

**Self-Help for the Elderly
CHANGES Program**

SCOPE OF WORK

The Community Help and Awareness with Natural Gas and Electric Services (CHANGES) pilot program was ordered by California Public Utilities Commission Resolution CSID-004 and is supported by the four major investor owned utilities (IOUs) in California, specifically Pacific Gas and Electric Company, San Diego Gas and Electric Company, Southern California Edison Company and Southern California Gas Company. It will be administered by Self-Help for the Elderly (SHE) according to the following operational specifications.

Service Components

The CHANGES Program will provide Outreach, Education, and Need and Dispute Resolution services to Limited English Proficient (LEP) energy consumers in the State of California. Services will be targeted to LEP consumers; however, English speaking consumers seeking services will not be turned away. Services will be provided through a network of Community Based Organizations (CBOs), all of which are members of the existing Telecommunications Education and Assistance in Multiple-languages (TEAM) Collaborative.

Outreach

Outreach services will be conducted to inform the general public about the availability of CHANGES services and will include the following:

1. Community Events - Participation in community outreach events which may include Health Fairs, Outreach Events, Bill Fairs, Ethnic or Cultural Events, and other events of relevance to the targeted community and consumers. When possible and practical, SHE will provide advance notice of any community events that CBOs have indicated they will attend.

2. Media Placements – Media placements will be made by CBOs to inform the public about the availability of CHANGES services, and will include interviews, announcements, informational articles, and/or advertisements through local media television, radio and newspaper outlets. In most cases, outreach will be conducted through ethnic media, and will be placed in the languages of the targeted consumers.

Events and media placements will be required to reach a minimum of 2,500 potential consumers, to qualify for payment. Multiple events or media placements may be combined to reach a total of 2,500 potential consumers to qualify for payment of one event or placement.

Documentation of services provided will be collected prior to payment and will include brief reports on the service provided and examples of media placements, when available.

CBOs will be expected to include outreach information on the CHANGES Program in regular informational and outreach materials (newsletters, websites, outreach flyers) as appropriate. However, these activities will not be eligible for payment as outreach services.

Consumer Education

Consumer Education services will be delivered to consumers in small group sessions (i.e. educational workshops) or on a one-to-one basis. Education will be provided in the consumers' primary language; and in a culturally competent manner, that may vary among CBOs.

Utilities shall provide customer collateral material to SHE, which will be translated by SHE or its subcontracted CBOs as needed. Investor Owned Utility (IOUs) logos will not be included on translated materials.

Workshop topics will include, but may not be limited to:

- How to Read and Understand a Utility Bill, including baseline and tiered billing rates;
- Energy Conservation;
- Low Income and Special Services Programs (i.e. Third Party Notification, Low Income Energy Efficiency, Family Electric Rate Assistance and Medical Baseline)
- Disconnection rules, payment arrangements and other services to avoid disconnections and deposits

Documentation of Consumer Education will include sign-in sheets that indicate the number of consumers educated, the language in which the education was provided, and the topic of the educational session. CBOs will conduct simple pre- and post-tests to determine an increase in consumer knowledge as a result of the education provided.

Needs and Dispute Resolution

Definition of Dispute Resolution- A "dispute" is when a consumer requires CBO assistance to resolve an issue regarding a service provided by the electric or gas utility for which the customer has been unable to resolve independently, due to limited English proficiency and/or those consumers not reachable through traditional channels such as phones, direct mail or email.

Definition of Needs Resolution— a “need” is something that requires the CBO’s assistance to achieve but is not a dispute – (i.e., setting up payment arrangements, requesting a payment extension, help enrolling in utility programs such as Medical baseline, CARE, FERA, receiving general information, or service requests, etc.)

Needs and Dispute Resolution services will be conducted by the CBO network and will include pre-determined processes for contacting the utilities’ Customer Service staff to discuss consumer bills and services on behalf of the consumer. Utility companies will provide contact information for escalating disputes that cannot be resolved with Customer Service staff. If necessary the CBO may receive assistance from the CHANGES network or the CPUC Public Advisor staff in resolving disputes, but the dispute will not be registered with the CPUC unless it remains unresolved and the consumer seeks assistance from the CPUC Consumer Affairs Staff.

Documentation of Needs and Dispute Resolution services will include consumer identifying information, account information, demographic information, and specific data and narrative describing the dispute and the outcome. It is anticipated that Dispute Resolution services will include negotiating payment plans, disconnection intervention, assistance with reconnection; high bills disputed bills, and assistance with other billing and service issues.

CARE/FERA Enrollment

CHANGES CBOs will be encouraged to become enrolled as approved Capitation Agencies (or as the utilities energy partners or other program which will allow the CBO to refer customers for CARE enrollment) for the utilities in their service areas prior to beginning CHANGES activities. CHANGES CBOs will enroll consumers in CARE and other low income programs as appropriate. All CHANGES CBOs who are capitation agencies will be compensated for CARE enrollment through the existing capitation programs at the same rate.

Data on CARE enrollments will be collected and reported through the CHANGES Program; however, no CHANGES funds will be utilized for compensating CBOs for CARE enrollment. Reports will specifically indicate that data collected in relation to CARE is the number of applications submitted for potential enrollment, and does not reflect actual enrollment.

Program Administration

SHE will oversee administration of the CHANGES Program. Milestone Consulting will be subcontracted to provide program coordination including CBO training and technical assistance, collaborative communications and support, and reporting.

Confidentiality

SHE will ensure that consumer privacy is protected and that personal information is not disclosed to unauthorized individuals. Confidentiality requirements will be reviewed with CBOs at project implementation. IOU specific customer confidentiality policies and/or guidelines must be followed for each respective IOU.

Evaluation, Tracking and Reporting Tasks

Data collection will include collecting and reviewing written verification of Outreach and Education activities; and electronically collecting data about Dispute Resolution in a CHANGES database. Data collection will occur on an ongoing basis and analyzed data will be included in programmatic reports.

Outreach activities will be tracked through the submission of reports on each activity, submitted by the CBO with their monthly invoice. Data includes the number of potential consumers reached through the outreach activity, the language in which the activity was completed, and the type of activity that was completed.

Regular data collection of Consumer Education activities will include statistical and demographic data on participants served and topics of education provided. LEP consumers will be required to sign-in for educational workshops as verification that services were provided.

Database

SHE will develop a basic database to track Resolution activities. Information collected will include demographic information, information about the type of dispute, and the result of the resolution service provided. Statistical information collected in the database will be summarized in monthly and year end reports. Access to the database will be limited to SHE and its subcontractors and the CPUC project manager.

Monthly Reports

Monthly reports will be submitted to all participating utility companies and the CPUC. CBOs will be responsible for submitting their progress toward contract deliverables each month, accompanied by appropriate verifying documentation, when they submit monthly invoices for payment. CBOs will submit invoices for services rendered directly to SHE for payment. CBO information will be compiled into a network-wide report that includes a summary of activities for the month, by IOU, and year-to-date statistics.

CBO Training, Monitoring and Technical Support

CBOs will receive training and ongoing support from SHE and its lead staff with support from the IOUs as requested to ensure that they remain up to date on consumer issues and best practices in service delivery, including:

1. Individualized telephone meetings twice per month to discuss progress, provide training and advice, discuss issues regarding individual complaints, and provide programmatic reminders.
2. Quarterly site visits to each CBO to review documentation and provide face-to-face support.
3. Intensive individualized training to CBOs in need of extra assistance, or to train new CBO staff members.
4. Assistance with individual Dispute Resolution for difficult cases.