? [If needed: Do you feel the program should be expanded or contracted?}

1. What types of services should be expanded/contracted?
2. [If resource constraints at their CBO are a barrier to expansion] If your organization could get more resources, would you support expanding the program? If expand: What areas of the program should be expanded?
3. Should any areas be consolidated or eliminated so that resources can be re-focused?

Q35. Are there people in need that you don't have the capacity to serve? If so, who?

Q36. What do you see as possible changes to the program to help it better serve clients in these areas? [PROBE: Activity type]

Survey Needs

We're close to the end. We wanted to let you know that we will be conducting a participant survey with some clients who have been served by CHANGES in the coming months to better understand the perceived benefits of the program, how the program meets customer needs, and opportunities for improvement.

Q37. **Are there any ways your organization can help us raise awareness of the survey or encourage your former clients to take it?

Q38. Are there any specific questions you think are important to ask clients to better understand the value of the program?

Q39. **Do you have suggestions as to how to be sensitive when asking certain questions?

1. What sensitive subjects or questions should we be aware of?

Closing

Q40. Those are all the questions we have for you today. Is there anything else that you think is important for us to know about the program that we have not covered?

Thank you for taking the time to chat with me today. We really appreciate your feedback.