CHANGES: Milestone Consulting Staff Interview Guide

August 9, 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 Milestone Consulting who support the CHANGES program
Population Size	2
Contact List Size	2
Completion Goal(s)	Both staff in the same interview
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 and Organization Information	Q1 – Q3, Q5 – Q21
CHANGES Goals and Services	Q4 – Q13, Q15 – Q22
Key Metrics and Data Collection Processes	Q14, Q23 - Q26
Budget and Funding of CHANGES	Q27 – Q33
Program Performance and Effectiveness	Q34 – Q39
Spatial Analysis	Q37

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. Milestone Consulting helps train the CBO staff. 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

Hi [FIRST NAME],

I'm contacting you on behalf of the California Public Utilities Commission (CPUC). My firm has been contracted by the CPUC to evaluate the CHANGES program. We would like to speak with you about CHANGES to hear about your involvement, the program's goals, its metrics, and any opportunities for improvement. The goal of this research is to learn what the program can do to improve the customer experience and if there are any gaps the program may not be addressing. Everything you say is confidential and not tied to your name in what we report.

I'd like to schedule a time to talk over the phone in the next week or two. We'll need about 45 minutes to cover all the questions. Please let me know what time works well for you or if there are any questions I can answer for you about this research.

I look forward to chatting with you soon.

Sincerely,

Hannah Merriam

Instrument

Introduction

Hi [FIRST NAME]. This is _____ from Opinion Dynamics, calling to chat about 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. The CPUC and IOUs also value any feedback you can provide about how they can work with you or the CBOs better to make a more effective relationship. I want to assure you that your answers are confidential and will not be tied to your name in anything we report. I'll be taking notes, but I would like to record this conversation to make sure they're accurate. Is that okay with you?

Do you have any questions for me before we begin?

Introduction

Q1. To start, please describe your role at Milestone Consulting as it relates to the CHANGES program.

Q2. How long have you been in that position?

Q3. How are you involved in the TEAM program, if at all?

Q4. What are your organization's responsibilities with regards to CHANGES? [PROBE:
   o Training staff at the network of CBOs
   o Liaison between CPUC and CBOs

   1. Does it differ by CBO? If so, how?
   2. Does it differ by IOU? If so, how?
   3. Does it differ by activity? If so, how?

Q5. [If unclear] What trainings do you provide for the CBOs?

   1. How often do trainings occur?
   2. Are they in-person or virtual?
   3. How long are they typically? (an hour or two, a whole day?)

Q6. Do you receive any materials from the IOUs or CPUC for your work with the CBOs?

   1. [If yes] What do you get and how often?
   2. [If yes] How useful are those materials?
   3. Are there materials you don't have that you wish you did? What are they?
   4. [If no] Where do you get the information for your work with the CBOs?
   5. [If no] Is additional support needed from the CPUC or IOUs?

Q7. To the best of your knowledge, how would you describe the clients served through the CHANGES program? PROBE:

   o Their situations?
   o Income? How do you define low-income?
   o Age?
   o Gender?
   o Ethnicity?
   o Language?

Q7A. What are some reasons why the people served through CHANGES might not go directly to the utility to get their needs met?

Q8. Are there energy-related needs among limited-English proficient Californians that are not currently addressed by the program?

Q9. What are your criteria for including a CBO in the CHANGES program?

Q10. What are your criteria for eliminating a CBO that's already in the CHANGES program?

Goals and Metrics

Q11.   In your own words, what do you see as the primary goal of the CHANGES program?

Q12.   From your perspective, what is the purpose or goal of each of the program's four main activities?
PROBE:
  o   Outreach
  o   Education
  o   Needs Assistance
  o   Dispute Resolution

1.   Are one of these activities more important to the LEP customers than others?
2.   Which activity would you say is least needed by the LEP customers?
3.   Of the services the program provides, what do you think is most helpful or critical? Why?
4.   Would you say the program services are well-aligned with customer needs?

Q13.   I understand the utilities have customer service representatives who speak other languages. What does CHANGES do that those representatives can't do?

Q13A. I understand the utilities work with CBOs to promote other low-income programs like CARE. What is the added value that CHANGES provides compare to the outreach the utilities otherwise support?

2.   How should the services or functions be consolidated, if at all?

Q14.   To what extent is the program 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 it's 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.   Do you feel the program is "successful" in serving clients energy-related needs? Why/why not?

Q16.   What are good measures of success? [Number of customers served, number of repeat customers, number of services provided?]

Q17.   What might make it more successful?

Q18.   Can you talk a little more about the services CHANGES provides in terms of their relative cost (financial, resources needed, etc.) for benefits (e.g., Dispute Resolution vs Education)?

Stakeholder Roles and CBOs

Q19.   How would you describe the value of the program to the customers served? [PROBE: do they see this program adding value to their clients?]

Q20. How would you describe the role of the IOUs as it relates to supporting the CHANGES program and serving CHANGES customers?

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

    2. What can the IOUs help to prevent these customer issues from occurring in the first place?

Q21. How would you describe the role of the CPUC as it relates to supporting the CHANGES program and serving CHANGES customers?

    1. Do you have any suggestions for the CPUC about how they can make a more effective relationship with you or the CBOs to better serve CHANGES customers?

Q22. How would you describe the role of SHE as it relates to supporting the CHANGES program and serving CHANGES customers?

    1. Do you have any suggestions for SHE about how they can make a more effective relationship with you or the CBOs to better serve CHANGES customers?

CHANGES Data Collection and Tracking

Now let's talk about the data you and the CBO's collect for the CHANGES program.

Q23. **Please walk me through your data reporting process (collecting data from CBOs and reporting to CPUC).

Q24. Are there data you are expected to track and report, if any?

Q25. What metrics are most difficult for you to track and report?

    1. What are the barriers or what makes it difficult?

Q26. To the best of your knowledge, what metrics are most difficult for the CBOs to track and report?

    1. What are the barriers or what makes it difficult?

Q27. **How feasible is it for the CBOs to track additional details about the needs or disputes they resolved? [IF NEEDED: Specific information might help the utilities improve their outreach or instructional materials, and would like to learn more about what the CBOs do. So, is this reasonable to ask the CBOs?]

    1. What alternative or additional metrics do you feel would better reflect CHANGES performance?

    2. [If unclear] Are there data you wish you could track, but don't? What is it and why don't you collect it?

    3. Is there any data being collected now that you don't find very useful?

    4. How do you use the data you collect, if at all?

Budget and Funding

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

Q28.   Please walk me through the funding and reimbursement process. [If needed, for a given month, or year]

    1.   First, in terms of how you are funded and reimbursed by the CPUC
    2.   Second, in terms of how the CBOs are funded and reimbursed

Q29.   [If unclear] How are funds allocated to the different CBOs?

Q30.   [If unclear] How are funds allocated to the different activities?

    1.   Outreach activities
    2.   Educational activities
    3.   Needs assistance activities
    4.   Dispute resolution activities?

Q31.   In your opinion, is the current allocation of funds appropriate given the goals of the program and the needs of customers being served?

Q32.   Are there any costs you incur implementing this program that are not covered by the CPUC?

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

Q33.   Are there any cost-related challenges with data tracking, such as database management? If yes, please describe.

Q34.   What happens if a CBO goes over their maximum budget for one activity/multiple activities, for their contract? [Amounts below if needed]

    1.   Outreach activities ($4,000)
    2.   Educational activities ($10,000)
    3.   Needs assistance activities ($9,375)
    4.   Dispute resolution activities? ($8,250)
    5.   Contract budget ($33,625)

Program Effectiveness

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

Q35.   What are your thoughts on expanding or contracting the program?

    1.   Can you tell me a bit more about that answer?

    2.   If expand: What areas of the program should be expanded? (Language related needs; location related needs; service-related needs)

    3.   Should any areas be consolidated or eliminated so that resources can be re-focused?

Q36. From your perspective, are there people in need that the program doesn't have the capacity to serve? If so, who?

    1.   Are there energy-related needs among limited-English proficient Californians that are not being met by the CHANGES program?

Q37. What do you see as possible changes to the program to help it better serve limited-English proficient customers? [PROBE: Activity type]

    1.   [IF UNCLEAR] What do you see as the biggest areas for improvement with the CHANGES program?

Q38. Are there any potential modifications to the distribution of CBOs you recommend? [Assuming no resource constraints at SHE that would prevent it]

    1.   Are there geographical areas where CHANGES should engage more CBOs? Which areas and why?

    2.   Are there language related needs that would benefit from additional resources and/or CBOs?

    3.   Would you recommend adding or removing CBOs? If so, what types of CBOs?

    4.   Are there other implementation approaches that should be considered for CHANGES based on the needs of the target populations across the state?

Q39. Focusing on PY 2019 – PY2021, what were the biggest challenges your organization has faced implementing this program? [PROBE: Communication, data collection]?

    1.   How did COVID-19 affect your process for serving clients through CHANGES?

Q40. What were biggest successes of this program?

Closing

Q41. 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.