

# ULTS Interim Marketing Campaign Phase II

## *Mid-Year Campaign Report*



Submitted by

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## **Introduction**

The Universal Lifeline Telephone Service (ULTS) Interim Marketing Campaign (Phase II) is a joint effort combining the expertise of three marketing partners to reach a widely diverse audience of 11 different target populations. The campaign requires a multi-lingual, multi-modal approach in order to sufficiently address the issues intrinsic to gaining acceptance of the ULTS program to this varied audience

The first portion of the campaign has been completed successfully, both from the planning and implementation perspectives of the program. The marketing team has developed a mutually beneficial partnership with the Telecommunications Division Staff at the CPUC and is looking forward to carry out the Interim Marketing Campaign in the coming months.

## **Program Management**

The program management portion of the contract began with meetings to develop the policies and procedures; workplan and timelines; staffing; and reporting. Communications channels were established and the first phase of the Community Based Organization (CBO) campaign effort completed. Additionally, RHA had to search for a new subcontractor to provide the general market, Latino, African American, Russian and Armenian advertising and public relations component of the program due to a conflict of interest disclosed by the previous partner, Runyon, Saltzman and Einhorn. Panagraph, Inc. presented the qualifications and experience to provide the service, and a proposal with a new budget was presented to the Telecommunications Division for approval.

## ***Infrastructure Development***

The infrastructure of the program included the development of procedures and systems for data collection for reporting, training, invoicing, targeting and evaluation. These were continually refined as the program evolved.

RHA invested time, funds and staff hours outside of the program budget to create an intricate database system that would link together all aspects of the program. The following program functions were integrated into this database system:

- Targeting
- Training
- CBO Helpline
- Regional Coordinators
- Callbacks
- Quality Assurance
- Marketing Activities
- Accounting



Program management is able to track the success of the program while the CBOs upload their activity; Regional Coordinators monitor CBO progress; Public Relations events are posted; etc. This tool provides information to all components as needed.

In order for the three campaign elements (CBO Outreach, Advertising and Public Relations) to work harmoniously together, weekly conference calls and weekly status reports among the team were implemented. These communications allow the team an opportunity to update and discuss progress, concerns, workflow and recommendations.

### ***Marketing Oversight***

The new team comprised of RHA, Panagraph, Inc. and SAESHE met on April 24<sup>th</sup> and 25<sup>th</sup> to discuss the strategy for the advertising and public relations components of the program. A meeting was initially conducted with the CBO Resource Team to obtain their input about the overall campaign and to determine the elements important to them and their constituents. The marketing team went on to develop two options for the look and feel of the campaign, and presented to the CBO Resource Team for input. Focus group testing was also conducted on both options to obtain information on specific reactions from the Latino, African American and Asian communities. The creative and tactical elements were then revised using the information obtained, and the final campaign focus of “50% Off” was chosen and developed for CPUC approval. Final copy was developed and translated into Spanish, Cambodian, Chinese, Tagalog, Korean, Laotian, Vietnamese, Hmong, Russian and Armenian. Once final copy was approved, all collateral, television and radio spots, and newspaper ads were produced for placement in the approved multi-media plan.

As each aspect of the workplan for the advertising and public relations activities was developed and presented for approval, it was determined that some activities should be discontinued. One element in the advertising campaign - the Phone Cards for Seniors - was determined that it may not be appropriate to expend ratepayer funds in this manner and has therefore been discontinued. The budget for this activity was then utilized to develop ULTS phone/address books and magnets as promotional items. An additional benefit of this decision was that twice as many units were produced and can be distributed to all potential clients, and residual budget left over was applied to other areas.

The Special Events component was also revised after it was determined that the Campaign Launch Press Conference activity would not be as effective as this was not a new program being offered to consumers. The funds in this category were then shifted to enhance the media tour activity, the ULTS Day Events, and two Asian Community Events in Southern California.



## ***Operational Oversight***

Extensive coordination with the CPUC Telecommunications Division staff, advertising and public relations subcontractors, and RHA staff established standardized reporting mechanisms, timeline updates, invoicing, status reports and work plans. Approval timeframes were built into the timeline as it was revised. All collateral, advertising spots and copy, translations, media plans, public relations plans and activity work plans required CPUC approval. RHA submitted program materials to the appropriate CPUC staff for review, coordinated revisions to the materials when necessary, and followed up with subsequent approvals in order to ensure that the materials were relevant to the program and met CPUC guidelines for accuracy.

Program management worked with the Call Center Manager to create a unified request for information from the telecommunications carriers who provide ULTS service for entry into the database. Also, it was important to coordinate with the development of the Call Center Guidelines and procedures, particularly with regard to the marketing program data requirements. Program management collaborated with the Call Center Manager on the database design and data processing to ensure all functions worked in a seamless manner.

CBO Resource Team organization criteria, interviews and selection took place at the beginning of the campaign to ensure their input was received on the overall campaign. After the CBO Community Links application process and criteria were finalized, applications for CBO Community Links organizations were solicited. Once evaluation and scoring of the responses were completed, agreements were executed. The CBOs began training on September 8<sup>th</sup> and implemented their outreach for the program the following week.

Hiring for project management staff, regional coordinators and helpline took place as the staffing pattern required. All program staff was on board by June to ensure proper training in job duties by the time the marketing phase was kicked off.

## ***Training***

As RHA completed the hiring for the program management and CBO monitoring staff, rigorous training and orientation was conducted. Initial hiring training includes RHA policies and procedures, safety training as well as job duties and expectations. Program training included the overall program guidelines and background, information about the target populations, grassroots outreach, marketing strategies and program reporting specifically centered around the Online database.



In preparation for the training of the CBO Community Links, an outline was developed to identify all topics to be covered in the training sessions. From the outline, drafts of training materials were created and reviewed by program staff and matched to the outline. An agenda was created and documents organized to match the flow of the agenda. A ULTS Education-Assistance Form was created to serve as a collection tool for client data on those educated and assisted by the CBOs with calls to the Call Center. Training materials included topics such as program guidelines; the ULTS Online database; workshops and one-on-one educations; forms; outreach strategies; callbacks; and the roles and responsibilities of the CBOs and RHA Regional Coordinator staff. Materials were presented to the CPUC Telecommunications Division for review and approval. Trainings were conducted regionally in strategically located venues at the beginning of the CBO phase so that organization representatives could easily attend.

RHA Regional Coordinators provide initial and ongoing program training and technical assistance to their assigned Community Links. Assistance is provided during scheduled and unscheduled visits and when areas of need are identified. The ULTS Helpline staff is also trained to assist the CBOs with questions on program guidelines or procedures.

In addition, certain CBO Links who will act as spokespersons for PR opportunities will participate in media training conducted by Panagraph and SAESHE, with oversight by RHA. This activity will ensure that the spokespersons are knowledgeable about the issues surrounding ULTS and can successfully conduct interviews with a variety of media outlets. A CD recording of the session will be provided to the remaining CBO Links for benefit to their staff, as well as to prepare for impromptu PR opportunities that may arise within their communities.

### **Quality Assurance**

RHA currently has five Regional Coordinators who work directly with the CBO Community Links to assist them with questions, outreach strategies, procedural issues and forms. They particularly function to evaluate the workshops and one-on-one content being delivered to the clients. Additionally, Regional Coordinators will review back-up documentation to ensure that processes and files are in place. Site visit reports are produced for each visit and notations made for items to review and follow up.

Regional Coordinators also measure progress toward goals for each CBO. RHA established four benchmark periods and each CBO is required to achieve the benchmark goals at the end of each period to receive their benchmark bonus. If CBOs are in danger of not achieving the goals, the Regional Coordinators will work with them to design systems or other outreach methods to enhance their quality and production. This will ensure CBO success and overall program goal attainment.

The database system also provides a tool for reviewing the performance of the CBO Community Links. CBOs data enter their marketing and education activities and then provide the hard copy documentation for review. RHA staff reviews the documentation and either approve or deny verification of each entered activity. This ensures that errors or missing data are caught and the CBO is then provided additional training in areas that are deficient.



RHA will also provide quality assurance calls to a random sample of clients in order to find out about their experience with the CBOs, carrier and/or the Call Center. In this way we will determine if there are particular areas that require retraining or – as in the case with the carriers – require updated or further information to achieve enrollments within our transfer process.

### **Reporting**

RHA designed weekly status reports which link closely to the Monthly Status Report required with our invoicing. All invoiced activity is reported in the Monthly Status Report. Additionally, the timeline of activities is updated monthly and submitted with the Monthly Status Report to indicate activities that are started, ongoing or completed. This provides the CPUC Contract Manager with a monthly picture of the progress of the program.

RHA, Panagraph and SAESHE made a presentation to the Universal Lifeline Telephone Service Administrative Committee and telecommunications carriers on the overall campaign design, creative elements and advertising and public relations activities on August 19<sup>th</sup>. This presentation provided an overview of the entire campaign as it would roll out utilizing the mixed media, public relations activities and CBO outreach methods.

Marketing Reports are tabulated on a monthly basis. The first report provided information from September 8<sup>th</sup> (the beginning of the advertising campaign and the Call Center) to September 28<sup>th</sup>. Subsequent reports will show monthly activity in arrears so as to capture accurate cost information that cannot be gathered before the end of each calendar month. The marketing reports contain statistics on the number of estimated audience, number of respondents, and the number referred for service by target group, outreach effort and cost.

### **Accounting**

The accounting function in this program encompasses tracking of the budget reflected in Exhibit F; tracking of the subcontractor invoices and budgets; and tracking and payment of the CBO Outreach activities. Systems were set up early on for the gathering and processing of program costs. The CPUC provided their template for invoicing and for travel expense claims. RHA then provided this information to the subcontractors and CBO Outreach organizations to use in submitting their expenditures. In this way, forms are consistent and easily fed into the overall invoice for services performed.

As the program budget was initially developed two years prior to start up, revisions were required to Exhibit F to include a new subcontractor, to incorporate activity changes, and to fine tune of each activity. Some line items were adjusted to accommodate these changes; however, the overall program budget remained the same.



The program database provides CBO Community Link invoicing as each activity is verified by review of back-up documentation. Subcontractor activity is detailed in the submitted invoices. Program payables are processed at least once a month to ensure that all are paid in a timely manner. All RHA program labor and costs are summarized for each month on a spreadsheet, which shows monthly and year-to-date expenditures, and budget remaining in each category.

### ***Information Systems Management***

RHA invested its own funds and time in the development of the ULTS Program Database because we valued the ability for all program elements to be linked to information sharing. This online system will capture data for advertising, public relations, events and CBO outreach, and provide a system for RHA program staff to report their activities. Testing on the system began in July and training for all users began in August. Reports are pulled at least monthly by the Information Systems Manager to help program management track progress toward goals. The Information Systems Manager also designs new reports as required to provide more detailed reporting in specific areas.

Data is entered into the system from various sources, such as CBO Community Links, RHA Regional Coordinators, CBO Helpline, Call Center, Marketing and Accounting. All components have access to the data that directly affects their involvement in the Program; however, rights are assigned carefully to ensure the integrity of the database.





## **ULTS Helpline**

The ULTS Helpline was established within the first month of operating the program to assist with the implementation of the CBO Resource Team and the CBO Community Links Phases. The Helpline staff was the point of contact for the coordination of the CBO Community Links Application process. A database was created from various sources to include organizations that exhibited the characteristics of the criteria required for the outreach portion of the program. The Helpline performed maintenance of the database, and made calls to organizations to inform them about the program and to encourage their participation. A system was designed to catalog and distribute the applications. Calls to the Helpline during the application phase centered around specific questions on demographics, program guidelines, compensation and partnership opportunities.

Once the CBO Community Links applications were received and evaluated, an important role for the Helpline was to schedule and secure sites for the CBO Community Links training sessions held in September.

As the program evolves, the ULTS Helpline staff have answered callers' questions regarding procedures and policies; ULTS OnLine usage; media and marketing referrals; and collateral ordering, inventory and distribution. As training is completed, training evaluation forms are tabulated by the Helpline for analysis.



## **Community Based Organization Outreach**

The Community Based Organization Outreach portion of the ULTS Marketing program is designed in two tiers. The first tier, the CBO Resource Team, is comprised of twelve organizations with broad-based influences and existing networks within the target groups in Northern and Southern California. The second tier, the CBO Community Links, includes organizations that provide direct services to the target populations.

### ***CBO Resource Team***

The criteria used for selection of the Tier One CBO Resource Team are:

- Strong geographic presence on a regional or statewide basis
- Recognized for leadership abilities with constituents
- Strong affiliation to grassroots community organizations
- Priority of services based on ethnicity, culture or age
- Currently represents and/or serves one or more of the underserved targeted populations identified

The activities performed by the Tier One organizations include:

- Assistance with identifying CBOs that serve the target population
- Encouragement and promotion of participation by CBOs in the program
- Input to Panagraph and SAESHE for campaign development
- Assistance with presentations at community events, as well as Public Relations Activities
- Review and evaluation of promotional and marketing materials
- Assistance in maintaining effective linkages to the target populations

The CBO Resource Team consisted of the following twelve organizations:

- Economic and Social Opportunities, San Jose
- El Concilio, Burlingame
- Oakland Citizens Committee for Urban Renewal, Oakland
- County of Los Angeles Dept. of Community & Senior Citizens Services, L.A.
- Korean Health, Education, Information and Research Center, Los Angeles
- Los Angeles Urban League, Los Angeles
- Metropolitan Area Advisory Committee, National City
- Refugee Assistance Program, San Diego
- Congress of California Seniors, Sacramento
- La Cooperativa Campesina de California, Sacramento
- Accion Latina, San Francisco
- Union of Pan Asian Communities, San Diego



The purpose of the first meeting with the Resource Team was to introduce them to the Marketing Team and to obtain their input on campaign ideas, marketing strategies, barriers to marketing to their clientele, and concerns of their constituents. With this input, the marketing team developed the strategy and concepts for the campaign. A second meeting was convened to introduce the concepts and to gather ideas and views on how the strategies and campaign elements would affect their constituents. This phase provided invaluable information and enabled the team to complete the advertising, public relations and collateral development to meet the needs of the overall campaign with an emphasis on providing the CBO Community Links with the support needed to be successful in their outreach efforts.

### ***CBO Community Links***

The CBO Community Links are composed of organizations that provide services to the demographically targeted populations identified in the ULTS Interim Marketing Campaign. To date, 45 organizations have been selected according to the following criteria:

- Proven track record in outreach efforts
- Capabilities and resources to execute the ULTS grassroots outreach campaign
- Ethnic populations served, relative to established demographic targets
- Languages of the populations served, relative to established demographic targets
- Income and age of population served, relative to established demographic targets
- Links to other community based organizations for potential partnership opportunities

The selected CBO Community Links responded to the application in the following areas:

- Collaborations established
- Staffing, resources and technology capabilities
- Location where the work will be performed (in house, door to door, and community events)
- Methods to be used to educate and refer new ULTS customers
- Production schedule indicating how many customers will be served by the project
- Budget detail required to start-up the program.
- Total budget based on the number of people to be recruited or referred.

72 applications were received during the first phase and 10 were received for the second phase. The second round of applications was solicited in order to cover areas where no organization was awarded a contract. A team of seven evaluators reviewed and scored the responses based on target population, collaborative efforts, organizational structure, resources available, methodology, technology capability and proposed budget. Selection guidelines were provided to ensure that the target populations were served throughout the entire state.

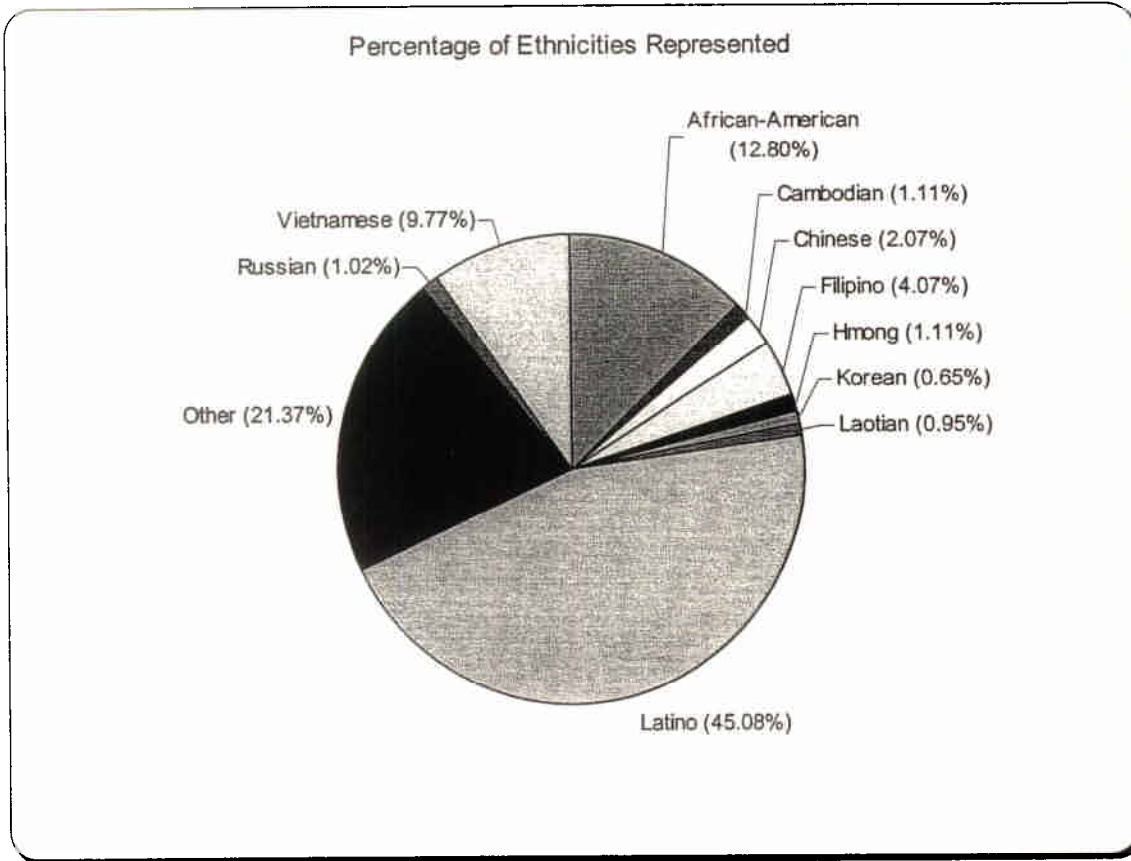


A third phase for areas still missing coverage by the CBO Community Links outreach is being conducted at this time. The 45 organizations selected thus far are:

- Alliance for African Assistance
- Alpha of San Diego
- Community Action Partnership of San Bernardino County
- California Human Development Corp.
- Catholic Charities Diocese of Fresno
- Central Valley Opportunity Center
- CHARO Community Development Corp.
- Commission on Human Concerns
- Community Action Board of Santa Cruz
- Community Action Partnership of Orange County
- Community Action Partnership Riverside County
- Community Catalysts of California
- Community Resource Project, Inc.
- Congress of California Seniors
- Desert Alliance for Community Empowerment
- Economic and Social Opportunities
- El Concilio
- Filipinos for Affirmative Action
- First Chance Y Chow, Inc.
- Foothill Unity Center
- Fresno County Economic Opportunity Commission
- Glenn County Human Resources Agency
- Home Start, Inc.
- Innovative Educational Systems
- Korean Health, Education, Information & Research Center
- Metropolitan Area Advisory Committee
- Mexican American Opportunity Foundation
- Migrant Education – Region 2
- Neighborhood House Association
- Oakland Citizens Committee for Urban Renewal
- People's Community Organization for Reform and Empowerment
- Plumas Crisis Intervention & Resource
- Proteus Incorporated
- Redwood Community Action Agency
- Sacramento Chinese Community Service Center
- Sacramento Urban League
- South Bay Community Services
- Southeast Asian Community Center
- St. Francis Medical Center
- Tenderloin Housing Clinic
- Union of Pan Asian Communities
- Veterans in Community Services, Inc.
- WISE Senior Services
- WRAP Family Services
- YWCA of San Gabriel (Intervale Senior Services)



These organizations represent the following target populations:



CBO Community Links have specific activities they will perform to deliver the outreach portion of this program. These activities include education workshops, one-on-one counseling, questionnaires to customers without phone service, community event educations and, ultimately, calls to the ULTS Call Center. All organizations receive specific payments for verified activity. The total goals for the combined workplans of those selected to date are:

<b>Activity</b>	<b>Goals</b>
Education workshop or one-on-one attendees	113,252
ULTS Questionnaires	12,954
Community Events Attendees	43,750
Calls to the Call Center for customers with phones	8,303
Calls to the Call Center for customers without phones	10,334



Through careful analysis of all of these factors, and relying the experience of the team in social marketing programs for a diverse clientele, the following primary drivers were outlined:

- Cost savings – This is a key element within the low-income demographic, where money is a constant daily stress in the lives of low-income families.
- Connectivity: Staying connected to friends, family, schools, jobs and health and emergency services is directly linked and a vital contributor to quality of life.
- Reliability: Landline phone service is reliable and available at all times.
- Confidentiality: Many members of ethnic groups are sometimes concerned with their level of privacy, and are reticent to trust government entities.
- Trust: Low-income families have had negative experiences in the past with some telecommunications carriers and are skeptical that a program such as ULTS can fulfill its promise. Taking this into consideration, the mode of information is very important.
- Ethnic customization: Images and messaging themes must be modified to address individual characteristics of certain ethnic groups within the collateral pieces.

After several cooperative creative sessions between Panagraph and SAESHE, two concepts were developed and presented to RHA. These included two different drivers that may affect whether a person may subscribe to landline phone service:

- 1.) “Emergency Services”: A mother relates a story of having just installed a phone in her home, thanks to Universal Lifeline Telephone Service. Soon after, she goes into early labor while home alone and has to phone an ambulance. She is able to call 911 and receive rapid response to her call for help. The headline reads “Home telephone service saved my baby’s life.” (For the Asian ads, the imagery was modified to a grandfather and granddaughter, to identify with the strong connection to elders in the Asian communities.)
- 2.) “Save 50%”: A young man is seen painting a large, red “50%”. Copy is driven by the cost savings message, with a headline that reads “Basic home telephone service that saves you 50%.” (The Asian ads were similar, but added certain cultural elements [calligraphy and models] with which the Asian market would more closely identify.)

Both concepts were modified as a result of the team creativity session, and then presented to the ULTS Resource Team in early June 2003. The Resource team made several suggestions for improvements, which were incorporated into the copy and imagery for focus group testing.

The first phase of the focus group testing occurred in late June 2003 over four sessions with Latino and African-American groups. The purpose of the testing was to validate initial assumptions gathered thus far; determine a global campaign theme that could be applied across a diverse target audience; test cultural sensitivity and relevance; and learn the existence and specificity of potential regional differences. The breakdown for the focus groups was as follows:

- Southern California: Latino and African-American
- Central California: Latino
- Bay Area: African-American





In order to ensure that CBO Community Links are successful in their outreach, training sessions were designed and conducted in strategic locations. All CBOs were trained in areas of program guidelines; ULTS Online database; workshop presentations and techniques; one-on-one educations; forms; outreach strategies; callbacks; and the roles and responsibilities of the CBOs and RHA Regional Coordinator staff.

RHA Regional Coordinators located in our offices throughout the state are assigned a group of CBO Community Links. Coordinators work closely with these organizations to train them on program processes; provide input and evaluation on specific activities; and assist in the design of outreach methods or provide technical assistance when needed. *Note: Phone and on-site visits are recorded, with a description of findings, items discussed, resolutions of any areas of concern, or success stories.*

Regional Coordinators have also developed a benchmark schedule for each CBO Community Link so that CBOs will know whether they are on track to reach their overall goals. There are four benchmark periods in the program and if goals are achieved, predetermined benchmark bonuses will be paid.





The second phase of the testing was done with various Asian groups in the LA area. These sessions were less formal than the above groups, as the primary test was for cultural relevance, sensitivity and imagery for the Asian market.

All focus group attendees met the criteria to be a ULTS subscriber, and groups were gender-balanced to provide for a cross-section of opinions. The concepts were also presented alternately (radio/ad or ad/radio for each group) to level any media preference biases that might have swayed the opinions of the respondents.

The results of the focus groups determined a clear preference for the 50% concept. While there was somewhat of an emotional draw to the emergency services ad, (particularly with the female respondents) many felt the 50% concept was more clear and compelling. It was also determined that the theme would be more universally accepted than the “mother and baby” or Emergency theme.

Modification guides were gathered for each ethnic group and incorporated for the final comps to be presented to the CPUC Telecommunications Development Staff. Groups were also gauged for media and information source preferences. Based on the feedback received from the ULTS Resource Team, the Focus Groups and the Telecommunications Division Staff, it was determined to move forward with the “50%” concept for collateral development.

### Collateral Materials

The collateral materials were developed from the initial ad concepts presented and approved by the TD Staff. Collateral was modified for cultural elements, models and copy to address the 11 different language groups of the campaign.

All copy and creative elements were compiled and submitted to TD Staff for review and approval. The materials developed were:

- Print Ads – for insertion in ethnic and mainstream publications
- Radio Spots – to run on ethnic and mainstream radio stations
- TV Spots – to run on ethnic TV stations
  - *Note:* This was made possible by a value added grant from Univision in exchange for a media buy, and by remaining budget from the original Phone Cards project.
- Program Brochure – to be used for CBO outreach and community events
- CBO Flyer – to be used for CBO outreach
- Slim Jim – to be used for CBO outreach and door-to-door canvassing activities
- CBO Customizable Ad – for insertion in organizational newsletters and media partner publications
- ULTS Banner – to be used for community events
- Promotional Items (Magnet Picture Frame and Telephone Address Book) – to be used for senior outreach and community events

*Note: These two projects were selected to replace the phone cards project after issues arose surrounding the non-competitive requirements of the campaign, as well as the overall cost of the project. Using that initial budget, it was possible to double the amount of promotional item units and also pay for a portion of the production of the Asian television spots.*



The approval process included initial review by the RHA Marketing Manager, Program Manager, Executive Administrator and various RHA staff representing several ethnic groups to verify translations for theme and consistency. Then the TD Staff reviewed the material, filtering all translations through various bi-lingual staff. Content, messaging and translations were reviewed and approved, with modifications as recommended. All collateral pieces went through a rigorous evaluation process and were submitted for final review in late July/early August 2003. Final approval was received by late August 2003.

The collateral was printed and distributed to CBOs in September 2003.

### Media Buy

Two media buy recommendations were made in June 2003 to the TD Staff and reviewed by the Public Affairs and Public Advisors Offices. For both campaigns, an aggressive, mixed media approach was recommended that would capitalize on the preferred information sources of each target audience. Media was recommended in mainstream as well as specific ethnic, in-language outlets that would maximize the saturation of the ULTS messages, and spur the response to the call to action. The campaign would utilize newspaper, radio and television to reach various segments of the target audiences.

Specific outlets were proposed based on the following criteria:

- Broadcast stations selected based on the most recent Arbitron radio/Nielsen television book
- Stations/newspapers selected on the ability to effectively reach the target market, both quantitatively and qualitatively
- Ability to incorporate diverse station formats to optimize reach to "different types" of listeners
- Minimum 70% reach; minimum 7x frequency (per region)

The first media buy recommendation was based on the original proposal submitted to the CPUC in March 2001. The second recommendation took present day circumstances into consideration, and was revised based on those circumstances, as well as on new opportunities that presented themselves to the campaign. Primarily the changes to the second recommendation were:

- Modification of the outlets chosen. Some outlets were simply no longer in business or had experienced format changes
- The addition of TV spots for Latinos
- The replacement of Jazz stations with "Mega" stations for African-Americans
- The addition of mainstream publications for African-Americans
- The addition of Asian TV



After careful deliberation and collaborative discussions with CPUC staff, Option #2 was selected as proposed and the buy was placed in August 2003. The first ads kicked off the campaign the week of September 8, 2003 and immediate results were realized. By 9:00 a.m. that morning, the call center had received 4 calls that were transferred to carriers. As of October 26, 2003, 3,699 callers responded to the advertising campaign by calling the ULTS Call Center.

Ongoing modifications and analyses continue to be made. A careful eye is being used to evaluate outlet performance, call generation and regional call trends based on the overall media mix. During the hiatus (beginning the week of November 17, 2003), this data will be compiled to make formal recommendations to modify the placements in the second phase of the campaign, scheduled to start back up the week of January 12, 2004. This will enable the media plan to be customized to the actual results of Phase I to maximize its effectiveness and support the other efforts of the campaign.

### ***Public Relations***

The Public Relations (PR) Program is the final of the three-pronged outreach effort. Public Relations is used to garner valuable third-party endorsement of a product or message. ULTS is no exception. Trust is a key factor to the target audiences' acceptance of ULTS as a viable service. Therefore the Public Relations efforts have been designed to combine grass roots outreach with mainstream and ethnic media editorials to add credibility to the ULTS messages.

PR collateral, such as press releases, a backgrounder, and frequently asked questions/answers were developed and submitted to the CPUC staff for approval. These collateral materials serve as tools for the overall effort. The components included in the ULTS PR Program have been outlined below.

#### Asian Yellow Pages

Asian communities access yellow pages for information on a variety of products and services. Media partnerships allowed various publications to publish information on ULTS and its benefits to several different Asian ethnicities.

#### Faith-Based Organization (FBO) Outreach

Religious organizations provide support, services and assistance to the target communities that ULTS seeks to serve. These organizations are often deeply involved in working to help their constituencies and the neighborhoods in which they are located. Equally important are their community relationships that are built with a degree of trust and credibility that is hard to find. In October 2003, higher levels of various religious organizations were contacted to educate them about ULTS and to offer collateral to be distributed to community-level FBOs. Education packets will be distributed in November 2003 to various community-level FBOs, along with follow-up and support from CBO Links.



### Media Tours

Media Tours afford different media outlets the opportunity to interview a ULTS spokesperson to learn about ULTS and give referral information for the outlets' audiences. Because the kick off press conference was cancelled, more concentration to this activity was made possible. This activity is designed to fill in the gap generated by the advertising hiatus in November and December. ULTS Resource Team Members and CBO Links will serve as spokespersons. Readers/listeners will be directed to the local CBO in their area for assistance with the enrollment process.

The first phase of the media tour will take place in mid-November 2003, with a second phase in December 2003. All spokespersons will undergo media training by the professional PR staffs of Panagraph and SAESHE, with oversight conducted by RHA.

### Ethnic Publication Articles

Publications, specifically smaller rural or ethnic publications, welcome articles that are ready to print with little necessary editing. Pre-developed articles are being produced and will be submitted to publications throughout the state, hitting close to every county in need. Specific attention was paid to those smaller counties not served by other mediums (advertising/CBO representation) where some need existed according to Census 2000 data. Again, most of the efforts will be concentrated during the advertising hiatus in November and December 2003.

### PSAs & Radio Spots

As of a couple of years ago, radio stations are no longer required by the FCC to air free public service announcements. As a result, the opportunity for PSAs is limited and requires aggressive negotiation for placement. Both Panagraph and SAESHE seek opportunities to work with media that can contribute and stimulate word of mouth communication to create awareness of the campaigns on which they work. These relationships have been leveraged for the ULTS Campaign.

PSAs were negotiated as part of the media buy with radio stations around the state. Live announcer scripts, at :10, :30 and :60 seconds, were also prepared for radio stations not providing public service time as part of the media buy. Every attempt has been made to encourage the PSA time to occur during the advertising hiatus.

### Senior Citizens Campaign

Senior associations provide vital services and programs to the aging population. 15-20 senior citizen associations serving a variety of ethnic make-ups within the targeted communities will be contacted. Associations will be selected both regionally and by the ethnicities they serve. Sites will be contacted to schedule on-site visits and collateral distribution opportunities during the media hiatus. The ULTS Marketing Team and local CBO links will work in partnership to staff the events and educate seniors about ULTS.



### Recent Immigrant Campaign

Similar to the Senior Citizens Campaign, English-language, adult and occupational schools that serve specific ethnic audiences within the targeted communities will be contacted. These outlets will be contacted and asked for assistance to disseminate ULTS information to their students.

### Special Events

- **Kick-Off Press Conference:** This launch activity was cancelled at the direction of the CPUC staff for various reasons. Existing budget for this activity was allotted to increase the efforts of the ULTS Day Events and the Media Tours.
- **ULTS Day Events:** This series of events, to take place in various regions across the state, is designed to create further awareness of ULTS by focusing on the CBO outreach effort. CBO Links will host various events in different regions of the state, and media will be solicited to cover the events. The activity will culminate with an event that will take place on the steps of the Capital in Sacramento, where plans are underway to have a particular day declared “ULTS Day” statewide. ULTS success stories will also be utilized to show, in a practical manner, how ULTS has made a difference in the lives of low-income families. Efforts to organize the events and coordinate with the Governor’s office began in September 2003, and are targeted to take place in March 2004.
- **Asian Community Events:** Because Asian media is limited, the possibilities to increase the efforts in the areas of Media Tours and ULTS Day were not possible. Therefore, SAESHE proposed an alternative, accepted by TD Staff, to participate in two large Asian Events in Southern California in September. Both events saw attendees of various Asian communities and had more than 100,000 attendees combined. During the events, collateral and promotional items were distributed, and direct education of ULTS was provided to visitors to the ULTS booths.



## Accomplishments

### *Statewide Outreach Effort*

In every county of the state where there was a documented need for home telephone phone service within the targeted communities (according to Census 2000 data) some type of outreach is being conducted. Because of the comprehensive media and PR programs, crossover to other counties occurs, increasing the reach to unintended, but eligible targets. In addition, response is being received from other ethnicities (such as Caucasian, African immigrants, Native Americans, etc.) due to the mixed media campaign. Therefore, eligible households, regardless of ethnicity, are being reached through this campaign.

### *Respondent and Referral Success*

In the first two months of the campaign, the ULTS Call Center has received tremendous response to the mixed media and CBO Outreach portions of the campaign. The following table identifies the number of respondents, the numbers referred and the information source that spurred them to call from the launch of the campaign (September 8, 2003) through the end of the last reporting period (October 26, 2003).

Source	Total Respondents	Total Referred
Media		
Newspapers	513	449
Radio	879	770
Television	793	735
CBO	293	272
Public Relations		
Asian Yellow Pages		
Faith-Based Outreach		
Senior Citizen Outreach		
Recent Immigrant Outreach		
Community Events (Non-CBO)	13	11
Other	451	245
<b>TOTAL</b>	<b>2,942</b>	<b>2,482</b>



Target Populations	Total Respondents	Total Referred
African American	392	347
Armenian	4	4
Cambodian	14	12
Caucasian	214	188
Chinese	297	277
Filipino	72	58
Hmong	56	46
Korean	284	257
Laotian	19	18
Latino	1,076	1,020
Russian	13	9
Vietnamese	147	120
Other or declined to say	354	126
<b>TOTAL</b>	<b>2,942</b>	<b>2,482</b>



## Issues and Recommendations

### ***Issue: Responses to RFP***

The response to the Grant Application was less than anticipated, and grants submitted often indicated that CBO respondents lacked a basic understanding of performance-based grants. It was determined that Community Based Organizations usually responded to grants that awarded lump sums upon approval of the proposed activity. Many organizations had the capabilities and resources to execute the ULTS grassroots outreach campaign and serve the target populations; however, their responses did not clearly propose the methods, activities and budget detail that RHA required in order to select the best organizations to fulfill the program goals and objectives.

#### ***Recommendation: Educate to the format and incentives***

RHA recalculated the activity proposed by each CBO selected to participate to accommodate the needs of the target populations by region and counties as indicated by the 2000 census and GIS mapping. Organizations selected to respond were contacted and educated to the need in their area. The system of bonus payments was explained as additional reimbursement upon reaching program goals. With increased understanding of need in their respective areas served and financial incentives, participation was confirmed, new goals were defined, and budgets set.

In counties where insufficient response was received, calls were made to solicit response based on increased understanding of the performance-based model to facilitate additional response to Phase II of the grant application distribution.

### ***Issue: Serve Target Populations Statewide-Rural & Urban***

It was a challenge to achieve a balance of service to the rural and urban areas of California's target population with only 50 CBO Community Links. The GIS mapping and the Census 2000 data defined the locations of the eligible target populations. In some circumstances, CBOs that serve rural areas were not available or did not apply, even after phone calls were made to solicit their response.

#### ***Recommendation: Cover Rural Areas with Public Relations and Media***

Rural areas receive information about ULTS through Public Relations efforts and some Media crossover from major metropolitan areas where reach occurs. All but two counties will be reached by CBO representation, media crossover, or PR efforts. These remaining two counties contain less than .05% of the general eligible population.





### ***Issue: Approval Process***

Much has been learned in working with the Telecommunications Division and the complex set of challenges its staff faces. Staff members have multiple responsibilities, which makes a timely approval process difficult for them. A multi-lingual campaign requires many different sets of eyes to review each translation, thus placing an extra workload on TD staff. Though the most significant items of the campaign have already been reviewed and approved, the following recommendations are made with future campaigns in mind:

#### ***Recommendation: Approval Process Evaluation and Revision:***

A longer review period must be allocated for CPUC review. Several divisions must review and approve the material. Timelines should be built with this knowledge in mind. In addition, a calendar should be developed and published to all parties that will participate in the review process so that they may schedule time for review and corrections. This way, staff can anticipate when material will be presented and effectively time-manage the project into their workload.



## Findings

### ***Geographical Information System (GIS) Mapping***

GIS data was utilized to prepare maps to determine the need for ULTS in all California counties and to aid in the selection of CBO Community Links with the ability to reach the greatest number of people. This determination was based on information gathered in Census 2000, identifying households without phone service and low-income populations. Using GIS data broken out by county and zip code, RHA was able to select CBO Community Links that best serve the target populations in the regions with the greatest density of households eligible for ULTS with and without phone service.

### ***Focus Groups***

In addition to validating initial assumptions and determining preferences for ad concepts, additional findings from the focus groups were instrumental in adapting a media strategy to better reach certain target populations. The focus group results were used to further refine the methods of outreach and the collateral pieces to be developed.

For example, results of the focus groups showed that African-American members of the low-income demographic typically do not read the ethnic publications. While the readership of African-American newspapers as an ethnic group is significant, income levels of the readership tend to be higher than the ULTS eligibility level. Therefore, it was determined that a combination of ethnic and mainstream media to reach the low-income demographic group of African-Americans would be more effective than using only ethnic publications.

It was also determined that television is the primary source of information for Latinos and some Asian groups. Therefore, television advertisement was chosen as an additional medium for the media buy.

### ***Responses from Non Targeted Populations***

Even though specific ethnicities were targeted for this campaign, a significant response has been received from populations outside of these target groups. These responses are determined from voluntary identification in the ethnic categories such as Caucasian, Other, Other Asian and Native American. This response is the result of different ethnicities responding to English language African-American ads placed in mainstream media outlets, and also by populations not specifically targeted by the marketing campaign but served by selected CBO Community Links.



### ***ULTS Online Goal Tracking***

Initial response to the ULTS Online application is favorable. Community Link Organizations have stated that the ability to follow progress in real time allows them to prioritize their activities to focus on education and outreach. The time they would have dedicated to paper processing and reporting is minimized freeing them to focus on goals.