California LifeLine Evaluation

Project Manager: Cynthia Chase
Project Coordinator: Meagan Wylie

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Evaluation Summary

- Per a 2019 Legislative Analyst's Office (LAO) Report, CPUC contracted with California State University, Sacramento (University) to conduct an **external evaluation of the LifeLine Program** to:

  - Further understand the factors impacting the participation rates of LifeLine

  - Fulfill the LAO recommendations

  - Provide necessary information to the CPUC for future LifeLine Program analyses and modifications

  - Provide possible strategies to increase LifeLine's reach to low- income households in the State

California Public Utilities Commission

CALIFORNIA LIFELINE PROGRAM ASSESSMENT & EVALUATION

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Contents

iv

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Evaluation Focus Areas

I. **LifeLine Program Reach and Effectiveness**

II. **Program Operations and Implementation**

III. **Phone Service Providers and Market Competition**

IV. **Customer Experience**

V. **Program Awareness, Marketing and Community Outreach**

Key Recommendations Overview

I.   **LifeLine Program Reach and Effectiveness**

   - 4 Primary Recommendations

II. **Program Operations and Implementation**

   - 8 Primary Recommendations

III. **Phone Service Providers and Market Competition**

   - 3 Primary Recommendations

IV. **Customer Experience**

   - 4 Primary Recommendations

V.   **Program Awareness, Marketing and Community Outreach**

   - 10 Primary Recommendations

*Qualifications of Recommendations

- Recommendations are presented **for consideration by the CPUC, the Legislature, and other agencies and interested parties** who serve the target population.

- Recommendations are organized by primary sections of the report and **listed without hierarchical priority**.

- Some recommendations, if implemented, will be of higher impact than others. Some will take considerably more resources and time to implement.

- It is per the discretion of the CPUC, Legislature, and stakeholders to **further consider criteria for implementation and determine which**, if any, to advance over a designated timeframe.

- Implementation of **these recommendations are *not* assumed to be the sole responsibility of CPUC**. Rather, several of the following ideas will require action and leadership by other parties as they are not within the latitude of CPUC to address.

Key Recommendations

I. LifeLine Program Reach and Effectiveness

1. Realign LifeLine Policies to Meet Current Telecommunication Needs of Low-Income Populations.

2. Develop a LifeLine Program Strategic Plan that is Accountable to the Diversity of the State's Population.

3. Assess the Accuracy of the Recently Updated Methodology Used for Program Enrollment Estimates.

4. Add Visualization Map(s) of Coverage by Service Provider to Demonstrate True 'Availability' Where Access to Phone Service for both Wireline and Wireless can be Readily Obtained Through Infrastructure as well as Identifying Service Gaps.

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Key Recommendations

II. Program Operations and Implementation

1. Implement Recommendations Identified by the Renewals Working Group.

2. Streamline Program Enrollment and Renewal Processes, including Digitizing Customer Correspondence.

3. Revise Renewal Process and Requirements for *Wireline* Consumers to Meet the Needs of the Specific Demographic.

4. Simplify the Eligibility Verification Process for Enrollment and Renewal for *Wireline* and *Wireless* Customers.

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Key Recommendations

II. Program Operations and Implementation

5. Expand the List of Acceptable Government Issued forms of Identification or Documentation Used for Program Eligibility.

6. Regularly Produce and Track Enrollment Data Disaggregated into Regions and Populations via Digital Dashboard

7. Clarify and Document the Functions and Responsibilities of the Communications Division Staff and the Implementation of the LifeLine Program Overall.

8. Revisit the Current Approach to the TPA Request for Proposal /Contract to Ensure Long-Term Sustainability and Optimal Functioning of the Program.

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Key Recommendations

III. **Phone Service Providers and Market Competition**

1. Conduct External Economic Analysis to Justify or Revise Subsidy Rates to Stimulate Market Competition.

2. Institute an Eligibility Authorization Number System that Customers May Apply to a Service Provider of their Choice.

3. Cultivate True Market Choice and Competition by Actively Promoting All LifeLine Service Provider Plans and Services and Allow Customers to Choose their Plan Via a CPUC hosted Online Marketplace.

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Key Recommendations

IV. **Customer Experience**

1. Utilize Trusted Sources Including Social Services and Community Based Organizations to Promote and Support Enrollment in the LifeLine Program.

2. LifeLine Enrollment be Embedded in the Tribal Temporary Assistance for Needy Families Process to Increase Tribal Enrollment.

3. Routinely collect LifeLine Customer Experience Feedback to Ensure that the LifeLine Program Meets the Telecommunication Needs of Low-Income Californians.

4. Provide Training for Communications Division LifeLine Staff that Increases Knowledge of the Needs and Challenges for the Low-Income Population.

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Key Recommendations

V. Program Awareness, Marketing and Community Outreach

1. Immediately Seek Approval for Increased Budget to Engage in a Strategic Marketing and Outreach Campaign for the LifeLine Program.

2. Engage a Professional Public Relations Marketing Firm to Develop a Targeted Communication Campaign to Achieve the Enrollment Goals Outlined in the Strategic Plan.

3. Include in the Marketing Firm's Scope of Work, Specific Direction to Work with Tribal Leaders and Representatives.

4. Hire Regional Tribal Liaisons who are Trusted Representatives within Tribal Communities and Whose Responsibility is to Liaise Between CPUC and Tribal Entities and Coordinate LifeLine Related Activities.

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Key Recommendations

V. **Program Awareness, Marketing and Community Outreach**

5. Utilize and Leverage Existing State and Federal Resources to Create Necessary Infrastructure for Tribal Lands to have Essential Telecommunications Connectivity.

6. Increase Coordination with Disability Advocacy Groups to Increase Accessibility and Enrollment.

7. Develop Training Resources to Support Qualifying Benefits Programs, Community Based Organizations, Advocacy Groups and Service Providers in the Promotion of and Education About the LifeLine Program.

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Key Recommendations

V. Program Awareness, Marketing and Community Outreach

8. Increase the Awareness and Legitimacy of the Lifeline Program Through Community Partnerships with Trusted Sources.

9. Continue Exploratory Conversations with the Office of Digital Innovation (ODI) or Contract with Another Professional Website Designer to Improve the LifeLine Website Interface to Support Program Operations, Customer Experience, and Use as a Program Marketing Tool.

10. Improve the Quality of the *Wireless* Customer Experience by Replacing the Street Teams Process with Trusted Legitimate Social Services Sources and CBOs who Direct Verified Customers to the Online Marketplace to Select a Service Provider.

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Recommendations Explored but <u>NOT</u> Selected for Inclusion

A. Utilize the National Verifier

B. Transfer the Administration of the Program to the Department of Social Services

C. Require All *Wireless* Providers to Participate in the Program

D. Update Methods to Improve Program Enrollment

E. Identify Processes to Ensure High Quality Equipment & Services for LifeLine Customers

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Question & Answer Session

- Project Manager: Cynthia Chase c.chase@csus.edu
- Project Coordinator: Meagan Wylie meagan.wylie@csus.edu