

CHANGES SHE 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 SHE implementing the CHANGES program
Population Size	3
Contact List Size	3
Completion Goal(s)	1-3
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 - Q2
CHANGES Goals and Services	Q3-Q7, Q11 - Q16
Key Metrics and Data Collection Processes	Q10, Q17 - Q20
Budget and Funding of CHANGES	Q22 - Q28
Program Performance and Effectiveness	Q29 -Q34
Spatial Analysis	Q33
Survey Needs	Q35 - 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. 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). As you may know, my firm is working with the CPUC to assess the CHANGES program. We would like to speak with you about the program, its 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 or organization 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 45-60 minutes to cover all the questions. Please let me know what time works well for you. Also, the CPUC suggested you could help me schedule the interview with Casey McFall and Ahmad Noorzayee of Milestone Consulting. Please let me know when they are available for a separate interview, unless you prefer I reach out to them.

Please let me know if there are any questions I can answer for you about this research.

I look forward to hearing from 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, what is your role at SHE as it relates to the CHANGES program?
- Q2. How long have you been in that position?
- Q3. What are your organization's responsibilities with regards to CHANGES? PROBE:
- Implementing the program
 - Managing network of CBOs,
 - Liaison between CPUC and CBOs
 - As CBO
1. Do your responsibilities differ by CBO? If so, how?
 2. Do your responsibilities differ by IOU? If so, how?
 3. Do your responsibilities differ by activity? If so, how?
- Q4. In general, how would you describe the clients you serve through the CHANGES program? PROBE:
- Their situations? (Limited English, learning disabilities, elderly, newly arrive to country)
 - Income? How do you define low-income?
 - Age?
 - Gender?
 - Ethnicity?
 - Language?
- Q5. Are there energy-related needs among your clients that are not currently addressed by the program?

Goals & Metrics

- Q6. In your own words, what do you see as the primary goal of the CHANGES program?
- Q7. From your perspective, what is the purpose of each of the program's four main activities? PROBE:
- Outreach
 - Education
 - Needs Assistance
 - Dispute Resolution
1. Which activity would you say is least needed by your clients?
 2. Which service is most helpful or critical for the Clients? Why?
 3. Which one of these services is most costly or time-consuming for you to provide?
 4. Would you say the program services are well-aligned with customer needs?

- Q8. **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?
- Q9. To what extent is the program successfully meeting client needs? [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?
- Q10. What are good measures of success? [Number of customers served, number of repeat customers, number of services provided?]
- Q11. What might make it more successful?
- Q12. 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

- Q13. How would you describe the value of the program to the clients you serve? [PROBE: what is the value CHANGES provides that clients cannot get from the utility?]
- Q14. Do you receive any materials from the IOUs or CPUC for your outreach activities? How about for your education activities?
1. [If yes] What do you get and how often?
 2. [If no] Where do you get the information for those materials?
 3. [If no] Is additional support needed from the CPUC or IOUs?
- Q14A. 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 a factsheet on that you don't currently have?
- Q15. 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?

- Q16. 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?

CHANGES Data Collection and Tracking

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

- Q17. What data are expected to track and report?
- Q18. What data are difficult for you to track and report, if any?
1. What are the barriers or what makes it difficult?
- Q19. What metrics are most difficult for the CBOs to track and report?
1. What are the barriers or what makes it difficult?
- Q20. Do you find that the information you and the CBOs track is sufficient for demonstrating the value of the CHANGES program? [IF NEEDED: What do we need to be tracking to show how valuable this program is?]
1. What alternative or additional data ?
 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. [If any above] How feasible would it be for you or the CBOs to collect that data?
 4. Is there any data being collected now that you don't find very useful?
 5. How do you use the data you collect?
- Q21. **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?]

Budget and Funding

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

- Q22. 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

- Q23. [If unclear] How are funds allocated to the different CBOs?
- Q24. [If unclear] How are funds allocated to the different activities?
1. Outreach activities
 2. Educational activities
 3. Needs assistance activities
 4. Dispute resolution activities?
- Q25. In your opinion, is the current allocation of funds appropriate given the goals of the program and the needs of customers being served?
- Q26. 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?
- Q27. Are there any cost-related challenges with data tracking, such as database management? If yes, please describe.
- Q28. 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.

- Q29. Based on your experience with CHANGES, are some CBOs more focused or better at certain types of services than others? Can you give an example and why?
- Q30. What are your thoughts on expanding or contracting the program?
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?
 3. If expand: What areas of the program should be expanded? (Language related needs; location related needs; service-related needs)
 4. Should any areas be consolidated or eliminated so that resources can be re-focused?

- Q31. From your perspective, are there people in need that the program doesn't have the capacity to serve? If so, who?
- Q32. What do you see as possible changes to the program to help it better serve its target population? [PROBE: Activity type]
1. [IF UNCLEAR] What do you see as the biggest areas for improvement with the CHANGES program?
- Q33. 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. What are your criteria for including or eliminating CBOs?
 5. Are there other implementation approaches that should be considered for CHANGES based on the needs of the target populations across the state?
- Q34. 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 affect your process for serving clients through CHANGES?

Survey Needs

As you may already know, we will be conducting a participant survey in the coming months to better understand the perceived benefits of the program, how the program meets customer needs, and opportunities for improvement.

- Q35. Are there any specific questions you think are important to ask clients to better understand the value of the program?
- Q36. Do you have suggestions as to how to be sensitive to the population when asking certain types of questions?
- Q37. What sensitive subjects or questions should we be aware of?

Closing

- Q38. 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.