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APPENDIX A CHANGES BENCHMARKING INTERVIEW GUIDE

A.1 PURPOSE

The evaluation team will conduct semi-structured interviews with program staff of identified programs have similar characteristics to the CHANGES program. These surveys will be used to collect relevant data to further understand any similar service offerings with the CHANGES Program, determine strengths and weaknesses of similar services, and identify new or unique implementation strategies that could be employed to improve the effectiveness of the CHANGES Program. This document outlines the topics we plan to explore during the interviews.

A.2 SURVEY INFORMATION

The evaluation team has selected the following programs for the benchmarking interviews. The table below contains acronyms used to refer to each program or service. These acronyms are used to identify questions in the interview guide which are targeted for specific programs.

TABLE A-1: PROGRAM ACRONYMS

Acronym	Program or Service
CUB	Citizens Utility Board Bill Clinics
CAP	UGI Customer Assistance Program
CMHE	Community Mental Health Equity Project
LACC	Language Access & Cultural Competency Funding
LACR	Language Access & Cultural Responsiveness Research
NVA	Nuestras Voces Adelante
CEEP	Community Energy Engagement Partnership

A.3 INTERVIEW RECRUITING EMAILS

Subject: Interview Request – Benchmarking Research

Hi [**First Name**],

My name is [**Name**] with Verdant Associates. We are a consulting firm contracted to evaluate California's CHANGES program (Community Help and Awareness of Natural Gas and Electrical Services). Our evaluation is overseen by the California Public Utilities Commission.

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As part of the evaluation, we are leading a benchmarking task to better understand how similar programs serve their target communities and meet program goals.

We would like to understand more about [**Program**] to learn from your successes and challenges. Please let us know if you are available for a call, so that we can learn from you about [**program**].

You can click on this [*link]* to schedule a time that works best for you, or we can arrange a time by email.

If there is someone else in your organization who would be a better contact for this discussion, please provide their information so that we can contact them.

Thank you for your time,

[Name/email/phone]

Verdant Associates

This evaluation is overseen by the California Public Utilities Commission, learn more here: https://www.cpuc.ca.gov/about-cpuc/divisions/news-and-public-information-office/consumer-affairs-branch/team-and-changes-programs.

I found your contact information from the CUB website. You may not be the right person I'm attempting to reach, so if not, I apologize, and I hope you might be able to point me in the right direction.

My name is [INTERVIEWER NAME] with Verdant Associates. We are a consulting firm contracted to evaluate a California-based program called *Community Help and Awareness of Natural Gas and Electric Services (CHANGES)*. The program provides services to Limited English Proficient (LEP) consumers who are looking for help with energy issues, including education and bill assistance. The CHANGES program and evaluation is overseen by the California Public Utilities Commission (CPUC).

Our evaluation includes a benchmarking study to learn how similar services/programs throughout the country serve their target communities and meet goals. We identified services provided by the **CUB Outreach Team** and **CUB Consumer Advocacy Team** as similar programs/services to include in our study. Specifically, we are interested in **CUB's education, bill clinics and hotline**.

We are hoping you (or someone from your team) may have 15 minutes to chat with us around organization goals, successes, challenges, and lessons learned from these programs/services.

Any chance we could set up some time this week or next week to chat? Or is there someone else from your organization that might be a better fit for this discussion?

We can send out a few times that may work.

Thanks so much for your time!

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A.4   INTERVIEW GUIDE

Introduction

Thank you for taking the time to speak with us. We'd like to start our discussion with some background about Verdant and why we are talking today – Verdant is a consulting firm which specializes in objective, data driven analysis and advisory services, mainly to utility companies and government agencies such as the California Public Utilities Commission. We are currently evaluating the CHANGES program, which is an acronym that stands for Community Help and Awareness of Natural Gas and Electrical Services. This program seeks to provide services to Limited English Proficient customers in California who need help with issues related to their electric and gas service. Program services include help accessing or updating their account, understanding program offerings, paying bills or understanding what to do if they cannot pay their bills. The program is operated by a network of community-based organizations (or CBOs) that perform community outreach to connect with these communities.

As part of the evaluation, our team is leading a benchmarking task, to better understand how other similar programs successfully meet the needs of the programs they offer and the communities they serve.

While we realize that the [**Program**] isn't identical to the program that we are evaluating we believe there may be some similarities between what CHANGES offers, and what you offer. We would like to understand more about your program to so that we can learn from your successes, as well as understand your program's challenges.

With your permission, I'd like to record this discussion for note taking purposes. Do I have your consent to begin recording? **[Begin recording if they agree]**

Do you have any questions for me before we begin?

1. Please describe your role and responsibilities as it pertains to **[*program]*.**

[IF program = LACR, SKIP TO QUESTION 14]

Program Details

2. Can you provide a description of [**program**]? (probe for: Services provided; case management)

[if program is not NVA] 2b. How are services implemented?

[if program = CUB] 2c. What are the differences between the virtual and in-person bill clinics? (probe for: marketing, participants)

[if program = CMHE] 2d. Can you describe the services related to "increased access & case-management"?

[if program = CMHE or LACC or NVA or CEEP, Else Skip to 4]

3. What is the role of the Community Based Organizations (CBOs)? (probe for: cultural competency)

      3a. Describe the partnership between the CBOs and the project.

4. What need is addressed by [**program**]?

[if program = NVA, SKIP TO QUESTION 5]

4a. Are there aspects of [**program**] specifically designed to eliminate the need for participants to require future help of the program, by enabling them to pursue the help they need themselves?

[if program = CMHE] 4b. One of the project domains is noted as "technology access and enhancement". How does "access to technology" play a part in people receiving or not receiving the help they may need?

4c. Are there ways that people might mitigate the negative impacts of not having access to technology?

5. How does someone qualify to benefit from [**program**]? (probe for: target population)

[if program = LACC] 5a. Is there a different target population for different events?

6. What are the general demographics of participants? (probe for: age, income level, LEP status, specific communities)

[if program = CUB or CAP or CEEP] 6a. Is any part of the program specialized or tailored to serve limited English speaking populations?

[If 6a = Yes] 6b. If so, can you provide more information about it?**[if program = CUB or CAP or CEEP]**

7a. Does the program include or incorporate any one-on-one case management?

[If 7a = Yes] 7b. If so, can you provide more information about it, how it works, and how affective it is?

8. What is the marketing strategy of [**program**]? How do most people hear about [**program**]?

9. Does this program connect participants or educate participants about other services from which they could benefit?

Program Outcomes

10. How do you measure success of [**program**]? What metrics are used?

11. What do you perceive as the strengths of [**program**]? (Probe for strategies that work exceptionally well, what about them makes them work?)

12. What do you perceive as the weaknesses of [**program**]?

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12a. Is there anything being done or any recommendations to address this?

13. How satisfied are participants with [**program**]?

Funding/Expense

14. What is the funding structure of [**program**]? Can you provide information on implementation costs?

LACR Questions

[Ask Question 15 Through Question 18, Only If Program = LACR]

15. Can you tell us more about the research.

> **15a**. What was the purpose of the research?

> **15b**. How was the research funded?

> **15c**. What were the research outcomes, and were they achieved?

> **15d**. Is further research planned?

16. What was La Clinica del Pueblo's role in the work (or if interviewing La Clinica del Pueblo, what was your role in the work)?

17. With the focus on language and cultural barriers, what are main takeaways from the research?

> **17a.** What are real-world examples of how these barriers may be overcome?

18. Based on your research and expertise, do you have any best practices or strategies you could suggest for reaching under-served communities to be most effective?

Documentation and Additional Contacts

19. Do you have any materials such as reports, budgets/financials, program satisfaction, or implementation plans you can share with us?

20. Do you have recommendations of someone else we should speak with [either from one of the CBOs you work with, or anyone else]?

APPENDIX B CHANGES PROGRAM ADMINISTRATOR INTERVIEW GUIDE

B.1   RESEARCH OBJECTIVES AND QUESTIONS

This is the interview guide to be used for IDIs with both IILA and Milestone Consulting. We will be conducting 1.5-hour interviews with each organization to discuss the CHANGES program.

The table below summarizes the research topics and questions that will be included in the interview.

TABLE B-1: PRIMARY RESEARCH OBJECTIVES, QUESTIONS, AND ACTIVITIES

Research Objective and Questions	Questions
Benchmarking Analysis	
1. What programs (offered by IOUs or in other jurisdictions) provide similar services to the customers served by CHANGES? Do the similar programs use any approaches or provide any services that should be adopted by the CHANGES program?	bench_1, bench_2, bench_3
2. If present, what are the strengths and weaknesses of the overlapping IOU offerings and, how can similar services be streamlined to optimize customers' experiences and the use of ratepayer funds?	bench_2, bench_3
3. How could the need for CHANGES services be mitigated by addressing customer issues when they first arise?	cust_5, cust_6
Market Profile Analysis	
4. What are the demographics of the clientele currently served via the CHANGES CBO network?	cust_1
5. Is the program currently providing services to targeted customers that are not formally acknowledged?	cust_2
6. What are the core missions, customer demographics, locations served, and services offered by the CBOs supporting CHANGES?	backgr_1, backgr_2, backgr_3, goal_1, goal_2
7. What are the core reasons customers are soliciting assistance from the CHANGES CBOs?	cust_3,
8. Has the program evolved and shifted its focus from LEP customers to other populations which may warrant additional program services?	cust_1, cust_4
9. Where (geographically) are program services being conducted and does the level of service address customer segment needs? Are all CBOs providing services in the four program areas of interest?	cust_4, cust_9, cust_10, cbo_1, cbo_2
10. Are there any gaps in CBO service coverage (such as areas having high need but lacking access to services)?	cbo_1, cbo_2
11. Is a change in program funding warranted considering: 1) PY 2022-24 program activity and financial data and historical program data and trends (e.g., clients seeking services, program spending, and program service needs) 2) Wage and cost inflation and program changes since PY 2016?	fund_1, fund_2, fund_3, fund_4, fund_5, fund_6, effect_1, effect_2

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B.2 INTERVIEW GUIDE

B.2.1 Introduction Script

Hi [FIRST NAME]. This is _____ from Verdant Associates, calling to discuss the CHANGES program. Is now still a good time to talk?

As I mentioned, Verdant Associates is working with the CPUC to evaluate the CHANGES program. Your insights as the program administrator are crucial for understanding how the program operates, what challenges you face, and how customer demographics and needs may be changing

[**IILA**] Throughout our conversation, we will be asking you questions that relate to your role as the program manager. Please try to think about this as the program manager. Additionally, where you feel it would be meaningful, let us know your responses as they relate to your role as an individual CBO.

I'll be taking notes, but I would like to record this conversation to ensure accuracy. Is that okay with you? Do you have any questions before we begin?

B.2.2 Background and Role

backgr_1. What is your role at [IILA/Milestone Consulting] as it relates to the CHANGES program?

    backgr_1a. How long have you been in this position?

backgr_2. What are [IILA/Milestone Consulting]'s primary responsibilities with regards to CHANGES? How long has your organization been performing this role?   [*Probe: Managing the CBO network, liaison with CPUC/IOUs, program oversight, training, etc.*]

    backgr_2a. How many people at your organization support the CHANGES program? Please describe their roles and whether they are full-time or part-time involved with CHANGES.

backgr_3. How does the CHANGES program align within your organization's primary activities or mission?

B.2.3 Program Goals

goal_1. How would you describe the primary goals of the CHANGES program?

goal_2. How does your organization measure or track the effectiveness of the program towards meeting its primary goals or objectives?

B.2.4 Customer Demographics and Evolving Needs

cust_1. Have you noticed any changes in customer demographics since the beginning of your organization's involvement with CHANGES?   [*Probe: Age, income level, languages spoken, length of time in the US, family structure, culture, types of support or assistance needed*]

cust_2. Is the CHANGES program currently serving customer populations that weren't originally part of the program's target demographic of LEP customers? Please describe the shift in demographics you've seen? Is data on this shift captured in the program tracking data?

> **cust_2a.** Has support of non-LEP customers changed over time? Why?

> **cust_2b.** Do non-LEP customers typically require different assistance than LEP customers?

> **cust_2c.** Has service to non-LEP customers impacted the program's ability to service to LEP customers?

cust_3. How do customers typically learn about the CHANGES Program services? Do customers initiate contact because of utility related needs or other issues? (e.g., Housing, Food, etc.)

cust_4. Do you believe the current program services (case management, education, outreach) adequately address customer needs? *[Probe: Are there gaps in services? Services that are underutilized? Energy-related needs among LEP customers not currently addressed by the program?]*

In your experience can you estimate what proportion of consumers needing case assistance return to the CHANGES CBOs for additional services in the future? Do future issues tend to be the same as prior issues reported?

cust_5. In your opinion is there anything that could be done (by CBOs or IOUs) to avoid the need for consumers to seek additional assistance in the future from CBOs after their initial issue(s) have been resolved?

cust_6. What can IOUs do better to ensure that consumer issues are resolved before they need the support of a CHANGES CBO? *[Probe: Financial Assistance Programs/ Bill Reduction]*

B.2.5   CBO Network

cbo_1. Are there geographic areas, language communities, or other communities that you believe are underserved by the current CBO network?   *[Probe: What is contributing to this? Why are these customers underserved?]*

cbo_2. In order to meet the needs of the target population, would you recommend any changes to the CBO network? *[Probe: Geographic additions? Languages/Communities?]*

B.2.6   Funding and Program Sustainability

fund_1. (*We're familiar with the current allocation of funds, as found in the CPUC/IILA contract signed in 2024*) In your opinion, is the current allocation of funds appropriate for the goals of the program and the needs of the customers being served?

> **Fund_1a. Consider Allocation Across All Tasks**: (CBO Activity/Database Admin/Marketing/Reporting/Other Admin)

Fund_1b. Consider Within CBOs (Outreach/Education/Needs Assistance/Dispute Resolution/Other Billable)

fund_2. What happens if a CBO goes over their maximum allotted budget for an activity-type? (e.g., outreach, education, needs assistance, dispute resolution)

fund_3. In the last three years, were there any costs incurred by [IILA/Milestone Consulting] or the CBOs that were not covered by the program's funding? *[Probe: Invoicing activities?]*

> **fund_3a**. [If Yes] How do you manage these financial challenges?

fund_4. Do reimbursement rates adequately compensate CBOs for their work?

> **fund_4a.** [If No] What is a reasonable reimbursement rate for the CBOs?

fund_5. The program budget has remained at ~$1.7 million per year since 2016. How has this affected program operations in the last three years? *[Probe: Impact on CBO compensation, ability to expand services, administrative costs]*

> **fund_5a.** Are there program management or administrative tasks that are not taking place due to limitations of the current funding? *[Probe: Not making necessary changes/updates to the program tracking database]*

fund_6. Are CBOs able to serve all CHANGES-eligible customers who seek assistance? *[Probe: If not, what are the primary reasons why? Budget Limits? Capacity Constraints? Referrals to other organizations? Unmet demand? Scope outside of what CBOs can provide assistance with?]*

fund_7 In your opinion, is the current program funding at a level which allows [IILA/Milestone] to sustainably cover all reasonable costs associated with managing the program?

B.2.7 Benchmarking and Program Comparison

bench_1. Are you aware of other programs, either offered by the IOUs or in other states, that provide similar services to those offered via the CHANGES program? *[Probe: What programs? In what ways are they similar to CHANGES?]*

bench_2. Do you see any overlap between the services CHANGES provides and other IOU utility programs or services? *[Probe: Do you coordinate with IOU programs to enhance the effectiveness of CHANGES? Are there areas of duplication or confusion?]*

bench_3. What do you see as CHANGES' unique strengths compared to other services offered by the utilities?

B.2.8   Program Effectiveness and Future Directions

effect_1. What do you see as the biggest challenges facing the CHANGES program currently? *[Probe: Funding, staffing, customer outreach, program complexity, database and managing across a large number of different organizations]*

effect_2. If CHANGES had additional resources, what would be your priorities for program improvement or expansion? *[Probe: Geographic expansion, new services, additional CBOs, enhanced training, evaluating services delivered and ongoing strategic review of services. Database improvements]*

effect_3. Are there any program services or approaches that you think should be modified or eliminated? Why and How?

B.2.9   Closing

close_1. Is there anything important about the CHANGES program that we haven't discussed today?

close_2. Do you have any questions about this evaluation or our research approach?

Thank you very much for taking the time to speak with us today. Your insights are invaluable for understanding how the CHANGES program is operating and how it might be improved to better serve California's limited-English proficient customers. We appreciate your cooperation with this evaluation.

APPENDIX C   CHANGES CBO SURVEY

C.1   PURPOSE

To identify specifics around program approaches (e.g., CBO outreach strategy, case management specifics, educational offerings, etc.) and ask questions to better understand how program services and demographics are changing through time.

C.2   INTERVIEW AND SURVEY INFORMATION

This document is designed to be used as both a phone interview guide and an online web survey instrument. The evaluation team will reach out to each CBO and request to conduct a one-hour interview. For CBOs that are unable to schedule an interview with the team, we will provide an option to respond to the questions via an online Qualtrics web survey. The questions will remain identical between the two options to facilitate analysis, post interview and survey completion. All CBOs, regardless of whether they choose the interview or survey option, will receive a $100 donation to their organization as thanks for their time.

C.3   MAPPING SURVEY QUESTIONS

TABLE C-1: RESEARCH OBJECTIVES WITH CORRESPONDING SURVEY QUESTIONS

Research Objective and Questions	Questions
Benchmarking Analysis	
1. What programs (offered by IOUs or in other jurisdictions) provide similar services to the customers served by CHANGES? Do the similar programs use any approaches or provide any services that should be adopted by the CHANGES program?	F4
2. If present, what are the strengths and weaknesses of the overlapping IOU offerings and, how can similar services be streamlined to optimize customers' experiences and the use of ratepayer funds?	C1a:b, C2, C3a:d, E2a:c, E3, E4, F1, F2, F4
3. How could the need for CHANGES services be mitigated by addressing customer issues when they first arise?	B2a:b, C1a, C1b, C2, C3a:c, E2c
Market Profile Analysis	
4. What are the demographics of the clientele currently served via the CHANGES CBO network?	A1, A3, A4a, A4b, C3a
5. Is the program currently providing services to targeted customers that are not formally acknowledged?	E3, E4
6. What are the core missions, customer demographics, locations served, and services offered by the CBOs supporting CHANGES?	A1, A2, A3, A4a, B1a, D1, D2
7. What are the core reasons customers are soliciting assistance from the CHANGES CBOs?	B1a, C1a, C2

8. Has the program evolved and shifted its focus from LEP customers to other populations which may warrant additional program services?	A3, A4a,b, B1a:b, C3a:d
9. Where (geographically) are program services being conducted and does the level of service address customer segment needs? Are all CBOs providing services in the four program areas of interest?	D1, D2, D3
10. Are there any gaps in CBO service coverage (such as areas having high need but lacking access to services)?	D2, D3, E4
11. Is a change in program funding warranted considering: 1) PY 2022-24 program activity and financial data and historical program data and trends (e.g., clients seeking services, program spending, and program service needs) 2) Wage, cost inflation and program changes since PY 2016?	A4b, A5, D2, D3, E1, E2a:b, E3, E4, E5a:b, E6a:b, F2, F3

C.4   INTERVIEW RECRUITING EMAILS

Subject Line: Your Expertise is Needed: Important Interview About the CHANGES Program

Hi [Name],

Verdant Associates is conducting an evaluation of the CHANGES Program for the California Public Utilities Commission (CPUC). Your participation will help us understand how the program is currently working for you and members of your community and whether any improvements can be made.

This interview should take approximately one hour to complete. Your responses will be confidential and reported in aggregate form. As a thank you for your participation, we will provide a $100 donation to your organization upon completion.

Please use the link below to schedule time to share your experience with the CHANGES Program. Our team looks forward to meeting you and learning more from you about how the program is serving your community's needs.

[link to schedule]

Thank you,
[NAME]

C.5   INTERVIEW GUIDE

Section A: Organization Background

A0. Please record the name of your organization for data entry purposes. [OPEN END, Force Response]

A1. What is your organization's main mission or goal? **[OPEN END]**

A2. Tell us about the demographics of customers you provide assistance to through the CHANGES Program (You can include age, income, languages they speak, how long they've lived in the U.S., family situation, cultural background, and other non-CHANGES help they need). **[Open end]**

A2a. How do members of your community typically learn about the services your organization offers through the CHANGES program? [Open End]

C2. Do customers typically come to you specifically for a utility issue, or do they come to your organization to get assistance with a different issue and then learn about CHANGES services you provide while receiving these other services from your organization?
    1.   Always for utility issues specifically
    2.   Usually for utility issues specifically
    3.   About half and half
    4.   Usually find out while seeking other services
    5.   Always find out while seeking other services

A3a. This study is focused on the CHANGES program over the last 10 years. Thinking back over that period, have the demographics of the clients your organization has provided assistance to through CHANGES shifted?
    1.   Yes, the demographics have shifted as follows: **[Open End]**
    2.   No

[IF A3a = 1]
A3b. Has this demographic shift impacted the services you provide through CHANGES**?**
    1.   Yes, the services we provide have shifted as follows: **[Open End]**
    2.   No

A4a. How many CBO staff are currently trained to handle CHANGES services? **[numeric]**

A4b. Has the number of staff changed over time?
    1.   Increased
    2.   Decreased
    3.   Stayed the same

A4c. What percentage of their time do these staff currently spend on CHANGES? (Please give the percent for each staff member currently supporting CHANGES) [OPEN END]

A4d. Has the total number of staff hours dedicated to CHANGES changed over time?
1. Increased
2. Decreased
3. Stayed the same

Section B: Service Delivery

B1a. Which of these CHANGES services do you offer? For each one, tell us if the need for these services has changed over time. [Matrix with "No change in need", "Increased Need", "Decreased Need", "Don't offer this service"]

1. Dispute resolution
2. Needs assistance to pay off outstanding utility bills (e.g., LIHEAP)
3. Energy and utility bill educational classes/workshops
4. Community outreach activities promoting CHANGES topics

[IF ANY CHANGE IN B1a]
B1b. What do you think has contributed to the change in need? [OPEN END]

B1a_Other. Are there any other primary services you provide through the CHANGES program? (If so, have the need for these services changed over time?) [OPEN END]

B2a. How often do your clients try to resolve their utility issues themselves, before seeking your help?
1. Always
2. Often
3. Sometimes
4. Never
5. Don't know

B2b_open End. Interviewer - DO NOT READ - This is a place to add notes here regarding question B2A [OPEN END]

[IF B2a <> 4,5]
B2b. What are the most common reasons they can't resolve their utility issues on their own? [OPEN END] [PROBE: What did the customer do to try to resolve their utility issues]

Section C: Customer Demographics & Needs

C1a. Next I am going to read you a list of reasons why customers may need CHANGES program assistance. Please tell me what percentage of your customers need CHANGES assistance for each of the following reasons:

(These do not need to add up to 100%)

1. Limited English proficiency: _____%
2. Cultural needs that can't be met by utilities: _____%
3. Lack of familiarity with utility systems: _____%
4. Complex billing or service issues: _____%
5. Difficulty navigating technology: _____%
6. Lack of access to technology: _____%
7. Hearing or vision impairments: _____%
8. Fear or suspicion of the utilities_____%

C1b. Are there any other primary reasons customers need CHANGES program assistance (as opposed to receiving assistance directly from their utility)? If so, what percentage of your customers is this a reason for seeking assistance.: **[OPEN]**

C3a. Do you currently serve English-proficient customer populations? [Probe: if so, do you ever record English as the language the service is being provided in and it later shifts to the client's native language?]

1. Yes - Please describe who: **[OPEN END]**
2. No

[IF C3a = 1]

C3b. Has your organization's support of English proficient customers changed over time?

1. Yes, it has changed as follows: **[OPEN END]**
2. No

[IF C3a = 1]

C3c. Do English proficient customers typically need different kinds of help than limited-English proficient customers?

1. Yes, LEP and non-LEP assistance needs vary as follows: **[OPEN END]**
2. No

[IF C3a = 1]

C3d. Has service to English proficient customers impacted your ability to serve limited-English proficient customers?

1. Yes, service to LEP customers has been impacted as follows: **[OPEN END]**
2. No

C4. Do you have CHANGES educational materials in all of the languages you need them in?

1. Yes. And did your organization translate the CHANGES materials for your clients? [Open End]

Section D: Geographic Coverage

D1. We have a list of counties your organization serves through CHANGES. Please describe any geographic limitations within the counties served: [**Open End**]

D2. Are you aware of populations in your area that could benefit from CHANGES services but aren't currently served?

1. Yes
2. No
3. Don't know
4. ADD NOTES IF NEEDED

[IF D2 = 1]
D3. What populations aren't being served and why? (Select all that apply)

1. Specific language groups (which ones?): **[OPEN]**
2. Geographic areas too far from our office (where?): **[OPEN]**
3. People within our boundary, but we lack sufficient CHANGES funding to support them
4. Undocumented immigrants who avoid services
5. Elderly population with mobility issues
6. Customers outside utility service territories
7. Customers served by a different CBO that isn't part of CHANGES
8. Other (please specify): **[OPEN]**

Section E: Service Outcomes & Effectiveness

E1. When cases aren't resolved, what are the main reasons? (Select all that apply)

1. Customer doesn't follow through on what we've discussed
2. Utility is unresponsive
3. Issue is too complex
4. Documentation is missing

5.   Other (please specify): **[OPEN]**

E2a. How often do customers return for additional help after their initial issue(s) have been resolved?
   1.   Always
   2.   Often
   3.   Sometimes
   4.   Never
   5.   ADD NOTES IF NEEDED

[IF E2a <> 4]
E2b. Do they typically come back for assistance with a different issue or additional help with their initial issue? (Select all that apply)
   1.   Different issue
   2.   Same issue

[IF E2b = 1, same page]
E2d. Why do you think this specific type of issue recurs?

[IF E2c = 1, same page]
E2e. What does your organization do to help the customer manage this kind of issue by themselves in the future?

E2f. What can utilities do better to address a customer's issues before they need help from a CHANGES CBO?

E3. How often does your organization provide utility-related assistance without receiving CHANGES compensation?
   1.   Very frequently (weekly)
   2.   Frequently (monthly)
   3.   Occasionally (few times per year)
   4.   Rarely (once per year or less)
   5.   Never

[If E2 <> 5]
E4. What are the typical reasons your organization isn't compensated by CHANGES for utility case assistance services? (Select all that apply)

1. Customer is outside utility service territory
2. Issue doesn't qualify for CHANGES reimbursement
3. Have already helped the customer with another CHANGES issue and can't be reimbursed for additional help
4. No more CHANGES funds available for dispute resolution or needs assistance (reached budget max)
5. Other (please specify): **[OPEN]**

E5a. Do you incur any costs related to CHANGES that are not covered by the program's funding?
1. Yes (please describe) **[OPEN END]**
2. No

[IF E5a = 1]
E5b. How do you manage these financial challenges? **[OPEN END]**

E6a. Do current CHANGES program reimbursement rates adequately compensate your organization for your work?
1. Yes
2. No (please specify why not and what reimbursement rate would provide adequate compensation) **[OPEN END]**

E6b. Has the adequacy of CHANGES Program reimbursement rates changed over time?
1. Yes (please share how) **[OPEN END]**
2. No

E7. Have you done any CHANGES related work (educational events, outreach activities, or case assistance) without getting paid because the program used up all its yearly budget?
1. Educational events (please share topics and number of events) [OPEN END]
2. Case assistance (please share estimated number of cases) [OPEN END]
3. Outreach activities (please share number and type of activities) [OPEN END]
4. No [Open End]

E8. How much additional budget would you need to cover your costs for all of the CHANGES services you provide to customers?

Section F: Program Assessment

F1. What are the main strengths of the CHANGES Program? (Select up to 5)

1. Culturally competent services
2. Individualized case management
3. Community-based approach
4. Holistic assistance
5. Language accessibility
6. Trusted relationships with community
7. Effective utility advocacy
8. Comprehensive service offerings
9. Flexible service delivery
10. Strong coordination among CBOs implementing the program
11. Other (please specify): **[OPEN]**

F2. What are the main weaknesses of the CHANGES Program? (Select up to 5)
1. Insufficient funding
2. Administrative burden
3. Inadequate reimbursement rates
4. Slow payment processing
5. Insufficient training
6. Poor communication with utilities
7. Other (please specify): **[OPEN]**

F3. What are your biggest challenges implementing CHANGES? Please write more details about each challenge, as needed, in the boxes provided. **[have open end for each to allow for expanding upon the answer]**
1. Staffing limitations
2. Funding constraints
3. Language barriers
4. Utility company responsiveness
5. Customer follow-through
6. Program restrictions
7. Other (please specify):
8. No challenges **[Exclusive]**

F4. Do you offer services through other utility programs that are similar to CHANGES or TEAMS services?
1. Yes (please specify) **[OPEN END]**
2. No

F5. In your opinion, is there anything utilities can do to make it easier for you to provide CHANGES services?

    1. Yes (please explain) **[OPEN END]**
    2. No

Section G: Contact Information & Follow-up

G1. Do you track staff hours spent on CHANGES? If yes, would you be willing to share that data with us to support our funding re-assessment work?

    1. Yes, we track staff hours and can share
    2. No, we don't track or are unable to share

G2. To facilitate the $100 donation to your organization, please share a web link or directions for donation. **[OPEN END]**

Survey Completion

Thank you for completing the CHANGES Program CBO Survey! Your responses will help improve services for limited English proficient customers throughout California.

The $100 donation to your organization will be processed within 2-3 weeks using the information you provided.