

# CHANGES IOU Interview Guide

July 26, 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 IOU that are working with SHE and CPUC to implement CHANGES
Population Size	8
Contact List Size	8
Completion Goal(s)	4
Contact Sought	Staff members most 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 Background	Q1 - Q2
CHANGES Goals and Services	Q3 - Q7
Key Metrics and Data Collection Processes	Q8 - Q9
Budget and Funding of CHANGES	Q10 - Q13
Program Performance and Effectiveness	Q14 - Q18
Spatial Analysis	Q16

## 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 conversation about CHANGES

Hi [FIRST NAME],

I'm contacting you on behalf of the California Public Utilities Commission (CPUC). As you may know, my firm is working with the CPUC to assess the CHANGES Program. We would like to set up a time to discuss the program with you over the phone. My questions ask about the program goals, the data tracked, the appropriateness of the funding sources, and opportunities to expand the program.

Please let us know some times that work well for you to talk in the next week or two. The questions will take about 45-60 minutes. I'm also happy to answer any questions you may have about this research.

I hope to hear from you soon.

Sincerely,

## Instrument

### Introduction

Hi [FIRST NAME]. Thank you for taking the time to speak with me today. The purpose of our call is to learn more about the CHANGES Program and how to best measure its effectiveness. Your answers will be confidential and not tied to your name in anything we report. Is it okay with you if we record this interview just to make sure our notes are accurate?

Do you have any questions for me before we begin?

### Background and Introduction

[IF MORE THAN ONE IOU REPRESENTATIVE, ASK INTRO QUESTIONS FOR EACH ONE, THEN TAILOR FOLLOWING QUESTIONS TO THEIR BACKGROUND/MAIN ROLE/EXPERTISE]

Q1. What is your role at [ORGANIZATION] and how it relates to the CHANGES Program?

Q2. How long have you been in that position?

- Q3. In your own words, what do you see as the primary goals for the CHANGES program?
- Q4. From your perspective, what are the goals of the program's four main activities? [Dispute resolution, Needs assistance, outreach, and customer education]
- Q5. Now that we've discussed goals a bit, how would you describe the value of the program to [IOU name] limited-English proficient (LEP) customers? [Probe – do they see this program adding value to their customers]
- Q6. Does your utility provide any materials to SHE or the CBOs for their outreach and education?
1. [If yes] What do you provide to them?
  2. [If no] Where do they get the information for those materials?
- Q7. Besides supporting the CHANGES program, what other services does your utility provide to limited-English proficient customers?
1. From your perspective, are there any areas of overlapping services between what CHANGES provides and other programs or services your utility provides? [Probe for duplicative services]

## CHANGES Metrics

- Q8. Are there specific metrics for the CHANGES program that you are tracking for your IOU? [Probe – what are the metrics? Are they stated in any formal documentation? If so, try to get materials emailed to you]
- Q9. Do you find that the information tracked by SHE and the CBOs is sufficient for understanding the program's value? Why or why not?
1. What alternative or additional metrics do you feel would better reflect CHANGES performance? [Probe for data for annual reporting vs data for evaluations (once every 3 years)]
  2. [If any above] How feasible would it be for the CBOs to collect that data?
  3. Is there any data being collected now that you don't find very useful?

## Budget and Funding

Next, I have a few questions about budgets and funding.

**Table 3: Approved CHANGES Budget, PYs 2021-2026**

IOU	2021	2022	2023	2024	2025	2026	Total
SCE	\$525,000	\$525,000	\$525,000	\$525,000	\$525,000	\$525,000	\$3,150,000
PG&E	\$525,000	\$525,000	\$525,000	\$525,000	\$525,000	\$525,000	\$3,150,000
SDG&E	\$265,000	\$265,000	\$265,000	\$265,000	\$265,000	\$265,000	\$1,590,000
SoCalGas	\$437,502	\$437,502	\$437,502	\$437,502	\$437,502	\$437,502	\$2,625,012
<b>Total</b>	<b>\$1,752,502</b>	<b>\$1,752,502</b>	<b>\$1,752,502</b>	<b>\$1,752,502</b>	<b>\$1,752,502</b>	<b>\$1,752,502</b>	<b>\$10,515,012</b>

- Q10. As we understand, [IOU name] has an approved budget of [\$ in Table 3] for 2021. Do you normally spend the entire budget in any given program year?
- Q11. How do you feel about the amount your utility spends on CHANGES given the goals of the program?
1. Can you tell me a bit about how you recover your share of the costs from your customers? Are you able to recover the full amount?
- Q12. Currently, CHANGES is funded from the CARE program, until a long-term Commission funding source can be established. What are your thoughts on this funding arrangement?
1. What would an ideal funding arrangement look like to you?
  2. Overall, should funding for the program be expanded, modified, or eliminated?
- Q13. What are some of the measurement criteria that [IOU name] uses to assess whether the funding levels are appropriate? [Probe for which criteria are best]

## Program Effectiveness

Lastly, I want to talk about the program's effectiveness.

- Q14. We talked previously about the goals of the program. Now I'd like to know to what extent would you say the program is meeting its goals? [PROBE: helping customers understand their energy bills; resolving bill disputes, service issues, and avoiding disconnection; increasing customer awareness of assistance and energy programs; supporting customer access to the programs; teaching customers about ways to save energy?]
1. [If unclear] Is it meeting its goals in one areas of activity more than others?
  2. [If any are not meeting goals] How could the program better serve its target population in this area?

- Q15. Based on overall program performance, what are your thoughts on expanding the Program? [If needed: Do you feel the Program should be expanded?]
1. Can you tell me a bit more about that answer?
  2. If expand: What areas of the Program should be expanded?
  3. If don't expand: Should any areas be consolidated or eliminated?
- Q16. Are there any changes that could be made to CBO coverage to optimize the program's effectiveness?
1. Do you feel the current distribution of CBOs in your territory is sufficient to meet the needs of your LEP customers?
  2. If not, what language groups do you think need more services in your area?
  3. Are there other implementation approaches that should be considered for CHANGES based on the needs of the target populations across the state?
- Q17. What do you see as the biggest barriers of the program overall?
1. What have been the biggest challenges your organization has faced supporting this program? [PROBE: COVID-19, communication, data collection]?
- Q18. What have been the biggest successes of this program?

## Closing [ASK ALL]

- Q19. 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 CHANGES Program that we have not covered?

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