

**Orange and Rockland Utilities, Inc.  
OUTREACH AND EDUCATION PLAN  
2016**

Submitted by Maria Pollard, O&R Corporate Communications,  
on Sept. 30, 2016

# Orange and Rockland Utilities, Inc.

## OUTREACH AND EDUCATION PLAN 2016

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**Section 1  
Utility Information**

# UTILITY OUTREACH & EDUCATION AND COMPANY OFFICIALS

Dates Covered by Plan: From: January 1, 2016 To: December 31, 2016

- Contact information for Outreach and Education (O&E) Liaison to Office of Consumer Services (OCS) Staff:

Name: Maria Pollard  
Title: Manager – Corporate Communications  
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Email: pollardm@oru.com

Telephone No. (845) 577-2472 Fax No. (845) 577-6989

- Contact information for Senior Manager/Officer in charge of Outreach and Education:

Name: Cecille Jones  
Title: Section Manager – Corporate Communications  
Mailing Address: O&R, 4<sup>th</sup> Floor, One Blue Hill Plaza, Pearl River, NY 10965  
Email: jonesec@oru.com

Telephone No. (845) 577-2409 Fax No. (845) 577-6989

- Contact information for the Director of Outreach and Education:

Name: N/A  
Title:  
Mailing Address:  
Email:

Telephone No. ( ) - Fax No. ( ) -

- Name and Title of President or Chief Executive Officer:

Name: Timothy P. Cawley  
Title: President and CEO

# TERRITORY PROFILES

Please provide the following data:

Total number of residential accounts:

- Number of electric: 197,615
- Number of natural gas: 121,860
- Estimated or known total population in the service territory: 582,000  
Please identify the source of this statistic: 2014 Census Data @75%
- Names of counties served in whole or in part: Rockland and parts of Orange and Sullivan counties
- Total number of customers who participate in online billing: 32,688
- Total number of customers estimated who use e-mail for utility information and alerts: 103,000  
Total number of customers estimated who use mobile applications to manage their account: 28,761
- Total number of customers estimated who use mobile applications to obtain educational information, etc.: There were 189,089 mobile logins in 2015

## Special Needs Customers

- Total number of accounts coded 62 or over: N/A
- Total number of accounts coded Elderly/Blind/Disabled: 21,211
- Total number of customers known to be on life support equipment: 752
- Estimated number of low income customers and/or eligible for the Home Energy Assistance Program (HEAP): 12,584
- Estimated number of customers receiving HEAP during the last heating season: 13,830
  - regular: 11,470
  - emergency grants: 2,360
- Total number of customers receiving bills and brochures in Braille: 6
- Total number of customers receiving large-print bills: 836

### Customers with Limited English Proficiency (LEP)

- Languages other than English spoken in the service territory: Around 6 % of our population speaks Spanish. This is the highest percentage we have in our service territory.
- Please identify the source of this information: The American Community Survey of the US Census Bureau for public awareness.

### How does the utility identify special needs and LEP customers?

Outreach efforts such as language blocks and Spanish literature and advertisements encourage customers to call us for help in communicating with us. We have Spanish-speaking representatives in our Call Center. We also have access to a language translation service which allows us to use interpreters and conduct business with the customer through a three-way phone line. Our field personnel can also help assess special needs and language barriers and refer them to our call center.

### How does the utility encourage these customers to identify themselves?

We reach out via advertisements, brochures and bill inserts with language blocks. Our gas and electric safety materials are produced in Spanish.

### Do Customer Service Representatives discuss Special Needs Programs with customers who call to apply for service?

Yes. At the time customer's call to connect service, the Customer Service Representative asks them questions to determine if they fit the Elderly, Blind and Disabled criteria.

Note: Specific outreach programs targeted to these customers should be discussed in Section 2: Outreach and Education Topics, under the Special Needs page.

# BUDGET INFORMATION

## Estimated Outreach & Education Budget for January – December 2016:

**Electric: Total..... \$231,000**

### Breakdown by Categories

**Energy Efficiency..... \$64,200**

**Customer Service ..... \$77,900**

**Seasonal Campaigns..... \$58,800 (winter portion: \$44,110)**

**General..... \$30,100**

**Gas: Total..... \$229,000**

### Breakdown by Categories

**Energy Efficiency..... \$30,700**

**Customer Service ..... \$49,500**

**Seasonal Campaigns..... \$143,000 (winter portion: \$107,250)**

**General..... \$5,800**

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## Actual Budget for Outreach & Education for January – December 2015:

**Electric: Total..... \$237,200**

### Breakdown by Categories

**Energy Efficiency..... \$33,600**

**Customer Service ..... \$84,300**

**Seasonal Campaigns..... \$93,700 (winter portion: \$32,780)**

**General..... \$25,600**

**Gas: Total..... \$152,600**

### Breakdown by Categories

**Energy Efficiency..... \$25,200**

**Customer Service ..... \$57,100**

**Seasonal Campaigns..... \$60,900 (winter portion: \$57,850)**

**General..... \$9,400**

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**Section 2**

**Mandated Outreach and Education**



# OUTREACH & EDUCATION REQUIRED BY COMMISSION ORDER – (PART I)

Various Commission Orders have included specific Outreach & Education requirements. Please complete the form in Part II of this section for each case that included requirements for O&E, and for which the reporting time is still active. Similarly, we request that all Steam Corporations indicate the last time an O&E report was filed with the Commission and to which office it was sent.

**PLEASE FILL OUT:**

We have 0 number of Cases at this time and have completed a form for each active case.

# OUTREACH & EDUCATION REQUIRED BY COMMISSION ORDER (PART II)

There are zero cases to report.

## Case No.

Required by Order, Joint Petition, Settlement, Other:

Date the Order was Issued and Effective:

Summary of O&E requirements:

Intervals for which the O&E Report/s are Required to be Submitted (e.g., quarterly annually):

Confirm that past reports have been properly submitted: It is important to note that the reports must be sent to the Secretary's office. Simultaneously you may send a copy to Michael Corso, Director of the Office of Consumer Services.

Please indicate to which office your O&E Reports were submitted and specify the date/s:

- |  |       |
|--|-------|
| <input type="checkbox"/> Secretary's Office          | Date: |
| <input type="checkbox"/> Office of Consumer Services | Date: |
| <input type="checkbox"/> Other: _____                | Date: |
| (Name of DPS contact person)                         |       |

Date Reporting May Cease:

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**Section 3**

**Global Outreach and Education Tools**

# **2016 Outreach & Education Plan with 2015 Results**

## **WEBSITE, EMAIL, SOCIAL MEDIA MOBILE APPLICATIONS**

Please describe how the utility uses its Website, Email, Social Media, and Mobile Applications as part of its overall O&E plan. Note: use of these tools for specific topics (e.g. safety) should be described on the page for that program.

### **New/Continuing Program:**

The Company uses its website, email blasts, social media (including Facebook, Twitter and YouTube, mobile website and mobile app to provide customers with various ways of receiving information and communicating with the Company. The Company promotes different programs and services from the home page of its Website and also drives customers to content on the Website through other media (i.e., print ads, digital ads, radio ads, and through the Company publications and bill inserts, emails and social media). The Company sends out email blasts on a monthly basis to keep customers informed on timely information, posts on its social media pages at least once a week during blue sky days and monitors the conversation daily.

### **2015 Results, Evaluation and Feedback:**

- We sent 31 email blasts to our customers in 2015. Our average open rate was 21.1%.
- Email blasts went out monthly and, with the assistance of our vendor Zeta Interactive, the addresses were cleaned up and authenticated.
- We published 176 posts on Facebook. Our likes increased from 3,445 to 5,409 in 2015.
- We posted 140 tweets on Twitter. Our followers increased from 2,233 to 2,700 in 2015.
- We conducted a targeted digital campaign on Facebook to increase awareness of gas safety featuring a video in English and Spanish. We reached 144,652 Facebook users, there were a total of 376,160 views of the video, the video was shared 283 times, and the campaign resulted in 432 new likes to our Facebook page.
- Implemented a Gas Leak Map on oru.com website to show locations of reported outdoor gas leaks in our NY service territory. This map was developed in-house.

### **Goals for 2016:**

We plan to continue our current methods to reach customers through various communications platforms and, in addition:

- Promote ORUConnect on our YouTube channel to feature our new videos

- Add My Account features to our mobile App including make a payment, enroll in budget billing, enroll in eBill, review past bills, and review account summary.

### **How Priority Was Set:**

Statistics and research illustrating the trend toward increased use of cell phones and electronic media encouraged the Company to make this another viable method for reaching our customers. The Company strives to make it as convenient as possible for customers to do business with us. Part of that goal is to offer a variety of communication platforms.

### **Description of 2016 Program:**

O&R plans to continue offering all customers convenient options to do business with us. Our outreach efforts will emphasize that we understand customer expectations and their need to do business with us 24/7 using various technological platforms such as through our [oru.com](http://oru.com) Website, our mobile Website, mobile app and texting – all of which allow us to be conveniently accessible to our customers.

The O&R Mobile App was enhanced to offer a better customer experience with the following:

- My Account – View and pay bills, enroll in Budget Billing and eBill programs
- Latest News feed – Latest O&R press releases can be accessed

### **Measures to Evaluate the 2016 Program:**

Our goal is to achieve increased use of our mobile Website, mobile App and texting.

### **Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Advertising
- Bill Inserts
- Email
- Social media

Social media titles for Facebook, Twitter and YouTube is ORUConnect.

# 2016 Outreach & Education Plan with 2015 Results

## EVENTS (HOME SHOW)

Describe how the utility identifies and participates in public events. Distinguish between utility-sponsored and community sponsored events.

### **New/Continuing Program:**

O&R sponsors and participates in two Home Shows annually – one in Rockland County and one in Orange County. The venue provides customers with an opportunity to engage with Company representatives face-to-face and one-on-one about energy efficiency, our new online store and Bring Your Own Thermostat programs, electric and gas safety, energy choice, gas conversions, tree trimming, new construction, storm restoration, and any other topic the customer chooses to discuss.

- Current Home Show themes include advertising logo “EVERYTHING MATTERS” Booth includes hand-out materials and the presence of experts offering assistance to customers regarding our online store, storm preparation and restoration, Outage Map, texting options, energy-efficiency rebates and incentives, energy-saving tips, gas expansion, vegetation management and safety.
- A Customer Service Supervisor is available at the booth to address questions and concerns about a customer’s account or bill. The Customer Service Supervisor has computer access to customers’ accounts and can address specific questions about a customer’s bill or account.

### **2014 Results, Evaluation and Feedback:**

Results are based on anecdotes from customers and feedback from employees who staff the booth. Overall, customers had a positive impression of O&R. They were interested in our new energy efficiency products and online store, natural gas expansion and demand response programs.

### **How Priority Was Set:**

The Home Shows in Orange and Rockland counties are the single, largest, well-known and most established annual events that are attended by thousands of our customers. The Company participates in the Home Shows because it is a key venue for customers to approach us. It provides an opportunity for them to talk to us about how they can save energy and money on their energy bills, what programs and incentives are offered to encourage them to live more energy-efficiently, and how they can do business with us.

**Description of 2016 Program:**

Our participation in the Home Shows is targeted to homeowners. The shows offer the Company a unique opportunity to engage in discussions about saving energy and money. This venue is a win-win for the customers and the Company because we both learn from one another. Customers receive answers to their concerns and questions. And the Company gains valuable feedback from the nature of the questions our customers are asking. This year we redesigned our booth with café seating so customers can sit down with our experts and have a quality conversation.

**Results for 2016:**

In order to encourage customers to come to our booth, the Company offers free admission to the Home Shows in Rockland and Orange counties. We mail the tickets as bill inserts and we also advertise and send e-mail blasts on how to download the tickets if customers missed them in their bill. Over 55% of Home Show attendees used the O&R insert for free admission in Rockland and over 45% in Orange County. We plan to offer free tickets and participate again in the 2017 Home Shows.

**Methods of distribution:**

- Free ticket/bill insert
- Email blasts

# **.2016 Outreach & Education Plan with 2015 Results**

## **GENERAL ENERGY-EFFICIENCY EVENTS**

Describe how the utility identifies and participates in public events. Distinguish between utility-sponsored and community-sponsored events.

### **New/Continuing Program:**

Each year, O&R historically attends a number of annual community events that are “headliners” and popular among our customers or have a niche-interest, such as the Small Business EXPO that provides a venue for local businesses. We also attend new events that may attract target audiences. The Customer Energy Services department evaluates the effectiveness of the event based on attendance and leads for their programs. Events are identified through invitations, recommendations and proactive, topical searches for relevant energy-related opportunities.

### **2015 Results, Evaluation and Feedback:**

In 2015, O&R participated in more than 35 events throughout its New York service territory, as well as sponsored some of these events. Following each event, consideration is given to how much the audience benefited from O&R’s attendance, and how much the Company benefited in terms of outreach and education. After evaluating an event in terms of number of people attending the event and showing interest in our booth, the Company considers whether or not to attend a specific event again the following year.

### **Goals for 2016:**

The Company plans to attend more education and outreach events in 2016 than it did in 2015, and will continue to seek out promising events with our target audiences.

### **How Priority Was Set:**

Events are prioritized based upon how much O&R’s attendance can benefit the projected audience, and how much outreach and education opportunity is predicted.

### **Description of 2016 Program:**

In 2016, O&R plans to participate regularly in a number of scheduled annual events, as well as new outreach and education opportunities that arise.



**Measures to Evaluate the 2016 Program:**

Following annual and newly attended events, O&R will take into consideration the impact its attendance had on each event's audience, and how much of an outreach and education opportunity each event presented for the Company.

## 2016 Outreach & Education Plan with 2015 Results

### UTILITY OUTREACH EVENT SCHEDULE

In an effort to evaluate the previous plan year, please provide a schedule of events attended during 2015. If events are already scheduled for 2016, please include those on a separate sheet.

DATE	EVENT	LOCATION (CITY)
Jan '15	Home Depot Expo at the Middletown Home Depot	Middletown
Feb '15	Suburban Home Show at Rockland Community College	Suffern
Mar '15	Dairy and Livestock Day and Trade Show	Pine Bush
Mar '15	Orange County Home Show at SUNY Orange	Middletown
Mar '15	Rockland Business Association Luncheon	Suffern
Mar '15	Rockland Business Association Business Marketplace	West Nyack
Apr '15	Mid-Hudson 3D Printing Forum	West Haverstraw
Apr '15	Community Connection & Business Expo	Central Valley
Apr '15	Merchant Meeting at Palisades Mall	West Nyack
Apr '15	Woodbury Community Association	Monroe
Jun '15	Wyckoff Day	Wyckoff
Jun '15	Home Depot Expo at the Middletown Home Depot	Middletown
Jun '15	Rockland Environment Day	Hillburn
Jun '15	Liberty Elementary School Science Fair	Valley Cottage
Jun '15	Spring Valley Community Resource Day	Spring Valley
Jul '15	Leadership Orange Presentation	Montgomery
Jul '15	Tri-State Chamber's Annual Arts Walk	Port Jervis
Jul '15	Woodbury Chamber of Commerce Presentation	Port Jervis
Aug '15	National Night Out Against Crime	Port Jervis
Aug '15	WMBE Opportunities Expo	White Plains
Aug '15	Middletown Community Health Fair	Middletown
Aug '15	Leadership Orange Presentation	New Windsor
Aug '15	Run 4 Downtown	Middletown
Aug '15	Goldkap Premier Business Networking Event	Nyack
Aug '15	Annual Senior Fair	Suffern
Sep '15	1 <sup>st</sup> Annual Hudson Valley Fiesta Latina	Monroe
Sep '15	Orange County Chamber Expo	New Windsor
Sep '15	Home Depot Expo at the Middletown Home Depot	Middletown
Sep '15	Orange County Senior Games	Montgomery
Oct '15	Orangetown Police Department Open House	Orangeburg
Oct '15	Warwick Applefest	Warwick
Oct '15	Home Depot Safety Day	Middletown
Nov '15	Health Fair and Holiday Bazaar	Spring Valley
Nov '15	Girl Scout Troop Meeting Presentation	Valley Cottage

Dec '15	Orange Partnership Gala	New Windsor
Dec '15	Goldkap Laugh and Learn	Nyack
<b>DATES 2016</b>	<b>EVENT</b>	<b>LOCATION (CITY)</b>
Feb 19-21, '16	Suburban Home Show at Rockland Community College	Suffern
Mar 6, '16	REACH Foundation STEAM Expo	Suffern
Mar 9, '16	Dairy/Livestock Day & Trade Show	Pine Bush
Mar 18-20, '16	Orange County Home Show at SUNY Orange	Middletown
Apr 2, '16	Home Depot Expo at the Middletown Home Depot	Middletown
Apr 3, '16	Community Connection Expo	Central Valley
Apr 13, '16	Goldkap Premier Business Networking Event	Sparkill
May 4, '16	Palisades Institute Forum on Success Networking Event	Orangetown
May 10, '16	Rockland Business Association Presentation to the Green Council	West Nyack
May 25-26, '16	Low Income Forum on Energy (LIFE) Conference	Albany
Jun 7, '16	Liberty Elementary School Science Fair	Valley Cottage
Jun 8, '16	Rockland Business Association Morning Mingle	Nanuet
Jun 14, '16	Rockland Business Association Presentation to the Green Council	West Nyack
Jun 25-26, '16	Rockland-Bergen Rock Festival	Tappan
Jul 9, '16	Home Depot Expo at the Middletown Home Depot	Middletown
Jul 14, '16	Orange County Chamber of Commerce Membership Breakfast	Middletown
Aug 2, '16	Port Jervis Night Out Against Crime	Port Jervis
Aug 6, '16	4 <sup>th</sup> Annual Health Fair	Middletown
Aug 7, '16	18 <sup>th</sup> Annual Arts Walk & Summer Street Fair	Port Jervis
Aug 25, '16	Goldkap Premier Networking Event	Suffern
Sep 10, '16	2 <sup>nd</sup> Annual Hudson Valley Fiesta Latina	Monroe
Sep 18, '16	Orange County Senior Games	Montgomery
Sep 25, '16	Congers-Valley Cottage Rotary 10 <sup>th</sup> Annual Italian Festival	Congers
Oct 1, '16	Green Meadow Waldorf School Fall Fair	Chestnut Ridge
Oct 2, '16	Warwick Applefest	Warwick
Oct 15, '16	2 <sup>nd</sup> Annual Orangetown Day	Orangeburg

# **2016 Outreach & Education Plan with 2015 Results**

## **CUSTOMER ASSISTANCE LINES/CALL CENTER**

### **New/Continuing Program:**

The Customer Assistance department provides important information to our customers through our telephone lines utilizing our “On-Hold” messages. These messages include topics relating to Public Safety in the event there are downed wires during a storm. On blue sky days, the messages are less specific and range from billing and payment options to gas and electric safety and payment assistance programs.

Our Life Support Equipment customers are provided with a confidential number for quick access to report a power outage. They are also given advanced notification of any scheduled outages. Additionally, a courtesy call is placed prior to a potentially damaging storm or other event that may result in service interruption.

The Customer Assistance department also places upfront messages about large outages or other system emergencies on the IVR.

### **2015 Results (evaluation and feedback):**

The Customer Assistance department has not received customer feedback on these messages.

### **Goals for 2015:**

Our LSE program offers peace of mind and safety for those on qualified life support equipment. We want people to take advantage of the program and also be aware of other safety measures. The Customer Assistance department will continue to provide these important messages throughout 2016.

### **How Priority Was Set:**

Based on inquiries from customers, our Customer Service department has determined that Public Safety, Payment options and Power Quality and Reliability rank high on the list of important topics for customers.

### **Description of 2016 Program:**

The 2015 Customer Assistance program will remain the same. We will continue to conduct our annual LSE mailing in the Fall of 2016.

**Measures to Evaluate the 2016 Program:**

The Customer Assistance department reviews these messages to ensure they have the most updated information.

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**Section 4  
Outreach and Education Topics**

# **2015 Outreach & Education Plan with 2014 Results**

## **CUSTOMER RIGHTS AND RESPONSIBILITIES**

### **New/Continuing Program:**

Our Rights and Responsibilities outreach effort is a continuing program.

### **2015 Results, Evaluation and Feedback:**

In 2015, residential customers were sent notices of their rights and responsibilities (R&R) as bill inserts in July, and commercial customers in September. Additionally, the rights and responsibilities brochures are programmed for insertion in the first bill received by new customers.

### **Goals for 2016:**

Orange & Rockland will continue to raise awareness about customer rights and responsibilities through the R&R brochures, which are sent to new customers and distributed annually to all customers of record. In addition, the R&R brochure is available 24/7 on the Company website.

### **How Priority Was Set:**

The Company's priority regarding notices of customer rights and responsibilities was set in accordance with the New York State Public Service Commission Title 16, the Home Energy Fair Practices Act, and the Energy Consumer Protection Act.

### **Description of 2016 Program:**

Orange & Rockland provides the Residential and Commercial R&R brochures to all customers as a guide to information about the Company and special protections afforded to customers, as well as their responsibilities as a customer of O&R. Orange & Rockland wants customers to have an excellent customer experience when they do business with us. In 2016, updated versions of the Residential and Commercial R&R are scheduled as bill inserts in July and September, respectively.

**Measures to Evaluate the 2016Program:**

The program will be evaluated based on our success at meeting the mailing and insert deadlines.

**Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Bill insert
- Webpage

<http://www.oru.com/aboutoru/tariffsandregulatorydocuments/index.html>



# **2016 Outreach & Education Plan with 2015 Results**

## **BILLING SERVICES AND PAYMENT ALTERNATIVES**

### **New/Continuing Program:**

O&R offers customers the option to receive their bill by traditional mail or as an electronic bill (eBill) sent by email with links for customers to view and pay their bills and to read bill inserts through the Company's Website at [oru.com](http://oru.com). O&R now provides a more secure login option for customer access. The customer is required to create a username and passcode when logging into their O&R account.

Customers have the ability to pay their energy bill by traditional mail, in person at a convenient walk-in location through a Customer Service Representative, by phone using either our automated Voice Response Unit or by talking with a Customer Service Representative. Additionally, customers can use home banking, wire transfers, electronic fund transfer (a.k.a. Automatic Bill Payment), credit or debit card payments through a third-party vendor, or at any of the several authorized payment locations located throughout the service territory.

### **2015 Results, Evaluation and Feedback:**

2,067,199 payments were processed through alternative methods. To encourage further participation in O&R's paperless billing option, we sponsored two contests in 2015 to assist in boosting eBill enrollment. Customers who participate on our eBill program have increased 21% from 2014 to 2015. These customers have access to bill inserts via links to the Company website. eBill participants are more likely to pay their bills by an alternative method.

The Company considers eBill an environmentally friendly effort. With every new enrollment we partner with the National Arbor Day Foundation to plant a tree on the customer's behalf in a National Forest damaged by fire.

### **Goals for 2016:**

The Company will continue to promote customer eBill enrollment on [ORU.com](http://ORU.com), bill inserts and through digital paid advertising.

**How Priority Was Set:**

The Company is responding to customers' ever-increasing use of online tools, smart phones and other mobile devices. We also want to continue practicing environmental responsibility by reducing paper waste and ameliorating climate change.

**Description of 2016 Program:**

We will continue in 2106 our program for 2015.

**Measures to Evaluate the 2016 Program:**

We will monitor the number of new eBill customers on a monthly basis.

**Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Bill inserts
- Website
- Email blasts
- Social media

<http://www.oru.com/programsandservices/paymentandbillingoptions/>

## **2016 Outreach & Education Plan with 2015 Results**

### **SPECIAL NEEDS CUSTOMERS**

#### **New/Continuing Program:**

- Annually, a bill insert is sent to all residential customers in November informing them of the Company's Elderly, Blind and Disabled (EBD) program and encouraging those who may qualify or know of someone who may qualify to contact the Company.
- Periodically, during the year, articles on EBD and LSE appear in *@home*, the Company's residential customer newsletter/bill insert.
- An EBD promotion panel is placed on the home page of [www.oru.com](http://www.oru.com) through the month of November. (When a customer clicks on this panel, information on the EBD program appears and customers are invited to use the online form at [www.oru.com/contactus](http://www.oru.com/contactus) to enroll in the program.)
- An EBD information message appears on customers' bills at least twice each year.
- EBD is advertised in print publications in December in both English and Spanish.
- LSE annual letters with information on the program features, a checklist to be used for emergencies and a program brochure are sent to all accounts coded as LSE.
- Certification and recertification letters and reminders are sent to all current and pending LSE customers throughout the year.
- Our Life Support Equipment customers are provided with a confidential number for quick access to report a power outage. They are also given advanced notification of any scheduled outages. Additionally, a courtesy call is placed prior to a potentially damaging storm or other event that may result in service interruption.

#### **2015 Results (evaluation and feedback):**

We continue to focus on our LSE and EBD customers by offering flexible payment arrangements. Where appropriate, we guide these customers to seek further assistance from The Department of Social Services and other relevant agencies. We have a staff of Spanish-speaking Customer Service Representatives for those customers who prefer to conduct business in Spanish. We also offer a language line that helps customers speak to our representatives through an interpreter. We also provide safety brochures in Spanish.

### **Goals for 2016:**

- Continue with existing outreach methods to EBD or potential EBD customers. An LSE article is included in our quarterly newsletter to customers in April. We also prepare bill inserts to all customers and posters displayed at DSS offices and our business offices in November and advertisements in December. This ad will also run in Spanish.
- Provide safety brochures in Spanish.
- Use large typefaces for EBD bill inserts and posters.
- Have EBD materials and Emergency Planners available at the O&R booths at both the Home Shows in Rockland and Orange counties.
- Use direct mail to ensure that all eligible customers are notified. Low-income customers are identified as customers who have received Home Energy Assistance Payments (HEAP).

### **How Priority Was Set:**

The Company recognizes the importance of safety and reliable service and proactive communications to special needs customers. These priorities are dictated by HEFPA11.5 (a) (5) – (7) and (b) (1)-(4). Census data indicates that Spanish is the second most predominant language in the Company's service territory.

### **Description of 2016 Program:**

We will continue to assist our special needs customers at every point of contact. We will maintain our current methods of outreach to our EBD customers through our annual EBD mailing which is conducted every October. Additionally, our November bill insert highlights our EBD program, as will our bill messages and website. We will also continue to conduct our annual LSE mailing in September. In this mailing, we provide our LSE customers with an LSE program brochure and a personal action planner.

### **Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Website
- Brochures
- *@home*
- Bill inserts
- Advertisements

<http://www.oru.com/programsandservices/specialneedsandassistance/>

# **2016 Outreach & Education Plan with 2015 Results**

## **WINTER HEATING SEASON AND ENERGY FINANCIAL ASSISTANCE**

### **New/Continuing Program:**

Continuing program to assist customers in managing their winter and summer energy bills by providing information about Company and third-party assistance programs.

### **2015 Results (evaluation and feedback):**

The following information was provided to customers in 2015:

- Information on how to access financial assistance on the Company's Website, consumer newsletter/bill insert called *@home*, bill inserts, press releases, social media postings and messages on hold when customers call and wait to speak to a Customer Service Representative.
- Information on CO prevention and gas safety on the Company's Website, in *@home*, bill inserts, and print as well as radio ads.
- Information on NYSERDA's Empower Program on our Website and to a targeted audience via first class/direct mail.
- Referrals to customers requesting assistance to NYSERDA.
- Seasonal energy and safety tips on the Company's Website, consumer newsletter *@home*, email, press releases and social media.
- Bill inserts, launched a new webpage and sent an email blast regarding tips to prevent hardship that comes with high winter heating costs. The message included how utilities try to keep prices consistent as they buy commodities, and encouraged customers to consider budget billing and shopping for energy.

### **Goals for 2016:**

It is imperative that we help customers manage their heating costs as best as they can throughout the winter. That's why we heavily promote available assistance programs, provide seasonally appropriate energy-efficiency tips and remind customers of winter safety tips. The steps we take are listed below:

- Assist customers in accessing heating assistance programs such as The Neighbor Fund and HEAP grants
- Publish descriptions of energy heating assistance programs in the fall and winter consumer newsletter *@home*.
- Publish a HEAP bill insert in the fall.
- Issue press release, email blast and social media postings to promote assistance programs in early winter.
- Send assistance information to customers facing termination of service.
- Provide information on CO poisoning prevention in *@home*, print advertising in local newspapers and electronic advertising on radio stations in November.

- Publish gas emergency number online and in printed materials.
- Print gas safety ads in newspapers.
- Mail gas scratch and sniff cards and natural gas safety brochure as bill inserts in early fall to all customers.
- Offer energy-savings tips via bill inserts, Website, social media and press releases to help customers lower their energy bills.
- Highlight budget billing in Company's *@home* newsletter, online, on social media and on-hold call center messaging.
- Notify customers of the free Empower Program via our newsletter and refer customers requesting to participate to NYSEERDA.
- Publish seasonal energy and safety tips in the Company's *@home* newsletter and social media.
- Provide information on the Company's energy-efficiency programs to help customers lower their energy use.

### **How Priority Was Set:**

While mandated by PSC, we realize that heating costs can be a hardship. We consistently share information on where people can go for help and encourage them to call us before financial worries continue to grow.

**Description of 2016 Program:** (In addition to advising customers about what to do to avoid a service disconnection, this category should include issues such as weatherization, furnace inspection, zone heating, preventing carbon monoxide emergencies, etc.)

The Company will continue to provide customers with information on assistance programs offered by the Company and third parties. The Company will continue to educate customers on how to control their energy use, manage their bills, understand CO prevention and gas safety issues, and participate in energy-efficiency program offerings.

### **Measures to Evaluate the 2016 Program:**

Feedback from Customer Service on behalf of customers regarding any additional concerns.

### **Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Bill inserts
- *@home*
- Webpages
- Email blasts
- Social media

<http://www.oru.com/programsandservices/specialneedsandassistance/>

<http://www.oru.com/energyandsafety/safety/index.html>

<http://www.oru.com/customerservice/customercommunications/heatingseason.html>

<http://www.oru.com/managemybill.html>

# **2016 Outreach & Education Plan with 2015 Results**

## **NATURAL GAS & ELECTRIC SAFETY**

### **New/Continuing Program:**

To increase safety awareness and prevent accidents.

### **2015 Results (evaluation and feedback)**

- Broadened the use and effectiveness of the one-call damage prevention system via print and electronic advertising (newspapers and radio stations) email blasts, and social media.
- Hosted excavator 811 training breakfast seminars in Orange and Rockland counties.
- Sponsored a Call Before You Dig advertisement along with the Hudson Valley Damage Prevention Council in the Rockland Boulders baseball stadium.
- Sent targeted direct mail letters on the topic of “Call 811 Before You Dig” to over 3,000 contractors. This letter was also sent in Spanish.
- Sponsored Children’s Newspaper Advertising Art Contest on gas and electric safety.
- Informed our customers about the hazards of gas leaks via bill inserts, emails and a new ad campaign.
- Produced and mailed new gas odorant inserts to help increase public awareness of gas leak detection through visual and sensory recognition.
- Informed and educated customers on what steps to take for personal safety in the event the presence of gas or a gas leak is detected.
- Informed and educated customers on how to notify the Company or emergency response officials of such an event.
- Ran print, digital, and radio advertising for both Gas safety and Call 811.
- Reinforced generator and downed wire safety in storm communications materials, storm press releases, online, in social media and in our consumer newsletters.
- Mailed Natural Gas Safety brochure to all customers as a bill insert.
- Mailed Natural Gas Pipeline Safety brochure to all customers as a bill insert.
- Printed both the natural gas and pipeline safety brochures in Spanish.
- Along with other utilities in New York State, O&R participated in gas safety TV advertising through an NGA partnership.
- Internal “Lookout for the Mark-out” campaign.
- External pilot “Lookout for the Mark-Out” campaign.
- External focus group to with a variety of participants to mitigate educational gaps.
- Mailed Electric Safety brochure to all customers as a bill insert in March.
- Sent annual letters, as part of National Safety month in June, to school principals in our service territory promoting our electric and gas safety Website pages for Grades 3 through 9 students and

educators. For high school students and educators, there is a video available about how to avoid electrical accidents. The letter lists who to call to obtain the video.

### **Goals for 2016:**

We want to reduce the number of accidents, injuries or fatalities caused by contact with or unsafe actions around our facilities. This will take public awareness and educational efforts. We will use a variety of vehicles to inform people about ways they can stay safe around gas and electric services.

### **How Priority Was Set:**

Some aspects of our safety communications are mandated. Other efforts are determined by evaluating potential safety risks and increasing awareness efforts accordingly.

### **Description of 2016 Program:**

The general public and contractors are the target audience. Delivery vehicles will include bill inserts, advertisements, emails, direct mail, social media, seminars and meetings with public officials.

- Gas safety messages will generally begin in April and run through October.
- Electric safety will begin in June and continue throughout the summer hurricane season.
- O&R has taken the lead in becoming a certified excavating company under the Gold Shovel Standard in June of 2016. It's a single certification system that provides transparency for excavator safety performance. The program is gaining traction.
- Municipalities will receive a series of emails and letters from O&R Community Relations managers directing them to videos and other free training opportunities available through Dig Safely New York.
- Broader radio coverage for our gas safety messages.
- Partner in NGA awareness efforts.

### **Measures to Evaluate the 2016 Program:**

We will compare the number of damages in 2016 versus 2015.

### **Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Bill inserts
- Website
- Emails
- Videos
- Advertisement
- Direct mail



- Social media

<http://www.oru.com/energyandsafety/safety/>

# **2016 Outreach & Education Plan with 2015 Results**

## **NATURAL GAS EXPANSION**

### **New/Continuing Program:**

The Company will continue to promote the many benefits of using natural gas and encourage its customers to convert from oil or propane to a high-efficiency natural gas heating system.

### **2015 Results, Evaluation, and Feedback:**

In 2015, 227 customers converted from oil or propane to a natural gas heating system. The Company initiated a campaign to encourage customers within 100 feet of a natural gas distribution main to convert to natural gas. The Company also produced a postcard identifying the incentives and benefits of converting from oil or propane to natural gas heating. This effort yielded positive results and will be rolled out again in 2016, this time expanding to customers within 300 feet of a natural gas distribution main.

Customers continue to provide positive feedback about the Gas Conversion pages on O&R's website, which was launched in 2014. The site offers more than just FAQs. Customers can find out how the process works, what incentives are available to them, whether or not there is gas available in their neighborhoods, how much they can expect to pay in heating costs and what other customers who switched to gas have to say in their testimonials.

### **Goals for 2016:**

For the general populations, the Company will continue to educate customers about the benefits of natural gas through mailers, bill inserts, the dedicated Gas Conversion Webpage ([www.oru.com/convert](http://www.oru.com/convert)), and home/ trade shows and social media. Additionally, the Company will initiate a digital campaign that will offer a new gas conversion landing page, print and digital advertising, as well as social media outreach. The Company will aggressively market the availability of natural gas to customers who currently have gas service for water heating and cooking, but not for home heating, and to customers who live within 300 feet of a gas distribution main. Such marketing will include direct mailers, neighborhood association meetings, Town Hall-style meetings, community meetings, as well as phone and/or in-person follow-up meetings with customers who inquire about converting their heating systems.

### **How Priority Was Set:**

Natural gas is a clean, convenient and affordable heating method. The Company wants to aggressively expand its natural gas distribution system to offer customers the opportunity to make the switch to natural gas. Such expansion is predicated on enough interest and encouraging customers to convert to natural gas, especially if the conversion and equipment rebates make it practical to do so.

**Description of 2016 Program:**

The Company's efforts will be geared to customers who may benefit from converting to gas heating systems. The Company will staff multiple trade/ home shows throughout its territory to market natural gas. Communities, neighborhoods and developments that have the potential to be served with natural gas will be identified throughout the territory. Once identified, marketing will ensue in these areas and include direct mailers, neighborhood association meetings and door-to-door marketing. In addition to expanding to unserved areas, the Company will market natural gas along routes where reinforcement natural gas mains are being installed. This effort will allow us to accomplish two goals: create system redundancy and provide natural gas to customers who otherwise might not have been afforded the opportunity to use gas based on the economics of line extension.

**Measures to Evaluate the 2016 Program:**

The Company will continue to monitor the feedback of customer's who express interest in using natural gas. The Company also will measure the conversion rate of customers who switch from oil or propane to natural gas heat.

**Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Direct mail
- *@home*
- Brochures
- Website
- Bill inserts
- Social media
- Advertising

<http://www.oru.com/programsandservices/incentivesandrebates/greenteam/residentialprograms/gasconversionrebate.html>

# **2016 Outreach & Education Plan with 2015 Results**

## **SERVICE INTERRUPTIONS**

### **New/Continuing Program:**

This is a continuing program to keep customers informed regarding service restoration.

### **2015 Results, Evaluation, and Feedback:**

In 2015, we promoted our 24/7 outage communications tools through bill inserts, social media, email blasts, print advertisements, press releases and promotions in our own Website. Highlights of our latest outage information tools include:

- Texting capabilities - In the event of a power outage, simply text "OUT" to 69678 (myORU) and follow the prompts. Customers can also sign up to receive text messages that update them on estimated restoration times and other outage information.
- [oru.com/mobile](http://oru.com/mobile) -- This web page that allows customers to see the communications tools we offer. They can compare and learn about our texting program, mobile web, app and social media all from this Web page. The Web page also provides links to sign up for texting and download our app.

### **Goals for 2016:**

As a company, we offer tools that help make doing business with us 24/7 more convenient than ever, especially when it comes to reporting and checking on outages. We plan to continue to promote tools such as texting, our app, mobile Web, and our social media (available 24/7 during storm events).

### **How Priority Was Set:**

Customers use mobile communications to simplify their lives. People aren't just sitting at home any longer waiting for the power to come back on. They are on the move, but that doesn't mean they don't need to know what's happening at home. Our texting program, mobile app, mobile Web, and presence in social media make getting that information convenient and accessible wherever the customer is.

### **Description of 2016 Program:**

We want to target both business and residential customers in our outreach efforts regarding outage communications and ensure that our customers are not only aware of the latest tools we have to offer but also avail themselves of those tools. We'll continue to use all the vehicles we have at our disposal as we did in 2015.

**Measures to Evaluate the 2016 Program:**

We will use the number of customers who sign up for text messaging to determine the success of our outreach efforts.

**Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Bill inserts
- Email blasts
- Press releases
- Social media
- Advertisements
- Website
- Community events

<http://www.oru.com/customerservice/mobilecommunications.html>

<http://www.oru.com/energyandsafety/storms/index.html>

<http://www.oru.com/energyandsafety/damagetoequipment.html>

# **2016 Outreach & Education Plan with 2015 Results**

## **SUMMER DEMAND RESPONSE/ LOAD REDUCTION**

The December 20, 2000 Order, Case Number 00-E-2054, required utilities to provide Staff with a public awareness plan detailing the company's steps to educate customers regarding the load and capacity situation and actions consumers can take to control their energy usage and bills.

### **New/Continuing Program:**

O&R's Heat Response Guide defines the steps that should be taken when the forecasted system load is over 1,300 MW, which is a Heat Watch condition on the electric system. The Guide also outlines additional steps when the forecast is for over 1,500 MW, which is a Heat Alert condition.

In an effort to more fully inform O&R customers about the need to use electricity wisely during the hottest days of summer, we further refined our practices in five ways this year.

First, when practical, we worked with the Senior Electric System Operator to make the Heat Watch/Heat Alert call a day in advance --- a call that typically would not be made until the day of the Heat Watch/Alert. Some background is needed here. O&R maintains an Electric Operations/Communications program --- Heat Watch/Heat Alert --- designed to upgrade normal electric system operations and communications messaging during a heat wave to adjust to increasing electric demand due to rising air conditioning use. As part of that program, O&R prepares and markets a press release, which includes conservation and coping tips, and conducts media outreach, including social media and O&R website postings, advising its customers to take steps that day to most efficiently use electricity.

In the past typically, this readiness status would be determined about 6 a.m. the day of the Heat Watch or Alert. By working with Electric System Operations, we have been able to push that analysis and determination to the day before the actual Heat Watch/Alert day.

That advance word lets us get the Heat Watch or Heat Alert warning into customers' homes on the 6 p.m. and 11 p.m. television newscasts the night before the Heat Watch day, and the early morning TV and radio news before customers leave for work on the morning of the actual Heat Watch day.

As a result of that extra time, customers actually have an opportunity to act on the Heat Watch's key message: don't leave the air conditioning on in an empty house. Otherwise, they hear the Heat Watch declaration too late in the morning of the Heat Watch and they have no way to take action after they have left home --- unless they use their cell phone or laptop to control their air conditioning.

In some instances when the forecast is not clear cut, we cannot get the call a day ahead --- but where we can, we now do.

Second, we have created graphic elements that illustrate the conservation/coping messages and those are used to further fortify our social media message.

Third, we have re-branded a heat-tips animated video developed by our sister utility Con Edison so that we can use it with our customer base. That video is embedded in our Heat watch/Heat Alert press release to further fortify that message as well.

Fourth, on days when the forecast is especially hot, but the electricity demand is not predicted to exceed 1300 MW, we issue a press release with conservation/coping tips as a general summer proposition to reinforce the connection between the hot weather and the need to prudently use electricity.

At the end of the day, it's summer and it's going to be hot. But there is still an appreciable difference between just high temperatures and smoldering high temperatures and sticky humidity.

Fifth, we re-issued the summer prep press release in the middle of the summer heat. There's nothing like a blistering heat wave to focus the media's --- and customers' attention --- on how O&R has prepared to keep the air conditioning running on high demand days. So, the first two summer prep releases went out this year on June 2, and the second two went out on July 22.

In addition we launched in 2015 our Demand Response (DR) program (Bring your Own Thermostat). Enrolling in the program allows O&R to make brief, limited adjustments to your central air-conditioner setting on peak days when energy consumption is high in the summer. Customers who enroll receive \$85.

The BYOT program was also boosted by the launch of our online store that offers instant rebates on smart thermostats as well as direct enrollment into our BYOT program. WE met our goals for DR in this program

### **2015 Results, Evaluation, and Feedback:**

The Heat Advisory program with its public announcements for Heat Watches and Heat Alerts placed O&R squarely in the forefront of the public's consciousness and local media picks up on the effort with requests for interviews on the matter.

### **Goals for 2016:**

The Company plans to follow the same protocol as it did in 2015.

### **How Priority Was Set:**

This is mandated by the Commission and our protocol.

## **Measures to Evaluate the 2016 Program:**

We will consider the outreach to be successful when communities are sensitive to conservation efforts and we continue to operate reliably on high demand days.

### **Provide a List and Two Copies of All Material Distributed, and Method of Distribution**

- Press releases
- Postings on Website
- Social media
- Advertising
- Bill inserts

<http://www.oru.com/energyandsafety/thepowerofgreen/>

<http://www.oru.com/customerprograms/incentivesandrebates/newyork/residentialprograms/bringyourthermostat.html>



**Orange and Rockland Utilities, Inc.**  
**OUTREACH AND EDUCATION PLAN**  
**2016**

**Section 5**

**Employee Outreach and Education**

# **2016 Outreach & Education Plan with 2015 Results**

## **CUSTOMER SERVICE/EMPLOYEE TRAINING**

### **New/Continuing Program:**

Customer Assistance has a four-month full-time training class for all newly hired Customer Service Representatives (CSRs). The training consists of understanding and navigating the Customer Information Management System (CIMS), all aspects of billing including tariffs and regulations, all policies and procedures with regard to credit, issuing service orders and electric and gas safety. The CSRs also receive annual training on HEAP program, Elderly, Blind and Disabled customers, and Winter Protections.

Throughout the year, the CSRs participate in monthly communication meetings where relevant topics are discussed. Subject matter experts from other areas are also invited to speak on topics such as solar energy, the importance of protecting Personally Identifiable Information, training on the Standards of Competitive Conduct, safety, tree trimming and demand billing, to name a few.

### **2015 Results (evaluation and feedback):**

New CSRs have been positive about the initial training and seasoned CSRs appreciate the monthly refreshers. In addition, all employees attended required full-day training on Enhancing Customer Relationships.

### **Goals for 2016:**

Continue monthly communication meetings and conduct regular refresher training on various topics such as billing, power quality and soft skills. The training program for CSRs will continue in 2016. All employees who did not complete Enhancing Customer Relationship training will be required to complete the courses in 2016.

### **How Priority Was Set:**

CSR training is a continuing program.

### **Description of 2016 Program:**

The call center will continue to train the call center staff on soft skills training. We will focus on the importance of customer safety. Utility Representative Verification Program was developed to promote confidence and promote customer safety when working with a utility program. The customer has direct dial number for employee verification.

**Measures to Evaluate the 2016 Program:**

We will evaluate the program through year end.

# **Orange and Rockland Utilities, Inc.**

## **OUTREACH AND EDUCATION PLAN**

### **2016**

## **LITERATURE AND ADVERTISING SCHEDULES**

### **Literature**

- Energy-efficiency Program bill inserts -- produced monthly
- *@home* consumer newsletter -- January, April, July and October
- Payment options – February
- Home show tickets – January through March
- Gas Safety -- February
- ESCO Environmental Disclosure Label – April
- Voluntary TOU bill inserts -- April and December
- Pipeline Safety – May
- Natural Gas Safety brochure -- June
- Residential Rights & Responsibilities and When Storms Strike – July
- Call 811 bill insert – August
- Commercial R&R , Natural Gas Pipeline Safety, and Texting bill inserts, LSE letters, brochures and planner – September
- Smell Gas. Act Fast. odorant card -- October
- EBD -- November
- CO/Generator Safety and HEAP/Neighbor Fund bill insert – December

### **Advertising**

Our advertising vehicles include a mix of print, radio and digital. The schedule and creative rotation is:

- Call 811 and Gas Safety -- March through October
- Energy Education (energy efficiency, storm prep/safety, 24/7 tools) – June through September
- CO safety – October and November
- Gas Conversion – October through December
- Imposter (how to tell a real employee from a fake one) – October through December
- ebill – October
- EBD – November and December