

CHANGES PROGRAM ANNUAL REPORT

Community Help and Awareness of Natural Gas and Electricity Services

Program Year: June 2020–May 2021

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 2020–May 2021 and highlights areas of interest for CPUC, other policymakers and interested parties.



**California Public
Utilities Commission**

CHANGES PROGRAM ANNUAL REPORT

JUNE 2020–MAY 2021

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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) 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. The CPUC formalized the CHANGES program through Decision 15-12-047 “as an ongoing statewide program, effective January 1, 2016.”¹ The CARE proceeding (A.19-11-003) extended the CHANGES in decision D.21-06-015 with a “program at a total of \$10,515,012 for program years 2021-2026”, which includes two program evaluations.²

This report summarizes the services provided and related insights from the most recent program year (PY), June 2020-May 2021, and includes impacts from the COVID-19 pandemic. 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

Overall, CHANGES experienced a significant decrease in the services delivered in the last program year. In particular, the level of education, outreach and dispute services saw significant reductions year-over-year (YOY), as lockdown restrictions from the pandemic became pervasive throughout the state.

However, the number of case assistance services provided this year bucked that trend, increasing by **6** percent overall from the previous PY (from **6,440** to **6,820** services). A large part of that can be attributed to the increasing difficulties that clients faced in meeting their energy costs. For instance, LIHEAP services increased from **1,685** applications in the last PY to **2,278** this PY, an increase of over one-third. In addition, support in applying for (non-LIHEAP) emergency financial assistance programs increased from **15** percent of all case services (**945** cases) last PY to **26** percent (**1,772** cases) in this one. Even discounting enrolments in the AMP program (**381** services) this represents a large enrolment increase in emergency applications.

Consumer Education attendance dropped by **50** percent from the previous PY, mainly because it was not possible to organize in-person workshops due to the pandemic restrictions. To adapt to the new conditions CHANGES reformatted educational materials for use in remote workshops. However, because a large proportion of the CHANGES LEP target population are older and often lack the resources and knowledge to access online video conference platforms they were underserved during the PY.

Outreach also fell significantly. The acute decline in clients reached through Community Events was remedied by significantly increasing the potential reach by in-language ethnic media outlets (which almost doubled) and a sharp increase in social media postings e.g., Facebook, Instagram, Twitter. It is difficult to

¹ 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>

² 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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compare the effectiveness of these broader media outreach events to in-person community event-based outreach, but it is fair to note that the CHANGES program was originally conceived with a high level of interpersonal interaction embedded into its three service components.

During the pandemic CHANGES pivoted to meet client needs, still the pandemic significantly impacted CBOs' ability to deliver CHANGES services. In response CHANGES modified service delivery and outreach methods to maintain safety protocols (e.g., collecting documents and bills while social distancing at COVID related health events). The CBOs were compelled to shift priorities to the immediate health and safety needs of their communities and staff, but opportunities to engage clients were also leveraged in relation to the various other COVID related relief programs e.g., the CA COVID-19 Rent Relief program, and COVID testing and vaccine services.

The reduction in services overall has impacted the CBOs financially. Education and outreach fell for the reasons given but COVID related protections such as moratoriums on disconnections and the relaxation of assistance program recertification requirements, also had the effect of reducing the number of dispute cases. This impacted CBO funding levels because needs assistance services are reimbursed at half the rate of disputes.

The pandemic has added to what was already a challenging operating environment for CBOs, but they continue to respond to the needs of their communities. This was acknowledged when the CPUC first decided to employ CBOs in delivering the TEAM program, which is provided in partnership with CHANGES. As noted on page 39 of D.07-07-043: "...that CBOs had unique insights into the consumer problems faced by specific communities. We recognized the special relationship CBOs have with LEP consumers they assist with telecommunications problems."

Client Demographics

Recipients of CHANGES case support had the following characteristics:

1. They were overwhelmingly low income, where approximately **95** percent of participants were CARE eligible.³
2. They tend to be in older age groups, where **50** percent were over **60**-years old, and the remainder between **21** and **59**-years old.⁴ In the prior year **62** percent of service recipients were over **60**-years old. This appears to correlate to the outreach and education shift to online media platforms that are more accessible by the younger demographic.
3. Approximately **72** percent of program participants receiving case assistance were Spanish speakers (**51** percent) and Cantonese (**21** percent). The next largest language groups were Vietnamese – **8** percent, and Korean - **4** percent. CHANGES serves a wide range of different languages in California's LEP communities e.g., case assistance services were provided in **27** different languages.

³ Based on data pulled from the program database on all clients receiving case services from 2010 to 2015.

⁴ This data was provided by the program contractor and is based on the TEAM database data.

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Program Year (PY) June 2020 – May 2021

1. Introduction

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.⁵ The CPUC formalized the CHANGES program through Decision 15-12-047 “as an ongoing statewide program, effective January 1, 2016.”⁶ The CARE proceeding (A.19-11-003) extended the CHANGES “program at a total of \$10,515,012 for program years 2021-2026”, in decision D.21-06-015.⁷

The CHANGES program is modelled on the Telecommunications Education and Assistance in Multiple (TEAM) languages program, which helps clients with their telecommunication service needs.⁸ 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 2020 through May 2021. 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 oversee 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).

⁵ 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>.

⁶ Ibid, p.1

⁷ D.21-06-015, Ordering paragraphs 20-22, p. 475-476: <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M387/K107/387107687.PDF>

⁸ 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

SHE operates 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>.

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



Figure 1: Map of CBOs in the CHANGES Program

3. Individual Case Assistance

Types of Case Assistance Services Provided

CBOs provide case assistance for clients who have payment difficulties, need to lower their energy bills, dispute their bills, need help managing their account and have other bill issues. Regardless of the reason for a consumer’s initial contact, CBO staff assess their full range of needs. While disputes result from a consumer’s belief that a utility has acted incorrectly concerning their account or service, CBOs provide needs assistance to clients who request help with utility services or bills but do not feel that the IOU has acted in error. The overall range of services are described below and in Table 2.

Overall, 5,149 clients received a total of 6,820 different services during the year.⁹ Therefore, on average each consumer received 1.3 services per case. Of these 5,149 clients, 4,375 (85 percent) received needs assistance services and 774 (15 percent) received dispute resolution services. There was a reduction in dispute resolution cases this year and that can be mainly attributed to the moratorium on disconnections.

In common with the previous PY, most CHANGES services support clients with payment difficulties (64 percent) or to reduce their bill charges (12 percent).¹⁰ In the last PY the corresponding percentages were 63 and 10 percent respectively. This underlines the ongoing concern that energy costs continue to disproportionately impact LEP clients in the communities supported by CHANGES CBOs, who as noted in the Executive Summary, are overwhelmingly low income.

CBOs supported 2,278 HEAP/LIHEAP applications for financial support and that made up over half of the 4,356 services provided to those with payment difficulties and represents 33 percent of the CHANGES services overall. Though services for payment difficulties increased 8 percent, LIHEAP services increased 35 percent or 593 services from 1,685 in the previous PY. HEAP/LIHEAP application support, in common with the previous PY, is the largest single service provided by CHANGES CBOs.

To further underscore this concern, CBOs processed 1,772 applications for emergency financial assistance programs (excluding LIHEAP), making up 26 percent of all case services. These applications include Arrearage Management Program (AMP), Other onetime payment sources (e.g., churches), and IOU assistance programs up from 15 percent in the last PY. This also represents an increase of 827 (or 88 percent) from the 945 similar services provided in the last PY. This indicates that clients’ ability to make utility payments declined this PY, a year which was severely impacted by the pandemic.

CBOs offer tailored case assistance to help clients with utility company disputes and other needs assistance. Case assistance includes help with starting and changing accounts, support with payment difficulties, and reducing bill charges by assisting with enrolment into financial assistance programs.

⁹ This number underestimates the full range of case assistance provided each customer. Until mid-2021-2022 PY, the needs assistance services recorded the primary type of case assistance only. Recent changes to case reporting allow cataloging primary and ancillary case assistance provided. We expect the change to show more than one service recorded per needs assistance client, e.g., Arrearage Management Plan, Stop Disconnection, CARE Enrollment services could all be provided to one customer as part of the case assistance.

¹⁰ See “Overall Category” column in Table 2.

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Table 2: Types of Case Assistance Provided in the PY 2020-21 *					
Overall Category	Subcategory	Service provided	# Services provided	%	
PAYMENT DIFFICULTIES	HEAP/LIHEAP	HEAP/LIHEAP Application Assistance **	2,278	33%	
	Emergency Financial Assistance Programs	Arrearage Management Plan (AMP)	381	6%	
		Other source of one-time payment (e.g., church) ***	345	5%	
		Enrolled in SCG Gas Assistance Fund	345	5%	
		Enrolled in SDG&E - Neighbor to Neighbor Program	190	3%	
		REACH program - PG&E territory	383	6%	
		Enrolled in SCE's Energy Assistance Fund	128	2%	
		Subtotal	1,772	26%	
	Support with payment plans/extensions	Set Up Payment Plan	177	2.6%	
		Set Up Payment Extension	115	1.7%	
		Subtotal	292	4%	
	Disconnection / Reconnection support	Stop Disconnection	12	0.2%	
		Assisted with Reconnection	2	0.0%	
		Subtotal	14	0%	
	Total – PAYMENT DIFFICULTIES			4,356	64%
	REDUCING BILL CHARGES	Support with CARE program	CARE Enrollment	170	2%
CARE Billing Problem			5	0.1%	
Assist with CARE recertification or audit			16	0.2%	
High Energy User Dispute			14	0.2%	
Assisted High Energy User			1	0.0%	
Subtotal			206	3%	
Medical Baseline		Medical Baseline Application Assistance	346	5%	
ESA Program		Applying for/support with ESA	145	2%	
Support with Lowering Energy Use /Managing Bills		Scheduled Energy Audit	24	0.4%	
		Energy Efficiency Tool	63	1%	
		Added/Removed Level Pay Plan	1	0.0%	
		Demand Response Programs	9	0.1%	
Subtotal	588	9%			
TOTAL - REDUCING BILL CHARGES			794	12%	

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BILLING DISPUTE	-	Bill Adjustment	51	1%
	-	Request Meter Service or Testing	7	0.1%
TOTAL - BILLING DISPUTES			58	1%
ELECTRICITY AGGREGATION (CCAs)	-	Electricity Aggregation (CCAs)	442	6%
GAS AGGREGATION (CTAs)	-	Gas Aggregation	368	5%
SOLAR ISSUES	-	Solar issues	31	0.5%
SUPPORT WITH SETTING UP / CHANGES TO ACCOUNT	-	Assist with Changes to Account	456	7%
	-	Billing Language Changed	238	3%
	-	Set Up New Account	36	1%
	-	Set Up 3rd party Notification	2	0.0%
TOTAL - SETTING UP/CHANGES TO ACCOUNT			732	11%
OTHER ITEMS	-	Scheduled Service Visit	21	0.3%
	-	Report Scam	3	0.0%
	-	Reported Safety Problem	1	0.0%
	-	Consumer Education Only	5	0.1%
	-	Time of Use/Rate Plan assistance	9	0.1%
TOTAL - OTHER ITEMS			39	1%
TOTAL SERVICES PROVIDED AS PART OF CASE SUPPORT			6,820	100%

* Figures in percentage column are rounded to the nearest whole number and may not add up to 100 percent

** 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 IOUs.

Languages Used for Case Assistance

Figure 2 below, shows the most common of the 26 languages¹¹ spoken by program participants. Nearly three-quarters of participants were Spanish or Cantonese speakers, receiving 51 percent and 20 percent of services, respectively.

¹¹ There are 27 languages if Native American English is identified as a separate language.

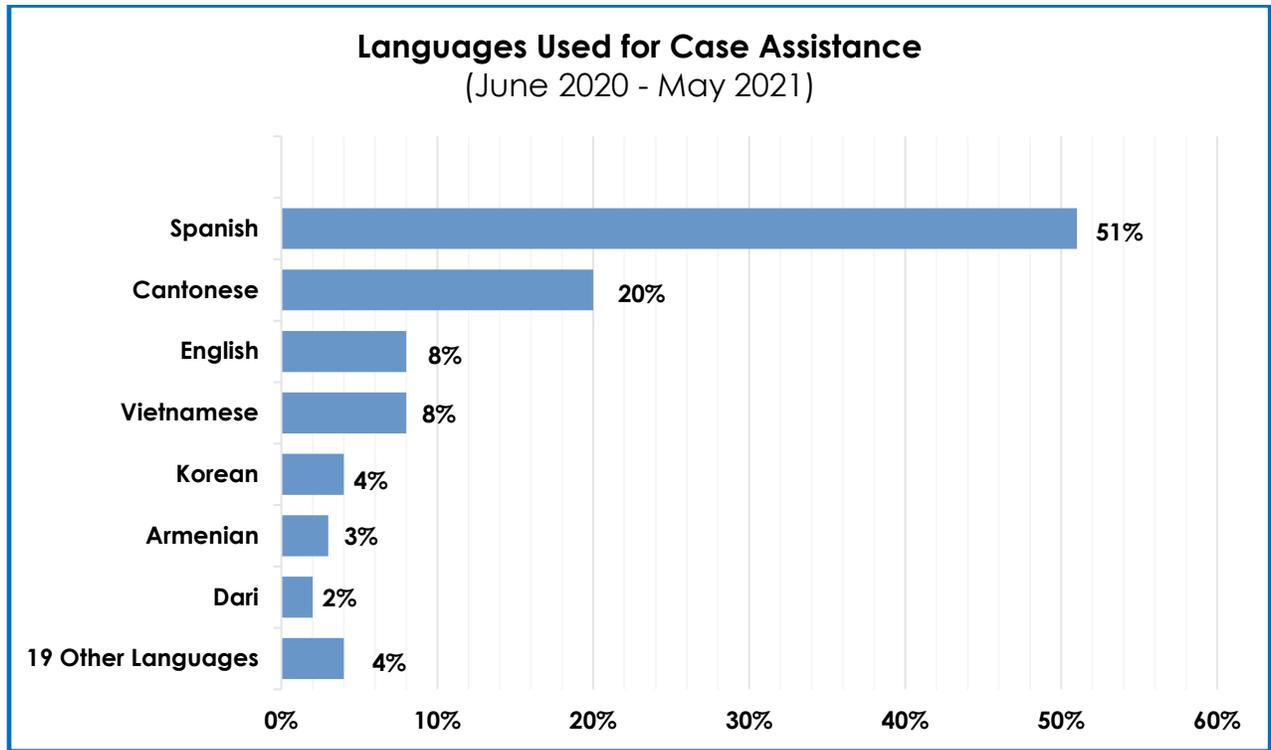


Figure 2: Languages Used for Case Assistance

Comparisons with Previous Year

Column D, in Table 3 compares the proportional share of each large service category to the previous PY as shown by the figures in parentheses in columns A) and B). This data indicates that the distribution of services has stayed constant despite this PY starting and ending during the pandemic, whereas only the last quarter of the 2019-20 PY overlapped with it. However, as noted above, after drilling down into the subcategories, there have been some large distributional and actual changes. There was a large increase in support for both LIHEAP and emergency financial assistance across both metrics. Of the largest service categories, the most marked distributional change was a reduction in clients that had issues with electricity aggregation. A significant number of these clients had questions about why they were billed by a different entity than the one they were familiar with.

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Table 3: Comparison of Case Assistance in 2020/21 Versus 2019/20

Overall Category	(A)	(B)	(C)	(D)
	2019-20	2020-21	YOY Actual Variance (% Change)	YOY Distributional Change (%B)- (%A)
	Services Provided (% of All Services)	Services Provided (% of All Services)		
PAYMENT DIFFICULTIES	4,044 (63%)	4,356 (64%)	312 (8%)	1.1%
REDUCING BILL CHARGES	653 (10%)	794 (12%)	141 (22%)	1.5%
BILLING DISPUTE	96 (1%)	58 (0.9%)	(38) (40%)	(0.6%)
ELECTRICITY AGGREGATION	576 (9%)	442 (6%)	(134) (23%)	(2.5%)
GAS AGGREGATION (CTAs)	427 (7%)	368 (5%)	(59) (14%)	(1.2%)
SOLAR ISSUES	27 (0.4%)	31 (0.5%)	4 (15%)	0.0%
SUPPORT WITH SETTING UP / CHANGES TO ACCOUNT	592 (9%)	732 (11%)	140 (24%)	1.5%
OTHER ITEMS	25 (0.4%)	39 (0.6%)	14 (56%)	0.2%
TOTAL SERVICES PROVIDED AS PART OF CASE SUPPORT	6,440	6,820	380 (6%)	N/A

4. Education

General Information

CBOs provided consumer education focused on eight different topics, in workshops that typically span 45-60 minutes in length. CBOs typically choose educational topics based on their assessment of the needs and interests of their respective communities.

The pandemic led to a far larger need for remote learning. In response, the lead contractor 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. This demonstrated the program’s ability to pivot in response to a radically changing service landscape. However, despite this flexibility the program 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 and an older demographic in addition to being LEP.

Overall, the CHANGES program educated 50 percent fewer clients in this PY compared to the previous one due to the COVID-19 pandemic, impacting service delivery for the entire PY. In-person workshops were not feasible, and remote services are difficult to deliver to a population with limited knowledge of, and access to, technology. Due to the changed landscape following the pandemic it is very difficult to compare between years and draw meaningful conclusions. Given that cautionary note, Understanding Your Bill did not decrease as much as most other topics, showing persistently high demand relative to other topics.

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Table 4: Comparison of Education Attendees by Topic Compared to the Previous Year				
Topic	2019-20 PY (Percent of attendees)	2020–21 PY (Percent of attendees)	YOY Change	YOY % Change
Understanding Your Bill	7,724 (23%)	4,869 (29%)	(2,855)	(37%)
CARE/FERA and Other Assistance Programs	7,554 (22%)	3,748 (22%)	(3,806)	(50%)
Avoiding Disconnection	4,465 (13%)	1,931 (11%)	(2,534)	(57%)
Electric and Natural Gas Safety	2,975 (9%)	1,839 (11%)	(1,136)	(38%)
Energy Conservation	3,768 (11%)	1,581 (9%)	(2,187)	(58%)
High Energy Use and CARE	3,214 (9%)	1,254 (7%)	(1,960)	(61%)
Gas Aggregation	2,325 (7%)	944 (6%)	(1,381)	(59%)
Level Pay Plan	1,879 (6%)	815 (5%)	(1,064)	(57%)
TOTAL	33,904	16,981	(16,923)	(50%)

Education Topics Offered

As shown in Figure 3 below, the majority of those attending education workshops attended the topics on Understanding Your Bill (29 percent) and CARE/FERA and Other Assistance Programs (22 percent). The remaining topics on Avoiding Disconnection, Electric and Natural Gas Safety, Energy Conservation, High Energy Use & CARE, Gas Aggregation, and Level Pay Plan made up 49 percent of education topics.

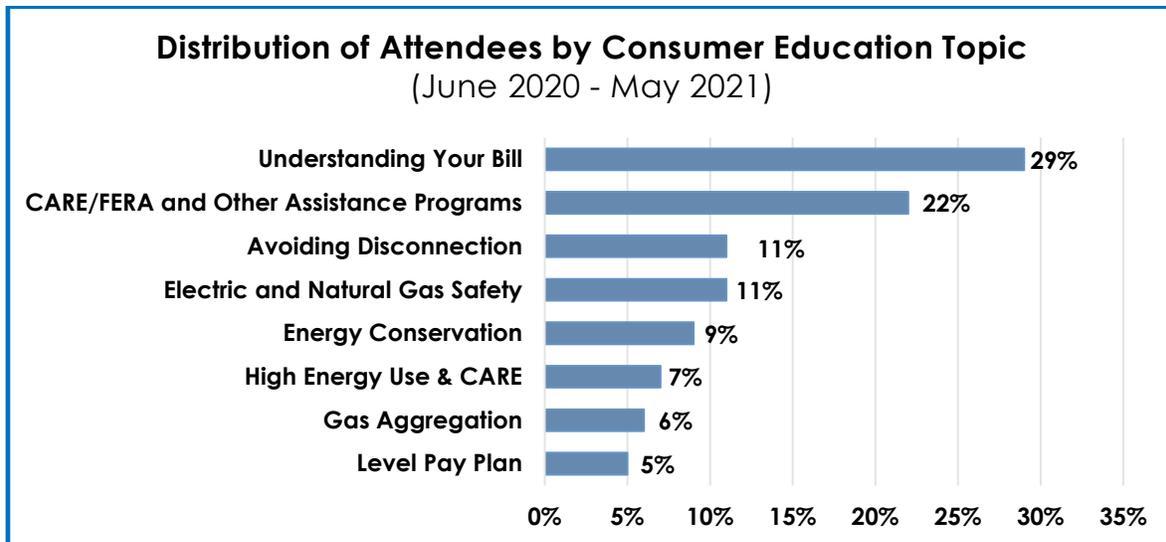


Figure 3: Distribution of Education Attendees by Workshop Topic

Education Breakdown by Language

As shown in Figure 4 below, the highest number of clients receiving Consumer Education spoke Cantonese (22 percent), followed by Native American English (18 percent), Spanish (17 percent), and Vietnamese (12 percent). Of the remaining 31 percent of attendees, these were made up of Mandarin, English, Dari, Armenian, Arabic, Korean and a smattering of 7 other languages. Almost four-fifths of English-speaking clients were Native Americans living on tribal lands.

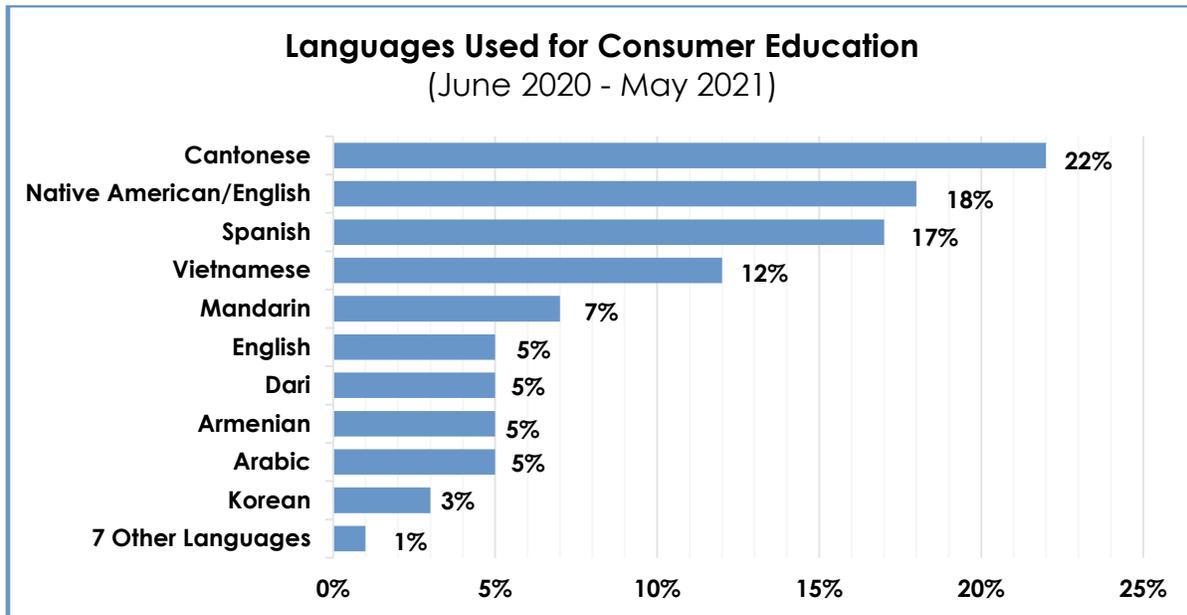


Figure 4: Distribution of Clients Educated by Language

5. OUTREACH

Sources of Client Referrals

Historically, the most common source of CHANGES client referrals came through friends or family. This trend has become more pronounced during this pandemic affected year. This source has increased by 7 percent in the last year. Other popular approaches include outreach to clients in other programs offered by CHANGES CBOs, media placements and community events.

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Table 5: Sources of Referral for CHANGES	
Clients' Referral Source	% Of Clients
Referred by Friend or Family	39%
Participated in Another Program at the CBO	16%
Media Placement (print, radio, or television)	15%
Outreach - Community Event	14%
CHANGES Consumer Education Workshop	7%
Special Outreach Project	6%
Referred by Another CBO	2%
Received TEAM Services	<1%
Total	100%

Types of Client Outreach

Outreach comprises the following five components: community events, media placements, social media, community presentations, and special outreach projects. As shown in Table 6 below, community events mostly ceased because of the pandemic. At the only events that occurred 1,100 clients were provided program information at two vaccine clinics. Despite the difficulties with in-person outreach, significantly more clients were potentially reached as CBOs shifted outreach to television, radio, print and social media outreach.

CBOs pivoted in response to the pandemic to rely more on in-language ethnic media outlets. This in turn led to an increase in potential clients reached because media placements reach significantly larger audiences. However, these forms of outreach lack the personal connections that are often the key to attracting clients and demonstrating the helpful services they can access.

Another consequence of the pandemic is that CBOs are increasingly using social media to raise awareness about the program, and utility issues, in their communities. These social media posts increased from 250 in 2019-20, to 870 in this PY.

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Table 6: Comparison of Outreach Activities with the Previous Program Year				
(Number of Clients Reached)				
Outreach Component:	2019–20 Program Year	2020–21 Program Year	YOY Change	YOY Percent Change
Community Events	174,319	1,100	(173,219)	(99%)
Media Placements	1,398,390	2,761,800	1,363,410	97%
Social Media (postings)	250	870	620	248%
Community Presentations	4	16	12	300%

6. Conclusion

Overall, CHANGES experienced a significant decrease in the services delivered in the last program year. In particular, the level of education, outreach and dispute services saw significant reductions, compared to the prior year, as lockdown restrictions from the pandemic became pervasive throughout the state. However, the number of case assistance services provided this year bucked that trend, increasing by 6 percent overall from the previous PY (from 6,440 to 6,820 services). A large part of that can be attributed to the increasing difficulties that clients face in meeting their energy costs.

CHANGES pivoted to meet client needs during a pandemic, which significantly impacted CBOs’ ability to deliver CHANGES services. In response CHANGES modified service delivery and outreach methods to maintain safety protocols (e.g., collecting documents and bills while social distancing at COVID related health events). The CBOs were compelled to shift priorities to the immediate health and safety needs of their communities and staff but leveraged opportunities to engage clients through the various other COVID related relief programs e.g., the CA COVID-19 Rent Relief program, and COVID testing and vaccine services.

CHANGES adapted to the new conditions by reformatted educational materials for use in remote workshops. During the pivot to online/remote workshops consumer Education attendance dropped by 50 percent from the previous PY. It appears that because many CHANGES LEP target population are older and often lack the resources and technical knowledge they were not able to fully access online video conference platforms and may be underserved.

The number of Outreach events fell significantly. The acute decline in clients reached through Community Events was remedied by significantly increasing the potential reach by in-language ethnic media outlets (which almost doubled) accompanied with a sharp increase in social media postings e.g., Facebook, Instagram, Twitter. The effectiveness of these broader media outreach events to in-person community event-based outreach is difficult to assess due to the lack of in-person feedback.

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The reduction in services overall impacted the CBOs financially. Education and outreach fell for the reasons given but COVID related protections such as moratoriums on disconnections and the relaxation of assistance program recertification requirements, also had the effect of reducing the number of dispute cases. This impacted CBO funding levels because needs assistance services are reimbursed at half the rate of disputes.