



California Public
Utilities Commission

ULTS Administrative Committee Meeting

Meeting Minutes September 19, 2023

Please join the California Public Utilities Commission (CPUC) for the Q3 2023 Universal LifeLine Telephone Service Administrative Committee Meeting

When: Tuesday, September 19, 2023 (1:00 p.m. – 4:00 p.m.)

Where: CPUC Courtyard Conference Room, 505 Van Ness Ave., San Francisco, CA 94102

WebEx Meeting Link:

<https://cpuc.webex.com/cpuc/j.php?MTID=m1c1634cd68a8107e769c96a2015dc875>

Call-in Number: 1-855-282-6330 **Access Code:** 2487 242 2635 **Meeting Password:** 2023

California LifeLine Program Meeting Agenda

Session 1: Welcome & Kick-Off

Session Outcome: Meeting Kick-Off

Session Topics: Welcome, Opening Remarks, Public Comments

1:00 p.m. – 1:05 p.m.	Introduction: David Avila, Chair
1:05 p.m. – 1:10 p.m.	Welcome: Commissioner Genevieve Shiroma
1:10 p.m. – 1:15 p.m.	Approval of Minutes: Committee reviews and approves the last meeting minutes prepared by the Communications Division (CD)
1:15 p.m. – 1:20 p.m.	Public Comments

Session 2: Program Alerts & New News

Session Outcome: Inform Critical Program Updates

Session Topics: New News, Alerts & Highlights

1:20 p.m. – 1:45 p.m.	CPUC Communications Division (CD) Updates: Robert Sansome <ul style="list-style-type: none">• LifeLine iFoster & ACP Pilots and Other Program Updates
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Session 3: Program Performance & Metrics

Session Outcome: Understand “What’s Working” vs What’s Not Working”

Session Topics: Internal & External Past Quarter Performance & Future Guidance

1:45 p.m. – 1:55 p.m.	Benchmark Comparisons of CA LifeLine to Other States: Chris Burke
1:55 p.m. – 2:05 p.m.	Fiscal Report: Lalaine Semana

2:05 p.m. – 2:20 p.m.	CAB Consumer Contact Statistics Report: Rosa Sauer
Session 4: Program Enrollment & Operations <i>Session Outcome: Understand Consumers Enrolling & Staying on the Program</i> <i>Session Topics: Operational Topics & Updates</i>	
2:20 p.m. – 2:40 p.m.	3rd Party Administrator - Maximus Report: James Graettinger <ul style="list-style-type: none"> • Completed Initiatives and Impact • Upcoming Initiatives • Program & Operation Reports
2:40 p.m. – 2:45 p.m.	Claims Status: Lisa Anthony
Session 5: Growth & Strategy <i>Session Outcome: Exploring How to Achieve Program Growth</i> <i>Session Topics: Industry, Special Initiatives, External Collaborations</i>	
2:45 p.m. – 2:55 p.m.	USAC Update: David Avila
2:55 p.m. – 3:00 p.m.	Greenlining’s Outreach to Cities and CBO’s for Digital Equity: Vinhcent Le & Caroline Siegel-Sing
3:00 p.m. – 3:05 p.m.	What the Center for Accessible Technology Does: Kate Woodford
Session 6: Committee Administration & Governance <i>Session Outcome: Lifeline Committee Management, Deliverables & Commitments</i> <i>Session Topics: Committee Deliverables, Sub-Team Reports/Read-Outs, Calendars</i>	
3:05 p.m. – 3:30 p.m.	Annual Report: Marcie Evans, Vice Chair
3:30 p.m. – 3:35 p.m.	CAS Working Group Report: Alex Godkov & Linda Lassen
3:35 p.m. – 3:45 p.m.	Administrative Committee Vacancies & New Nominations/Appointments: <ul style="list-style-type: none"> • 9 open positions <ul style="list-style-type: none"> ○ Large ILEC – 1 Alternate ○ CLEC – 1 Alternate ○ Small ILEC – 1 Alternate ○ Consumer – 1 Primary, 1 Alternate ○ CBO – 1 Primary, 3 Alternates • New Public Advocates Office Alternate Appointment <ul style="list-style-type: none"> ○ Sharmila Sevalakshmirajeswara
3:45 p.m. – 3:55 p.m.	2023 Sub-Committees: <ul style="list-style-type: none"> ▪ Committee Membership & Filling Committee Vacancies ▪ Acquisition Efforts ▪ Retention Efforts
3:55 p.m.	Future Q4 Meeting Update
4:00 p.m.	Adjournment

Member Roster

1	Large ILEC	Primary Alternate	Chris Burke Vacant	Frontier Communications
2	Small ILEC	Primary Alternate	Linda Lassen Vacant	Sierra Tel
3	CLEC	Primary Alternate	Marcie Evans Vacant	Cox Communications
4	Wireless	Primary Alternate	David Avila Alex Gudkov	TracFone Wireless, Inc. TruConnect
5	Deaf / Hearing Impaired or Disabled Rep	Primary Alternate	Kate Woodford Brian Winic	Center for Accessible Technology CA Department of Rehabilitation
6	Consumer	Primary Alternate	Vacant Vacant	
7	Consumer	Primary Alternate	Vinhcent Le Caroline Siegel-Sing	Greenlining
8	CBO	Primary Alternate	Cesar Motts Vacant	Southeast Community Development Corp.
9	CBO	Primary Alternate	Andre Chapple Vacant	Faith Church, African American Empowerment, National Diversity Coalition, Answer City Outreach
10	CBO	Primary Alternate	Vacant Vacant	
11	CPUC's Public Advocates Office	Primary Alternate	Christopher Bartulo Sharmila Selvalakshmirajeswara	Public Advocates Office Public Advocates Office

Meeting Minutes – ULTS-AC Meeting, September 19, 2023, 1:00 pm – 4:00 pm

Attendees: 6 primary members and 4 alternate present

Primary members: Chris Burke, Marcie Evans, David Avila, Kate Woodford, Vinhcent Le, Christopher Bartulo

Alternates: Alex Gudkov, Brian Winic, Caroline Siegel-Singh, Sharmila Selvalakshmirajeswara

Other Attendees: **Commissioner** Shiroma, Lisa Bass, Lisa Anthony, Robert Sansone, Rosa Sauer, Lalaine L. Semana, Cheryl Wynn, Sindy J. Yun, Rosa Sauer, Jim Graettinger, Danyel Cordoba, Rebecca Amisshah-McKinney, Rick DiLollo, Sydney Williams, Kellie Jones, Judy Holiday

Introduction: David Avila – Opening remarks

Welcome: Commissioner Genevieve Shiroma – Opening remarks

- Thank you to everyone for the 3rd quarterly meeting, we have a full agenda. We are looking at ideas on how to add LifeLine participants and get those numbers up. Lifeline is here for the long-term.

Approval of Minutes:

- Marcie Evans – Motion to approve

- Vinhcent Le - Second
- Motion approved by the committee members

Public Comments:

- No Comments

CPUC Communications Division (CD) Updates: Robert Sansone

LifeLine iFoster & ACP Pilots and Other Program Updates

See presentation #1 CPUC Commission Division Updates

- Foster youth is coming along.
- August report: There are 53,000 LifeLine subscribers taking advantage of ACP Pilot
- Sacramento State University's May 2022 LifeLine Program Assessment
- LifeLine Program Reach
 - Geocoding has been successfully implemented with Maximus to identify the entire geo population
 - Also doing outreach and beginning partnerships with various State agencies
- Program Operations and Implementation
 - Greatly expanded text messaging and pre-recorded calls
- Customer Experience
 - Expanded our acceptance of documentation to begin accepting CDCR which is mainly LA County's correctional facilities parolee IDs as an acceptable form of identification for those parolees coming out of jail that need a phone.
 - Re-designed all our forms and print communications to improve accessibility.
 - Announced a new customer portal.
- Questions/Comments:
 - Vinhcent Le: How many providers are there on the Lifeline ACP pilot?
 - Robert Sansone: There are two - SafeLink and Telrite
 - David Avila: Is there another wave of enhancements that will be released coming from the recommendations by Sacramento State?
 - Robert Sansone: A big part of the recommendations was for staff to engage with marketing outreach, so staff internally is working with upper management on how to proceed with that initiative.

Benchmark Comparisons of CA LifeLine to Other States: Chris Burke

See presentations #2, 2b, 2c: National Lifeline Statistics

- USAC Lifeline Reimbursement Trends Over 10 Years
 - Over the last ten years, there has been a steady decrease in Lifeline.
- USAC Lifeline Reimbursement Rate Trend
 - There was a precipitous decline in 2016 when the third LifeLine modernization report and order came out, which changed eligibility criteria; the National Verifier was fully implemented in 2019 which would have caused more controls over the enrollments than before.
- Top 10 States/Territories by Lifeline Participation Rate

- Puerto Rico is much higher, perhaps due to the hurricanes and other recent issues they have had; California is 6th within the top ten, and all these states are higher than the nationwide average.
- Top 10 States/Territories by Lifeline Eligible Households
 - The column at the end shows which states have a Lifeline state discount. Georgia has the highest participation rate of the top ten, despite not having a state discount. California comes in as the highest with LifeLine participation by eligible households.
- Questions/Comments:
 - Robert Sansone: Do we know what the level of competition is for the various resellers for the wireless community in Georgia, Texas, and Ohio? Is it a competitive marketplace or is it focused on a couple of providers, and are they in an area of coverage where consumers are signing up, for example, Atlanta?
 - Chris Burke: In many states, some people are leaving the ETC market, probably more so the ILECs leaving the ETC market; I can look further into it.
 - David Avila: Let's identify the competitors within each state, so we can see how much they are being paid out from USAC, that will give us an indication of how many ETCs are in that state and see if competition is a factor to drive the growth of the program.
 - Jim Graettinger: As Chris identified, Puerto Rico has gone through a series of hurricanes, California has also gone through a series of wildfires and mudslides. Is there Lifeline information provided through emergency campaigns such as the Red Cross or SNAP when they are connecting with those impacted, to see if that is why there is increased participation?
 - David Avila: Your point is well taken; we will look into that.
 - Vanessa Garcia: The programs being run in these states that have state support, are they being run by a separate TPA or through the National Verifier TPA?
 - Chris Burke: California and Texas are, Michigan and New York are not.
 - Commissioner Shiroma: California (CA) has a statute that states we ultimately must have a system that does not require a social security number. The National Verifier is Federal and heavily relies on social security numbers. CA is looking at the program that has the maximum breadth of accessibility to people that are in those poverty levels, and then there is the CA program. How do we have an effective CA program that still garners Federal funds, augmented by CA funds, and then there are CA only circumstances. We will be having a roundtable discussion about Social Security numbers, so our efforts continue. Also, CalFresh is connected to Maximus' database so the next step is to see if Medical/Medicaid can be connected in.

Fiscal Report: Lalaine Semana

See attachment #3 Fiscal Report

- Prior fiscal year for period ending June 30, 2023
 - Total Revenue: \$296,171,768
 - Total Appropriation: \$530,638,330
 - Total Expenditures: \$209,933,182
 - Remaining/Available Appropriation: \$324,822,122
 - Total Available Cash as of June 30, 2023: \$457,301,543
- Current fiscal year for period ending July 31, 2023

- Total Revenue: \$17,374,610
- Total Appropriation: \$718,322,194
- Total Expenditure: (\$15,313,165)
- Remaining/Available Appropriation: \$709,939,223
- Total Available Cash as of July 31, 2023: \$454,812,230
- Questions/Comments:

CAB Consumer Contact Statistics Report: Rosa Sauer

See presentation #4 CAB LifeLine Contacts Quarterly Report

- Consumer Affairs Branch LifeLine Overview
 - CAB has dedicated specialists and consumer affairs specialists to assist consumers with LifeLine-related issues:
 - Appealing LifeLine denials
 - Disputing various issues with LifeLine Service Provider
 - Requesting information on LifeLine application process
 - Resolving consumer questions or complaints with LifeLine application process regarding Rules/General Order 153; a lot of consumers have knowledge of the General Order
 - Resolving issues with wireless devices; it is a non-jurisdictional issue for us, however we do reach out to the Service Providers and see what it is that we can do for them.
- LifeLine Contacts Received by CAB: June 2023 – August 2023
- Top LifeLine Contact Categories Received by CAB: June 2023 – August 2023
- SB 28 is coming, where the internet will become jurisdictional for the CPUC.
- LifeLine Contacts Closed by CAB: June 2023 – August 2023
- LifeLine Contacts Received and Closed by CAB: 15-Month Trend
- Questions/Comments:
 - David: Does funding for the call center specialists come out of the LifeLine funds?
 - Rosa Sauer: CAB does not use any of the LifeLine funding for those resources.

3rd Party Administrator – Maximus Report: Jim Graettinger

See presentation #5 Maximus CA LifeLine

- Completed Initiatives
 - TPA introduced a standalone IEH household worksheet process for subscribers, which detached that from the renewal process.
 - The statistics show the number of Wireline is much lower than the Wireless number, however approvals for both are similar, and above 70%
 - All wireless Service Providers have transitioned to SPIA for new enrollment applications.
 - Changed SMS text reminders for renewals from exposed PINs to hyperlinks with embedded PINs and are sending out multiple messaging campaigns.
- Questions/Comments:
 - David Avila: Are you measuring these tactics to see what more can be done and how do we improve upon this? We in this forum are interested in hearing how we can improve the outcome with consumers.

- Jim Graettinger: Absolutely. We do not want too many changes at the same time because then it becomes difficult to determine what is having an impact. However, now that we are six months in, now is the time to look at these campaigns and see if there are changes to be made. We meet regularly with the CPUC team and CAB to look for areas for improvement.
- Improved the program experience for subscribers trying to transfer their LifeLine benefits.
- Delayed mailing renewal forms to save costs to the LifeLine Funds
- Changing days on text reminders to transition away from PINs.
- Adding electronic reminders for soft denial subscribers due to nonresponse
- TPA support of Service Providers for USAC's Payment Quality Assurance (PQA) program
 - The CPUC's FY23 PQA Lifeline Assessment results for the improper payment rate were less than 1%, which is very impressive and a great accomplishment for the Program as a whole.
- Upcoming Initiatives
 - California LifeLine Customer Portal, Phase I coming December 15th.
 - The Portal is an enhancement of the public website.
 - A PIN will no longer be required for applications, renewal forms or standalone, it will be replaced by an authentication code.
 - Customers will have more control.
- Program and Operations Reports
 - Program Participation – Active LifeLine Subscribers
 - Enrollment Eligibility Methods – By Qualifying Program
 - CalFresh is the largest qualifying program, and if we can get the database connection with Medi-Cal, being it is the second largest qualifier, that will practically cover the entire program.

Claims Status: Lisa Anthony

See presentation #6: Claims Processing Update

- June 2023 – Received all wireless and wireline claims for the month.
- July 2023 – Service Providers have until September 29th to submit July claims; 85% for wireless and 58% for wireline.
- August 2023 – Began receiving claims for August; Service Providers have 60 days to submit after each month end.
- Questions/Comments:
 - David Avila: Do you find that Service Providers comply with the 60 days or are you finding a challenge?
 - Lisa Anthony: For the most part they are submitting claims by the deadline, we have definitely seen an improvement.

USAC Update: David Avila

See presentation #7 Federal Lifeline and National Verifier Updates

- Lifeline and ACP Participation
 - ACP participation is on the rise, but there is an opportunity for greater awareness of the program.
 - 50% of consumers are still unaware of the ACP program.
 - The Program has exceeded 20 million household participation.

- Affordable Connectivity Program (ACP)
 - The initial funding of this program is projected to run out the 2nd quarter of 2024, however there is a lot of advocacy going on for ways to extend funding.
 - ACP enrollment rates have increased at a much greater rate than LifeLine.
 - ACP transparency is very important therefore the FCC has issued reporting, and the collection of data by the Service Providers is due in November.
- Alternative Verification Platform Issues
 - The FCC is requiring Service Providers to have all ACP subscribers approved through AVPs to have their eligibility re-confirmed by the National Verifier.
- The National Verifier service provider has greatly improved the enrollment experience.
 - SNAP and Medicaid help to establish Lifeline eligibility.
 - Improvements to the customer experience is vital to helping consumers start their enrollment process and enroll in the program.
- Lifeline and ACP National Verifier Database Connections

Break: 3:05 pm – 3:10 pm

Greenlining’s Outreach to Cities and CBOs for Digital Equity: Vinhcent Le & Caroline Siegel-Sing

See presentation #8 The Greenlining Institute

- Town Link Program
 - Worked with the city of Oakland to address the digital divide in the city.
- Our Model
 - Greenlining acted as the anchor and pass through organization to help recruit community-based organizations to deliver the message and help recruit, closing the digital divide.
- Impact
 - The program ran for about nine months and hosted 17 digital literacy classes.
- Our Findings
 - 42% of lower income households did not have internet access.
 - 60% did not know about ACP and Lifeline
 - Of consumers that were likely to qualify, only about half did subscribe to these programs.
- Best Practices
 - Two-way communication to reach communities that do not have digital access.
 - Providing funding for enrollment support
 - Finding organizations to do the work that have ties to cover populations.
- Capacity Building in California
 - Hoping to work with cities like Stockton and Fresno, to ensure that those cities are applying for these funds and are going to the communities that need it the most.
- Questions/Comments:
 - David Avila: What is the scope and reach of Greenlining?
 - Vinhcent Le: Our scope is all of California, but we are focusing more on the central valley. We are also working in cities like Stockton, San Diego, and Los Angeles on different types of programs, not just broadband but also other programs.
 - David Avila: What can this committee do to help drive more growth for the California Lifeline Program?
 - Vinhcent Le: CPUC will be involved in the digital equity plan that comes out hopefully next month, where California can get funding for programs that connect people with digital

literacy training. Also, ensuring that funding flows from California through these cities, to local organizations. The website design can also be a driver since we found that poor experience with either the service or enrollment process was a key reason that people who knew about the program did not enroll.

What the Center for Accessible Technology Does: Kate Woodford

See presentation #9 Center for Accessible Technology (CforAT)

- Who We Are
- The Policy Group
 - We have three departments: only eight people at CforAT.
- Does CforAT Support the Lifeline Program?
- How Does CforAT Support Lifeline at the CPUC?
- Why Does CforAT Support Participate at the ULTS-AC?
- Questions/Comments:
 - David Avila: Given the scope, are there any opportunities to get more participants enrolled in the program?
 - Kate Woodford: We do not have the resources at this time.

Annual Report: Marcie Evans

See presentation #10 ULTSAC Annual Report

- In advance of this meeting, a copy of the annual report was distributed amongst all committee members so that we can vote and submit it by the deadline.
- Questions/Comments:
 - Commissioner Shiroma: What is the recommendation in the report?
 - Marcie Evans: We added a component in there to look at urban versus rural, prioritizing improvements that have a greater impact, continuing to look at renewal and recertification process, pushing community outreach and marketing, the continuation of LifeLine only support system, synchronization of the Federal Lifeline with its potential successor, leveraging other public purpose programs, utilizing the Medicare and SNAP databases, and others that are very high level.

Motion to approve: David Avila

Second motion to approve: Vinhcent Le

Motion to vote: Annual Report unanimously voted in

CAS Working Group Report: Alex Gudkov & Linda Lassus

See presentation #11 Concurrent Application System (CAS)

- CAS is being designed to allow consumers to have one entry point to multiple discounts.
- PG&E is leading the efforts to release this RFP and is scheduled to be released mid-December.
- Phase I: Preparation for RFP
- Phase II: Assisting PG&E with creating this RFP.
- Phase III: RFP Implementation
- Phase IV: Assisting with deployment scheduled for 2024-2025
- Should see increase in LifeLine participation from that channel in 2025-2026

Administrative Committee Vacancies & New Nominations/Appointments:

See presentation #12 Open Committee Positions

- New Public Advocates Office Alternate Appointment introduction
 - Sharmila Selvalakshmirajeswara
 - Sharmila worked with the LifeLine team for almost two years and has that experience.
- **9 open positions**
 - Large ILEC – 1 Alternate
 - CLEC – 1 Alternate
 - Small ILEC – 1 Alternate
 - Consumer –1 Primary, 1 Alternate
 - CBO – 1 Primary, 3 Alternates
 - Public Advocates Office – 1 Alternate
- Questions/Comments:
 - David Avila: We will continue working over the next quarter to identify candidates to close these vacancies.

2023 Sub-Committees

- Committee Membership & Filling Committee Vacancies
- Acquisition Efforts
- Retention Efforts
- Questions/Comments:
 - David Avila: We are starting to assemble some working groups to help with the key areas identified in the Sacramento report and will be working through those areas over the next quarter.
 - Sindy J. Yun: The Governor passed SB 143 last week, that will allow administrative committees such as ULTS, to meet virtually for the remainder of this year.

Future Q4 Meeting Date: TBD

- Questions/Comments:
 - Commissioner Shiroma: Today is Lisa’s last day as ULTS meeting coordinator, she has other assignments in the LifeLine program. Thank you for your contributions to this committee and for your leadership!

Meeting adjourned: 3:58 p.m.