

# Utility Assistance Tool

# Agenda

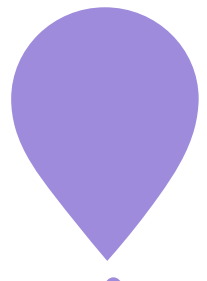
- The Journey
- Existing Tools
- Client insights
- Solutions
- Recommendations and next steps

# Timeline

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

Core Team focuses on **pursing a technology solution** to better serve vulnerable Arizonans and improve access to utility assistance.

Metal Toad presents proposed technology solutions. Core Team decides to pursue "**swinging for the fences.**"



JAN, 2017

SUMMER, 2017

AUG, 2017

AUG, 2018

OCT, 2018

FEBRUARY, 2019

Maricopa Family Support Alliance **identifies Utility Assistance as an area of focus** for community resilience building.

Core Team convenes for the first time

Metal Toad is hired.



# By the Numbers

60+

VOICES HEARD

47

INTERVIEWS

10

CLIENT INTERVIEWS

# Describe the Current System...

Challenging

Incomplete

Inadequate

Inefficient

Checking Boxes

Competitive

Time Consuming

Not Collaborative

Fractured

Duplicative

Siloed

Lack of Capacity

Lack of Dignity

Resistant to Change

Sufficient

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

	Client	Caseworker	CAP Director	Utility Community Outreach Rep	Funds Administrator
					
Quote	"I need help"	"I want to help"	"We're doing our best."	"I don't want a utility bill to be life or death, or to be a cause of poverty."	"I wish we could help more people."
Description	<ul style="list-style-type: none"> <li>• This person is seeking utility assistance.</li> <li>• Might not know what resources are available to them, and is in a high stress crisis situation.</li> <li>• At or below the poverty line, and may have a complicated family and living situation.</li> <li>• Might not be a native English speaker.</li> </ul>	<ul style="list-style-type: none"> <li>• This person is generally altruistic and driven by the desire to help.</li> <li>• Often burdened by bureaucratic processes</li> <li>• High burnout and turnover, "compassion fatigue."</li> <li>• Burdened with the responsibility of saying "no" to people in crisis situations.</li> <li>• Generally technically inclined</li> <li>• Strong aptitude for understanding processes and requirements.</li> </ul>	<ul style="list-style-type: none"> <li>• This person is a career social services director.</li> <li>• Does not typically work directly with clients, but they hear from their staff about the pain points and client concerns.</li> <li>• Concerned with making sure their organization is run well and is fulfilling its mission, vision, and values.</li> <li>• Concerned about funds and fund sources.</li> </ul>	<ul style="list-style-type: none"> <li>• This person heads the social services divisions at the utility company.</li> <li>• Works with CAP offices and relies on outside partners like Wildfire to manage their funds.</li> <li>• Concerned with internal processes and org needs of the Utility itself, and with the company's ability to serve their customers.</li> </ul>	<ul style="list-style-type: none"> <li>• This person is concerned that the money they have available is being used according to the rules set up by the fund.</li> <li>• Manage the funding flow at the portfolio level.</li> <li>• Interested in the global view--where the money is going, how many families did it help, etc.</li> <li>• Concerned about compliance with funding source rules</li> </ul>

# 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

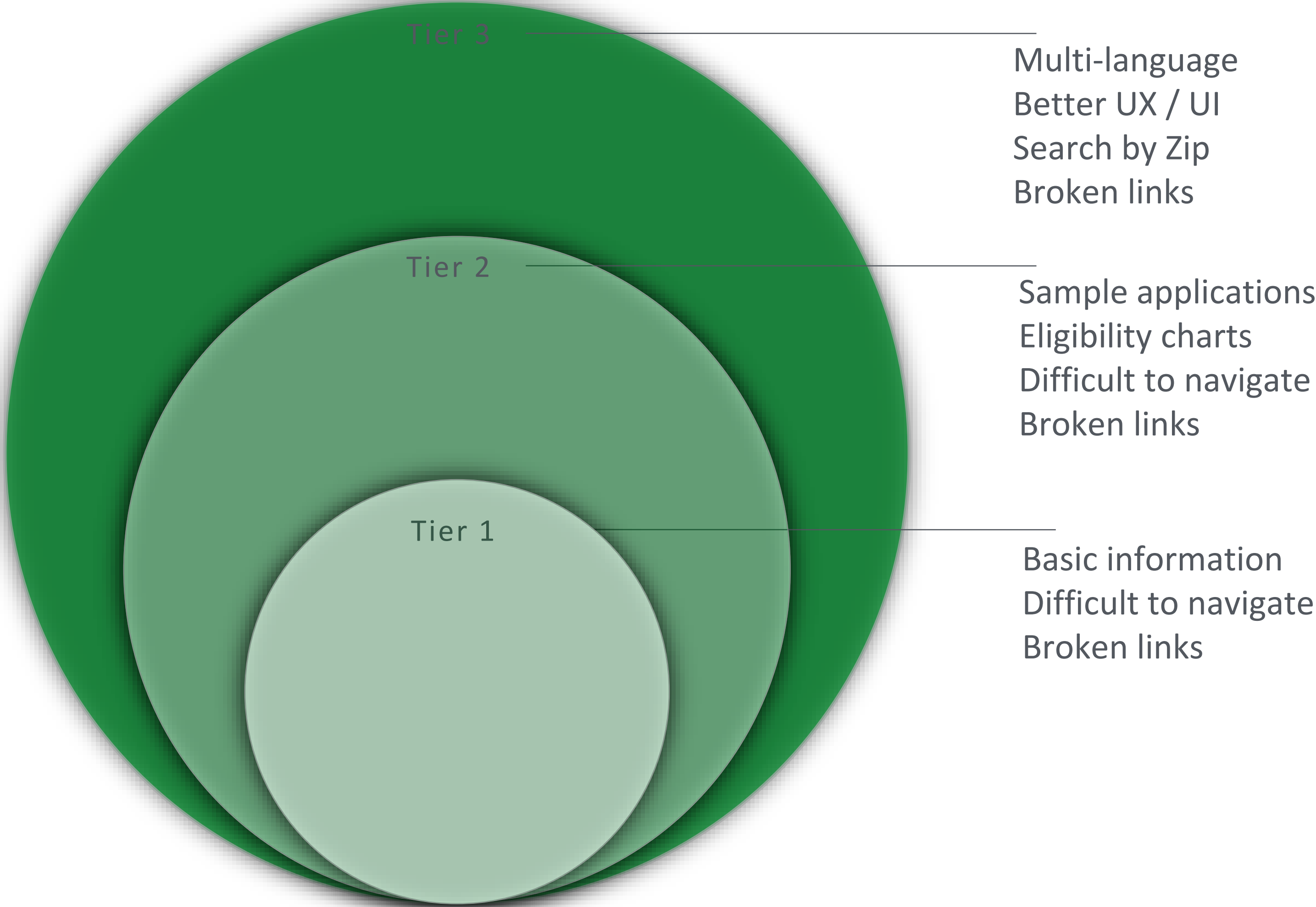


How Other People are Doing It

# 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 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

## Human Services

Central Office: 913-715-8800 | Housing: 913-715-6600  
11811 S. Sunset Drive, Suite 1300, Olathe, Kansas 66061 | [Directions](#)

[Home](#) » [Human Services](#) » [Outreach](#) » [Outreach Services](#)

### Outreach Services

**Johnson County residents needing assistance are encouraged to call 913-715-6653. Staff will screen residents for services and direct them to the nearest center.**

Multi-Service Outreach Centers provide a safety net for those in need and a means of moving beyond cycles of aid into self-reliance. We serve people in need of social services who live in geographic areas generally conforming with school districts.

- [Southwest Multi-Service Center](#): 510 W Main St., Suite D Gardner, KS 66030
- [North Central Multi-Service Center](#): 12425 W. 87th St. Parkway, Suite 200 Lenexa, KS 66215
- [Northeast Multi-Service Center](#): 6000 Lamar Ave, Suite 200 Mission, KS 66202
- [Olathe Multi-Service Center](#): 11811 S. Sunset Drive Suite 1300, Olathe, KS 66061

The center managers are available to meet with residents to address their situations. The centers work closely with school districts, area churches, businesses, and organizations, and the community at large. Regular business hours are 8:00 a.m. to noon and 1:00 to 5:00 p.m. Monday through Friday. See our [Outreach Services - Summer 2018 Newsletter](#). [Outreach Services - Fall 2018 Newsletter](#)

**Clients are seen by appointment only so we can provide a confidential setting and give clients our full attention.**

Items for the food pantries and funds for stabilization assistance are made possible through the generosity of partnering businesses, schools, churches, community organizations, and individuals. Donations are always welcome!

**Services provided include:**

- **Stabilization Assistance.** Funds are available to help qualifying families with utility payments, medical needs, transportation, and other special needs. Assistance may include coordination of services among multiple community agencies. Rent assistance is offered on a very limited basis to existing clients undergoing on-going case management services.
- **Case Management and Self-Sufficiency.** Social services professionals are available to help residents seeking guidance and assistance in addressing multiple, complex needs. Case management provides a way for residents to progress from needing emergency assistance to becoming self-sufficient
- **Food Pantry.** Non-perishable food items are available for qualifying families at the Multi-Service Centers. Toiletries, fresh produce, and meat are provided when available. (Items are not available at the Olathe Multi-Service Center)
- **Homelessness** - If you are living in Johnson County and [need emergency shelter and other homeless services \(espanol\)](#), you have options to connect to a variety of supports.
- **Kansas City's Medicine Cabinet** provides assistance for dental emergencies, diabetic supplies, durable medical equipment, optical needs, and prescriptions (no controlled substances).
- **Information and Referral.** Comprehensive information is provided about community resources throughout Johnson County.
- **Volunteer Opportunities** Become part of our volunteer team! If you are interested in volunteering with the Outreach Program or any other program of Johnson County Human Services, please call the Community Relations Manager at 913-715-8859. [More volunteer information](#)

# Tier Two



## DOE Weatherization

The U.S. Department of Energy (DOE) Weatherization Assistance Program reduces energy costs for low-income households by increasing the energy efficiency of their homes, while ensuring their health and safety. The program supports 8,500 jobs and provides weatherization services to approximately 35,000 homes every year using DOE funds. Through weatherization improvements and upgrades, these households save on average \$283 or more every year according to a national evaluation of the program. Since the program began in 1976, WAP has helped improve the lives of than 7 million families through weatherization services.

**For more information about DOE Weatherization, please call (760) 873-8557.**

### Weatherization Works Factsheet

US Department of Energy. "Weatherization Works." [www.energy.gov](http://www.energy.gov), US Department of Energy, Office of Energy Efficiency & Renewable Energy, Feb. 2018, [www.energy.gov/sites/prod/files/2017/05/f34/wap\\_factsheet\\_08.2017.pdf](http://www.energy.gov/sites/prod/files/2017/05/f34/wap_factsheet_08.2017.pdf). DOE/1561

## 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



1. **Download Now: (English or Spanish):**

[2019 LIHEAP Application Packet](#)

**2019 LIHEAP Aplicación Descargue Ahora!**

**MONO COUNTY:**

[Weatherization Application](#)

[LIHEAP Climatización](#)

**INYO COUNTY:**

[Weatherization Application](#)

# 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

The screenshot shows the top portion of the Oregon Energy Fund website. At the top left is the logo for Oregon Energy Fund. To the right are buttons for 'DONATE' and 'MENU'. The main heading is 'Where do I apply for energy assistance?'. Below this is a paragraph explaining that the fund provides assistance through 30+ partner agencies and nonprofits. A search interface follows, featuring a yellow dropdown menu labeled 'SELECT YOUR COUNTY', a text input field with the placeholder 'Type Your Zip Code and Press Enter', and a yellow 'SEARCH' button. The background of the page has a colorful, abstract pattern of dots.

The screenshot shows the 'Your Questions Answered' section of the website. The heading is 'Your Questions Answered'. Below this are four columns of text, each starting with a bolded question:

- Am I eligible to receive energy assistance?**  
Households are eligible for energy assistance when their total gross income is 70 percent or less than the statewide median income as determined by the State of Oregon. Please note that this allows for a higher income than other energy assistance programs. See the chart below to determine if you qualify.
- How do I apply for energy assistance?**  
Oregon Energy Fund distributes funds for energy assistance to 30+ partner agencies and nonprofits throughout Oregon. This model allows us to reach the widest number of Oregonians possible. If you are in need of utility assistance, please select your county from the drop-down menu above to see which of our partners are in your area and how to contact them. You can also call our office at 971-386-2124 for more information. Please note that our office does not provide direct assistance at this time.
- How is the payment made?**  
Payments are made directly to your fuel vendor (electric, oil, propane, wood or gas). The entire process can take up to three to six weeks, so if you're behind on your electric bill, don't wait for a shut off notice - act now.
- What are the income guidelines?**  
Eligibility is based on the total gross household income received by all members living in the home at the time of application (families sharing a dwelling must apply as one unit). Income includes wages, unemployment compensation, TANF payments, Social Security, SSI, pensions, VA, grants

# 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

	Client	Caseworker	CAP Director	Utility Community Outreach Rep	Funds Administrator
					
Quote	"I need help"	"I want to help"	"We're doing our best."	"I don't want a utility bill to be life or death, or to be a cause of poverty."	"I wish we could help more people."
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# Interview Quotes

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

# Interview Quotes

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

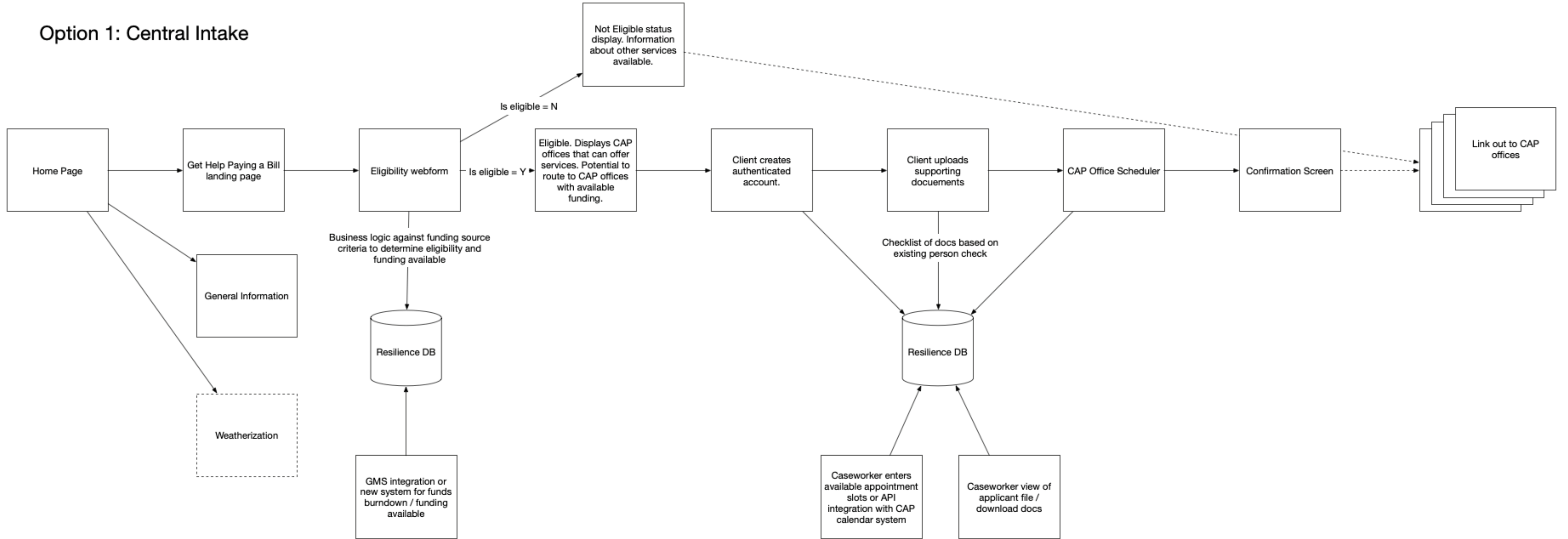
Segment E  
User who just needs Utility Assistance

# Client Segmentation

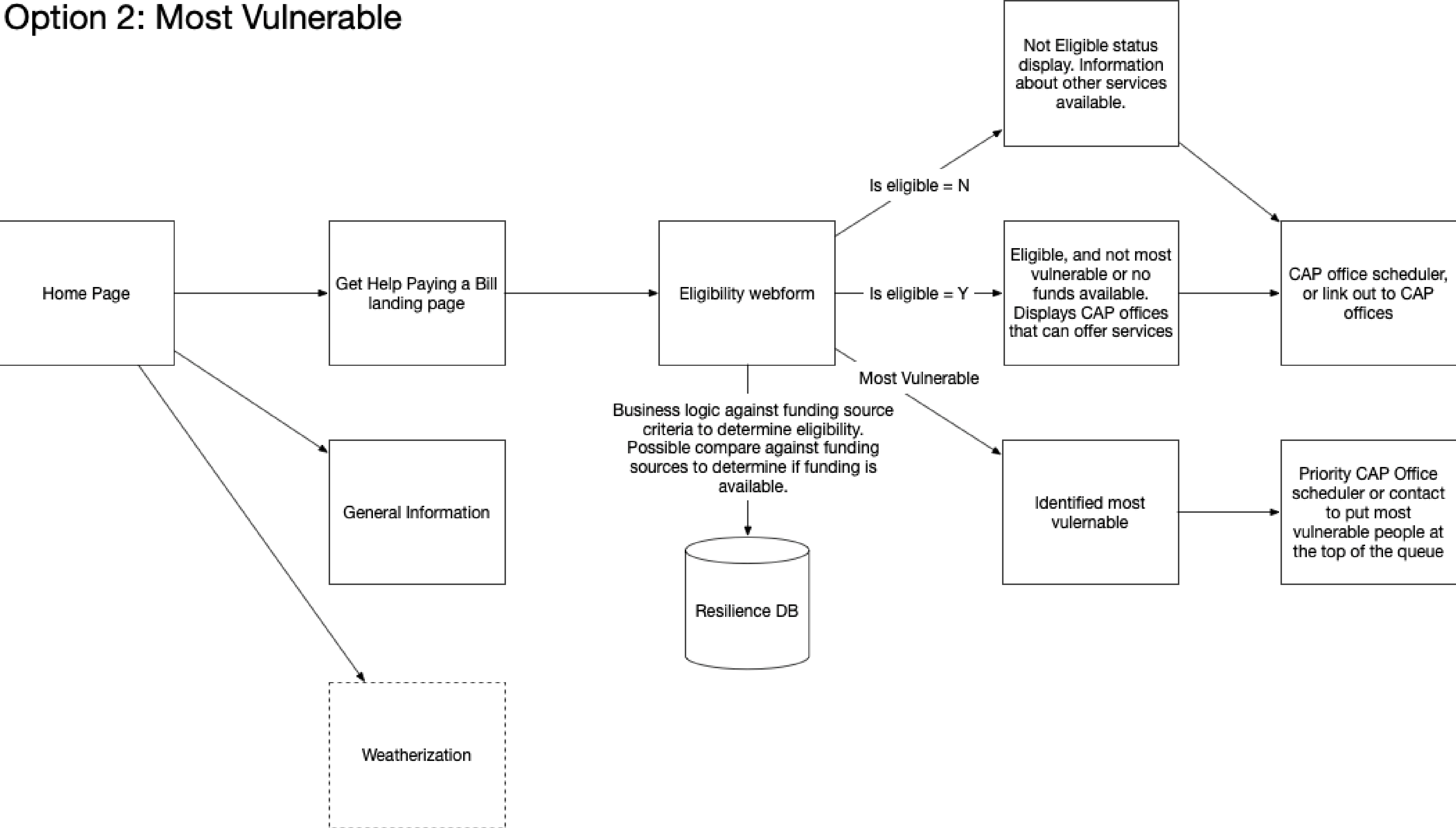
Segment A User who is looking for information	"Easier if someone answered the phone. Would've gotten the same information, but would have saved gas."
Segment B User who wants to know if they can get help	"This is crazy. I gotta sit here for 8 hours!?"
Segment C User who needs critical assistance	"I only have until the end of today."
Segment D User who needs case management	"It's hard to breathe if I can't pay the rent."
Segment E User who just needs Utility Assistance	"The money is the difference between having lights and not having lights. A great benefit."

# Solution Concepts

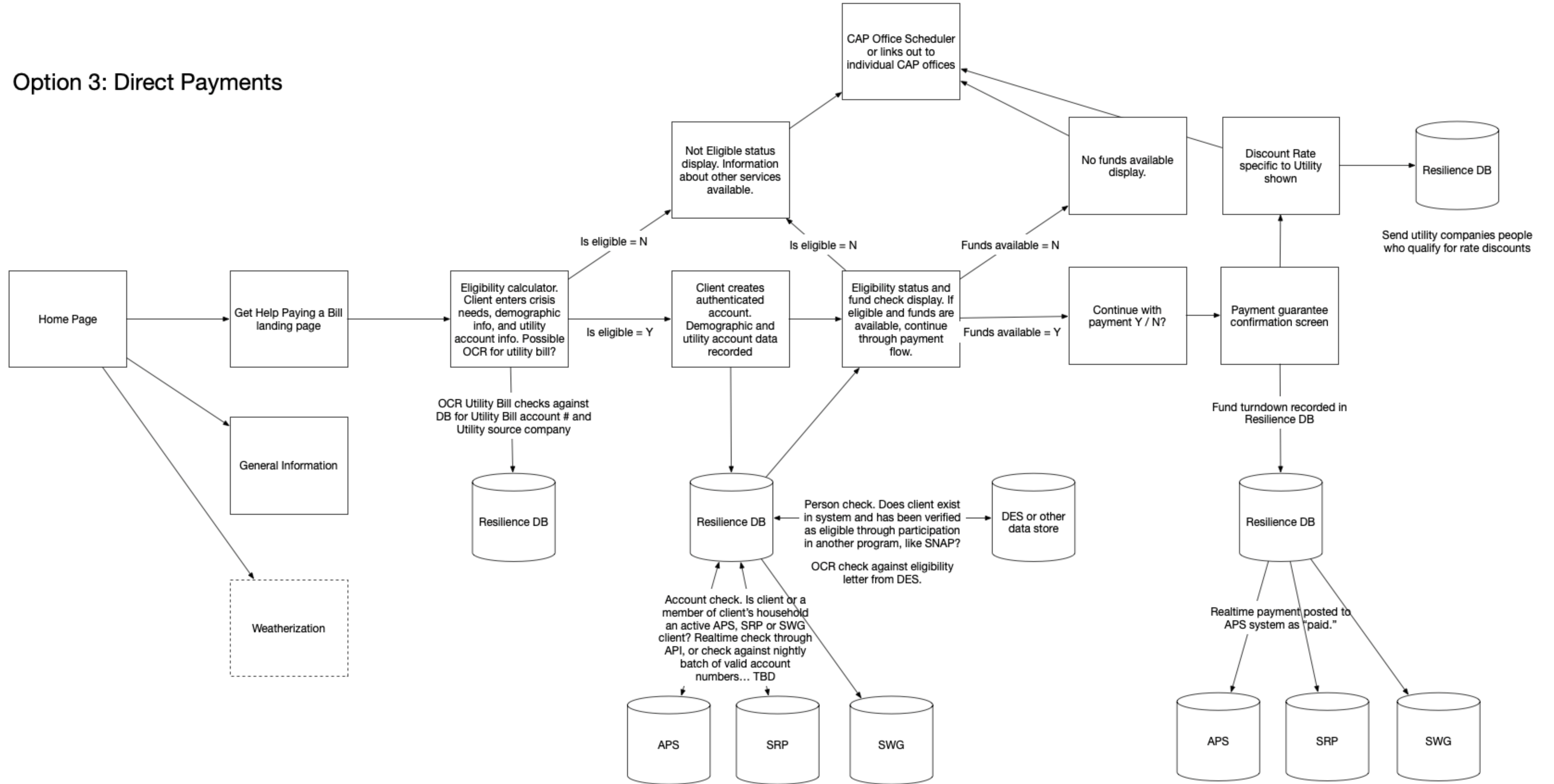
# Option 1: Central Intake



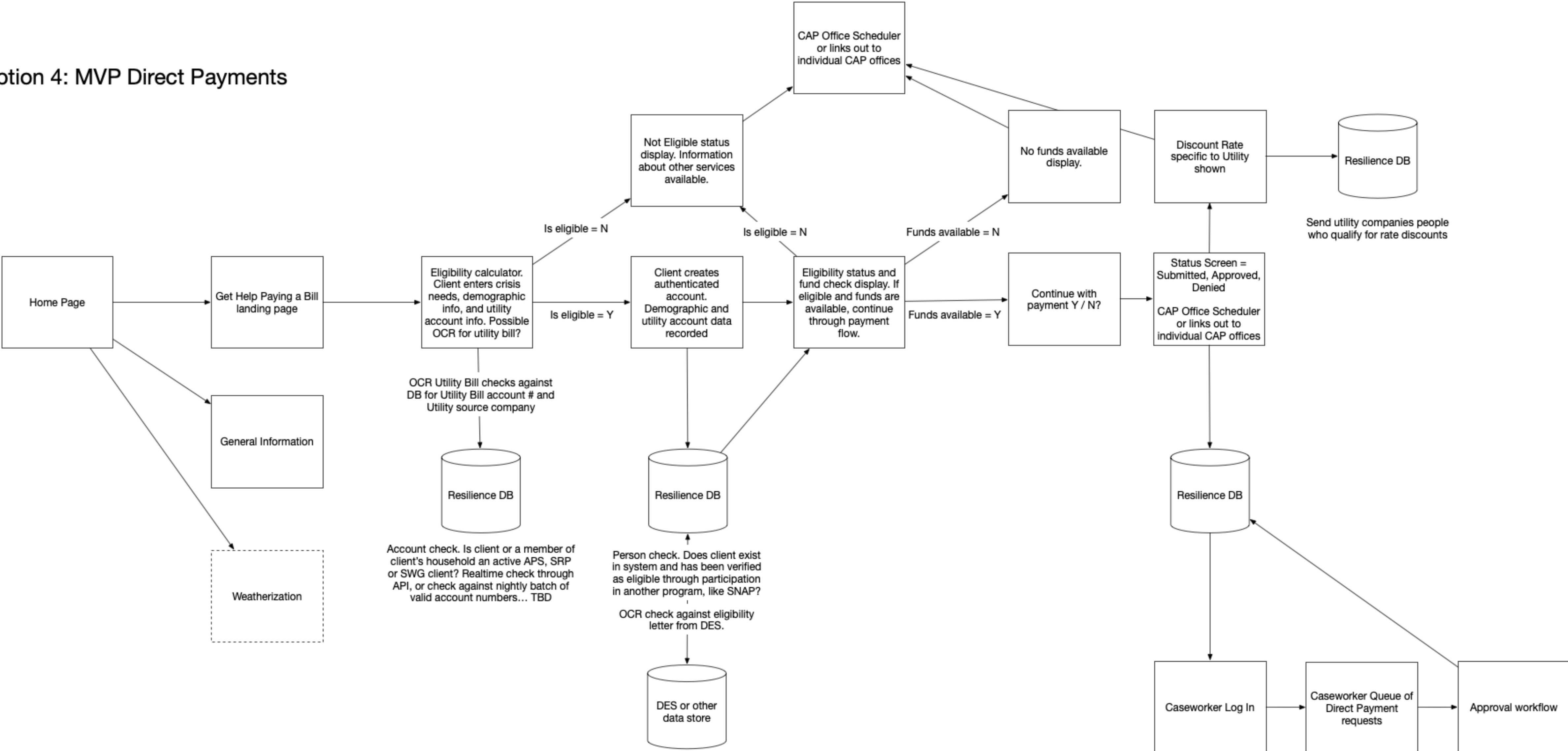
# Option 2: Most Vulnerable



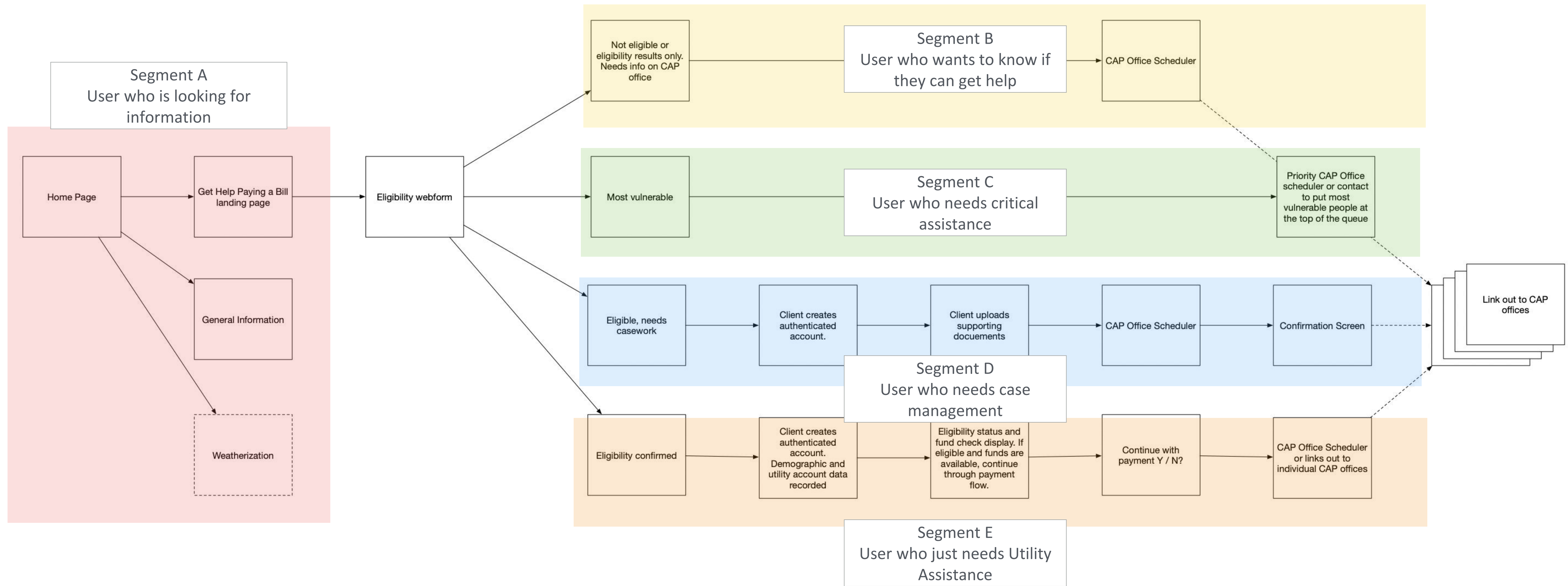
# Option 3: Direct Payments



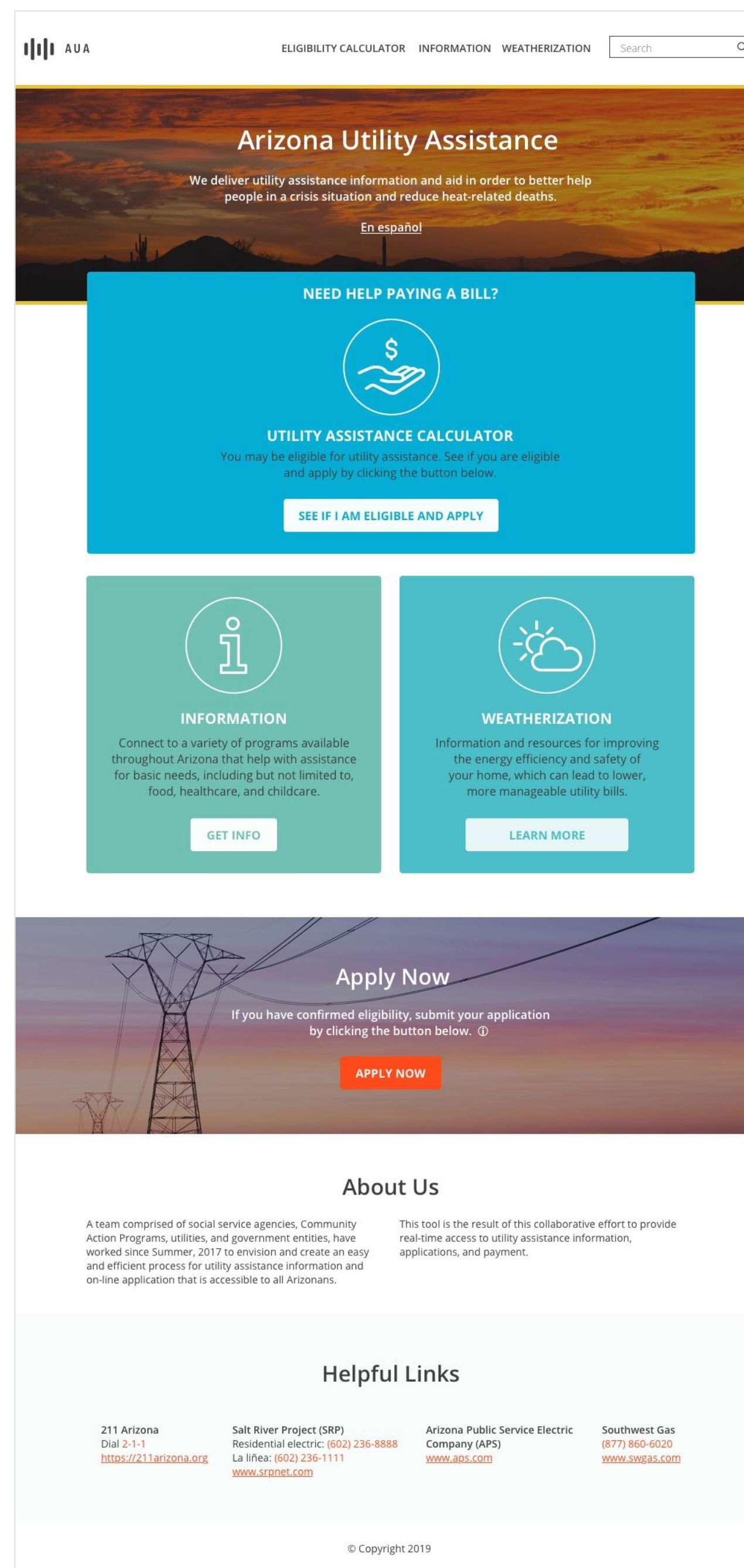
## Option 4: MVP Direct Payments







# Home Page Screen



# Utility Assistance Calculator, Screen 1

**AUA** ELIGIBILITY CALCULATOR INFORMATION WEATHERIZATION Search

## 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 1/4)

**Household Information** ⓘ

Number of Household Members\* 3

Annual Household Income\* \$28,000

**NEXT**

\*Indicates a required field

# Utility Assistance Calculator, Screen 2

**UTILITY ASSISTANCE CALCULATOR (STEP 2/4)**

**Applicant Information**

Residential Address

Residential Apt/Unit/Suite

Residential City\*

Residential Zip\*

Utility Account Number\*

**BACK** **NEXT**

\*Indicates a required field

# Utility Assistance Calculator, Screen 3

**AUA** **ELIGIBILITY CALCULATOR** INFORMATION WEATHERIZATION Search

## 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?\*

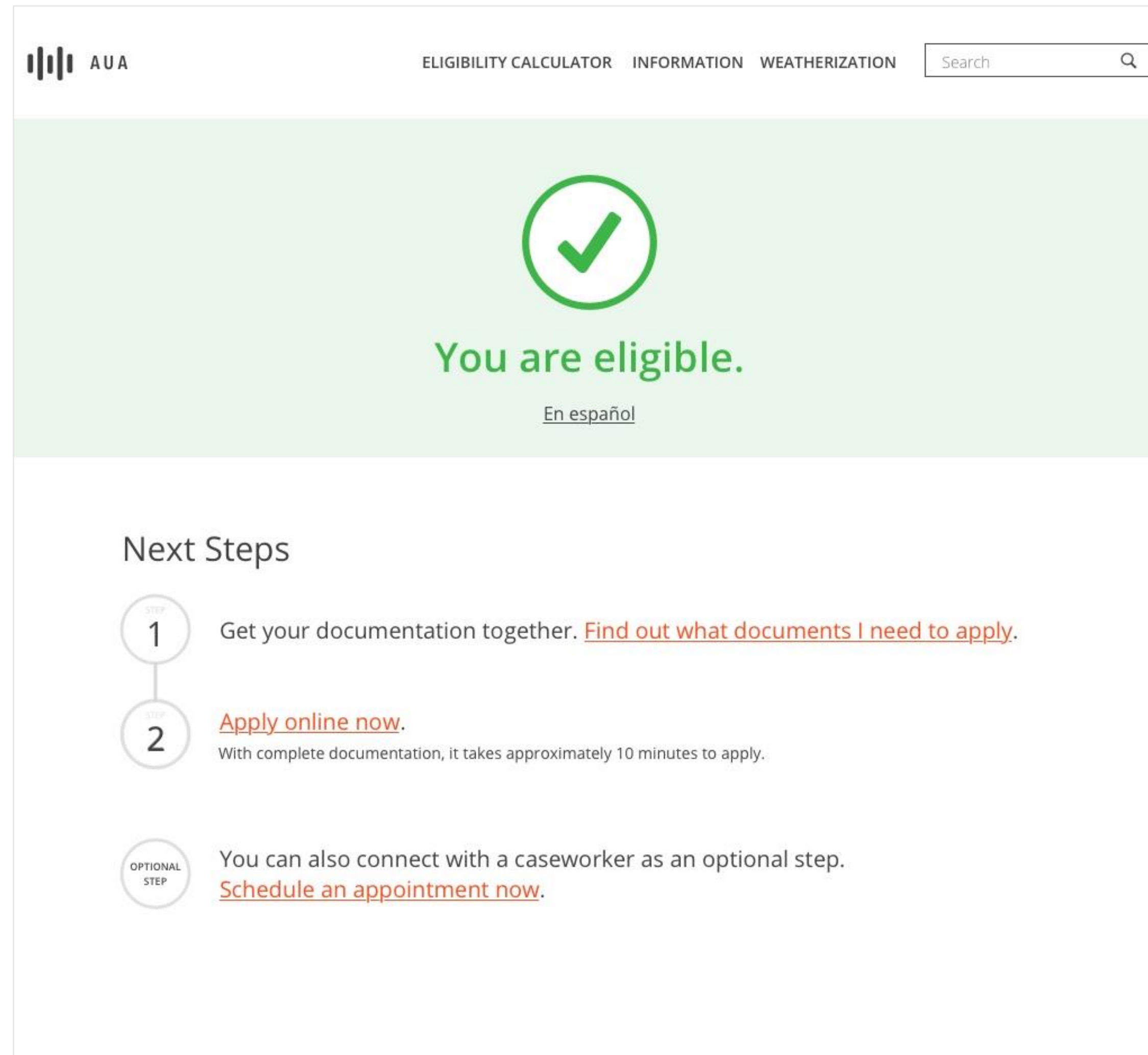
Do you or does anyone in your family have a disability?\*

Are there children in the home?\*

**BACK** **NEXT**

\*Indicates a required field

# Assistance Status — Eligible




The screenshot shows the AUA (Assistance to Urban Affected) website interface. At the top left is the AUA logo. The navigation menu includes 'ELIGIBILITY CALCULATOR', 'INFORMATION', and 'WEATHERIZATION'. A search bar is located on the right. The main content area features a large green checkmark icon and the text 'You are eligible.' with a link to 'En español'. Below this is a 'Next Steps' section with three items:

- STEP 1**: Get your documentation together. [Find out what documents I need to apply.](#)
- STEP 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)

AUA      ELIGIBILITY CALCULATOR   INFORMATION   WEATHERIZATION  



**You are not eligible.**

[En español](#)

### Why am I not eligible?

- Funds are currently not available.

Did you fill out the application correctly? [Return to the calculator.](#)

---

### Optional Next Steps

**OPTIONAL STEP** 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.


— OR —

**OPTIONAL STEP** View [helpful links](#) to additional community resources.

**OPTIONAL STEP** Try again at the beginning of next month when funds may be available.

# Assistance Status — Not Eligible (2)

 AUA      ELIGIBILITY CALCULATOR   INFORMATION   WEATHERIZATION  



**You are not eligible.**

[En español](#)


### 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.**

SELECT MY COUNTY ▼

— OR —

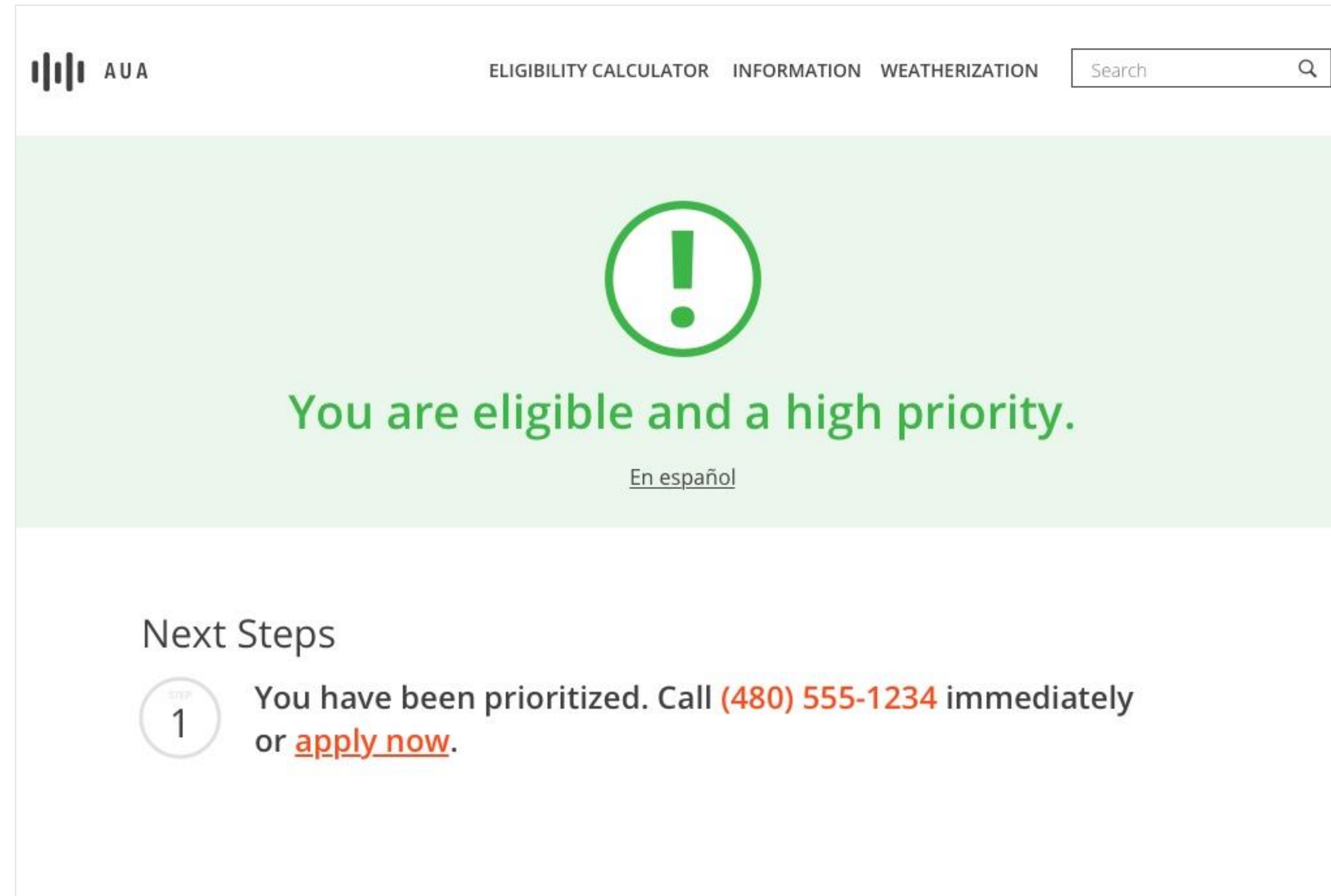
85215

SEARCH

 View [helpful links](#) to additional community resources.



# Assistance Status —Vulnerable



The screenshot shows the AUA website interface. At the top left is the AUA logo. To the right are navigation links for 'ELIGIBILITY CALCULATOR', 'INFORMATION', and 'WEATHERIZATION', followed by a search bar. The main content area features a large green banner with a white exclamation mark icon and the text 'You are eligible and a high priority.' Below this, there is a link for 'En español'. Underneath the banner, the 'Next Steps' section is visible, starting with 'STEP 1' in a circle, followed by the instruction: 'You have been prioritized. Call (480) 555-1234 immediately or [apply now](#).'

# Available Community Resources

**AUA** ELIGIBILITY CALCULATOR INFORMATION WEATHERIZATION Search

## Available Community Resources

Below is a list of the community resources available in your zip code.

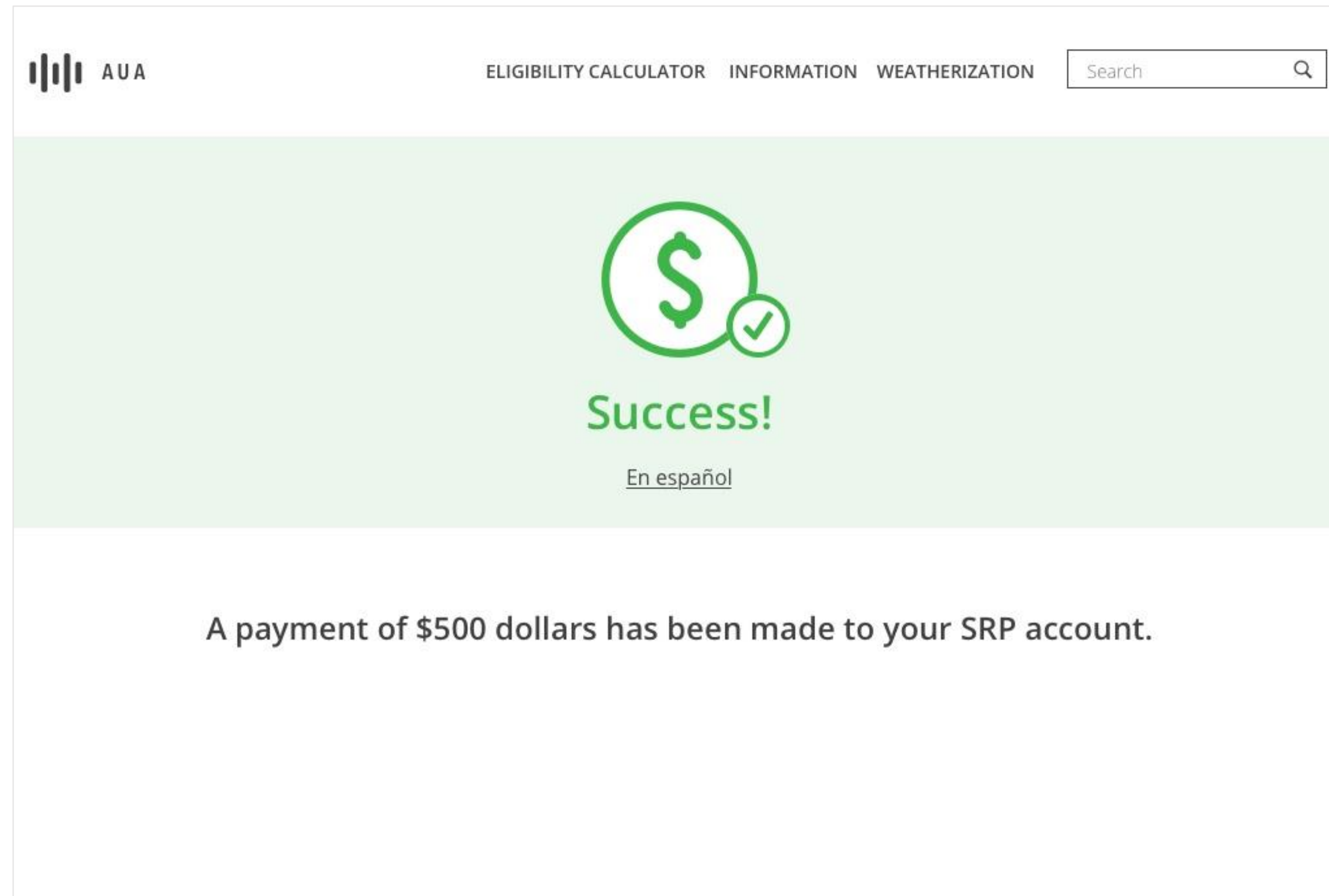
[En español](#)

- 1 CAP Office A**  
Address Line 1  
Address Line 2  
Hours: 9 am - 12 pm, Monday - Friday  
**SCHEDULE ONLINE**
- 2 CAP Office B**  
Address Line 1  
Address Line 2  
Hours: 1 pm - 5 pm, Monday - Friday  
**ADD TO CALENDAR REMINDER**
- 3 Community Resource**  
Address Line 1  
Address Line 2  
Hours: 9 am - 12 pm, Monday - Friday  
**Contact:**  
 **(480) 555-6789**

Don't see what you are looking for?  
Select a different county or search a different zip code below, or [return home](#).

**SELECT MY COUNTY** — OR —  **SEARCH**

# Status — Success!

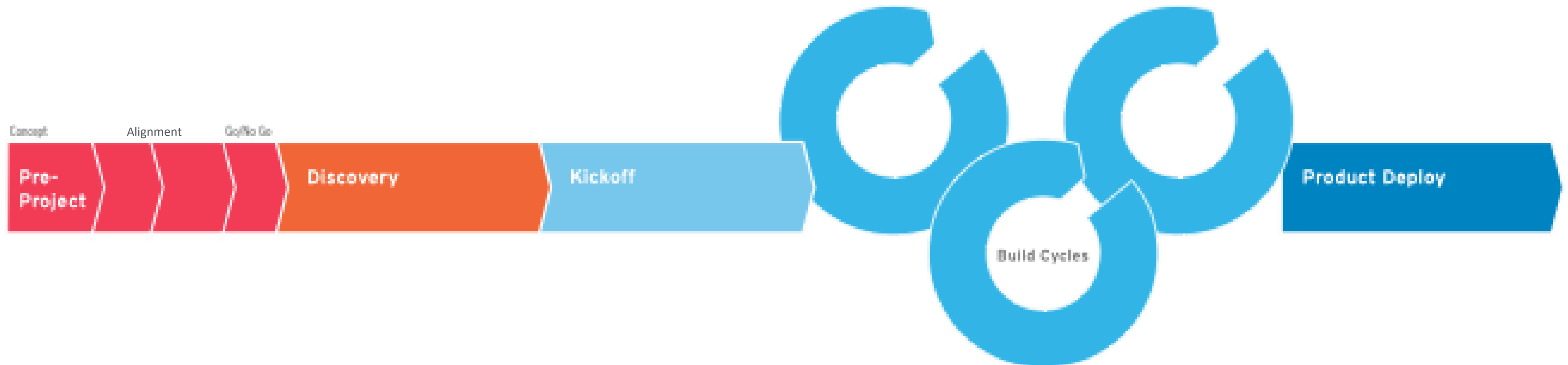


The screenshot shows a web interface for AUA. The top navigation bar includes the AUA logo, menu items for 'ELIGIBILITY CALCULATOR', 'INFORMATION', and 'WEATHERIZATION', and a search box. The main content area features a large green banner with a dollar sign icon and a checkmark, followed by the text 'Success!' and a link for 'En español'. Below the banner, a message states: '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