

# CHANGES PROGRAM ANNUAL REPORT

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Community Help and Awareness of Natural Gas  
and Electricity Services

Program Year: June 2021–May 2022

March 10, 2023

This California Public Utilities Commission (CPUC) report summarizes the services provided by the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program, for the Program Year (PY) June 2021–May 2022 and highlights areas of interest for CPUC, other policymakers and interested parties.



**California Public  
Utilities Commission**

CHANGES PROGRAM ANNUAL REPORT  
(Program Year June 2021–May 2022)

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## Executive Summary

The California Public Utilities Commission (CPUC) launched the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program, through a statewide pilot program in 2012 to support limited English proficient (LEP) clients. CHANGES is designed to help LEP clients manage their natural gas and electricity services. The CPUC formalized the CHANGES program through Decision 15-12-047 “as an ongoing statewide program, effective January 1, 2016.”<sup>1</sup> The California Alternate Rates for Energy (CARE) proceeding, A.19-11-003, extended the CHANGES program in Decision D.21-06-015 with a budget of “\$10,515,012 for program years 2021-2026”, which includes two program evaluations.<sup>2</sup> The vast majority of the LEP clients served are low-income and qualify for CARE, which is one of the main reasons why funding is approved through this proceeding.

This report provides an overview of services provided (and related insights) in the most recent program year (PY), June 2021-May 2022. One of the major themes of the year is COVID-19 and its related impacts. Program delivery is contracted to Self Help for the Elderly, a non-profit organization based in San Francisco. The program has three service components: individual case assistance, education, and outreach.

## Summary of Annual Activity

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The COVID-19 crisis continued to impact in-person CHANGES services offered in this PY, but there were signs of a gradual return to normal operations in late spring/early summer of 2022. By the end of the program year, more community-based organizations (CBO) offices opened to in-person client visits than at any time since the start of the pandemic. CBOs also became more familiar with remote methods of connecting with clients, which augmented the program’s operational model. This led to large increases in case assistance, education services, and community event outreach, which rose by **15 percent**, **76 percent**, and **110 percent** respectively this PY.

Case assistance is the most impactful service that CHANGES CBOs provide to LEP clients, because case assistance includes helping clients resolve disputes with the utility and/or a variety of other needs assistance services. Common examples of needs assistance include helping clients find financial solutions to meeting bill commitments, guidance on lowering bills, and help making changes to an account or service. All clients are provided services tailored to their range of needs regardless of their initial issue.

The case assistance services provided this year increased by **15 percent** overall from the previous PY, from **6,820** to **7,853** services. In common with the previous PY, the vast majority of CHANGES case assistance services relate to the target population’s struggles with the affordability of energy services. Over **80 percent** of all services fell under the aggregated categories “Support Meeting Bill Commitments” or “Reducing

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<sup>1</sup> D.15-12-047, p.1 and additional information on CHANGES, and the CPUC Decisions underpinning it can be found at: <https://www.cpuc.ca.gov/about-cpuc/divisions/news-and-public-information-office/consumer-affairs-branch/team-and-changes-programs>

<sup>2</sup> D.21-06-015, Ordering paragraphs 20-22, p. 475-476: <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M387/K107/387107687.PDF>

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Monthly Bill Charges”. In particular, the single most in demand service was applying for one-time financial support through the Home Energy Assistance Program/Low Income Home Energy Assistance Program (HEAP/LIHEAP) program. There were **3,093** such applications processed, which was **39 percent** of all CHANGES services. Also, demand for HEAP/LIHEAP applications increased **36 percent** from the last PY. For emergency financial assistance programs, excluding LIHEAP CBOs processed **1,701** applications (**22 percent** of all services). These applications included those for the Arrearage Management Program (AMP), IOU emergency assistance programs, and other one-time payment sources (e.g., churches). In summary, the magnitude and type of services sought indicate that clients’ ability to make their utility payments **declined this PY**.

Typical examples of services provided in the “Reducing Monthly Bill Charges” category include enrollment in programs such as CARE, Family Electric Rate Assistance (FERA), Energy Savings Assistance (ESA), and medical baseline. This set of services increased overall by almost half, from **794** in the last PY to **1,181** services this year (**15 percent** of all services), underpinned by an almost **three-fold increase in CARE** related services,<sup>3</sup> from **206** last year to **603** in this one. Other significant case services offered were modifying or setting up new accounts (**eight percent** of all services); support with gas aggregators (**four percent**) or Community Choice Aggregators (CCAs) (**two percent**); and support with time-of-use plans (**two percent**).

Overall, there was a **76 percent** rise in education attendance in this PY compared to the last one (**29,869** versus **16,981**). The sharp increase in attendees can be attributed to the easing of some COVID-19 restrictions and more in-person education workshops were being held by the last quarter of the PY. Also, some clients and CBOs have increased their comfort level with remote meeting platforms and improved their Internet access through newly implemented broadband programs offered by the Federal Communications Commission.

CBOs chose education topics that reflected their clients’ interests. In this PY, the two most popular topics, which together represented almost half of overall attendance were “Understanding Your Bill” and “CARE/FERA and Other Assistance programs”. These topics also underline that clients were concerned about high energy bills and interested in ways to keep themselves on track with their bill charges.

Historically, the most common source of CHANGES client referrals has been friends or family, and this trend has become more pronounced during the last two pandemic affected program years. Similar to the last PY, over **40 percent** of clients approached a CBO after hearing a favorable review from a trusted source. In terms of formal outreach, community event outreach was very low in the last PY but bounced back this year, as COVID-19 restrictions were relaxed. CBOs had an outreach presence at more than **double** the number of community events this PY compared to the last one, and these events had a larger average attendance, **893** attendees compared to **616** last year.

Conversely, efforts to undertake outreach through traditional media and social media declined this PY. Case assistance and education services both markedly increased this year, and the contractor indicated that this

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<sup>3</sup> Includes enrolments, recertifications, enrolment issues, and clients using energy levels above set CARE thresholds.

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may have contributed to reduced media outreach, as CBOs allocated more resources to staffing those services. Also, during the height of the pandemic, when offices were closed to visitors and service levels fell dramatically, CBOs were more reliant on remote channels such as media outreach to publicize the program.

### Client Demographics

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Recipients of CHANGES case assistance services had the following characteristics:

1. They were overwhelmingly low income, where approximately **97 percent** of participants were CARE eligible.<sup>4</sup>
2. Age groups were fairly evenly split, **52 percent** were over 60-years old, and **48 percent** between 21 and 59-years old.
3. Approximately **61 percent** of program participants receiving case assistance were Spanish (**40 percent**) or Cantonese speakers (**21 percent**). The next largest language groups served were English (**11 percent**), and Vietnamese (**10 percent**).
4. CHANGES serves a wide range of different languages in California’s LEP communities with case assistance services provided in **29** different languages, three more than the previous PY.

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<sup>4</sup> See Table 3 - CARE Enrollment at Time of Case Assistance Services.

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Program Year (PY) June 2021 – May 2022

## 1. Introduction

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The California Public Utilities Commission (CPUC) launched the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) thru a statewide pilot program in 2012 to support limited English proficient (LEP) clients. CHANGES is designed to help LEP clients manage their natural gas and electricity services.<sup>5</sup> The CPUC formalized the CHANGES program through Decision 15-12-047 “as an ongoing statewide program, effective January 1, 2016.”<sup>6</sup> The CARE<sup>7</sup> proceeding (A.19-11-003) extended the CHANGES “program at a total of **\$10,515,012** for program years 2021-2026”, in decision D.21-06-015.<sup>8</sup>

The CHANGES program is modelled on the Telecommunications Education and Assistance in Multiple (TEAM) languages program, which helps clients with their telecommunication service needs.<sup>9</sup> TEAM and CHANGES are delivered together under the same contract with the CPUC, through the same lead contractor and CBOs.

This report summarizes the services provided by the CHANGES program and highlights areas of interest for CPUC, other policymakers, and interested parties. This report covers the last PY, June 2021 through May 2022. It provides information on the three areas in which CHANGES delivers services:

- Individual case assistance
- Education
- Outreach

The CPUC contracts with Self-Help for the Elderly (SHE) to operate the CHANGES program. SHE and its subcontractors oversaw a statewide network of **27** Community Based Organizations (CBOs) to provide program services to LEP clients. The funding for the program is restricted to the jurisdictions of the four large Investor-Owned Utilities – Pacific Gas & Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E), and SoCal Gas (SCG).

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<sup>5</sup> D.15-12-047, p.3 and additional information on CHANGES, and the CPUC Decisions underpinning it can be found at: <https://www.cpuc.ca.gov/about-cpuc/divisions/news-and-public-information-office/consumer-affairs-branch/team-and-changes-programs>.

<sup>6</sup> Ibid, p.1

<sup>7</sup> California Alternate Rates for Energy (CARE) program, <https://www.cpuc.ca.gov/consumer-support/financial-assistance-savings-and-discounts/california-alternate-rates-for-energy>

<sup>8</sup> D.21-06-015, Ordering paragraphs 20-22, p. 475-476: <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M387/K107/387107687.PDF>

<sup>9</sup> The TEAM Program stems from the CPUC’s Consumer Protection Initiative – CPUC Decision D.06-03-013, where the CPUC ordered protections for clients and directed another proceeding to determine what, if any, protections, or assistance should be provided for clients with limited English proficiency.



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## 2. Overview of CHANGES CBOs

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In PY 2021/2022, SHE operated the CHANGES program as a single state-wide coalition of **27** CBOs that work collectively on a variety of issues impacting LEP communities. CBOs in the coalition are required to provide CHANGES services. As shown in **Table 1**, the CBOs are geographically concentrated in four different regions across the state. A full list of CBOs in the coalition can be accessed at: <https://www.cpuc.ca.gov/about-cpuc/divisions/news-and-public-information-office/consumer-affairs-branch/team-and-changes-programs>.<sup>10</sup>

<b>Table 1: Number of CBOs in Each Region</b>	
Bay Area & Northern California	9
Central Valley	5
Greater Los Angeles	10
San Diego County	3

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<sup>10</sup> See CBO Roster under “Resources” heading

### 3. Individual Case Assistance

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#### Types of Case Assistance Services Provided and Comparison with last PY

Case assistance is the most impactful service that CHANGES CBOs provide to LEP clients. It comprises either or both dispute resolution and needs assistance. Dispute resolution is provided to clients who believe that a utility has acted incorrectly regarding their account or service. This typically involves CBO staff advocating on behalf of a client disputing an incorrect Investor Owned Utility (IOU) bill or disconnection. Needs assistance comprises a wide range of different services that help clients to manage their services better.<sup>11</sup>

Common examples of needs assistance services include helping clients that are struggling to meet their utility bill commitments, general guidance to lower monthly bills, help in making changes to a client's account or service, and help choosing the most appropriate rate plan. CBO staff undertake a thorough case assessment of each individual's needs, regardless of their initial reason for contacting them. CBOs then tailor services to meet those needs. The overall range of services are described below and in the **Table in Attachment A**. Also, service type comparisons between this PY and the last one is shown in **Table 2**.

#### *Overall Services*

Overall, **6,221** clients received a total of **7,853** different services during the year. Therefore, on average each client received **1.3** services per case. Of these **6,221 clients, 92 percent (5,721)** received needs assistance services and **eight percent (500)** received dispute resolution services. The relatively low number of dispute resolution cases this year can mainly be attributed to the moratorium on disconnections. The number of individual clients that received case assistance increased this year by **21 percent**, from **5,149** last PY to **6,221** in this one.

#### *Services Related to Energy Affordability*

In common with the previous PY, the vast majority of CHANGES case assistance services relate to clients' struggles with the affordability of energy services. The most in-demand aggregated service categories<sup>12</sup> were "Support Meeting Bill Commitments" and "Reducing Monthly Bill Charges", which represented **67 percent** and **15 percent** of all services respectively. As shown in **Table 2**, the corresponding percentages for these categories in the last PY were only slightly lower, at **64 percent** and **12 percent** respectively.

This data underlines the ongoing concern that energy affordability issues continue to **disproportionately impact LEP clients** in the communities supported by CHANGES CBOs, who are overwhelmingly low income (see CARE eligibility within the "Spotlight on Selected Case Assistance Services" section later in the chapter).

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<sup>11</sup> In needs assistance cases clients do not believe that the IOU has made an error with their bill or services.

<sup>12</sup> See "Overall Category" column in the Table in Attachment A.

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As shown in **Table 2**, the service category with the largest yearly increase (by far) was support for clients that have difficulties in meeting their utility bill commitments. This category witnessed an increase of **909** services (**21 percent**) this year. This rise was propelled by the increase in support for Home Energy Assistance Program/Low Income Home Energy Assistance Program (**HEAP/LIHEAP**) applications for one-time financial support. In common with recent program years, this continues to be the single most provided service by CHANGES CBOs, increasing by **36 percent** from **2,278** services in the last PY to **3,093** this year.

To further underscore clients' concerns with affordability, CBOs processed **1,701** applications (**22 percent** of all services) for emergency financial assistance programs (excluding LIHEAP). These applications included those for the Arrearage Management Program (AMP), IOU emergency assistance programs, and other one-time payment sources (e.g., churches). In summary, the magnitude and type of services sought indicated that clients' **ability to make their utility payments declined this PY**, a year which was also impacted by the pandemic. More detail is provided about AMP issues in the Spotlight section later in the chapter. Also, within the "Meeting Bill Commitments" category, is support for payment plans and extensions, which continued to be relatively significant (**three percent** of services) though dropping slightly compared to the last PY.

### *Reducing Monthly Bill Charges*

The next most important service category was reducing monthly bill charges, and this involves CBO staff looking for ways to reduce clients' regular monthly bills. Typical examples include enrolling them in programs such as California Alternate Rates for Energy (CARE), Family Electric Rate Assistance (FERA), Energy Savings Assistance (ESA) and/or medical baseline. These services increased overall by almost half, from **794** in the last PY to **1,181** services this year, underpinned by an almost three-fold increase in CARE related services,<sup>13</sup> from **206** last year to **603** in this one. Applications for the ESA and medical baseline programs also remained significant, representing **five percent** and **two percent** of services respectively this year, similar proportions to the previous PY.

### *Modifying and Setting Up Accounts*

The third largest category of services (**eight percent** of all services) was help with "Modifying Accounts or Setting Up New Accounts". The most common types of change include setting up online account access, changing the language on the account or information about the customer of record, and setting up new accounts. Although this remained a relatively popular set of services, demand actually declined by **13 percent** compared to last year, from **732** to **640** services.

### *Core Transport Agents*

Issues with gas aggregation companies, also known as core transport agents (CTAs) continue to affect a significant number of CHANGES clients (**330**), and the number of cases remained relatively similar to the last PY. In comparison, issues with CCAs declined significantly, by **61 percent** this year. Both issues are

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<sup>13</sup> Includes enrolments, recertifications, enrolment issues and clients using energy levels above set CARE thresholds.

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described in more detail below in the Spotlight section, including data on clients complaining that CTAs are using misleading sales practices. The other major service that stands out in terms of demand is the number of clients seeking support with Time-of-Use (TOU) plans. In particular, they were concerned about higher costs from these plans and the lack of notification that their services would be switched to another company. More detail about this issue can also be found in the Spotlight section later in this chapter.

Columns A and B in **Table 2**, show each service category as a share of all services (see parentheses) and Column D compares this share to the previous PY. **Table 2** also indicates that there were some changes in the distribution of services since last year. There was a large increase in services delivered across both the “Support in Meeting Bill Commitments”, and “Reducing Monthly Bill Charges” categories. In aggregate these categories, which were already significant (at a combined **76 percent** of all services last PY) increased to over **80 percent** this year. As noted above, the need for services related to help in “Modifying or Setting up New Accounts” declined this year, which translated to a decrease of **three percent** as a share of all services. The need for electricity aggregation services also fell sharply, from **six percent** of all services last PY, to just **two percent** this year. Finally, driven by demand for help with time-of-use issues, the “Other Items” category increased just over **400%** this year.

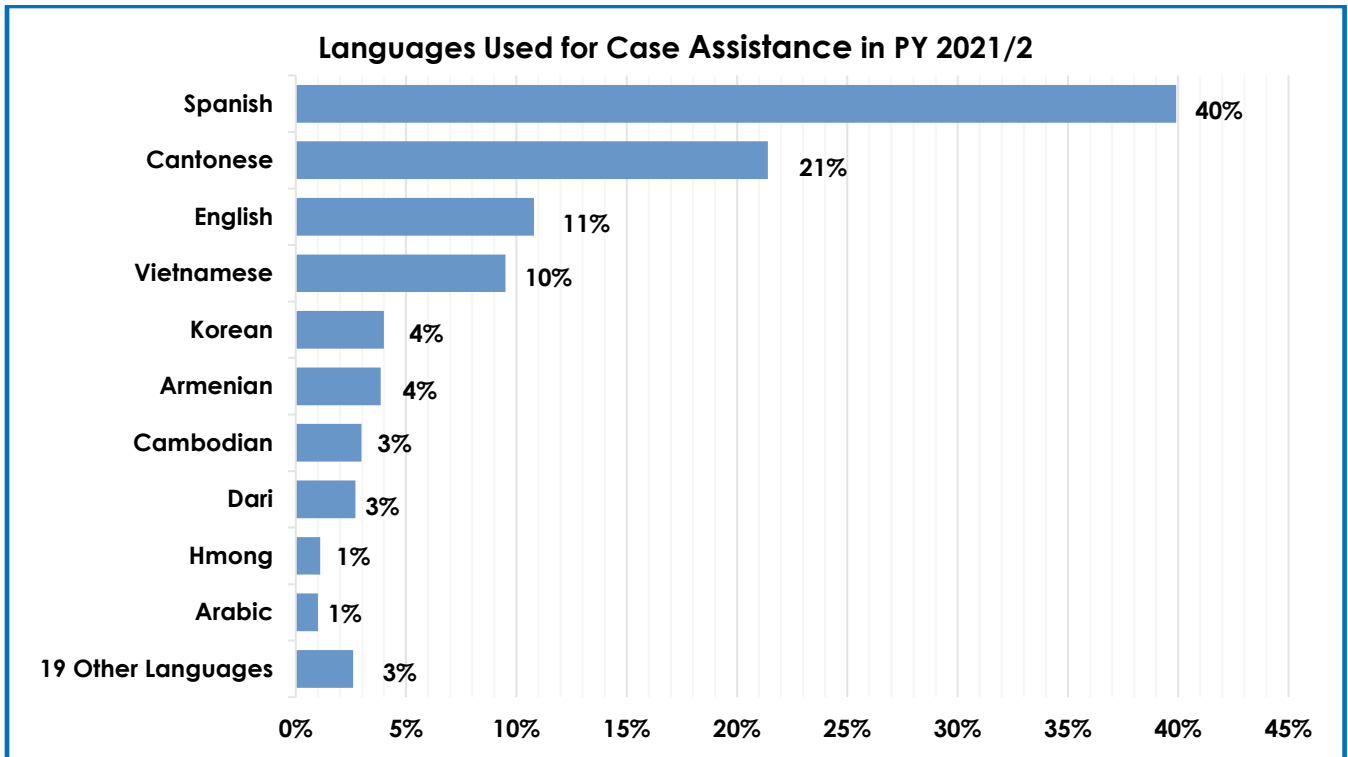
Overall Category	(A)	(B)	(C)	(D)
	2020-21	2021-22	YOY Actual Variance (% Change)	YOY Distributional Change (% B) - (% A)
	Services Provided (% of All Services)	Services Provided (% of All Services)		
<b>Support in Meeting Bill Commitments</b>	4,356 (63.9 %)	5,265 (67.0 %)	909 (20.9 %)	3.2%
<b>Reducing Monthly Bill Charges</b>	794 (11.6 %)	1,181 (15.0 %)	387 (48.7 %)	3.4%
<b>Modifying Accounts/ Setting Up New Accounts</b>	732 (10.7 %)	640 (8.1 %)	(92) (-12.6 %)	-2.6%
<b>Gas Aggregators</b>	368 (5.4 %)	330 (4.2 %)	(38) (-10.3 %)	-1.2%
<b>Other Items</b>	39 (0.6 %)	196 (2.5 %)	157 (402.6 %)	1.9%
<b>Community Choice Aggregators</b>	442 (6.5 %)	173 (2.2 %)	(269) (-61.9 %)	-4.3%
<b>Billing Dispute</b>	58 (0.9 %)	39 (0.5 %)	(19) (-32.8 %)	-0.4%
<b>Solar Issues</b>	31 (0.5 %)	29 (0.4 %)	(2) (-6.5 %)	-0.1%
<b>TOTAL SERVICES PROVIDED</b>	<b>6,820</b>	<b>7,853</b>	<b>1,033 (15.1 %)</b>	

Data Source: Program Database for PY 2021/22

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## Languages Used for Case Assistance

**Figure 1** below, shows that over **80 percent** of case services were delivered in four languages – Spanish (**40 percent**), Cantonese (**21 percent**), English (**11 percent**), and Vietnamese (**10 percent**). Compared to the last PY, **11 percent** less Spanish speakers were helped, with cases spread more evenly among the other languages. A significant number of services were also offered in Korean (**four percent**), Armenian (**four percent**), Cambodian (**three percent**), and Dari (**three percent**). In total services were delivered in **29** different languages this PY, an increase of three languages compared to last year.



**Figure 1: Languages Used for Case Assistance in PY 2021/22**

Note: The percentages in the chart will not equal 100 due to rounding

## Spotlight on Selected Case Assistance Services

In each annual report this section provides a more detailed analysis on some areas of interest to policymakers.

### *CARE Services and Eligibility*

Almost all, **97 percent** of CHANGES case assistance clients, are from low-income households. **Table 3** shows that, at the time of seeking service, **86 percent** of clients were already enrolled in CARE, another **11 percent** were qualified but not yet enrolled, and only **3 percent** were not qualified for the program.

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Enrolled in CARE		Qualify But Not Enrolled		Not Qualified		TOTAL	
5,318	86 %	697	11 %	206	3 %	6,221	100 %

Data Source: Program Database for PY 2021/22

### Disconnections

The moratorium on service disconnections protected consumers through most of the program year and meant that very few clients needed help with this issue. As shown in **Table 4**, in the 2021-22 PY, only **seven** clients approached a CBO to seek assistance with a disconnection. However, this will likely become an increasingly significant issue for LEP consumers in PY 2022/23 as the IOUs have all indicated that they will look to start disconnections during that timeframe. In fact, **138** clients have already indicated that in the 2021/22 PY they received disconnection notices. Fortunately, CHANGES CBOs were able to help resolve **113**, or **82 percent** of these cases.

Account Status	Total Clients
Disconnected Clients Seeking Case Assistance	7
CBO Achieved Reconnection of Services	3
Clients Seeking Assistance with Pending Disconnection*	138
CBO Achieved Cancellation of Disconnection	113

Data Source: Program Database for PY 2021/22

\* Consumer received disconnection notice from IOU

### Gas Aggregation Companies/Core Transport Agents (CTAs)

Most CTA cases involved clients either complaining that their gas supplier was transferred without their permission, or that they received higher bills after the switch. To resolve these cases most consumers requested that a CBO help them switch their service back to an IOU because they believed it would lower their bills. In a sample of clients,<sup>14</sup> **23 percent** identified misleading sales practices by the CTA. These practices included persuading clients that switching to their company would lower their bills or that no commitment to a contract would be necessary. In several cases written documents were not provided, or only in English, and contract terms were changed without notice to the client.

### Electricity Aggregation

<sup>14</sup> Based on a sample of 263 of the 330 CTA cases served in the PY

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CHANGES CBOs resolved electricity aggregation cases with five different CCAs in the program year. Almost **99 percent** of clients had two main concerns. First, that they were not made aware that their account would shift to a CCA (**46 percent**), and second, that their CCA bills were unexpectedly high (**53 percent**).<sup>15</sup> Despite complaints about higher bills there were no cases in which clients raised concerns about misleading sales practices.<sup>16</sup> In the majority of cases clients asked that their service be restored to the IOU.

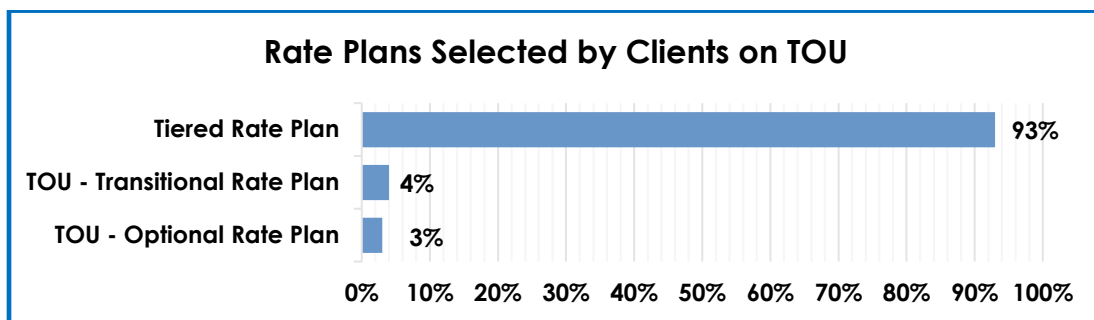
### *Arrearage Management Plan (AMP)*

During this program year, **666** clients were enrolled in an IOU Arrearage Management Plan (AMP). A limited number (**169**) of clients enrolled in an AMP were contacted for follow-up assessments to determine if the program successfully reduced their utility debt. Clients who were not able to maintain the required monthly payments in AMP were provided with additional services to assist with reducing payments or balances. Follow-up surveys of AMP cases indicated the following:

- At three months post-enrollment, **62 percent** of the **90** AMP plans remained active, though over half of those clients (**53 percent**) had already missed at least one payment.
- At six months post-enrollment, **66 percent** of the **74** AMP plans remained active, and **34 percent** of those clients had missed at least one payment.
- At 12 months post-enrollment, the sample size was very small, but only **one of the five** enrollees surveyed remained active in AMP.

### *Time-of-Use (TOU) Plans*

Assistance with selecting a rate plan was provided to **162** clients in the program year. This was a major change from last year when only **9** such services were recorded. These LEP clients were dissatisfied with their TOU plans and as shown in **Figure 2**, clients overwhelmingly (**93 percent**) chose to switch to a more traditional tiered rate plan. This indicates that TOU plans may not be a good fit for many LEP households in California.



**Figure 2: Rate Plans Selected by Clients on TOU**

<sup>15</sup> This data is based on a sample of 80 of the 173 CCA cases served in the PY

<sup>16</sup> Ibid.

## 4. Education

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### Education Services Provided by Workshop Topic

CBOs provided consumer education focused on eight different topics, in workshops that typically span 45-60 minutes in length. CBOs choose topics based on their assessment of the needs and interests of their respective communities. They generally present both a CHANGES and TEAM topic in back-to-back workshop sessions, to educate consumers about both energy and telco service issues.

Overall, **76 percent** more clients were educated in this PY compared to the last one (**29,869** versus **16,981**). The sharp increase in attendees can be attributed to the easing of some COVID-19 restrictions and more in-person education workshops were being held by the last quarter of the PY. Also, some clients and CBOs have increased their comfort level with remote meeting platforms and improved their internet access through newly implemented broadband programs offered by the Federal Communications Commission.

The lead contractor also developed over **300** consumer education presentation slide decks to ensure that all languages can be served in an online format. This facilitated access to educational sessions for computer literate clients that had access to internet with speeds sufficient to run online video conferencing software such as Zoom. These efforts showed that the program is able to pivot in response to a radically changing service landscape.

However, despite the flexibility shown by the program, the contractor does not view online education to be as effective or accessible as in-person educational presentations for the target populations, which tend to be both lower income LEP and from an older demographic (over half of clients are over 60 years old).

As shown in **Table 5** below, attendance for every topic increased significantly this year. In this PY, the two topics that stood out with the highest share of overall attendance were “Understanding Your Bill” (**29 percent**), and “CARE/FERA and Other Assistance Programs” (**21 percent**). These topics also had the largest year-on-year numerical increases in attendance, **3,727** and **2,511** respectively. The topics with the sharpest attendance rate increases were “High Energy Use and CARE”, and “Gas Aggregation”. This indicates that CBOs saw a large uptick in interest in these two topics.



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Table 5: Education Attendance by Topic Compared to the Previous Year				
Topic	2020-21 PY ( % of Attendees)	2021-22 PY ( % of Attendees)	YOY Change	YOY % Change
Understanding Your Bill	4,869 (29 %)	8,596 (29%)	3,727	77%
CARE/FERA and Other Assistance Programs	3,748 (22 %)	6,259 (21%)	2,511	67%
Avoiding Disconnection	1,931 (11 %)	3,201 (11%)	1,270	66%
High Energy Use and CARE	1,254 (7 %)	3,159 (11%)	1,905	152%
Energy Conservation	1,581 (9 %)	2,659 (9%)	1,078	68%
Electric and Natural Gas Safety	1,839 (11 %)	2,296 (8%)	457	25%
Gas Aggregation	944 (6 %)	2,193 (7%)	1,249	132%
Level Pay Plan	815 (5 %)	1,506 (5%)	691	85%
<b>TOTAL</b>	<b>16,981</b>	<b>29,869</b>	<b>12,888</b>	<b>76%</b>

Data Source: Program Database for PY 2021/22

### Education Topics Offered

As shown in **Figure 3** below and noted above, by far the two most attended topics were “Understanding Your bill” (**29 percent**) and “CARE/FERA and “Other Assistance Programs” (**21 percent**). In common with case assistance, this indicates that CBOs believed that their clients were most concerned about high bills, ways to reduce their bills, and how to apply for emergency financial assistance.

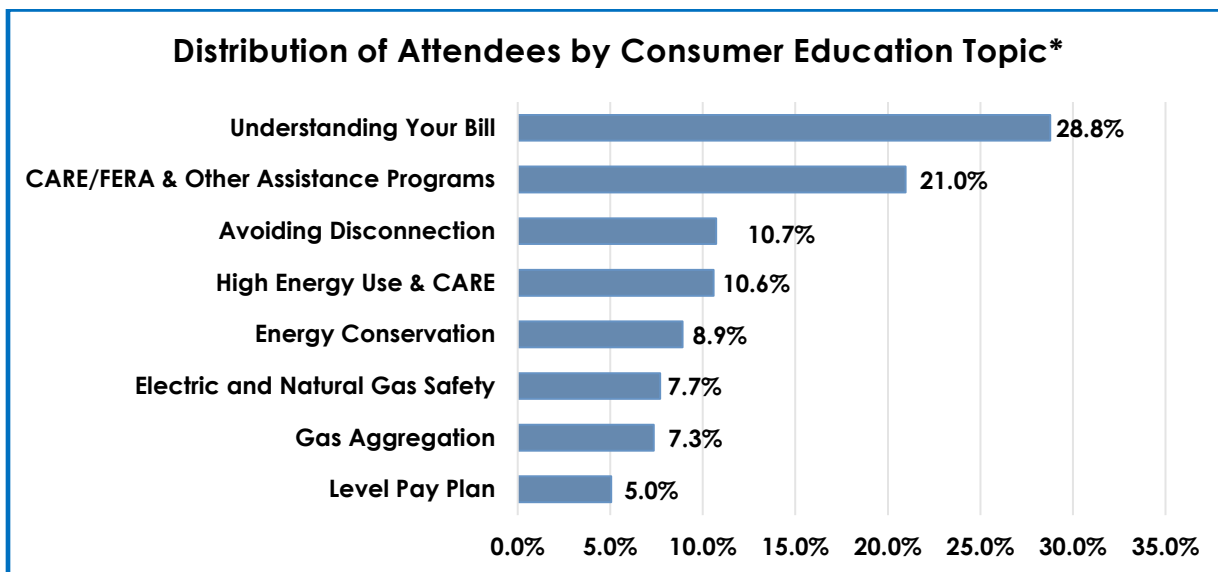
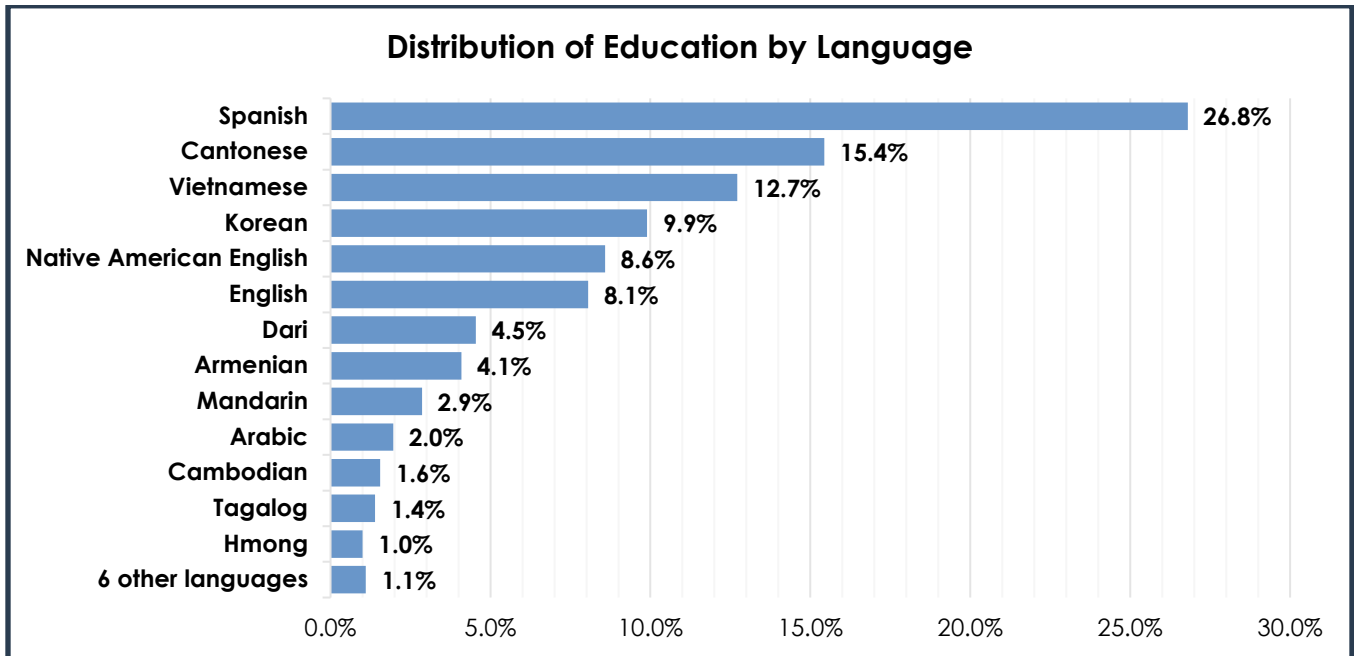


Figure 3: Distribution of Attendees by Consumer Education Topic

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## Education Breakdown by Language

As shown in **Figure 4** below, the five largest language groups receiving consumer education spoke Spanish (**27 percent**), followed by Cantonese (**15 percent**), Vietnamese (**13 percent**), Korean (**10 percent**), and Native American English (**nine percent**) speakers. In total education workshop sessions were provided in **19** different languages, up from **17** in the last PY.



**Figure 4: Distribution of Education by Language**

## 4. OUTREACH

### Sources of Client Referrals

Historically, the most common source of CHANGES client referrals has been from friends or family, and in this PY, **42 percent** of clients said they were referred by this source. This trend has become more pronounced during the last two pandemic affected program years. This type of referral is typical in low-income LEP communities who may not have as much trust for other types of outreach such as mailed brochures or advertising. The next most significant referral sources were participation in another program at the CBO (**21 percent**), and in-language media outreach placed by CBOs (**16 percent**). This PY has seen a rebound in terms of both the number of community events held and their average attendance. However, in both cases their magnitude is far lower than the pre-pandemic period. Therefore, it is not surprising that overall, a low share of referrals came from community events. This may change as community events become more common and with better attendance numbers.

Clients' Referral Source	% Of Clients
Referred by Friend or Family	42 %
Participated in Another Program at the CBO	21 %
Media Placement (Print, Radio, or Television)	16 %
CHANGES Consumer Education Workshop	11 %
Referred by Another CBO	4 %
Community Event Outreach	3 %
Received TEAM Services	2 %
Special Outreach Project	1 %

Data Source: Program Database for PY 2021/22

### Types of Client Outreach

Program outreach comprises community events, in-language media placements (on ethnic television, radio, and print outlets), community presentations (to other CBOs) and social media postings. **Table 7** shows a comparison of outreach activities between this PY and the previous one.

Community event outreach was very low in the last PY but bounced back this year, as COVID-19 restrictions were relaxed. CBOs had an outreach presence at **more than double** the number of community events this PY compared to the last one, and these events had a larger average attendance, **893 attendees** compared to **594** last year. Although community event outreach is still well below pre-pandemic levels, the

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upward trend appears likely to continue into the 2022-2023 PY as CBOs have now opened up most of their offices and are engaging in more in-person service delivery.

Conversely, media outreach and social media activity showed a declining trend, with the number of traditional media placements dropping **by almost half**, and social media postings falling by over **60 percent**. Case assistance and education services both increased markedly this year, and the contractor indicated that this may have contributed to reduced media outreach, as CBOs allocated more resources to providing those services.

An increased number of word-of-mouth referrals from within the community may also have had an impact on reducing the need for formal outreach. Also, during the height of the pandemic, when offices were closed to visitors and service levels fell dramatically, CBOs were more reliant on remote channels such as media outreach to publicize the program. Finally, as the pandemic continued, some of the media outlets that served some of the less represented languages may have shut down or reduced activities due to the challenging operating conditions.

Outreach Component	2020–21 <sup>17</sup> Program Year	2021–22 Program Year	YOY Change	YOY % Change
No. of Community Events Attended	21	44	23	110 %
Community Events (Estimated Attendance)	12,943	39,299	26,356	204 %
Total Media Placements	57	29	(28)	(49 %)
Media Placements (Estimated Reach)	2,984,253	1,123,362	(1,860,891)	(62 %)
Social Media (postings)	645	235	(410)	(64 %)
Community Presentations	16	10	(6)	(38 %)

Data Source: Program Database for PY 2021/22

<sup>17</sup> The outreach data reported in PY 2020-21 was updated following a change in reconciling the data. Community events and traditional media outreach were under reported in last year's reported figures.

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### 6. Conclusion

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The COVID-19 crisis continued to impact in-person CHANGES services offered in this PY, but there were signs of a gradual return to normal operations in late spring/early summer of 2022. By the end of the program year, more community-based organizations (CBO) offices opened to in-person client visits than at any time since the start of the pandemic. CBOs also became more familiar with remote methods of connecting with clients, which augmented the program’s operational model. This led to large increases in case assistance, education services, and community event outreach, which rose by **15 percent**, **76 percent**, and **110 percent** respectively this PY.

Case assistance is the most impactful service that CHANGES CBOs provide to LEP clients, because case assistance includes helping clients resolve disputes with the utility and/or a variety of other needs assistance services. Common examples of needs assistance include helping clients find financial solutions to meeting bill commitments, guidance on lowering bills, and help making changes to an account or service. All clients are provided services tailored to their range of needs regardless of their initial issue.

The case assistance services provided this year increased by **15 percent** overall from the previous PY, from **6,820** to **7,853** services. In common with the previous PY, the vast majority of CHANGES case assistance services relate to the target population’s struggles with the affordability of energy services. Over **80 percent** of all services fell under the aggregated categories “Support Meeting Bill Commitments” or “Reducing Monthly Bill Charges”. In particular, the single most in demand service was applying for one-time financial support through the HEAP/LIHEAP<sup>18</sup> program. There were **3,093** such applications processed, which was **39 percent** of all CHANGES services. Also, demand for HEAP/LIHEAP applications increased **36 percent** from the last PY. For emergency financial assistance programs, excluding LIHEAP CBOs processed **1,701** applications (**22 percent** of all services). These applications included those for the Arrearage Management Program (AMP), IOU emergency assistance programs, and other one-time payment sources (e.g., churches). In summary, the magnitude and type of services sought indicate that clients’ ability to make their utility payments **declined this PY**.

Typical examples of services provided in the “Reducing Monthly Bill Charges” category include enrollment in programs such as CARE, Family Electric Rate Assistance (FERA), Energy Savings Assistance (ESA), and medical baseline. This set of services increased overall by almost half, from **794** in the last PY to **1,181** services this year (**15 percent** of all services), underpinned by an almost **three-fold increase in CARE** related services,<sup>19</sup> from **206** last year to **603** in this one. Other significant case services offered were modifying or setting up new accounts (**eight percent** of all services); support with gas aggregators (**four percent**) or CCAs (**two percent**); and support with time-of-use plans (**two percent**).

Overall, there was a **76 percent** rise in education attendance in this PY compared to the last one (**29,869** versus **16,981**). The sharp increase in attendees can be attributed to the easing of some COVID-19

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<sup>18</sup> Home Energy Assistance Program/Low Income Home Energy Assistance Program. See <https://www.csd.ca.gov/pages/liheaprogram.aspx>

<sup>19</sup> Includes enrolments, recertifications, enrolment issues and clients using energy levels above set CARE thresholds.

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restrictions and more in-person education workshops were being held by the last quarter of the PY. Also, some clients and CBOs have increased their comfort level with remote meeting platforms and improved their Internet access through newly implemented broadband programs offered by the Federal Communications Commission.

CBOs chose education topics that reflected their clients' interests. In this PY, the two most popular topics, which together represented almost half of overall attendance were “Understanding Your Bill” and “CARE/FERA and Other Assistance programs”. These topics also underline that clients were concerned about high energy bills and interested in ways to keep themselves on track with their bill charges.

Historically, the most common source of CHANGES client referrals has been friends or family, and this trend has become more pronounced during the last two pandemic affected program years. Similar to the last PY, over **40 percent** of clients approached a CBO after hearing a favorable review from such a trusted source. In terms of formal outreach, community event outreach was very low in the last PY but bounced back this year, as COVID-19 restrictions were relaxed. CBOs had an outreach presence at more than **double** the number of community events this PY compared to the last one, and these events had a larger average attendance, **893** attendees compared to **594** last year.

Conversely, efforts to undertake outreach through traditional media and social media declined this PY. Case assistance and education services both markedly increased this year, and the contractor indicated that this may have contributed to reduced media outreach, as CBOs allocated more resources to staffing those services. Also, during the height of the pandemic, when offices were closed to visitors and service levels fell dramatically, CBOs were more reliant on remote channels such as media outreach to publicize the program.

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Attachment A: Case Assistance Services Provided by Type in PY 2021-2022

<b>Types of Case Assistance Provided in PY 2021-22</b>				
<b>Overall Category</b>	<b>Subcategory</b>	<b>Service Provided</b>	<b># Services Provided</b>	<b>%*</b>
<b>SUPPORT IN MEETING BILL COMMITMENTS</b>	<b>HEAP/LIHEAP</b>	HEAP/LIHEAP Application Assistance **	3,093	39%
		<b>Subtotal</b>	<b>3,093</b>	<b>39%</b>
	<b>Assistance with Emergency Financial Programs</b>	REACH Program - PG&E Territory	305	4%
		Other source of One-time Payment (e.g., Faith-based Organization, Private Emergency Fund) ***	255	3%
		Enrolled in SCG Gas Assistance Fund	232	3%
		Enrolled in SDG&E - Neighbor to Neighbor Program	115	1%
		COVID-19 Emergency Payment****	74	1%
		Enrolled in SCE's Energy Assistance Fund	54	1%
		<b>Subtotal</b>	<b>1,035</b>	<b>13%</b>
	<b>Arrearage Management Plans</b>	Arrearage Management Plan (AMP) Enrollment	666	8%
		Arrearage Management Plan Follow-up	169	2%
		Arrearage Management Plan – Billing or Enrollment Problem	23	0.3%
		<b>Subtotal</b>	<b>858</b>	<b>11%</b>
	<b>Support with Payment Plans/ Extensions</b>	Set Up Payment Extension	149	2%
		Set Up Payment Plan	120	2%
		<b>Subtotal</b>	<b>269</b>	<b>3%</b>
	<b>Other</b>	Cancel 24-Month Payment Plan	7	0.1%
		Assisted with Reconnection	3	0.0%
		<b>Subtotal</b>	<b>10</b>	<b>0.0%</b>
	<b>Total – PAYMENT DIFFICULTIES</b>			<b>5,265</b>
	<b>CARE/FERA</b>	CARE/FERA Support	603	7%

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<b>REDUCING MONTHLY BILL CHARGES</b>	<b>Medical Baseline</b>	Medical Baseline Support	366	5%	
	<b>ESA Program</b>	Applying for/Support with ESA	126	2%	
		<b>Subtotal</b>	<b>1095</b>	<b>14%</b>	
	<b>Support with Lowering Energy Use/ Managing Bills</b>	Energy Efficiency Tool	72	1%	
		Scheduled Energy Audit	11	0.1%	
		Added/Removed Level Pay Plan	2	0.0%	
		Demand Response Programs	1	0.0%	
		<b>Subtotal</b>	<b>86</b>	<b>1%</b>	
	<b>TOTAL - REDUCING BILL CHARGES</b>			<b>1,181</b>	<b>15%</b>
	<b>MODIFYING ACCOUNTS/ SETTING UP NEW ACCOUNTS</b>	-	Set Up Online Account Access	141	2%
Billing Language Changed			136	2%	
Changed Consumer Information on Account			123	2%	
Set Up New Account			88	1%	
Add/Removed Paperless Billing			45	1%	
Assisted with Making a Payment			45	1%	
Closed Account			31	0.4%	
Add/Removed Automatic Payment			16	0.2%	
Set Up Energy Alerts			8	0.1%	
Set Up 3rd party Notification			7	0.1%	
<b>TOTAL – MODIFYING / SETTING UP NEW ACCOUNTS</b>			<b>640</b>	<b>8%</b>	
<b>GAS AGGREGATORS</b>	-	<b>Support with CTA issues</b>	<b>330</b>	<b>4%</b>	
<b>COMMUNITY CHOICE AGGREGATORS</b>	-	<b>Support with CCA issues</b>	<b>173</b>	<b>2%</b>	
<b>OTHER ITEMS</b>	-	Time-of-Use/Rate Plan Assistance	162	2%	
		Scheduled Service Visit	16	0.2%	
		Utility Company Would Not Speak with CHANGES CBO	7	0.1%	
		Reported Safety Problem	5	0.1%	
		Reported Scam	4	0.1%	
		Consumer Education Only	2	0.0%	
<b>TOTAL - OTHER ITEMS</b>			<b>196</b>	<b>2%</b>	
<b>BILLING DISPUTES</b>	-	Bill Adjustment	28	0.4%	
		Requested Meter Service or Testing	8	0.1%	



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		Collection Agency Issues	3	0.0%
<b>TOTAL - BILLING DISPUTES</b>			<b>39</b>	<b>0.5%</b>
<b>SOLAR ISSUES</b>	-	<b>Solar Issues</b>	<b>29</b>	<b>0.4%</b>
<b>TOTAL SERVICES PROVIDED</b>			<b>7,853</b>	

Data Source: Program Database for PY 2021-2022

- \* Due to rounding the percentages will not add up to 100 exactly.
- \*\* LIHEAP consists of emergency and non-emergency payments. This year there were very few emergency cases.
- \*\*\* Source of bill payment/reduction assistance that does not include HEAP/LIHEAP or IOU programs.
- \*\*\*\* Includes various COVID-19 Emergency Assistance Programs including County, Municipality, and other sources.