Utility Assistance Tool
Agenda

- The Journey
- Existing Tools
- Client insights
- Solutions
- Recommendations and next steps
Maricopa Family Support Alliance identifies Utility Assistance as an area of focus for community resilience building.

ISC convenes a series of workshops with the Utility Assistance Community of Practice.

Core Team convenes for the first time. Core Team focuses on pursuing a technology solution to better serve vulnerable Arizonans and improve access to utility assistance.

Metal Toad is hired. Metal Toad presents proposed technology solutions. Core Team decides to pursue "swinging for the fences."
By the Numbers

- 60+ Voices Heard
- 47 Interviews
- 10 Client Interviews
Describe the Current System...

Challenging  Fractured
Incomplete  Duplicative
Inadequate  Siloed
Inefficient  Lack of Capacity
Checking Boxes  Lack of Dignity
Competitive  Resistant to Change
Time Consuming  Sufficient
Not Collaborative  Entrenched
Problem and Vision Statement

Problem Statement:
The current Utility Assistance workflow is difficult for clients to navigate, and puts a large administrative burden on caseworkers and on the Utility Companies. The system is fractured and requires duplicative work, and does not effectively target utility assistance funds to the most vulnerable populations at high risk for indoor heat related deaths. Finally, the current system makes it impossible for ecosystem organizations to realize efficiencies in collaboration, service, and communication.

Vision Statement:
To build a more effective way of delivering utility assistance information and aid to clients in order to better help people in a crisis situation, reduce heat related deaths, and realize efficiencies in the ecosystem.
## Prioritized Persona

<table>
<thead>
<tr>
<th></th>
<th>Client</th>
<th>Caseworker</th>
<th>CAP Director</th>
<th>Utility Community Outreach Rep</th>
<th>Funds Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quote</strong></td>
<td>“I need help”</td>
<td>“I want to help”</td>
<td>“We’re doing our best.”</td>
<td>“I don’t want a utility bill to be life or death, or to be a cause of poverty.”</td>
<td>“I wish we could help more people.”</td>
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<td><strong>Description</strong></td>
<td>• This person is seeking utility assistance.</td>
<td>• This person is generally altruistic and driven by the desire to help.</td>
<td>• This person is a career social services director.</td>
<td>• This person heads the social services divisions at the utility company.</td>
<td>• This person is concerned that the money they have available is being used according to the rules set up by the fund.</td>
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<td>• Might not know what resources are available to them, and is in a high stress crisis situation.</td>
<td>• Often burdened by bureaucratic processes</td>
<td>• Does not typically work directly with clients, but they hear from their staff about the pain points and client concerns.</td>
<td>• Works with CAP offices and relies on outside partners like Wildfire to manage their funds.</td>
<td>• Manage the funding flow at the portfolio level.</td>
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<td>• At or below the poverty line, and may have a complicated family and living situation.</td>
<td>• High burnout and turnover, “compassion fatigue.”</td>
<td>• Concerned with making sure their organization is run well and is fulfilling its mission, vision, and values.</td>
<td>• Concerned with internal processes and org needs of the Utility itself, and with the company’s ability to serve their customers.</td>
<td>• Interested in the global view—where the money is going, how many families did it help, etc.</td>
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<td>• Might not be a native English speaker.</td>
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Prioritized Goals

1. Get clients help when they need it
2. Ensure the most vulnerable population receives critical help
3. Make it easier for clients to apply for utility assistance
4. Make it easier for caseworkers to do their work
5. Give clients more information about whether they are eligible and funds are available
6. Make it easier for caseworkers to feel successful when they go home at night
7. Reduce caseworker turnover and burnout
8. Help CAP offices run more efficiently
9. Decrease cost of distributing funds
10. Reduce operational overhead throughout the system
How Other People are Doing It
Sites Surveyed

- MassSave
- Seattle City Light
- Energy Trust of Oregon
- PPL
- Southern California Edison
- Johnson County Kansas
- State of Washington Department of Commerce, and Utilities and Transportation Committee
- California Department of Community Services and Development
- HUD.gov
- Minnesota Commerce Department
- Texas Department of Housing and Community Affairs
- Kansas Department for Children and Families
- Mississippi Department of Human Services
- Orange County Government Florida
- Local church and social service agency sites
Three Tiers of Service

Tier 1
- Basic information
- Difficult to navigate
- Broken links

Tier 2
- Sample applications
- Eligibility charts
- Difficult to navigate
- Broken links

Tier 3
- Multi-language
- Better UX / UI
- Search by Zip
- Broken links
Tier One

Description

- Contact information for service providers (government, business, and/or non-profit)
- Description of services provided

What Works:

- Basic information provided
- Low maintenance costs

What Doesn’t Work:

- Content and contact information frequently not current
- Low usability / design / UX considerations makes it hard to navigate
- Little information provided about other services that could benefit the client
- Places the burden on the service providers to provide information, instead of empowering the client

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Tier Two

Description

• Eligibility requirements
• Income guidelines for eligibility
• Documentation needed for an application of services
• Printable applications or sample applications (PDF)
• Submission guidelines for applications

What Works:

• Expanded information about income and other eligibility requirements
• Application documents and submission guidelines

What Doesn’t Work:

• Broken links, out of date information, and application documents not current
• PDF applications are complex, long, and technical
• Clients are unlikely to have easy access to all of the technology needed to take advantage of the sites, such as a printer
• Low level of UX / design thinking
Tier Three

Description

- Multiple languages offered
- Clickable phone numbers, websites, and email addresses
- Online applications (that mostly didn’t work...)
- Service providers searchable by zip code
- Combo of utility assistance and weatherization information

What Works:

- Translation increases accessibility
- Clickable contact information increases ease of use
- Geo-location / zip code searches increases ease of use
- More focus on usability and UX

What Doesn’t Work:

- Technology does not overcome systemic workflow issues
- Broken links after searching by zip code

Translation increases accessibility
Clickable contact information increases ease of use
Geo-location / zip code searches increases ease of use
More focus on usability and UX

Technology does not overcome systemic workflow issues
Broken links after searching by zip code
High Level Takeaways

• Ease of use is important —> Focus on removing friction for users

• Content degrades quickly (broken links, out of date phone numbers, etc.)

• Technology doesn’t solve ecosystem-level issues

• Opportunity to do something nobody else has done
Client Feedback
## Personas - Descriptions

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                             • Might not be a native English speaker.                                                                                     |
| **Caseworker**              | • This person is generally altruistic and driven by the desire to help.  
                             • Often burdened by bureaucratic processes  
                             • High burnout and turnover, “battle fatigue.”  
                             • Burdened with the responsibility of saying “no” to people in crisis situations.  
                             • Generally technically inclined  
                             • Strong aptitude for understanding processes and requirements.                                                                 |
| **CAP Director**            | • This person is a career social services director.  
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| **Funds Administrator**     | • This person is concerned that the money they have available is being used according to the rules set up by the fund.  
                             • Manage the funding flow at the portfolio level.  
                             • Interested in the global view--where the money is going, how many families did it help, etc.  
                             • Concerned about compliance with funding source rules.                                                                     |
I’ve been on the phone since early this morning. Their phones were so busy. I called almost 40 times. Different numbers. Always busy. Then it would ring and a recorded message would play saying, “We are no longer accepting calls.” I just have this week, and I’m trying not to get put out.

- 21 year old woman, mother unemployed for the first time
Interview Quotes

I made 138 calls today. I wasn’t able to get through. If people could walk in, instead of just call, that would be better. If I could stand in line, I’d feel like I’m making progress. I haven’t found anywhere else but here to help me. Here, at least, I’m glad they told me a date and a time for a decision (Friday--in 4 days). But I only have until the end of today.

- 38 year old woman, single mother of two
All of the processes I have seen have been really, really long processes. You have to take off work. Then take off work again to come back. People want to see you fail, not succeed. Eight hours just sitting there. This is crazy. I gotta sit here for 8 hours!? Create a process that does work for the people. We don’t work for the people no more. They fend for themselves.

- 42 year old woman, wife and mother
Interview Quotes

When you know there is help out there, you are happy, but when you don’t have anyone to fall back on it makes you sad. It’s hard to breathe if I can’t pay the rent.

- 50 year old woman, living alone
How do you feel about the process as a whole?

Depressed
Stressed
Anxiety really bad
Worried
Frustrated
Overwhelmed
Relieved
Grateful
Sad
Lonely
What could make this process easier on you?

- “Someone answering my call and at least letting me get an appointment.”
- “Easier if someone answered the phone. Would’ve gotten the same information, but would have saved gas.”
- “The source and the information needs to be up to date. No longer offer that service. Lots of wrong numbers.”
- “If people could walk in, instead of just call.”
- “Conference call instead of in person appointment in the office. Transportation is hard. You can’t get help if you can’t get there.”
- “Is there another way to submit paperwork?”
- “We need a resources list. Something that makes it less frustrating. A lot of people work 2-3 jobs.”
Was there anything good about this process so far?

“Good for realizing the obstacles. Good on a personal level. I could tell my roommate this is what is going on. Realize where you are weak and to make sure this doesn’t happen again.”

"The money is the difference between having lights and not having lights. A great benefit. You’ll even get a little extra. Really is something that has made all the difference in the world.”

“It’s really hard to get through. But once you get here, things go smoothly.”
High Level Takeaways

• The “phone lottery” is a tremendous burden for clients. Clients feel like their efforts are going into “a void.”

• Asking people to get through a phone system and make an appointment and then physically show up at an appointment is a tremendous burden. The burden is different for different clients—hard to physically show up, hard to find the time to call, hard to find transportation... It takes resources to access resources.

• Making it hard for people to get the information they need is adding to the crisis situation.

• The lack of easy information is demoralizing and is a cause of hopelessness. Providing information is a way of restoring a client’s control over their situation.
Client Segmentation

Segment A
User who is looking for information

Segment B
User who wants to know if they can get help

Segment C
User who needs critical assistance

Segment D
User who needs case management

Segment E
User who just needs Utility Assistance
## Client Segmentation

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Solution Concepts
Option 4: MVP Direct Payments

- Home Page
  - Dot Help Paying a Bill landing page
    - General Information
      - Weatherization
  - OCR Utility Bill checks against DB for Utility Bill account info and Utility source company
    - Resilience DB
      - Account check: Is client or member of client’s household an active API, SIRP or SWIG client? Realtime check through API, or check against nightly batch of valid account numbers: TSG
      - Person check: Does client exist in system and has been verified as eligible through participation in another program, like SNAP?
        - OCR check against eligibility letter from DES.
          - DES or other data store
            - Resilience DB
              - Continue with payment Y / N
                - Funds available Y
                  - Eligibility status and fund check display, if eligible and funds are available, continue through payment flow.
                - Funds available N
                  - Eligibility status and fund check display, if not eligible, display funds available.
                  - Not eligible status display, information about other services available.

- Discount Rate specific to Utility shown
  - Send utility companies people who qualify for rate discounts
  - CAP Office Scheduler or link out to individual CAP offices
    - Status Screen = Submitted, Approved, Denied
      - CAP Office Scheduler or link out to individual CAP offices
      - Caseworker Log In
        - Caseworker Queue of Direct Payment requests
          - Approval workflow
Utility Assistance Calculator, Screen 1
Utility Assistance Calculator, Screen 2
Utility Assistance Calculator

You may be eligible for utility assistance. See if you are eligible by filling out the form below.

Not what you are looking for? Return to home.

En español

UTILITY ASSISTANCE CALCULATOR (STEP 3/4)

Vulnerability Criteria

Do you have a medical condition?* ▼

Do you or does anyone in your family have a disability?* ▼

Are there children in the house?* ▼

*Indicates a required field

BACK NEXT
Assistance Status — Eligible

You are eligible.

En español

Next Steps

1. Get your documentation together. [Find out what documents I need to apply.]

2. Apply online now.
   With complete documentation, it takes approximately 10 minutes to apply.

Optional step
You can also connect with a caseworker as an optional step.
[Schedule an appointment now.]
Assistance Status — Not Eligible (1)
Assistance Status — Not Eligible (2)

You are not eligible.

Why am I not eligible?

- Based on the information received, your income is too high to receive assistance.

Did you fill out the application correctly? Return to the calculator.

Optional Next Steps

Even though you might not be eligible for utility assistance, a case worker may be able to help find other assistance.

Want to talk to a caseworker? To find the office nearest you, select your county or enter your zip code below.

View helpful links to additional community resources.
Assistance Status —Vulnerable

You are eligible and a high priority.

Next Steps

1. You have been prioritized. Call (480) 555-1234 immediately or apply now.
Status — Success!

A payment of $500 dollars has been made to your SRP account.
Looking Ahead...
Next Steps

- Identify smaller steering committee members
- Decide on solution
- Identify funding
- Go / No Go Decision
- Deeper solution definition with technology integration points scoped out and UX / UI design
- Project planning, budgeting, etc
- Kickoff
Thank you