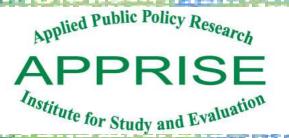# Oregon LIHEAP & OEAP Evaluation:
Fifth Stakeholder Meeting

Presenters: David Carroll and Dan Bausch

June 18, 2020

STUDY UPDATES

Preliminary FY 2020 Client Survey Findings

Presenter:

Dan Bausch, APPRISE

Outline

- Client Survey Overview

- Core Sample Survey Findings

- Selected Findings for Targeted Populations

- Summary of Key Findings
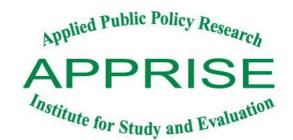
CLIENT SURVEY OVERVIEW

Purpose & Goals

- Conduct a survey of 500 recent participants to gain measurable information about their experiences and to analyze results based on key characteristics.

Goals:

1. Document client experiences with the application and intake process, access to services, program awareness, and the need for energy assistance.

2. Ask clients to provide their opinions of their experience.

3. Identify client's perceptions of the impacts of energy assistance and recent impacts of COVID.

4. Analyze results for a representative sample and for targeted populations.

Survey Design

- Modes
  - Respondents can self-complete the survey online or complete over the telephone with an interviewer

- Languages
  - Survey available in English and Spanish
  - Additional interviews conducted in Korean and Mandarin

- Survey Invitations
  - Clients were mailed a letter about the survey
  - Clients called multiple times at different times of day
  - Interviews completed in May and June 2020

Population and Sample

- ## Population
  - – LIHEAP/OEAP clients who applied between October and January 2020 and received assistance
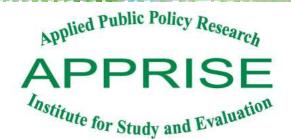
- ## Core Sample
  - – Representative sample of 614 clients
  - – Clients randomly-selected from three sample groups:
    - Households with elderly or disabled member
    - Households with young child
    - Households with no vulnerable members
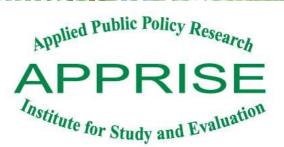
- ## Targeted Supplemental Samples
  - – Selected additional sample of 569 randomly-selected clients from targeted groups to ensure sufficient clients for analysis.

Survey Results

- Total interviews = 506 (to date)
  - Core Sample - 270 interviews
  - Supplemental Sample - 236 interviews

- Modes – 25% online, 75% by telephone

- Languages – 13% completed in Spanish

- Core Sample Response Rate = 52%

- Core Sample Margin of Error = +/- 6%

Survey Results
Comparison to Population

	FY 2020 Client Population N = 45,116	Core Sample n = 270
Percent Below Poverty	58%	58%
Returning Client from FY 2019	78%	78%
Elderly Household Member	51%	46%
Disabled Household Member	47%	50%
Young Child in Household	12%	12%
Hispanic Client	13%	17%
Interstate 5 Corridor	63%	61%

Source = OHCS OPUS Database

CORE SAMPLE SURVEY FINDINGS
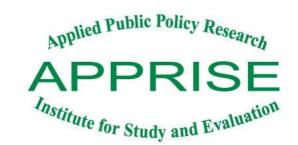
Program Outreach
Sources of Awareness in the Last Year

Heard about programs from any of the following sources in the last year?	All Core	Elderly	Young Child	No Vulnerable Members
Direct Contact with Agency	34%	35%	23%	33%
Family, Friends or Neighbors	32%	25%	46%	40%
Other Social Service Organization	36%	32%	43%	29%
Ads on TV, Radio, etc.	7%	9%	9%	4%
Oregon DHS	28%	27%	36%	36%
Utility Company	19%	19%	27%	27%
The News	3%	3%	4%	1%
None of These	9%	9%	11%	9%

Program Outreach
Most Important Source When Returning Clients Originally Applied
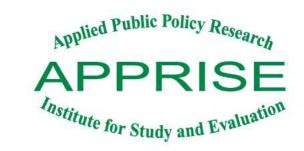
APPRISE
Applied Public Policy Research
Institute for Study and Evaluation

What was the most important in making you interested in applying?	All Core	Elderly	Young Child	No Vulnerable Members
Family, Friends or Neighbors	26%	27%	30%	31%
Other Social Service Organization	24%	20%	25%	20%
Direct Contact with Agency	13%	12%	15%	16%
Utility Company	14%	14%	13%	22%
Oregon DHS	14%	17%	13%	9%
Ads on TV, Radio, etc.	1%	0%	0%	0%
The News	1%	1%	0%	0%
None of These	8%	9%	5%	2%

Program Outreach
Client Use of Social Media to find Community Resources

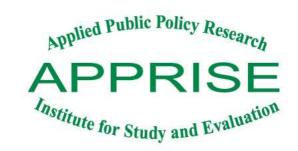| Do you use any social media website to look for or learn about community resources?	All Core	Elderly	Young Child	No Vulnerable Members
Yes	25%	14%	48%	30%
No	75%	86%	50%	70%

Program Outreach
Social Media Platforms Used to find Community Resources

What social media websites do you use most often to look for or learn about community resources?	All Core	Elderly	Young Child	No Vulnerable Members
Facebook	89%	85%	89%	95%
YouTube	19%	23%	7%	5%
NextDoor	7%	15%	0%	15%
Twitter	2%	0%	0%	0%
Other	13%	8%	11%	10%

Program Outreach
Importance of Social Media for Awareness

How important do you think it is for the program to use social media websites to let people know about the program?	All Core	Elderly	Young Child	No Vulnerable Members
Very Important	49%	47%	59%	53%
Somewhat Important	16%	12%	25%	23%
Not Very Important	7%	5%	4%	4%
Not At All Important	16%	21%	5%	10%
Don't Know	13%	15%	7%	10%

Client Situation at Time of Application

Status at time of recent application

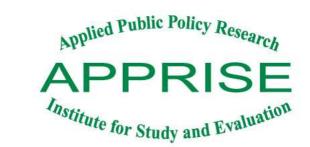| Which best describes your situation when you applied for assistance this fall or winter?	All Core	Elderly	Young Child	No Vulnerable Members
Payments Up-to-date	62%	81%	36%	36%
Late Payments	34%	19%	50%	60%
Shut Off / No Fuel	4%	0%	14%	4%

Client Situation at Time of Application
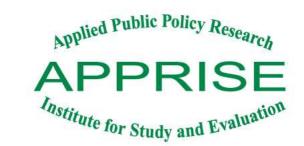## *Status at time of first application*

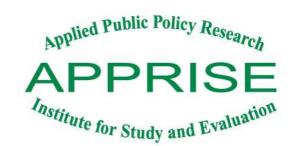| Thinking back to when you received energy assistance for the first time, which best describes your situation at that earlier time when you first applied?	All Core	Elderly	Young Child	No Vulnerable Members
Payments Up-to-date	52%	73%	3%	30%
Late Payments	45%	26%	87%	70%
Shut Off / No Fuel	3%	1%	11%	0%

Application Process
Method of Applying

How did you recently apply for energy assistance this fall or winter?	All Core	Elderly	Young Child	No Vulnerable Members
In-Person at the Agency	68%	66%	75%	83%
By Mail	21%	23%	11%	3%
Over the Phone	5%	5%	7%	7%
On the Internet	3%	2%	4%	3%
At an Outreach Event	2%	3%	2%	4%
Other	<1%	0%	2%	0%

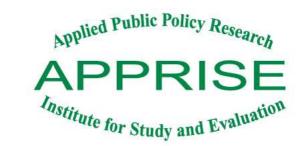# Application Process
Length of Time

How did you feel about the amount of time it took to get the energy assistance benefit? Was it…	All Core	Elderly	Young Child	No Vulnerable Members
Too Long	25%	24%	23%	24%
About Right	49%	55%	42%	49%
Very Fast	25%	20%	36%	26%

Application Process
Ease or Difficulty of Process

Please tell me how easy or difficult each of the following were when you recently applied for energy assistance. (Percentage that said "Very Easy")	All Core	Elderly	Young Child	No Vulnerable Members
Finding Information about the Process of Applying	57%	62%	68%	50%
Scheduling an Appointment at for an In-Person Interview	59%	67%	46%	49%
Getting to the Agency	69%	75%	76%	60%
Understanding and Completing the Application	67%	70%	71%	64%
Gathering and Submitting the Required Documents	56%	58%	59%	54%

Application Process
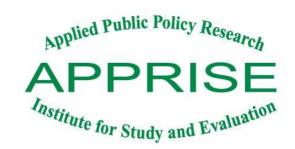## *Need for Assistance*

Did you need help from someone else to complete the application form, or were you able to complete the application form on your own?	All Core	Elderly	Young Child	No Vulnerable Members
Needed Help	31%	27%	36%	40%
No Help	69%	73%	64%	60%

Application Process
Need for Assistance

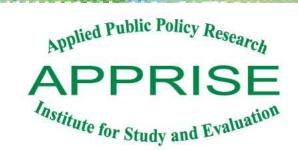| Who helped you complete the application form?	All Core	Elderly	Young Child	No Vulnerable Members
Family Member or Friend	18%	23%	5%	14%
Staff from the Energy Assistance Agency	64%	65%	80%	71%
Staff from Another Community or Social Service Agency	21%	19%	15%	14%

Experience & Interactions
Ease or Difficulty of Interactions

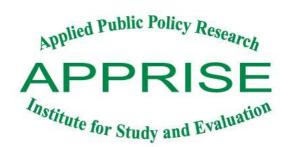| Please tell me how easy or difficult each of the following were when you recently applied for energy assistance. (Percentage that said "Very Easy")	All Core	Elderly	Young Child	No Vulnerable Members
Speaking to Staff at the Agency	74%	77%	75%	80%
Getting Answers to Questions	74%	74%	78%	75%
Receiving Assistance in a Timely Way	61%	64%	57%	60%

Experience & Interactions
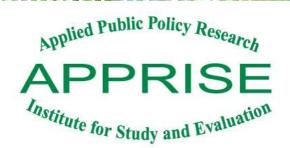*Client Views of Agency*
Service & Treatment

Percent Agreed	All Core	Elderly	Young Child	No Vulnerable Members
Before I contacted my local agency, I was concerned about how I would be treated.	25%	24%	27%	23%
Once I contacted the agency, I felt that the people at the agency understood why I needed assistance.	90%	91%	91%	94%
I felt that the people at the agency worked hard to ensure that I got the application completed.	90%	93%	93%	93%
I felt that the people at the agency treated me with respect.	93%	96%	95%	94%
I would feel comfortable going back to the agency if I needed assistance in the future.	93%	94%	96%	96%

Experience & Interactions
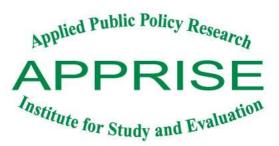*Referrals to Other Services*

When you applied for the energy assistance, did the agency provide you with information about any other services or programs that could be helpful to you?	All Core	Elderly	Young Child	No Vulnerable Members
Referred to Other Services	42%	40%	48%	44%
Not Referred to Other Services	45%	46%	38%	44%
Don't Recall	13%	14%	14%	11%

Experience & Interactions
Satisfaction with Experience

How satisfied were you with your experience applying for assistance?	All Core	Elderly	Young Child	No Vulnerable Members
Very Satisfied	83%	89%	77%	74%
Somewhat Satisfied	15%	8%	20%	24%
Somewhat Dissatisfied	2%	1%	4%	1%
Very Dissatisfied	<1%	1%	0%	0%

Client Feedback

APPLIED PUBLIC POLICY RESEARCH
APPRISE
Institute for Study and Evaluation
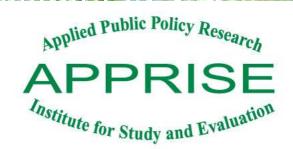
- "I think coming to us like they did was a big benefit. A lot of us are on electric scooters and such and can't get out, so it was great for them to come to our apartment."

- "It worked really well for me receiving the application in the mail. I filled it out and got other information that was needed and mailed it back. It worked very well for me."

- "I was fearful at first and embarrassed, but the staff at the power company & at the agency were so respectful, helpful, and nonjudgmental that it really eased me emotionally! I would encourage others who direly need assistance to not be fearful, but to not take advantage of the help."
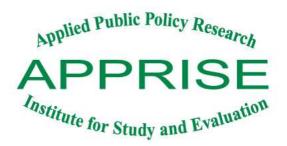
Client Recommendations
Categories

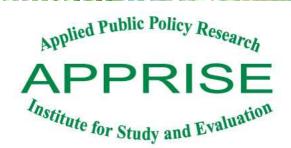| What suggestions do you have for improving the application process?	All Core	Elderly	Young Child	No Vulnerable Members
Improve Outreach	17%	<mark>33%</mark>	11%	15%
Better Customer Service	15%	14%	11%	18%
Easier/Clearer Communication	13%	5%	16%	21%
Make improvements to Application	17%	10%	0%	6%
Improve Accessibility	9%	10%	11%	12%
Improve Timeliness	9%	5%	16%	9%
Phone Service	7%	5%	<mark>21%</mark>	12%

Client Recommendations
Examples

- "More communication between agency staff because sometimes one person tells me something, and a different person tells me something else, and they made me do several trips between the agency and my home."

- "Maybe having a checklist for having all the right documents for the appointment."

- "Learning about other services they offer would've been nice…I have no idea what other services they offer."

- "Extended hours – it is hard with a child and work to get away to apply."
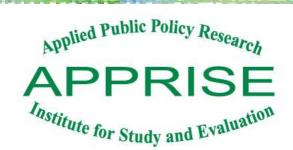
Program Impacts
Benefit Impacts if Client Behind on Bills

When you received your energy assistance benefit, was the amount you received enough to pay off any overdue bills?	All Core	Elderly	Young Child	No Vulnerable Members
Yes	78%	76%	83%	80%
No	22%	24%	17%	20%

Program Impacts
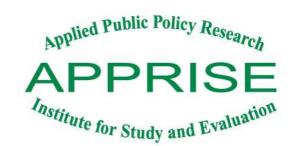*Expectations after Receiving Benefit to Pay Bills*

After you received your energy assistance benefit, did you expect you would be able to keep up with your energy bills, or were you afraid you would get behind again?	All Core	Elderly	Young Child	No Vulnerable Members
Expects to Keep Up with Their Bill	38%	38%	40%	34%
Afraid of Falling Behind Again	61%	62%	57%	66%

Recent COVID Impacts
Impact on Personal Life

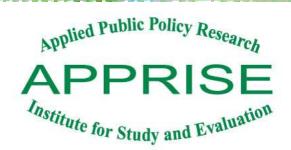| As a result of the coronavirus outbreak, has your own personal life...	All Core	Elderly	Young Child	No Vulnerable Members
Changed in a Major Way	44%	44%	46%	39%
Changed in a Minor Way	39%	36%	46%	47%
Stayed about the Same	16%	19%	7%	13%

Recent COVID Impacts
Impact on Household Income

For each of the following, indicate whether it is something that happened to you or someone in your household because of the coronavirus outbreak.	All Core	Elderly	Young Child	No Vulnerable Members
Laid Off	17%	5%	43%	30%
Cut in Pay/Hours	16%	4%	42%	32%
Forwent Pay due to Safety Concerns	10%	4%	16%	21%
Any of the Above	26%	8%	66%	50%

Recent COVID Impacts
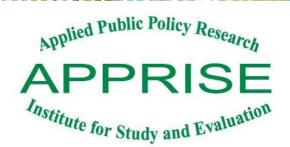## *Ability to Pay Energy Bills after Income Loss*

Due to this loss of income, are you suddenly unable to pay your full heating or electricity bill?	All Core	Elderly	Young Child	No Vulnerable Members
Unable to Pay	61%	50%	73%	63%
Able to Pay	39%	50%	27%	37%

DISCUSSION

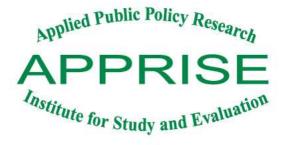# SELECTED FINDINGS FOR TARGETED POPULATIONS

Hispanic Clients
Client Views of Agency Service & Treatment

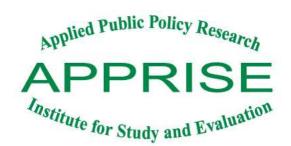| Percent Agreed	All Core	Hispanic	Spanish Interviews
Before I contacted my local agency, I was concerned about how I would be treated.	25%	39%	44%
Once I contacted the agency, I felt that the people at the agency understood why I needed assistance.	90%	89%	96%
I felt that the people at the agency worked hard to ensure that I got the application completed.	90%	92%	96%
I felt that the people at the agency treated me with respect.	93%	93%	96%
I would feel comfortable going back to the agency if I needed assistance in the future.	93%	94%	98%

Spanish Interview Clients
Sources of Awareness in the Last Year

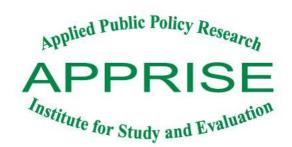| Heard about programs from any of the following sources in the last year?	All Core	Spanish Interviews
Direct Contact with Agency	34%	43%
Family, Friends or Neighbors	32%	65%
Other Social Service Organization	36%	33%
Ads on TV, Radio, etc.	7%	29%
Oregon DHS	28%	35%
Utility Company	19%	40%
The News	3%	10%
None of These	9%	5%

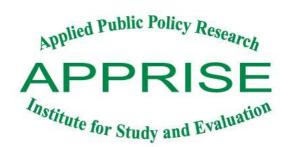# African-American Clients
Ease or Difficulty of Process

Please tell me how easy or difficult each of the following were when you recently applied for energy assistance. (Percentage that said "Very Easy")	All Core	African-American Clients
Finding Information about the Process of Applying	57%	44%
Scheduling an Appointment at for an In-Person Interview	59%	46%
Getting to the Agency	68%	62%
Understanding and Completing the Application	67%	70%
Gathering and Submitting the Required Documents	56%	67%

Hispanic and African-American Clients
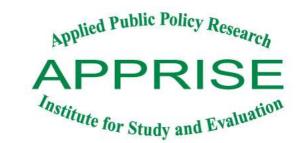## *COVID Impacts*

For each of the following, indicate whether it is something that happened to you or someone in your household because of the coronavirus outbreak.	All Core	Hispanic Clients	African-American Clients
Laid Off or lost a job	17%	33%	33%
Cut in pay due to reduced hours or demand	16%	44%	31%
Had to forgo pay to stay home because it was not safe to work	10%	15%	15%
ANY OF THE ABOVE	26%	62%	54%
Unable to Pay Energy Bills If Loss in Income	61%	63%	79%

Asian Clients
Help with Application

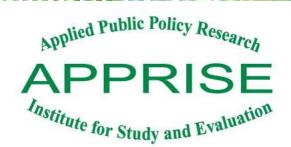|	All Core	Asian
Needed Help with Application	31%	44%
Help Provided by Agency Staff	64%	36%
Help Provided by Family Member or Friend	18%	36%
Help Provided by Another Community or Social Service Agency	21%	32%
Did Not Apply In-Person and Needed Help with Application	20%	42%

American Indian & Alaskan Native Clients

Outreach and Situation at Time of Application

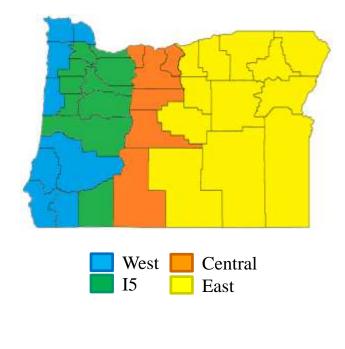|	All Core	American Indian & Alaskan Native
Do Not Recall Hearing About Program from any Listed Sources in the Last Year	9%	20%
Direct Contact with local Agency Most Important Source In Making Client Interested in Applying (Returning Client)	13%	27%
Tried to work on payment arrangement with utility company in year before coronavirus	34%	46%
Late Payments or Shut Off at time of recent application	38%	54%
Expected to Keep Up Will Bills after Past due Amount Paid	38%	21%

Non-Repeat Clients
Ease or Difficulty of Process

Percent that Rated "Very Easy"	All Core	Non-Repeat Clients
Scheduling an appointment for an in-person interview	59%	70%
Getting to the agency's office or finding transportation	69%	79%
Understanding and filling out the application form	67%	76%
Gathering/Submitted Required Documents	56%	67%
Speaking with Staff at the Agency	74%	83%

Targeted Group Comparison

	All Core	Hispanic Clients	African-American Clients	American Indian	Asian	Non-Repeat Clients
Behind/Shut Off When Recently Applied	38%	56%	73%	54%	28%	46%
Applied In-Person	68%	81%	74%	63%	61%	82%
Amount of Time to receive benefit was about right/very fast	75%	83%	89%	80%	91%	81%
Felt Treated with Respect	93%	93%	96%	93%	93%	95%
Satisfied with Experience	98%	97%	94%	93%	100%	97%

Targeted Regions Comparison

	All Core	Central	East	West
Behind/Shut Off When Recently Applied	38%	46%	33%	30%
Applied In-Person	68%	76%	88%	62%
Amount of Time to receive benefit was about right/very fast	75%	70%	69%	67%
Felt Treated with Respect	93%	93%	95%	97%
Satisfied with Experience	98%	100%	100%	98%

West Central
I5   East

SUMMARY OF KEY FINDINGS

Summary

Program Outreach

- Direct contact with agencies, contact with other community organizations, and family/friends/neighbors cited as most common ways clients recently heard about the programs.

- 29% of households interviewed in Spanish reported hearing about the programs in the past year from advertisements.

- 25% report using social media to find community resources, but 65% said they believe social media outreach is important to raise awareness of the programs.

Client Status at Time of Application

- 38% behind on bills (4% shut off) when they recently applied, but substantially higher for non-elderly, Hispanic, African-American, and American Indian households.

- 14% of households with a young child reported being shut off or without fuel when they recently applied.

- About half of returning clients reported being up-to-date on payments when they first applied, with only 3% reporting being shut off when they were new to the programs.

Summary

Application Process

- Mode – Two-thirds apply in-person, while about one-third reported applying remotely.

- Timeframe – 74% said amount of time was about right or very fast, 25% too slow

- Process - Gathering and submitting documents appears to be the most difficult step for clients. However, 56% still report this as being very easy.

- Application Help - 31% of clients needed help completing the application. Agency staff were the main source of assistance. 44% of Asian households reported needing assistance.

- A higher portion of non-repeat clients reported that steps in the application process were very easy compared to all respondents.

Experiences and Interactions

- More than 70% of clients say it is very easy to speak with staff and to get answers to questions.

- While 25% of clients agreed that they were initially concerned about how they would be treated applying for assistance, more than 90% of clients reported feeling respected, understood, and comfortable returning for future assistance.

- Overall Satisfaction – 98% satisfied (83% Very Satisfied) with high satisfaction across all targeted populations.

- Referrals – Only 42% of clients reported being referred to other services.

- Recommendations – Client recommendations included improving outreach, enhanced customer service, and faster timeframe.
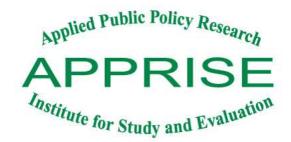
Summary

Program Impacts

- 78% of clients behind on bills reported the assistance was sufficient to resolve their bill payment issues.

- However, 61% of those clients reported being afraid of falling behind on bills again.

Recent COVID Impacts

- 44% of clients reported the pandemic had a major impact on their personal life.

- 66% of young child households reported a loss in income due to the pandemic, with 73% of these clients reporting they are suddenly unable to pay their full energy bill amounts.

- A majority of Hispanic and African-American households also reported income loss, with most unable to pay their full energy bills.

Next Steps

- June
  - Complete final supplemental survey interviews
  - Incorporate survey results with other data into Community Engagement Reports

- July
  - Document full aggregate results in a summary report

DISCUSSION