New York Electric Vehicle Residential Managed Charging Program

IMPLEMENTATION PLAN



Submitted by: New York State Electric & Gas Corporation and Rochester Gas and Electric Corporation

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Revisions:

Revision 1: January 1, 2023

1. Modified Section 1.2: Program Description to reflect the Companies' Petition filed with the Commission on October 31, 2022, seeking a modification to the Managed Charging Order.
2. Modified Section 2: Managed Charging Program Implementation to reflect the Companies were in contract negotiations with a Program Administration vendor.
3. Modified Table 1.A to update the timeline of the most recent Managed Charging Implementation Plan.
4. Modified Section 2.9.1: Approved Contractor List to reflect the completion of updates to the Joint Utilities Approved Contract List to include residential contractors.
5. Modified Section 3.4: Cost Recovery to reflect the Companies' compliance with Commission's Order to file Tariff Leaves to become effective by January 1, 2023.
6. Modified Section 5.5: Manage Charging Technology Accuracy Testing Plan to reflect the Companies, in collaboration with the Joint Utilities, had filed a proposal with Commission in compliance with the Managed Charging Order.

Revision 2: March 17, 2023

1. Modified Section 1.1: Background and Summary of Order and Section 1.2: Program Description to reflect the New York Public Services Commission Order issued February 16, 2023 on the Companies' Petition filed with the Commission on October 31, 2022, seeking a modification to the Managed Charging Order.
2. Updated Section 3.1.1: Passive Budget and Section 3.1.2: Active Budget with budget revisions filed on March 13, 2023, in response to Department of Public Service Staff Data Request DPS-1 LMR metering.

Revision 3: January 30, 2024

1. Modified Section 1.2: Updated background information provided to reflect the current state of the program and highlight recent activities.
2. Updated Section 2: Updated status of the program regarding procurement of Platform Provider.
3. Updated Section 2.1: Modified language regarding eligible equipment and pertaining to available technologies.
4. Updated Section 2.3.1 and 2.3.2: updated cost-based participation formulas to reflect changes to supply costs.
5. Updated Section 2.3.3: Clarified details on the EV TOU rate vs. OptimizEV.
6. Updated Section 2.5: Clarified eligible technologies and reference to an issue with Ford.
7. Removed Section 2.6 (Program Timeline)

8. Updated Section 2.8: Modified language regarding the program portal and provided new screenshots showing the customer-facing app.
9. Updated Section 3: Modified budgets, particularly with reference to the updated supply costs for 2023. Clarified method of calculating cost-based participation incentive.
10. Updated Section 4.1-4.2: Highlighted minor changes to the marketing plan.
11. Added Section 4.4.1: Provides a high-level overview for complaints and inquiries submitted to the Companies in 2023. Provided tally for complaints and inquiries and a summary of these issues encountered.
12. Added Section 4.5.5: Outlines the Dispute Resolutions for 2023.
13. Updated Section 5.1: Updated progress in selecting an EM&V partner.
14. Added Section 5.2.1: Provided EM&V datapoints required by the Commission, highlighting progress of the program up to the end of 2023.
15. Added 5.3.3: Provided results of NPS survey conducted in January 2024 for customer satisfaction in program year 2023.
16. Updated Section 5.5: Provided a brief update on the Testing Accuracy Task Force and Testing Standards Working Group.
17. Updated Appendix 6.1: Provided visuals of customer email communications and in-app communications.
18. Added Appendix 6.2: Added Net Promoter Score Survey.
19. Added Appendix 6.3: Added description of the charging setting hierarchy in the Platform Provider app to clarify how the customer-facing app functions.

Revision 4: January 30, 2025

1. Updated Glossary to include definition of Participant Portal
2. Modified Sections 1.1 and 1.2: Updated background information provided to reflect the current state of the program and highlight recent activities.
3. Modified Section 2.1: Modified language to include Level 2 EVSE requirement.
4. Updated Sections 2.3.1, 2.3.2 and 2.3.3: updated cost-based participation formulas to reflect changes to supply costs.
5. Updated Section 2.5: Updated to highlight eligible Telematics additions and discuss OEM API access for third parties.
6. Modified Section 2.6: Modified to reflect updated program enrollment process
7. Updated Section 2.7: Updated to include current customer resources
8. Updated Section 2.7.1: Updated to include web portal as an additional program participation pathway.
9. Modified Section 3.1: Modified to reflect up-to-date budget development techniques.
10. Updated Sections 3.1.1 and 3.1.2: Updated to reflect actual 2024 costs and revised 2025 budgets.
11. Modified Section 3.3: Modified to align with current tier-alignment efforts
12. Updated Section 3.4: Updated cost recovery methods

13. Updated Section 4.2: Updated to include 2024 marketing campaigns.
14. Deleted Section 4.2.1
15. Modified Section 4.2.1 (formerly 4.2.2): Modified to highlight NYSERDA list marketing efforts.
16. Updated Section 4.4.1: Updated to reflect 2024 Customer Complaints and Inquiries
17. Updated Section 4.5.5: Updated Dispute Resolutions for 2024
18. Updated Section 5.2.1: Updated to reflect EM&V Results for 2024
19. Modified Sections 5.3.1 and 5.3.2: Modified to clarify NPS Survey question and additional survey methods used to assess program participant satisfaction.
20. Updated Section 5.3.3: Updated to reflect results of latest NPS Survey
21. Modified Section 5.4: Modified to reflect current Participant Satisfaction Evaluation efforts.
22. Updated Section 5.5: Updated to outline 2024 Testing Accuracy Task Force and Testing Standards Working Group activity.
23. Added Appendix 6.1: Added up-to-date list of eligible Telematics and EVSE
24. Added Appendix 6.2: Added illustrative example of program enrollment process
25. Updated Appendix 6.3 (formerly 6.1): Provided samples of program communications new in 2024.
26. Added Appendix 6.4: Added illustrative samples of Participant Portals
27. Added Appendices 6.5 and 6.6: Added examples of 2024 marketing efforts
28. Updated Appendix 6.7 (formerly 6.2): Updated to reflect 2024 NPS Survey
29. Removed former Appendix 6.3 that depicted charging hierarchy

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GLOSSARY: ABBREVIATIONS, ACRONYMS & DEFINITIONS

Applicant	A customer seeking to become a participant in the managed charging program by applying
Approved Contractor	A contractor approved by the JU to be listed on the Approved Contractor List which is a tool for customers to identify EVSE installers
CLCPA	Climate Leadership and Community Protection Act
Commission	Public Service Commission of NY
Company	NYSEG or RG&E, collectively "The Companies"
Customer	A customer of NYSEG or RG&E and collectively the Companies
Charger	A device that supplies an EV with electrical energy. There are Level 1, Level 2, and DCFC categories of chargers which are differentiated by the level of power they provide.
EV	Electric Vehicle – Either Plug-in Hybrid Electric Vehicle (PHEV) and Battery Electric Vehicle (BEV) and collectively Plug-in Electric Vehicles (PEV)
EVSE	Electric Vehicle Supply Equipment also known as a Charger
Implementation Plan	This document. A plan describing the managed charging program and how the program will be implemented.
JU	The Joint Utilities of NY
L2	Level 2 EVSE is a charger which is the most powerful charger for the residential context and is generally purchased
Make-Ready Program	A program to support EVSE infrastructure installation in NY as established by the Make-Ready Program Order
Make-Ready Program Order	Case 18-E-0138: Order Establishing Electric Vehicle Infrastructure Make-Ready Program and Other Programs, July 16, 2020
Managed Charging Program	A program designed to optimize EV charging around grid conditions, usually broken into Passive and Active programs. Passive managed charging programs involve using behavior methods of shifting load. Active managed charging programs use direct control of user EV or EV chargers to shift load.
Managed Charging Order	Case 18-E-0138, Order Approving Managed Charging Programs with Modifications, Jul. 14, 2022.
Net Promoter Survey	A survey used to assess customer satisfaction by gauging their willingness to recommend (or promote) the program to others.
Participant	A customer of either NYSEG or RG&E (the Companies) that agrees to participate in this managed charging program in accordance with the Terms & Conditions as established by the Companies.
Participant Portals	The pathways within which a customer enrolls and participates in the managed charging program. The Companies operate and maintain two participant portals in the form of a mobile app and web portal.
Platform Provider	The entity that supports the Companies in the implementation of this program. The Platform Provider operates and maintains Software as a Service (SAAS) technology that enables EV interconnection via networked L2 Chargers or EV Telematics.
Residential Customer	A residential account of NYSEG or RG&E
Staff	Relevant employees of the Department of Public Service
Telematics	A feature of many EVs' onboard systems to receive and transmit data.
Technical Standards Working Group	Electric Vehicle Technical Standards Working Group (TSWG) will convene following the Utilities' filings to consider the method(s) proposed by the Utilities to establish metering and testing standards or criteria.

1. INTRODUCTION

1.1 BACKGROUND

Pursuant to the New York State Public Service Commission's ("the Commission") July 16, 2020 "Order Establishing Electric Vehicle Infrastructure Make-Ready Program and Other Programs" [1] ("Make-Ready Order"), which directed the Joint Utilities of New York ("JU") to "file an annual update of the Managed Charging Implementation Plans by no later than January 30 of each calendar year", New York State Electric & Gas Corporation ("NYSEG") and Rochester Gas and Electric Corporation ("RG&E") (hereinafter "the Companies") hereby submit this updated EV Managed Charging Implementation Plan ("MCIP") for program year 2025.

On July 14, 2023, the Companies launched an electric vehicle ("EV") managed charging program titled OptimizEV, which is available to all residential customers who own or operate an EV and meet the requirements for participation. This MCIP for 2025 includes the most recent program results for the Companies' EV managed charging programs, updated forecasts, and updates on adjacent activities such progress made by the Testing Accuracy Task Force and program marketing efforts. The Companies continue to work collaboratively with the Department of Public Service ("DPS") Staff ("Staff") on the framework for this MCIP, additional OptimizEV requirements identified in the MCIP, and future MCIP filing information stipulated in the Managed Charging Order.

1.2 PROGRAM DESCRIPTION

OptimizEV provides incentives to program participants for enrolling eligible equipment and participating in ongoing load shifting activities for a minimum of 12 months. Incentives depend on the Tier that is selected by participants' and the associated level of commitment to load shifting. The OptimizEV program design is outlined in Section 2 and summarized here. Each Tier differs in its level of commitment from participants and the level of load shifting the Companies expect to achieve. Participants are eligible to receive enrollment incentives for start-up actions in each Tier. In the Baseline Tier, participants are eligible for a one-time enrollment incentive of $25.00 for activating a networked L2 charger or EV via telematics in the Companies' web portal or mobile app and agreeing to share their charging session data with the Companies. In the Advanced Tier, participants are eligible for a one-time enrollment incentive of $150.00 for similar

[1] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Establishing Electric Vehicle Infrastructure Make-Ready Program and Other Programs, issued July 16, 2020.

start up actions as under the Baseline Tier, but also agreeing to schedule their charging sessions during off-peak periods and allowing the Companies to actively manage their scheduled charging sessions. Participation incentives are earned in each Tier according to OptimizEV requirements outlined in Section 2.3. Incentives are determined monthly and paid quarterly through off-bill payments.

Participants enroll their selected technology, whether through their EV's onboard computer (telematics) or a networked Level 2 charger. The Companies facilitate participation using 2 Participant Portals, within which participants can track their progress and control their charging either manually or on an automated basis. The OptimizEV program engages with participants through helpful emails and an app that provides powerful insights and notifications. These communications remind them of important program participation requirements, provide reports on their historic participation, and provide recommendations to achieve peak program participation and maximum incentives. These communications are further detailed in Section 2.7. Participants have support through the Companies' Program Staff and additional program and platform support provided by its Platform Provider.

The Companies maintain a detailed utility dashboard that provides insights into participant behavior in aggregate and on an individual-participant level. The dashboard enables the Companies to analyze program performance on an ongoing and near real-time basis and support continuous modifications to the platform and methods of engagement to drive high levels of participation and optimization of load shifting. The Companies also engage the Platform Provider to assist in driving program strategy regarding customer engagement, charging optimization, and general platform and program upgrades.

Through a procurement process the Companies selected, from a group of experienced and robust managed charging vendors, ev.energy as their Platform Provider to provide a holistic platform to support the growing number of managed charging participants across the Companies' service areas.

2. MANAGED CHARGING PROGRAM IMPLEMENTATION

The Companies, in collaboration with Staff and the JU have put significant time, focus, and resources into implementing an effective managed charging program in their respective NY service areas. These efforts are reinforced by ongoing feedback from Staff and significant consultation with the managed charging industry professionals. With evaluation, measurement,

and verification activities taking place as outlined in Section 5, the program will be under continual review and iteration. Efficacy of the program design and of the platform's features will be continuously studied and adjustments will be made as data is analyzed and understood. After careful study and review, the Companies outline the program below, as it is currently designed.

2.1 ELIGIBILITY CRITERIA

In this Section, the Companies state the eligibility criteria that will be used during participant enrollment. Customers must meet all these criteria to be approved to participate and receive enrollment incentives.

- Participants must be residential electric accountholders in NYSEG or RG&E service areas.
- Customers subscribing to the Companies' EV TOU tariff are not eligible to participate.
- Participants must own or lease a plug-in hybrid electric vehicle or battery electric vehicle and connect through a Level 2 EVSE. At this time, Level 1 EVSE are not eligible to participate in OptimizEV.
- Participants enrolling with a Level 2 EVSE must have an always-on Wi-Fi network and the EVSE must be connected to this Wi-Fi network.
- Participants enrolling with EV telematics must have an active cellular connection through their vehicle OEM.
- Participate in managed charging for a minimum of 12 months in either the Baseline or Advanced Tiers of the program.
- Participants' EVSE network or EV telematics must be capable of integrating with the Platform Provider's platform. The exact list of EVs and EVSEs that qualify for the program are determined by the integrations that the Platform Provider has made. This list is updated as new integrations are made or as OEMs change the access to their platforms.
- Participants must agree to additional terms and conditions specified by the Companies.
- Participants must agree to additional terms and conditions specified by the Companies Platform Provider relevant to the use of their mobile app and web portal.

For participants to be eligible for participation incentives, participants must fulfill the above criteria, as well as achieve certain levels of performance on an ongoing basis. See Section 2.3 for descriptions of the incentives and relevant criteria.

2.2 ENROLLMENT INCENTIVES

The Managed Charging Order defines Enrollment Incentive as "an incentive for enrolling in the program and performing certain start-up actions necessary for participation in the program." [2] The Commission required the JU to "limit any enrollment incentive included in the Managed Charging Program to no more than $25 for passive programs, or no more than $150 for active

[2] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 31.

programs."[3] The Companies offer enrollment incentives of $25 for Baseline Tier and $150 for the Advanced Tier.

2.3 PARTICIPATION INCENTIVES

OptimizEV consists of two Tiers: Baseline and Advanced. The Tiers have different requirements and parameters which coincide with different incentive values. In its Managed Charging Order, The Commission stated, "the Commission does grant some degree of flexibility to the Utilities in setting participation incentives through the processes outline in this Section, participation incentives paid to customers must be cost-based and are not to exceed the difference between the default volumetric rate and a Commission approved time-varying or dynamic rate that reflects the value of the off-peak charging or event participation. Changes to the participation incentives that are not cost-based require Commission approval." [4]

To comply with the cost-based participation incentive structure defined by the Commission, the Companies established the default volumetric rate as Service Classification No. 1 – Residential Service (SC-1) and its Commission approved time-varying rate as Service Classification No. 8 – Residential Service – Day/Night Rate Special Provision Plug-in Electric Vehicle (SC-8 PEV) for NYSEG. The Companies established the default volumetric rate as Service Classification No. 1 – Residential Service (SC-1) and its Commission approved time-varying rate as Service Classification No. 4 – Residential Service – Time-of-Use Rate Special Provision Plug-in Electric Vehicle (SC-4 PEV) for RG&E.

All participation incentive payments are assessed monthly and paid quarterly, as was required as a minimum frequency by the Commission in the Managed Charging Order. [5]

2.3.1 Baseline Tier Incentives: Design, Eligibility, and Cost-Based Justification

Baseline Tier participants receive the full cost-based value for each kWh of off-peak charging in each month they achieve 80% or greater, at home off-peak charging. Participants not achieving the 80% threshold in any given month do not earn an incentive for that month but do not lose their ability to earn in the other months of the year.

[3] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 61.
[4] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022, at page 35-36.
[5] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 35.

Cost-Based Justification for Baseline Tier Participation Incentives

For illustrative purposes the Companies provide examples of the potential maximum incentive available to Participants in the Baseline Tier. Actual incentives are based on 2024 Delivery and Supply components of SC-1 and SC-8 PEV (Night) at NYSEG and SC-1 and SC-4 PEV (Night) at RG&E.

The average annualized cost differential between SC-1 and SC-8 PEV (Night) including energy delivery and supply charges from January 2024 through December 2024 is $0.062 per kWh at NYSEG. The average annualized cost differential between SC-1 and SC-4 PEV (Night) is $0.050 per kWh at RG&E. Assuming a national average of 9.7 kWh consumed per day, the formula for the above incentives by operating company are:

NYSEG: 80% of 9.7 kWh = 7.76 kWh * $0.062 = $0.48/ day * 365 days = $175 estimated annual participation incentive.

RG&E: 80% of 9.7 kWh = 7.76 kWh * $0.050 = $0.39/ day * 365 days = $142 estimated annual participation incentive.

Participants' incentives are calculated monthly based on actual kWh consumption that occurs during off-peak hours.

2.3.2 Advanced Tier Incentives: Design, Eligibility, and Cost-Based Justification

Advanced participants take an active role in managing their charging in collaboration with The Companies to optimize charging for maximum benefit to ratepayers and the distribution system.

Participants are eligible to receive the full cost-based incentive (described below), assessed on a month-to-month basis if they maintain an active daily charging schedule and agree to allow active managed charging of their vehicles. Participants must also not override their managed charging schedule resulting in an on-peak charging event greater than 15 minutes, more than three (3) times per month.

To participate, customers use the Participant Portals to set an active daily charging schedule that includes a State of Charge (SOC) required and the Time that Charge is Needed (TCIN).

Cost-Based Justification for Advanced Tier Participation Incentives

For illustrative purposes, the Companies provide examples of the potential maximum incentive available to Participants in the Advanced Tier. Actual incentives are based on 2023 Delivery and Supply components of SC-1 and SC-8 PEV (Night) at NYSEG and SC-1 and SC-4 PEV (Night) at RG&E.

The average annualized cost differentials for NYSEG and RG&E are the same as those detailed in the baseline example. The Companies assume in this example that off-peak charging will occur 95% of the time due to customer scheduling and active manage charging control.

NYSEG: 95% of 9.7 kWh = 9.2 kWh * $0.062 = $0.57/ day * 365 days = $208 estimated annual participation incentive.

RG&E: 95% of 9.7 kWh = 9.2 kWh * $0.050 = $0.46/ day * 365 days = $168 estimated annual participation incentive.

Participants' incentives are calculated monthly based on actual kWh consumption that occurs during off-peak hours.

2.3.3 Participant Bill Reduction

Separate from the Managed Charging Program, the Companies offer a Time of Use Rate for EV drivers ("EV TOU Rate") to achieve savings on their charging. The average savings[6] between the day and night rates is approximately $0.074 per kWh at NYSEG including delivery and supply. This a 48% savings. At RG&E, this savings[7] is $0.105 per kWh which is equal to a 55% savings. However, since these rates are whole house rates, individual savings will vary depending upon a customer's ability to control and optimize their household consumption.

Unlike the Companies' EV TOU Rate, the value of incentives earned in OptimizEV apply directly to Participants' EV charging, and they bear no risk associated with other household consumption during on-peak hours. Any upfront or ongoing incentives earned through the OptimizEV are distributed off-bill. Customers must decide on adopting the Companies' EV TOU Rate or participating in OptimizEV depending upon their unique circumstances including their EV/EVSE home setup and household electricity consumption patterns.

The EV TOU Rate provides a separate pathway from OptimizEV for customers to actualize the monetary savings that using electricity as a fuel source may provide when they shift their EV load to off-peak hours. It also acts as an alternative offering for those EV drivers who are unable to participate in OptimizEV due to technology constraints of their EV or EV charging equipment. While the EV TOU rate and OptimizEV are distinct and separate offerings, they are competing offerings and the Companies note the similar goals to shift EV load away from on-peak hours affect enrollment rates in both offerings.

[6] Based on NYSEG SC-8 Residential Time of Use Special Provision PEV Tariffs from January, 2024 to December, 2024.

[7] Based on RG&E SC-4 Residential Day/ Night Special Provision PEV Tariffs from January, 2024 to December, 2024.

2.4 PARTICIPATION REQUIREMENTS

In its Managed Charging Order, the Commission directed "that any Managed Charging Program that offers an enrollment incentive shall require a minimum participation period of at least three months." [8] The Companies are using a 12-month period of participation as a requirement for enrollment and receipt of incentives. Three months is not a sufficient period of time to gain meaningful insights from individual driver's charging patterns, as many drivers' patterns of charging change throughout a year. Without a requirement to participate for a full year, the quality of insights gained through this program would negatively impact the evaluation and measurement efforts.

2.5 ELIGIBILE TECHNOLOGY

The Companies support participation through select models of both EVSE and EV telematics. The list of models of EVSE and EVs that the Companies support in the OptimizEV program is dictated by the integrations that their Platform Provider has made with various Original Equipment Manufacturers (OEMs) in the market. The type and number of integrations was a large component of the RFP and procurement process that the Companies conducted when selecting a Platform Provider. It was a substantial requirement for bidders to support the most popular EVSE brands on the market and all major EV manufacturers.

The Platform Provider is continually working to integrate with a wider spectrum of Telematics and EVSE. In 2024, the Platform Provider significantly increased their offering of Telematics connections, with most connections capable of active managed charging. These additions have all but eliminated eligible technology as a barrier to participation. For an up-to-date list of qualifying Telematics and EVSE, please see Appendix 1.

The Companies did have to remove Enel X as a qualified EVSE connection, due to Enel X shutting down production in the U.S. However, the Platform Provider created a workaround so that grandfathered Enel X users can continue to participate. As noted in last year's MCIP, program participants whose device becomes ineligible after enrolling will not be penalized if they no longer have a pathway to participate in the program.

The decision for Ford to block API access to third-party service providers discussed in last year's report remains in effect. This situation underscores the complexities and evolving dynamics in

[8] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 33.

the EV ecosystem, particularly regarding the relationships between OEMs and third-party service providers.

Managed charging is a nascent concept within the EV landscape, and stakeholders recognize that the relationships and interactions among OEMs, utilities, and third-party platform providers are in a state of flux. The companies are actively monitoring these developments to ensure they remain well-informed about shifts in policies, technological advancements, and market trends.

The Companies commitment to developing and maintaining quality connections with OEMs remains a priority. The Companies are dedicated to exploring alternative pathways and solutions that could enable future access to APIs. As the industry evolves, the Companies are prepared to pivot their approach as needed to ensure the sustainability and effectiveness of the program.

2.6 ENROLLMENT PROCESS

Customers utilize the resources described in Section 2.7 below to understand the program and determine the appropriate Tier to participate in given their unique EV charging requirements. Customers use a web portal that collects relevant participant information, verifies eligibility, provides guidance on their selection based on ongoing participation and fulfillment of the requirements within each tier and eligible equipment, settles all conditions of enrollment, and confirms a participant's successful enrollment. An illustrative example of the enrollment process can be found in Appendix 2.

2.7 CUSTOMER RESOURCES

On the Companies' website, there is a program landing page that contains several program-related resources. There is a program overview with information on OptimizEV, including several helpful documents available for viewing or download. These documents include a program guide, terms and conditions and a list of frequently asked questions (FAQ). The Companies' webpages also include program support contact information and a link to the web portal.

In September 2024, the Joint Utilities launched a dedicated webpage for Residential EV Managed Charging programs on their site[9]. This page offers high-level information about the various programs available and includes links to utility-specific program pages, making it an additional resource for potential participants.

The Companies may also conduct and record a webinar for residential single-family EV owners and host the recording on their website. This will provide customers with multiple ways to understand the program.

[9] Joint Utilities of New York. "Residential Managed Charging." Accessed at: https://jointutilitiesofny.org/index.php/ev/residential_managed_charging

Participants enrolled in the program receive communications in the form of emails and mobile app push notifications. These communications act as a resource to current participants, reminding them of important program participation requirements, providing reports on their historic participation and providing recommendations to achieve peak program participation and maximum incentives.

In 2024, the Companies launched new email communications that provide participation recommendations to Advance Tier users, provide all users with a customized monthly charging history report, and emails to provide clarification on utility account verification during the enrollment process. Illustrative examples of these communications are included in Appendix 3.

2.7.1 Participant Portals

The Companies Platform Provider operate and maintain two Participant Portals in the form of a mobile app and web portal. Both portals are currently available for participants and can be used interchangeably. The mobile app was made available before the July 14, 2023 date as required by the Commission in the Managed Charging Order. [10] The Companies developed a web portal as an alternative to the mobile app; offering OptimizEV participants two participation pathways. The initial web portal encapsulating the enrollment process was launched in April 2024, with additional features rolled out in September 2024. The final components will be launched Q1 2025, culminating in a full in-app experience within the web portal.

The Participant Portals feature an intuitive dashboard that allows users to easily monitor the current status and battery level of their vehicles. Additionally, participants can access a detailed charging history, which indicates whether charging occurred at home or away, along with the total kilowatt-hours (kWh) consumed.

Incentives are easily managed through a dedicated tab, where participants can link their preferred payment method, view their enrollment incentive, and track the ongoing monthly incentives they have earned.

For those in the Advanced Tier, the portals include a Smart Charge tab that enables users to establish customized charging schedules, including specific ready-by times. Advanced Tier participants also benefit from a convenient “Boost” button, allowing them to temporarily opt out of their smart charge schedule.

For illustrative examples of the Participant Portals, please refer to Appendix 4.

2.8 CONTRACTOR APPROVAL PROCESS

In its Managed Charging Order, the Commission directed the JU "to prepare and publish a list of approved contractors to aid Managed Charging Program participants by no later than January 1, 2023." [11] The JU have applied lessons learned in other program areas including energy efficiency, heat pumps, and EV make-ready programs to both source qualifying contractors as well as inform a formalized plan that includes eligibility criteria, an application process, and participant outreach.

2.8.1 Approved Contractor List

As of January 1, 2023, the Joint Utilities published new features for the existing Contractor List on the Joint Utilities website[12] to help program participants find an electrician to perform work under the Managed Charging Program. The Contractor List expands upon the existing resource for the Make-Ready Program so that qualified contractors may now indicate that they can perform work at commercial and/or residential locations. Customers seeking a contractor can filter the Contractor List using search criteria including commercial or residential services, utility service area, type of services offered, etc.

3. PROGRAM BUDGET

3.1 ACTUAL AND FORECASTED ANNUAL BUDGET

The budgets provided by the Companies are based on actual expenses for 2022 – 2024 and the low-scenario budgets submitted to Staff in compliance with its Interrogatory/Document Request No. DPS-1 LMR metering on March 13, 2023, for 2025. The Companies' budget adopts the EV Registration forecasts for 2022 – 2025 provided by Staff and a customer penetration rate of 5% established by Staff for program year2025 for Tier 1, or Baseline Tier, participants. For 2025, the Companies have modified the customer penetration rate to account for lower than forecasted enrollments in 2024 and adjustments to 2025 to increase enrollment forecasts. Additionally, the Companies have adjusted the average incentive per kWh to reflect the most recent 12-month historical average of delivery and supply rates as discussed in Sections 2.3.1 and 2.3.2 and illustrated below.

Other assumptions used in the development of the Companies' budgets include:

[11] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 58.
[12] Joint Utilities of New York. "Contractor List." Accessed at: https://jointutilitiesofny.org/ev/make-ready/approved-contractors

- All Tier 1 and Tier 2 Participants will receive a one-time $25.00 and $150.00 enrollment incentive respectively.
    - The enrollment incentive budget is calculated such that only incremental new Participants receive an enrollment incentive.
- All Tier 1 and Tier 2 Participants will require technology integration with eligible EVSE or EV telematics.
- In Tier 1, 80% of Participants will achieve the criteria to achieve full program participation incentives in any given program year.
- In Tier 2, 95% of Participants will achieve the criteria to achieve full program participation incentives in any given program year.

In addition, the Companies note that recent activity within the Testing Accuracy Task force and the Scope of Work ("SOW") developed with the Electric Power Research Institute ("EPRI") has resulted in a budget share of $79,557.44 and $38,071.07 for NYSEG and RG&E respectively. The Companies' actual costs for 2024 are reflected in the 2024 Evaluation line item.

3.1.1 Passive Budget

The Companies Tier 1 or Passive Budget is based on the cost-based participation incentives as directed by the Commission in the Managed Charging Order and discussed in the MCIP. Participation incentives shown in these budgets are based on assumptions related to the potential incentive that a participant is likely to achieve. Given an 80% threshold to achieve an incentive, the below budgets assume participants achieve the 80% threshold of off-peak charging and earn incentives based on achieving no higher levels of off-peak charging. Actual participation incentives will be earned, accrued, and paid based on each Participants' actual off-peak energy consumption. For the Passive Budget, the calculation for the potential maximum annual participation incentive is as follows.

NYSEG Cost-Based Participation Incentive Estimated Maximum Annual Incentive						
	Daily kWh	Annual kWh	% Off-Peak	Incentive kWh	SC-1/ SC-8 PEV Differential*	Estimated Annual Incentive
Tier 1	9.7	3,541	80%	2,832	$0.062	$175.58

*Based on average NYSEG SC-8 Residential Time of Use Special Provision PEV Tariffs from January to December 2024

RG&E Cost-Based Participation Incentive Estimated Maximum Annual Incentive						
	Daily kWh	Annual kWh	% Off-Peak	Incentive kWh	SC-1/ SC-4 PEV Differential*	Estimated Annual Incentive
Tier 1	9.7	3,541	80%	2,832	$0.050	$141.60

*Based on average RG&E SC-4 Residential Day/ Night Special Provision PEV Tariffs from January to December 2024

NYSEG Passive Managed Charging Budget Actual and Planned												
2022 - 2025 Program Budget		**2022**		**2023**		**2024**		**2025**		**Total**	
	Incentive	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Forecast**	**Participants**	**Budget**
Passive Enrollment Incentive*	$25	-	$ -	20	$ 325	250	$ 6,425	700	$ 17,488	970	$ 24,238
Passive Participation Incentive*	Variable	-	$ -	20	$ 266	250	$ 12,099	700	$ 71,020	970	$ 83,385
Total Incentive Budget*			**$ -**		**$ 591**		**$ 18,524**		**$ 88,508**		**$ 107,622**
Technology Integration		-	$ -		$ 39,145		$ 140,293		$ 136,954		$ 316,392
Tech. Integration Set-up			$ -		$ 119,500						$ 119,500
IT Billing/ Integration			$ -		$ -		$ -		$ -		$ -
Company Labor			$ 53,583		$ 32,288		$ 50,261		$ 50,484		$ 186,615
Company Overhead			$ 21,433		$ 12,915		$ 20,104		$ -		$ 54,452
Education and Outreach			$ -		$ 11,082		$ 28,456		$ 49,583		$ 89,122
Evaluation Costs (includes EPRI)			$ -		$ -		$ 32,929		$ 23,333		$ 56,263
Other Program Admin. Costs			$ -		$ 1,630		$ 5,770		$ 2,000		$ 9,400
Total			**$ 75,016**		**$ 217,151**		**$ 296,337**		**$ 350,863**		**$ 939,366**

RG&E Passive Managed Charging Budget Actual and Planned											
2022 - 2025 Program Budget		**2022**		**2023**		**2024**		**2025**		**Total**	
	Incentive	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Forecast**	**Participants**	**Budget**
Passive Enrollment Incentive*	$25	-	$ -	19	$ 400	170	$ 4,250	459	$ 11,472	648	$ 16,122
Passive Participation Incentive*	Variable	-	$ -	19	$ 481	170	$ 8,216	459	$ 33,512	648	$ 42,209
Total Incentive Budget*			**$ -**		**$ 881**		**$ 12,466**		**$ 44,984**		**$ 58,331**
Technology Integration			$ -		$ 18,726		$ 59,693		$ 58,517		$ 136,937
Tech. Integration Set-up			$ -		$ 51,600						$ 51,600
IT Billing/ Integration			$ -		$ -		$ -		$ -		$ -
Company Labor			$ 22,964		$ 41,513		$ 47,859		$ 43,272		$ 155,607
Company Overhead			$ 9,186		$ 16,605		$ 19,143		$ -		$ 44,934
Education and Outreach			$ -		$ 5,906		$ 10,528		$ 30,000		$ 46,434
Evaluation Costs (includes EPRI)			$ -		$ -		$ 14,844		$ 10,000		$ 24,844
Other Program Admin. Costs			$ -		$ 731		$ 3,202		$ 1,000		$ 4,933
Total			**$ 32,150**		**$ 135,963**		**$ 167,734**		**$ 187,773**		**$ 523,620**

3.1.2 Active Budget

The Companies Tier 2 or Active Budget is based on the cost-based participation incentives as directed by the Commission in the Managed Charging Order and discussed in the MCIP. Participation incentives shown in these budgets are based on assumptions related to the potential maximum incentive that may be achieved. Unlike in the Passive tier of participation, participants utilize a charging scheduler that coordinates charging away from on-peak and a participant is required simply to not override this schedule such that on-peak charging occurs (that is, if a participant overrides the schedule but this override occurs during the off-peak period, they are not penalized). With three possible opt-outs per month before losing their incentive, the Companies have recorded higher potential off-peak charging, up to 95%. Actual participation incentives will be earned, accrued, and paid based on each Participants' actual off-peak energy consumption. For the Active Budget, the calculation for the potential maximum annual participation incentive is as follows.

NYSEG Cost-Based Participation Incentive Estimated Maximum Annual Incentive						
	Daily kWh	Annual kWh	% Off-Peak	Incentive kWh	SC-1/ SC-8 PEV Differential*	Estimated Annual Incentive
Tier 2	9.7	3,541	95%	3,363	$0.062	$208.51

*Based on average NYSEG SC-8 Residential Time of Use Special Provision PEV Tariffs from January to December 2024

RG&E Cost-Based Participation Incentive Estimated Maximum Annual Incentive						
	Daily kWh	Annual kWh	% Off-Peak	Incentive kWh	SC-1/ SC-4 PEV Differential*	Estimated Annual Incentive
Tier 2	9.7	3,541	95%	3,363	$0.050	$168.15

*Based on average RG&E SC-4 Residential Day/ Night Special Provision PEV Tariffs from January to December 2024

NYSEG Active Managed Charging Budget Actual and Planned												
2022 - 2025 Program Budget		**2022**		**2023**		**2024**		**2025**		**Total**	
	Incentive	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Forecast**	**Participants**	**Budget**
Active Enrollment Incentive*	$150	-	$ -	53	$ 6,000	354	$ 57,875	1,276	$ 191,363	1,683	$ 255,238
Active Participation Incentive*	Variable	-	$ -	53	$ 878	354	$ 37,950	1,276	$ 165,929	1,683	$ 204,757
Total Incentive Budget*			**$ -**		**$ 6,878**		**$ 95,825**		**$ 357,292**		**$ 459,995**
Technology Integration			$ -		$ 106,561		$ 198,655		$ 340,238		$ 645,453
IT Billing/ Integration			$ -		$ -		$ -		$ -		$ -
Company Labor			$ 17,861		$ 96,863		$ 71,169		$ 151,452		$ 337,345
Company Overhead			$ 7,144		$ 38,745		$ 28,468		$ -		$ 74,357
Education and Outreach			$ -		$ 30,168		$ 40,294		$ 100,000		$ 170,462
Evaluation Costs (includes EPRI)			$ -		$ -		$ 46,628		$ 70,000		$ 116,628
Other Program Admin. Costs			$ -		$ 4,438		$ 8,170		$ 4,000		$ 16,608
Total			**$ 25,005**		**$ 283,653**		**$ 489,208**		**$ 1,022,982**		**$ 1,820,849**

RG&E Active Managed Charging Budget Actual and Planned											
2022 - 2025 Program Budget		**2022**		**2023**		**2024**		**2025**		**Total**	
	Incentive	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Actual**	**Participants**	**Forecast**	**Participants**	**Budget**
Active Enrollment Incentive*	$150	-	$ -	54	$ 6,000	266	$ 43,350	1,073	$ 160,969	1,393	$ 210,319
Active Participation Incentive*	Variable	-	$ -	54	$ 1,075	266	$ 18,491	1,073	$ 93,192	1,393	$ 112,757
Total Incentive Budget*			**$ -**		**$ 7,075**		**$ 61,841**		**$ 254,161**		**$ 323,076**
Technology Integration			$ -		$ 47,855		$ 93,403		$ 144,316		$ 285,573
IT Billing/ Integration			$ -		$ -		$ -		$ -		$ -
Company Labor			$ 7,655		$ 13,838		$ 74,885		$ 43,272		$ 139,649
Company Overhead			$ 3,062		$ 5,535		$ 29,954		$ -		$ 38,551
Education and Outreach			$ -		$ 15,094		$ 16,472		$ 90,000		$ 121,566
Evaluation Costs (includes EPRI)			$ -		$ -		$ 23,227		$ 30,000		$ 53,227
Other Program Admin. Costs			$ -		$ 1,869		$ 5,009		$ 2,000		$ 8,879
Total			**$ 10,717**		**$ 91,265**		**$ 304,791**		**$ 563,749**		**$ 970,521**

In both Passive and Active tiers, the Companies will utilize learnings from their EM&V activities to update these assumptions. Because these programs are still fairly new and participation is growing, the Companies will wait for more significant data before drawing conclusions on whether the assumptions in the above budgets are adequate or need updating. If this analysis dictates a change, the companies will file updates to the above.

3.2 IMPLEMENTATION: BUDGETARY CAPS & PARAMETERS

As defined by the Commission in its Managed Charging Order: "The total budgets for the managed charging programs are made up of two components. The first component, or the Enrollment and Implementation Component, is the budget for necessary implementation costs, program administration costs, and enrollment incentives paid to customers. The second component, or the Participation Incentive component, is the budget for participation incentives paid to managed charging program participants."[13]

Additionally, the Commission specified that "Since participation incentives are to be administered through utility tariffs, the costs associated with those incentives are provided for information only. This Order, however, authorizes a "not to exceed" budget for Enrollment and Implementation Component costs. The utilities have implemented the managed charging programs in accord with the aggregate three-year budget, with the option to move funding from year to year if needed."[14]

Finally, the Commission directed that "In establishing an appropriate budget for the managed charging programs at each utility, the Commission finds that it is appropriate to use the high participation scenario to determine each utility's participation incentive, enrollment incentive, and variable vendor costs components because that approach will best align with the ZEV goal. Using the high participation scenario will ensure that the Utilities are adequately funded to provide all eligible EV owners that want to participate in the managed charging programs the opportunity to do so."[15]

The budgets provided by the Companies in the previous section are revised from the previous MCIP filings and will continue to be updated in each annual MCIP filing. The Companies will report on OptimizEV details such as actual customers enrolled, actual incentives earned and actual program administration costs. Based on each previous program year actuals, the Companies will revise program participation targets and realign budgets accordingly.

3.3 OPTIMIZATION OF PROGRAM EFFECTIVENESS & COSTS

The Companies have taken actions to optimize program effectiveness, while endeavoring to contain program costs. There are two primary methods the Companies employ to achieve this goal: Customer acquisition and retention and customer Tier alignment.

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[13] Case 18-E-0138, Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure. Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 45.
[14] Id. At page 46
[15] Case 18-E-0138, Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure. Order Approving Managed Charging Programs with Modifications, Jul. 14, 2022 at page 46.

Customer Acquisition and Retention

Acquiring customers can be a costly component of OptimizEV. Educating consumers on managed charging concepts and gaining acceptance is challenging, particularly beyond early adopters of EVs. It is critical to deploy effective marketing strategies and tactics that achieve the greatest result for least possible cost. The Companies have executed strategies and tactics to achieve this goal. Since acquiring customers can be challenging and costly, it is important to retain as many customers in the program for as long as possible. Loyal and experienced customers not only reduce attrition, but they add value to the program through participation and potential promotion of the program to others. They become influencers.

Customer Tier Alignment

Ensuring Participants are enrolled in the right Tier is key to optimizing effectiveness and containing cost. Participants enrolled in the passive Tier 1 (Baseline) who successfully charge off-peak on a consistent basis provide the greatest benefit to the distribution system for lowest costs. Participants enrolled in the active Tier 2 (Advanced) provide additional value to the distribution system, mainly because of high levels of localized EV adoption. The Companies envision targeted recruiting of Tier 2 participants within identified constrained circuits in the future.

3.4 COST RECOVERY

The Companies complied with the directives of the Commission in its Managed Charging Order as it pertains to cost recovery. On December 2, 2022, the Companies filed tariff leaves to become effective January 1, 2023. Per the tariff leaves, the Companies recover program implementation costs, enrollment incentives, and participation incentives through the EV Surcharge.

3.5 PROCESS FOR FAST-TRACK INCENTIVE CHANGE

3.5.1 Filing & Timeline Requirements

As the Commission noted in its Managed Charging Order; “While it is possible that both enrollment incentives and participation incentives may need to change from time to time, it is reasonable to enact different processes and requirements for modifying enrollment incentives than participation incentives in recognition that changes to each type of incentive affect participants differently. Annual updates, at a minimum, to the MCIPs will establish a consistent cadence for scrutiny of utility managed charging program incentive levels.

However, the Commission will also establish a fast-track for implementing enrollment incentive level modifications if the utility identifies a trend where enrollment incentives are set too high."[16]

The remainder of page 32 and continuing page 33 of the Managed Charging Order details the procedures for filing a change to enrollment incentives through the fast-track process. This includes a requirement to file a letter with the Secretary no later than fourteen days in advance of the date the new enrollment incentives are to take effect. The Companies must notify customers of this change by posting the new enrollment incentives on their websites along with the date the new incentives will become effective. The Companies appreciate the Commission's foresight in this area and will follow the fast-track process as directed in the Managed Charging Order.

4. PROGRAM OUTREACH & FEEDBACK

4.1 ENROLLMENT PLAN

The Companies' Enrollment Plan is primarily focused on providing education and outreach to customers to raise awareness, acceptance and increase enrollment in OptimizEV as further discussed in Section 4.2. As part of the plan to achieve these goals, the Companies have initiated or plan to initiate partnerships with existing state, regional, and national EV driving clubs, alliances and associations which potentially includes groups such as NY auto dealers, vehicle manufacturers, and government. Additionally, recognizing the importance of equitable access to both zero emission vehicles ("ZEV") and associated charging incentive programs, the Companies plan to engage with low- to moderate-income ("LMI") advocates.

The following plan is in process with some initiatives launched and others still in queue. The Companies focused their efforts in 2023 on standing up OptimizEV and monitoring new enrollments to identify and correct any initial platform issues. This process allowed the Companies to ensure the proper functioning of the platform and the customer experience of new Participants before driving mass adoption. Once the platform was established and tested, the Companies began their marketing and outreach campaign in Q2 2024.

4.2 MARKETING, OUTREACH, & EDUCATION APPROACH

[16] Id. at page 32

OptimizEV marketing, outreach and education campaign is targeted toward residential EV owners within the Companies' service areas. The primary goal of the campaign is to support the Companies' efforts in increasing customer enrollment in OptimizEV.

The Companies are dedicated to promoting the environmental and financial benefits of the Managed Charging Program through customer education. Education is important to the success of the Managed Charging Program. The Companies have focused resources to help guide the customer through their EV journey. Participants have access to dedicated web pages on the Companies websites to find a wide variety of information for customer education, including a comprehensive program guide, terms and conditions and an FAQ page. Ongoing outreach and education are delivered by way of general marketing campaigns, informational webinars, and the Companies presence at relevant events and networking opportunities.

Tactical Overview

- Landing Page: provides an end-to-end consumer experience to learn more about OptimizEV
- Digital Marketing: Drive traffic to the new web page(s) through a multi-channel digital marketing campaign targeting key customer segments
- Event Research: Relevant industry associations and events for the Companies to sponsor and/or participate in. In 2024 the Companies tabled at 2 relevant community events.
- Webinar Support: Hosted webinars by the Companies to educate our customers
- Content Creation and Amplification: Amplification of newsworthy milestones or customers to highlight
- Media Outreach: The Companies will manage public relations outreach on an ad hoc basis for campaign milestones or other notable events
- Outreach in Coordination with EVSE Manufacturers: manufacturers like ChargePoint can identify their own customers in the Companies' service area and are able to send targeted marketing messages about the OptimizEV program
- Coordination with Affinity Groups: Work with affinity groups like local EV Clubs or environmental groups to promote the OptimizEV program. In 2024, the Companies partnered with their Platform Provider to promote the program on the Platform Provider's website. A depiction of the advertisement can be viewed in Appendix 5.
- Utilization of NYSERDA Rebate List: as mentioned in Section 4.2.1 below, NYSERDA has healthy rebates for EVs. The recipients of these rebates were sent OptimizEV information and invited to enroll, which resulted in notable increases in enrollment outlined in Section 4.2.1.

Target Audiences

The targeted audiences for OptimizEV are single family property owners who have a registered EV that the lease or own, customers in underserved communities, customers who own a home and are likely EV adopters, as well as two to four-unit multifamily property owners, and single-family property landlords and renters who either have a registered EV or are likely to purchase an EV. Additional audiences include other distribution channels like auto dealerships and workplaces since they are key influencers on potential EV owners.

The Companies may conduct research to identify subsegments of this audience that are the ideal targets for OptimizEV. This research may include an evaluation of certain demographics like location, income, current EV ownership, age, children in the home, and any others that apply. The Companies may conduct research into daily driving habits, purchasing habits, and message preferences to ensure the messaging best suits each group.

Advanced technology and internet search capabilities as well as database information allow the Companies to target key customers by certain demographics and location. Since different segments of the audience may receive different messaging, this will be integral to maximizing the number of customers who act.

Messaging Themes

The primary campaign messaging focuses on making customers aware of the value OptimizEV for customers with a registered EV to help them save money. In general, messaging themes for this audience encompasses the following:

- Ease of Enrolling: Customers only need to follow a few quick steps to enroll in EV Managed Charging.
- Enrollment Incentives: by signing up for EV Managed Charging, customers receive an incentive for charging during off-peak times.
- Cost Control: EV Managed Charging empowers EV drivers to have more control over their energy costs by charging their EV when incentives are available to offset some of the cost of charging.
- Carbon Reduction: EVs already have lower carbon emissions than internal combustion engine (ICE) vehicles. Enrollment in EV Managed Charging helps customers lower their carbon footprint even more by charging during off-peak times to reduce the need for peak-plants, which often use the dirtiest fuels.
- Expert Support: The Companies support EVs and are a trusted expert for customers' EV needs.

The Companies will refine their messaging and tactics through testing and performance analytics. As barriers to enrollment are identified, the Companies will develop new strategies designed to overcome those barriers.

4.2.1 Cross-Program Integration for Delivery & Recruitment

The Companies recognize the importance of integration with external offerings to maximize participation and customer satisfaction. OptimizEV exists while other programs similar in nature promote similar goals. One such option is the New York State Energy Research and Development Authority ("NYSERDA"). NYSERDA is offering EV drivers' incentive dollars to adopt clean driving options. NYSERDA's program offers rebate dollars up to $2,000 and boasts over 60+ car models that are eligible. NYSERDA'S state incentives coupled with an additional up to $7,500 from a Federal Tax Credit and the Utility offerings make an optimal time to purchase a new electric vehicle.

The Companies launched a successful marketing campaign in September 2024 targeted at the 5-year historical NYSERDA list. An initial email and follow up email were sent to NYSEG and RG&E customers from the NYSERDA list. NYSEG saw an 84% and 160% increase in enrollments for October and November respectively, compared to September enrollments. RG&E saw an 188% and 246% increase in enrollments for October and November 2024 respectively, compared to September enrollments. An illustrative example of the marketing email can be viewed in Appendix 6.

As the EV market changes and evolves the Companies expect other initiatives to compliment the Managed Charging Programs to emerge.

4.3 PARTICIPANT INSIGHT & SATISFACTION DATA

In its Managed Charging Order, the Commission directed that each member of the JU "shall obtain and document Managed Charging Program participant insights and participant satisfaction data, as discussed in the body of this Order. The Commission further directs that this data shall be detailed in the annual Managed Charging Implementation Plans." The Companies have complied with this requirement and outline how this compliance was met, including descriptions of how data was obtained and aggregated data reporting in Sections 4.4, 4.5., 5.3 and 5.4.

4.4 COMPLAINT & INQUIRY PLAN

In its Managed Charging Order, the Commission directed that each member of the JU "shall record all customer complaints and inquires related to the Managed Charging Program, as discussed in the body of this Order. The Commission further directs that the Utilities shall provide a high-level overview of their response to these complaints and inquiries in the annual

Managed Charging Implementation Plans, as discussed in the body of this Order." [17] The Companies complied with this requirement by implementing a complaint and inquiry tracking component in their customer service flow for participants in this Program. Customers are able to email Program support staff as issues or questions arise. The staff have kept records of all customer interactions of this nature and have categorized complaints and inquiries and reported on them in section 4.4.1. Categories correspond to different program or platform areas and are utilized by program staff to address issues on an ongoing basis. Categories include:

- Mobile App and/or Web Portal Issues
- Customer Communication Issues
- EV/EVSE Charging Issues
- Programmatic Issues
- Incentive Distribution Issues
- Incentive Disputes
- Charging Disputes

Issues are categorized based on *Risk Level* which will be scored on a 0 to 3 scale, where 0 = "Low Risk" and 3 = "Critical Risk" and the *Ease of Issue Resolution* will be scored on a 0 to 3 scale, where 0= "Simple Fix" to 3= "Complex Fix." This scoring will determine the order in which issues get attention and how the Companies and their partners resources are distributed. The *Risk Level* categories are:

- Low
- Medium
- High

Customers are assisted promptly as their issue arises and issues are resolved as quickly as the Companies are able, given the nature of each unique issue. Resolutions are categorized by *Resolution Status* to help identify areas that are not able to be resolved. The *Resolution Status* categories are:

- Resolved
- Partially Resolved
- Unresolved

Results of these issues and issue resolutions or non-resolutions are presented at a high-level in section 4.4.1. The Companies recognize that these inquiries and complaints play a large part in how the program and platform evolve over time, and the Companies take in customer feedback

[17] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 65.

and adjust as quickly as possible to drive a compelling and useful program for the Companies' customers. Please see Section 5.4 for more details on our Participant Satisfaction Evaluation Plan.

4.4.1 Complaints & Inquiry 2024 Overview

The Companies maintain the framework described in the previous section for categorizing the types of complaints and inquiries that Program Support Staff receive on the OptimizEV. As issues arose in 2024, the Companies communicated with potential and future participants and addressed their concerns in a timely fashion and achieved resolution of the majority of issues. Almost all issues were "Low Risk" with one "Medium Risk" issue arising. There were no "High Risk" issues.

The below tally of issues between the Companies' two operating companies does not fully represent the totality of emails that Program Staff receive. The Companies did not tally all emails that are received, as many emails are simple conceptual or practical questions such as "does NYSEG have any rebates for my EV?" or "Does your program support Tesla?" These types of questions are answered promptly, and customers are pointed to all relevant program documents. In this overview, the Companies tallied only those issues that could not be solved by simply referring to existing information. Generally, if a customer is having issues with the program or platform that go beyond basic informational requests, the Companies identified it as an issue or complaint that fell with the Complaint Resolution Process.

To provide additional context on the process, many customers emailed on multiple topics, and several people who made inquiries or raised complaints did not end up joining the program. An important example regarding those customers that made inquiries or raised complaints that did not join the program include those customers who could not join due to either there EV or EV charger being incompatible with the OptimizEV platform.

Below is the tally of issues between the two operating companies:

NYSEG		**Risk Level**			**Resolution Status**		
Issue Classification	*Count*	*Low*	*Medium*	*High/Critical*	*Resolved*	*Partially Resolved*	*Unresolved*
Mobile App and/or Web Portal Issues	**159**	158	1	0	159	0	0
Customer Communication Issues	**67**	67	0	0	67	0	0
EV/EVSE Charging Issues	**25**	25	0	0	25	0	0
Programmatic Issues	**196**	196	0	0	196	0	0
Incentive Distribution Issues	**31**	31	0	0	31	0	0
Incentive Disputes	**0**	0	0	0	0	0	0
Charging Disputes	**0**	0	0	0	0	0	0

RGE		Risk Level			Resolution Status		
Issue Classification	*Count*	*Low*	*Medium*	*High/Critical*	*Resolved*	*Partially Resolved*	*Unresolved*
Mobile App and/or Web Portal Issues	**73**	68	5	0	73	0	0
Customer Communication Issues	**44**	44	0	0	44	0	0
EV/EVSE Charging Issues	**21**	21	0	0	21	0	0
Programmatic Issues	**114**	114	0	0	114	0	0
Incentive Distribution Issues	**17**	17	0	0	17	0	0
Incentive Disputes	**0**	0	0	0	0	0	0
Charging Disputes	**0**	0	0	0	0	0	0

Programmatic Issues

Most issues, a total of 310, fell into the **"Programmatic Issues"** category. The issues in this category related to:

- ongoing incentive payments being distributed quarterly vs. monthly.
- participation in OptimizEV potentially effecting the participant's electric rate or meter.
- the differences between participation tiers, complaints about the list of eligible EV and EVSE equipment

- lack of clarity regarding program incentives being delivered as off-bill payments.
- how OptimizEV relates to the EV TOU Rate Plan.

In all cases, these issues were resolved, as they generally resulted from simple informational gaps. In 2023 there were a large number of inquiries related to connecting eligible EV or EVSE. This issue was pinpointed and resolved in 2024 by simplifying the equipment connection step within the enrollment process, eliminating inquiries on this issue.

Participant Portal Issues

The second largest area of issues, a total of 232, fell into the **"Mobile App and/or Web Portal Issues"** category. The issues in this category related to:

- customers needing assistance to complete the enrollment process
- Platform Provider's EV charging cost estimation feature as it relates to participation in the program
- Platform Provider's EV charging features
- trouble connecting an eligible EVSE in the mobile app due to the participant's EV not being listed

In most of these cases, the Participant Portal issues resulted from confusion during the enrollment process in Qs 1 and 2, before web portal enrollment was launched in Q3 2024. Since that time, these inquiries have dropped off almost completely.

There were several issues in 2023 that dropped off thanks to process improvements with the Platform Provider, including the "only charge off-peak" toggle feature being corrected, and equipment integration issues being addressed and fixed.

Customer Communication Issues

The third largest area of issues, a total of 111, fell into the **"Customer Communication Issues"** category. The issues in this category related to:

- switching from the Companies' EV TOU Rate Plan
- confusion over receiving charger rebates versus monthly incentives

The Companies began efforts in Q3 2024 to ramp up education both internally and externally about the differences between the Companies' EV TOU Rate Plan offering and OptimizEV. Internal customer service representatives are now well-versed in the offerings and are able to guide customers toward the offering that best suits their unique home charging situation.

Program staff will seek to further address this issue and clarification around incentives in program resources and information sources presented to customers.

Incentive Distribution Issues

The fourth largest area of issues, a total of 48, fell into the **"Incentive Distribution Issues"** category. The issues in this category related to:

- a delay in a few participants' enrollment incentives being paid out
- participants experiencing issues linking their PayPal/Venmo accounts

In all cases, the issues in this category were resolved, and required Program Support or the Platform Provider's support to either manually confirm eligibility for an incentive or guide a customer through adding their payment method.

Relative to the size of the program in 2023, the number of reported issues in this category were significantly lower in 2024 thanks to process improvements. However, the Companies will continue to monitor areas to improve the incentive distribution process if necessary.

EV/EVSE Charging Issues

The fifth largest area of issues, a total of 46, fell into the **"EV/EVSE Charging Issues"** category. The issues in this category related to:

- Advanced Tier participants' Smart Charge Schedule not being followed
- lapses in charging data being transmitted to the Platform Provider

These issues were all temporary issues that were resolved promptly by the Platform Provider. The Companies and the Platform Provider documented and communicated such issues between one another as they arose and resolved them as quickly as possible. In all cases, customers were informed and supported as the issues were resolved.

Relative to the size of the program in 2023, the number of reported issues in this category were significantly lower in 2024 due to improvements made by the Company and its partners.

There were no disputes over charging or incentive calculation. See Section 4.5.5 for the Dispute Resolution 2024 Overview.

4.5 DISPUTE RESOLUTION FRAMEWORK

In the Managed Charging Order, the Commission directed the JU to consult with staff and "include a dispute resolution framework in [the MCIP]. The dispute resolution section of the MCIPs shall provide details of how customer disputes regarding meter reading and billing discrepancies will be investigated and resolved by the utility and, among other things, shall explain the circumstances when the customer may: 1) return to the SC1 standard rates if desired; or 2) choose the TOU rate as an alternative for future billing periods. The MCIPs shall also include a resolution procedure if the dispute relates to the networked L2 charger or onboard EV telematics' Wi-Fi connectivity, including how to derive the off-peak usage based on customers' typical baseline behavior, an explanation of how the bill will be manually adjusted to account for the number of days that are in dispute, and how to address any reoccurring problems." [18] The Companies endeavor to provide Participants a transparent program that fairly awards for the load shifting potential they provide. When discrepancies arise between a Participant's expectations and experience, it is the Companies intent to resolve issues in a way that encourages strong participation from that customer in the future but also utilizes Program dollars cost-efficiently. This will be done through a clear dispute resolution process that prioritizes maintaining consistent, high-quality participation. Before addressing specific topics of resolution set out in the Order, the Companies outline the procedure through which a customer would submit a dispute.

4.5.1 General Dispute Resolution Framework

Participants will engage with the program in either Baseline or Advanced Tier of Participation and receive monthly reports on their activity within which a determination of their success or failure to achieve the relevant monthly goal is presented.

[18] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 29.

Dispute Arises:

If a customer disagrees with the determination, they will seek to understand this discrepancy and possibly prove their success in meeting their requirements. Possible disputes are numerous, but for Baseline Tier participants, a general example would be a participant who believes they achieved >80% off-peak charging, but the report determines they achieved 75%. For Advanced Tier participants, a general example could be a participant who believes they did not opt out more than 3 times in a given month of their preset charging schedule, but the report determines that they did. In any case, the participant will see to understand what caused this issue and/or prove their case.

Initiating a Dispute:

The participant will have been provided contact information for Program Support Staff during their enrollment, but there will also be guidance on the program website and program materials on how to seek out resolution to disputes which will be to reach out to Program Support Staff who will have a set procedure to handle disputes. Depending on the specific nature of the dispute, the participant will be advised to provide documentation of their charging behavior over the disputed time period.

In the above example of the Baseline Tier participant, the participant would access their OEM app and, depending on the capabilities of the given platform, export documentation of their charging history over a given month. This could be either a screenshot of their app or an exported report (generally in .csv format).

For the above example Advanced Tier participant, the participant would access their OEM app and, depending on the capabilities of the given platform, export documentation of their opt-out history over a given month. This could be either a screenshot of their app or an exported report (generally in .csv format).

Generally, participants can also reach out to the given OEM for support in providing relevant evidence.

The participant would collect their supporting evidence and submit it via email to Program Support Staff.

Review of Dispute:

Program Support Staff compares evidence provided by the participant against charging data accessed through the utility portal of the program platform.

The Companies will seek to resolve all issues in a timely manner. All participants seeking resolution to a dispute will receive a response within 3 business days and determinations will be made within 10 business days. In the case where a determination cannot be made due to technical issue or other delaying factor, the determination will be in the participant's favor and the appropriate incentive amount will be credited to the participant.

Dispute Determinations:

The Companies will proceed through all disputes with the goal of maintaining consistent, high-quality participation. The Companies will use this axiom and favor siding with the participant unless there is clear evidence that the participant did not fulfill their obligation within the program to the degree necessary to receive incentives. The Companies will also consider the tone of the dispute, using ad hoc judgment on whether preserving a positive experience outweighs the value of the incentive in contest.

When reviewing the evidence of charging, the Companies will follow the following conditionals:

- If the charging history provided by the participant through their OEM provider does not match that assessed by Program Support Staff, the determination will always be in favor of the participant.
- If the charging history provided by the participant matches that accessed by Program Support Staff, the determination will stand, and Program Support Staff will work with the Participant to ensure they're clear on how the determination was made and provide guidance on how to achieve success in following months.
- If there was a known technical issue with the platform during the timeframe in dispute, the participant will be assumed to have participated successfully and be credited the appropriate incentive amount.
- If a technical issue is discovered because of this dispute, the participant will be credited the appropriate incentive amount, and the Platform Provider will immediately take actions to resolve the technical issue.

Program Support Staff will always decide in the participant's favor where sufficient evidence is provided.

Program Support Staff will weigh the best course of action with regard to insufficient evidence in the participant's favor or where a determination cannot be made due to an inability of Program Support Staff to fully understand and explain a discrepancy between customer-submitted evidence and the utility-side data.

Depending on the nature of the dispute, the Companies may make the determination to credit the incentive to preserve a positive experience.

Participants with more than 5 disputes in a program year may be advised and guided by Program Support Staff to change their Tier of participation and/or method of participation (EV versus EVSE) depending on the nature of their disputes.

4.5.2 Meter Reading & Billing Discrepancy Disputes

The Companies will utilize the above dispute resolution framework to address all discrepancies between the data the Companies receive through a participant's EV or EVSE. The Companies do not intend to utilize the participant's residential electric meter to determine that Participant's performance with regards to incentives, nor will incentives be incorporated into the Participant's electric bill. Therefore, for the purposes of this MCIP, there will be no specific meter or billing-related issue to resolve. In general, the Companies meter reading and billing discrepancy dispute process adheres to the Home Energy Fair Practices Act (HEFPA) - Residential Consumer Rights.

OptimizEV does not require Participants to enroll in any of the Companies residential tariffs as a condition for eligibility in OptimizEV. In Section 2.1, the Companies outlined the requirements for eligibility and noted that customers on the Companies EV TOU Rate are not eligible to participate. In Section 2.3.3, the Companies discuss the benefits and risks associated with EV TOU Rates and customers must make informed decisions on the tariff or program that would be most beneficial for their energy requirements. Regardless of a customer's decision to enroll in the EV TOU Rate or participate in OptimizEV, the applicable tariff or program eligibility requirements will apply.

4.5.3 Networked L2 Charger or EV Telematics Disputes Related to Wi-Fi Connectivity

The Companies will follow the dispute resolution framework in Section 4.5.1 for disputes resulting from Wi-Fi connectivity issues. The process outlined above is designed to resolve all disputes, including issues where participant data is omitted from the data that the Companies receive through their integrations with participant EV or EVSE due to Wi-Fi connection interruptions.

4.5.4 Escalated Complaint & Dispute Documentation

Because Program Support Staff engage customers in all disputes through email, the Companies and their partners will document and retain all communications and relevant evidence. This material will be retained for a 12-month period to ensure all issues are resolved and participants have a full program year to reassert their claims. After the 12-month period, the Companies delete such communications.

Any disputes that result in discovery of technical or programmatic issues are fed into a queue for resolution and addressed depending on the severity of the issue and the time required to fix the issue. This process is described in Section 4.4. All such discoveries will be documented and referenced in the annual MCIP if such discoveries prompt significant programmatic or platform changes.

4.5.5 Dispute Resolution 2024 Overview

In 2024, the Companies can report that there were no disputes of the nature described above. As described in the Complaint & Inquiries 2024 Overview section above, the Companies handled a small number of inquiries related software issues that had initially resulted in customers having issues participating for very brief moments or lapses in the charging history being transmitted between EV/EVSE to the Platform Provider. As the Platform Provider made corrections in the platform, these issues resolved, and no customers maintained a dispute over their charging history and getting the correct incentive. In every one of these small number of cases, the customer was able to verify their adherence to the requirements of their participation tier and were awarded incentives accordingly.

5. PROGRAM EVALUATION & MEASUREMENT

In its Managed Charging Order, the Commission established its requirement for each member of the JU to "conduct evaluation and measurement activities to measure the effectiveness of the managed charging programs to be included in the annual reports." [19] The Commission notes that these "[e]valuations can provide valuable information and insights into program operations."[20] The Companies agree and intend to use these efforts to drive a continually-improving program design which provides customers clear goals and participation parameters, as well as valuable incentives and lifestyle benefits. The Companies will also use this data to understand how participants interact with the platform and regularly update the platform accordingly to drive strong outcomes for the program, including high levels of participation and efficient use of ratepayer dollars.

The Commission further notes that "[i]n addition to assessing and improving program performance, the Commission expects the broader impacts of the program will also be examined including how the market is evolving, understanding the effects of emerging technologies, and EV participants attitudes and behaviors regarding EV managed charging."[21] The Companies, again, agree. Evaluation and measurement activities will enable the program and platform to

[19] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, Jul. 14, 2022 at p. age 55.
[20] Id.
[21] Id.

stay current in an evolving and changing EV environment. The Companies will use these evaluation and measurement activities to understand the usability of the platform, the accessibility of managed charging in general, and satisfaction of participants. The Companies will work with the Commission, Staff, The JU, and the EM&V vendor procured for this program to understand and adapt to any in the EV landscape over the duration of the managed charging program. This will allow the Companies to continually improve the program and associated platform to be as user-friendly and valuable for the participant as possible in a market that has not yet reached maturity.

5.1 EM&V PLAN

In the Managed Charging Order, the Commission requires that "[a]ll evaluation and measurement activities are to be transparent, useful, and actionable with clearly articulated recommended actions. The planned evaluation and measurement activities shall be detailed in the MCIP, and the results documented in the annual MCIP filing." [22] The Companies are in the process of procuring an EM&V vendor through an open RFP process. The EM&V vendor and the Companies will work together to analyze data collected by the Platform Provider and drive insights into the program to improve the program design and platform features.

The Companies' Platform Provider currently provides metrics and data points required at minimum by the Commission in its Managed Charging Order (see Section 5.2.1 below). Furthermore, the Platform Provider aggregates deeper and more insightful metrics and data points that help the Companies improve their programs. The Companies plan to use insights generated from ongoing EM&V activities at the Companies' Connecticut affiliate's Managed Charging Program.

Once the Companies have acquired an EM&V vendor, the Companies, the Platform Provider, and this vendor will establish a reporting methodology that satisfies the Commission's requirements and leads to transparent, useful, and actionable insights.

5.2 DATA COLLECTION & REPORTING PLAN

The Companies will work with the Platform Provider and the future EM&V vendor to design reporting and data collection methods following the conclusion of the procurement process. As stated in the previous section, the Companies required the Platform Provider to collect and be able to report on all data points required by the Commission in the Managed Charging Order as a part of the contracting and scoping process, and the EM&V vendor will analyze the data collected and provide recommendations for program and platform changes. These changes will

[22] Id.

be aimed at improving the efficacy of the program in terms of load shifting and use of ratepayer dollars.

5.2.1 EM&V Results for 2024

In the Managed Charging Order, the Commission set out specific data to be collected as part of the evaluation and measurement activates performed by each member of the JU regarding their Managed Charging Programs. That list can be found in the Order. [23] The Companies report on these cited parameters below. The Companies will also evolve their capabilities to deliver deeper metrics with guidance from their future EM&V vendor.

1. Program Enrollment
    a. Program Enrollments by Month

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	**Total**
NYSEG	46	38	32	34	35	39	49	44	45	83	117	42	**604**
RG&E	20	20	15	28	28	20	38	28	26	75	90	48	**436**

    b. Attrition by Month

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
NYSEG	1	0	2	1	1	3	3	2	2	3	3	2
RG&E	0	0	1	2	1	0	1	3	0	1	4	4

[23] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at pages 55-57.

c. Incentive Payout by Month

NYSEG

Month	Baseline		Advanced		Total
	Enrollment	*Monthly*	*Enrollment*	*Monthly*	
January	$375.00	$103.51	$5,700.00	$893.08	$7,071.59
February	$225.00	$398.40	$2,400.00	$1,548.45	$4,571.85
March	$250.00	$494.25	$4,650.00	$1,528.78	$6,923.03
April	$350.00	$505.20	$4,200.00	$1,668.19	$6,723.39
May	$250.00	$559.93	$3,150.00	$2,372.83	$6,332.76
June	$600.00	$767.43	$3,000.00	$3,086.61	$7,454.04
July	$475.00	$958.71	$4,775.00	$3,893.02	$10,101.73
August	$400.00	$1,262.14	$3,750.00	$3,973.55	$9,385.69
September	$600.00	$1,395.80	$4,050.00	$4,219.07	$10,264.87
October	$950.00	$1,740.55	$7,650.00	$4,192.36	$14,532.91
November	$1,300.00	$2,135.61	$11,700.00	$6,854.94	$21,990.55
December	$650.00	$1,777.20	$2,850.00	$3,719.14	$8,996.34
Total	$6,425.00	$12,098.73	$57,875.00	$37,950.02	**$114,348.75**

RG&E

Month	Baseline		Advanced		Total
	Enrollment	*Monthly*	*Enrollment*	*Monthly*	
January	$75.00	$218.07	$3,000.00	$554.06	$3,847.13
February	$175.00	$480.65	$1,200.00	$1,104.36	$2,960.01
March	$150.00	$497.25	$1,200.00	$989.22	$2,836.47
April	$400.00	$432.10	$3,150.00	$963.44	$4,945.54
May	$175.00	$527.33	$3,150.00	$1,172.96	$5,025.29
June	$200.00	$577.31	$2,250.00	$1,511.76	$4,539.07
July	$275.00	$703.01	$2,250.00	$1,648.94	$4,876.95
August	$425.00	$798.60	$2,400.00	$1,813.13	$5,436.73
September	$375.00	$911.53	$2,400.00	$2,005.16	$5,691.69
October	$675.00	$896.42	$7,800.00	$2,027.93	$11,399.35
November	$725.00	$1,184.29	$10,950.00	$2,725.71	$15,585.00
December	$600.00	$989.08	$3,600.00	$1,974.23	$7,163.31
Total	$4,250.00	$8,215.64	$43,350.00	$18,490.90	**$74,306.54**

d. Program Enrollments by Tier (not requested, but provided)

Tier	NYSEG	RG&E
Baseline	250	170
Advanced	354	266
Total	**604**	**436**

2. Program Administration Funds Spent to Administer Programs that Include but Not Limited to:
    a. Staff Salaries
    b. Company Overhead
    c. Other costs that do not include direct program implementation, incentives and services, and program evaluation

Please see the Program Budget detailed in Section 3 that specifies these and other datapoints related to administering OptimizEV.

3. Billing Impacts
    a. Average Participant and Non-Participant Savings

Monthly incentive averages were broken up by participation tier and operating company. The sum of all months indicates average annual incentive received by participants enrolled in the program for the entirety of 2024, again broken out by participation tier and operating company. Non-participants do not directly save from the program.

Month	NYSEG		RG&E	
	Baseline	*Advanced*	*Baseline*	*Advanced*
January	$2.88	$10.76	$8.39	$8.27
February	$8.30	$14.21	$13.35	$14.34
March	$8.67	$11.58	$12.75	$11.11
April	$7.43	$10.76	$8.00	$9.45
May	$6.91	$13.41	$8.51	$9.61
June	$7.60	$15.75	$8.25	$11.28
July	$7.92	$17.30	$8.17	$10.57
August	$9.08	$15.83	$7.91	$10.73
September	$8.56	$15.51	$7.93	$11.08
October	$8.70	$13.18	$6.36	$8.82
November	$8.72	$17.58	$7.13	$9.24
December	$6.58	$9.14	$5.23	$6.17
TOTAL	**$91.36**	**$165.01**	**$101.98**	**$120.67**

b. Associated Bill Impacts

Based on incentives paid or earned by participating customers in 2024 the estimated bill impact to an SC-1 customer using 600kWh per month would be as follows.

Utility	Total Incentives	**Monthly Bill Impact**
NYSEG	$114,348.75	**$0.006**
RG&E	$74,306.54	**$0.009**

c. Value of Participation Incentives Differentiated by Delivery and Supply Costs

NYSEG	EV TOU Night	Standard Rate	**Incentive Amount per kWh**
Supply	$0.0469	$0.0664	**$0.0195**
Delivery	$0.0316	$0.0740	**$0.0424**

RG&E	EV TOU Night	Standard Rate	**Incentive Amount per kWh**
Supply	$0.0438	$0.0629	**$0.0191**
Delivery	$0.0396	$0.0706	**$0.0309**

The numbers above demonstrate the difference between the 2024 average of delivery and supply costs for each utility's default volumetric and Commission approved time-varying rate. For participants meeting their tier's monthly minimum requirements, incentives are calculated by multiplying their home EV off-peak charging accumulated kWh consumption for that month by the delivery and supply cost difference between their utility's default volumetric and Commission approved time-varying rate for that same month.

d. Updated Supply Rate Forecast Once the New Supply Rate is Calculated

The Companies do not have a supply rate forecast for 2025 at this time, as supply rates are calculated daily. However, the Companies can forecast 2025 delivery costs through filed tariffs. Since the program's participation incentives are based on both supply and delivery costs, the Companies believe it beneficial to calculate the forecasted differentials using the 2025 average of known delivery costs and average supply costs for 2024.

NYSEG	EV TOU Night	Standard Rate	**Incentive Amount per kWh**
Supply	$0.0469	$0.0664	**$0.0195**
Delivery	$0.0391	$0.0915	**$0.0524**

RG&E	EV TOU Night	Standard Rate	**Incentive Amount per kWh**
Supply	$0.0438	$0.0629	**$0.0191**
Delivery	$0.0459	$0.0815	**$0.0357**

e. Subsequent Adjusted Managed Charging Credit Modified in Coordination with the Updated Supply Forecast that Informs the EV TOU Rates

The table above shows the 2025 forecasted value of participation incentives using the 2025 average of known delivery costs and average supply costs for 2024, given that the Companies cannot forecast supply costs. For participants meeting their tier's monthly minimum requirements, incentives are calculated by multiplying their home EV off-peak charging accumulated kWh consumption for that month by the delivery and supply cost difference between their utility's default volumetric and Commission approved time-varying rate for that same month.

Using the formula from sections 2.3.1 and 2.3.2 above, the following are estimates for maximum 2025 annual incentive amounts per participant:

Baseline Tier:

NYSEG: 80% of 9.7 kWh = 7.76 kWh * $0.072 = $0.56/ day * 365 days = $204

RG&E: 80% of 9.7 kWh = 7.76 kWh * $0.055 = $0.43/ day * 365 days = $157

Advanced Tier:

NYSEG: 95% of 9.7 kWh = 9.2 kWh * $0.072 = $0.66/ day * 365 days = $241

RG&E: 95% of 9.7 kWh = 9.2 kWh * $0.055 = $0.51/ day * 365 days = $186

4. Participant Charging Behavior
    a. Average Duration of Charging Sessions

Month	NYSEG (hours:minutes)	RG&E (hours:minutes)
January	2:55	2:29
February	2:49	2:47
March	2:58	2:42
April	2:42	2:33
May	2:47	2:37
June	2:57	2:41
July	3:06	2:57
August	3:04	3:04
September	2:53	2:54
October	2:57	2:51
November	2:56	3:03
December	4:51	4:40

    b. Aggregated kWh Consumption Data for On- and Off-Peak periods, by Season if Applicable

Month	NYSEG		RG&E	
	Off-Peak	*On-Peak*	*Off-Peak*	*On-Peak*
January	23012.06	14601.33	19586.49	4287.13
February	31227.7	17231.91	27208.87	4252.55
March	41042.15	22087.91	31458.3	3398.08
April	44295.14	22746.57	30017.8	3878.01
May	60509.1	15688.14	37884.14	4300.66
June	69638.69	16428.92	44073.4	3745.95
July	81637.28	19841.16	47842.79	5153.81
August	90411.43	22525.25	47086.18	6393.29
September	92891.03	22569.72	53285.14	6402.36
October	111743.08	28933.02	69247.21	9509.57
November	133109.72	44016.02	95479.48	13337.52
December	161347.05	53699.98	127282.54	17102.18

c. Aggregated Number of Charging Events for On- and Off-Peak Periods, by Season if Applicable

Please note, the OptimizEV program does not have Demand Response Events. The table below is the count of individual charging sessions by month (on- or off-peak).

Month	**NYSEG**		**RG&E**	
	Off-Peak	*On-Peak*	*Off-Peak*	*On-Peak*
January	1390	1726	1122	864
February	1828	2150	1381	1036
March	2235	2637	1526	1002
April	2476	2881	1586	1166
May	2914	3156	1941	1415
June	3188	3577	2151	1326
July	3675	4182	2275	1614
August	4145	4497	2410	1717
September	4364	4541	2730	1863
October	5232	5578	3580	2652
November	6556	7631	5180	3804
December	7444	9427	6266	5103

d. Aggregated Duration of On-Peak Charging Events and Off-Peak Charging Events

Please note, the OptimizEV program does not have Demand Response Events. The table below is the aggregated duration of individual charging sessions by month (on- or off-peak).

Month	**NYSEG** (in hours)		**RG&E** (in hours)	
	Off-Peak	*On-Peak*	*Off-Peak*	*On-Peak*
January	3287.3	2376.8	2383.8	716.8
February	4034.4	2358.4	3091.2	860.5
March	5002.2	3238.8	3093.9	1174.3
April	4636.8	3352.6	3023.6	1371.6
May	5691.3	4157.7	3831.6	1744.0
June	6945.4	4792.4	4486.3	1746.6
July	9396.1	5294.1	5922.5	1787.2
August	9937.3	5409.9	6134.5	2131.7
September	9419.0	4871.6	6643.6	1879.9
October	11315.7	6329.5	8770.2	2785.8
November	14614.1	10588.3	12787.6	4895.9
December	27928.4	18506.0	24514.2	6972.1

e. Provide Information Requested in 4.a-4.d for Load Relief Hours if Applicable.

This is not applicable to the Companies' OptimizEV programs.

f. Event Opt-Out Rate for Active Managed Charging Programs

There are no Demand Response Events or any load events in the OptimizEV program. Instead, participants in the Advanced Tier of participation set a charging schedule that optimizes their charging to benefit the electric system. The requirement on participants is to not opt out of this schedule such that charging occurs on-peak. In the table below, the number of opt outs that resulted in on-peak charging are shown. There are no opt-outs in the Baseline Tier, as participants are simply asked to coordinate 80% or more of their charging time to off-peak.

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
NYSEG	28	28	45	59	60	87	96	148	87	148	248	255
RG&E	16	11	18	28	36	33	43	47	37	39	94	114

5. Percent Scoring Program Favorably/Unfavorably as Defined in the "Outreach and Feedback" Section

NPS Tier	**NYSEG**	**RG&E**
Promoter (9-10)	38.14%	32.39%
Passive (7-8)	27.84%	18.31%
Detractor (0-6)	34.02%	49.30%

5.3 NET PROMOTER SCORE SURVEY PLAN

In the Managed Charging Order, the Commission states that "the Utilities are directed to obtain and document participant insights and participant satisfaction data on the clarity of the program, satisfaction with program elements, and any issues that may have been encountered. Participant feedback can be obtained through surveys, focus groups, and/or other methods of participant engagement." The Commission further states that the "[u]tilities shall convene with Staff, at least sixty (60) days prior to the commencement of a managed charging program, to establish the language, scoring tiers, and methods of distribution for a Net Promoter Survey, which will serve as a survey mechanism that will request customers score their satisfaction with a managed charging program. The Net Promoter Survey shall be used to gauge customer satisfaction with managed charging programs and flag whether adjustments to the program should be

considered." [24] The Companies, along with the JU, discussed establishing a coordinated plan regarding the Net Promoter Score survey and distribution of such survey, and has been initiated by the Companies. Details of the plan and results of the first NPS survey are outlined below.

5.3.1 Plan for Survey: Language and Distribution

The NPS survey serves as one of several methods of interacting with participants and receiving feedback on the program and platform; other methods are outlined in Section 5.4.

The JU has collaboratively established the following language for the NPS scoring survey question: "On a scale of 0 to 10, how likely are you to recommend the [Utility Name] Managed Charging program? (0=Not at all likely and 10=Extremely likely)." The Companies included several other questions designed to gauge customer satisfaction with program elements, including enrollment, using the app, understanding the program, and receiving incentives. Open-ended response questions were also included to give participants the ability to share their full thoughts.

Participants were engaged with this survey via email in December 2024. This survey has enabled each member of the JU to establish an NPS score for their program. This score and the scoring tiers are described in Section 5.3.2.

The NPS score, and participant satisfaction data will be reported to Staff and the Commission with its annual MCIP as justification for any programmatic and platform changes established therein.

5.3.2 Description of NPS Survey Use, Scoring Tiers & Purpose

Generally, the NPS survey question is used as a methodology to assess customer satisfaction and loyalty with a product or service and is widely used in many industries.

Generally, NPS scoring tiers are broken into three tiers:

- "Promoters" respond with a score of 9 or 10
- "Passives" respond with a score of 7 or 8
- "Detractors" respond with a score of 0 to 6.

Promoters are satisfied and loyal customers, likely willing to be brand ambassadors by sharing positive feedback publicly or through word of mouth.

[24] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 53.

Passives are generally satisfied with the product but not happy enough to spread their feedback publicly or through word of mouth.

Detractors are customers who are generally unhappy and unlikely to participate again and are likely to spread their feedback publicly or through word of mouth.

Once survey responses are collected, the NPS is then calculated with the following formula:

NPS = % of Promoters (—) % of Detractors

NPS places a score of -100 to 100 and allows organizations and independent entities to rank how a product or service is performing in regard to satisfying their client base. For reference, the following is a rough metric for understanding a "good" or better NPS score:

- Above 0 is good,
- Above 20 is favorable,
- Above 50 is excellent, and
- Above 80 is world class.

To be above average, generally a score of greater than 50 is needed. [25]

To gauge customer satisfaction with program elements, the Companies utilized the following scale:

- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

The percentage of respondents responding with either "Very Satisfied" or "Somewhat satisfied" was used to calculate customer satisfaction for each program element.

The purpose of this survey within the context of the Managed Charging Program implemented is to gauge the satisfaction of participants and understand to what extent changes need to be made to the program itself or the platform used by participants within the program. In Section 5.4, the Companies outline other methods used to monitor customer satisfaction and receive feedback regarding the quality of the program or platform on an ongoing basis, such that changes can be made before issues arise that jeopardize the achievement of goals set by the

[25] Qualtrics, *Good Net Promoter Score*, https://www.qualtrics.com/experience-management/customer/good-net-promoter-score/, Accessed Sept. 22, 2022.

Commission and Staff and could lead to participant dissatisfaction with the Program and Managed Charging in general.

5.3.3 Results of December 2024 NPS Survey

The Companies here summarize findings of the Net Promoter Score Survey conducted in December 2024. The NPS Survey itself is attached in Appendix 7.

The survey was sent in mid-December to all participants who, at the time of survey distribution, were fully enrolled in the program and had participated in load shifting for at least one week.

NYSEG:

- **Surveys Sent:** 607
- **Surveys Completed:** 97

NPS Scoring		**Customer Satisfaction**			
Average (0-10)	***Score***	*Enrollment*	*Participant Portals*	*Participation Activities*	*Incentives*
7	**4**	68.0%	73.2%	58.8%	55.7%

RG&E:

- **Surveys Sent:** 430
- **Surveys Completed:** 71

NPS Scoring		**Customer Satisfaction**			
Average (0-10)	***Score***	*Enrollment*	*Participant Portals*	*Participation Activities*	*Incentives*
6.4	**-17**	50.7%	64.8%	43.7%	49.3%

The NPS scores of 4 and -17 in NYSEG and RG&E respectively are lower than expected, compounded by a low response rate. The Companies recognize that the feedback may not fully represent all participants, as those with negative experiences are often more inclined to respond to surveys. To address this, the Companies are considering offering incentives for survey completion to encourage a broader range of feedback in the future.

In the meantime, the Companies will analyze the satisfaction percentages for different program elements and review comments from open-ended questions to identify specific areas for improvement. The companies are committed to using this feedback to enhance the program and better serve our participants moving forward.

5.4 PARTICIPANT SATISFACTION EVALUATION PLAN

The Net Promoter Score survey described above in Section 5.3 is one of several methods the Companies have implemented and plan to implement to track participant satisfaction. Because this survey is implemented only occasionally throughout the program years, the Companies will implement more ongoing methods of keeping track of participants' experience within the program to maximize participant satisfaction and therefore the NPS Score that is reported to the Commission and Staff within the annual MCIP.

The Companies will collaborate with their future EM&V vendor and to develop and implement a plan based on their collective experience, capabilities, and recommendations. While some details of this plan will be developed after the filing of this update to the MCIP, the Companies can commit to the following initial fundamental elements of a Participant Satisfaction Evaluation Plan, designed to ensure the program and platform is continually evolving and improving:

1. NPS Survey (See Section 5.3)
2. Customer Service Ticketing and Escalation to Program Team (See Section 4.4)
    a. Establishing a Scoring System and Complaint Categorization
3. Generalized Sampling and Outreach to Participants to Gauge Satisfaction

Through these efforts, the Companies believe program and platform issues will be identified continuously and regularly and will enable the Companies and their partners to correct issues as they arise, rather than wait for the NPS Survey which will only be conducted on a preset timeline. The Companies recognize their responsibility in addressing issues early and often and are endeavoring to design and implement the most compelling OptimizEV and platform possible for their participating customers.

5.5 MANAGED CHARGING TECHNOLOGY ACCURACY TESTING PLAN

In the Managed Charging Order, the Commission requires that the Joint Utilities "shall propose a method for testing the accuracy of managed charging-enabling technologies no later than 180 days after issuance of this Order. The utilities are further directed to file such proposal with the Secretary."[26] The Joint Utilities filed their proposal on January 10, 2023, which was informed by industry research and external stakeholder engagement, including through the convening of the Technical Standards Working Group ("TSWG") on December 9, 2022.[27]

[26] Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure.* Order Approving Managed Charging Programs with Modifications, issued July 14, 2022 at page 58.
[27] Case 18-E-0138 - Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure, Notice Announcing Technical Standards Working Group Meeting, issued November 21, 2022.

The Order also required the TSWG, composed of the Joint Utilities and Staff with active participation from stakeholders, to propose eligible criteria for devices to be tested by July 14, 2023. The JU presented their criteria to the TSWG on April 12, 2023. In May 2023, the Joint Utilities released a request for information ("RFI") to formally gather stakeholder input on the testing setup, testing protocol, devices intended for testing and sample size of devices, and testing implementation costs and schedule. The results of the RFI were used to inform the implementation of an accuracy testing effort.

Pursuant to the Order, in December 2023, the Joint Utilities, in consultation with Staff, contracted with the Electric Power Research Institute ("EPRI") to design a testing protocol and conduct testing of eligible devices. EPRI prepared The Methodology for Testing the Accuracy of Data Collected from Managed Charging Enabling Technologies,[28] which summarized the protocol, its development through an initial round of testing, its application to a series of EVs, telematics providers, EVSEs and EVSE data hosts, and the results. The Joint Utilities filed the report on September 12, 2024.

Following the filing of the TATF Report, the Order required that the TSWG submit a comprehensive filing with recommendations to the Commission based on the results of the accuracy testing. The filing is due on March 31, 2025.

5.6 DPS STAFF CONSULTATION PLAN

In the Managed Charging Order, the Commission states that each member of the JU are "directed to consult with Department of Public Service Staff to review and report on the efficacy of the incentive levels, at least on an annual basis, as discussed in the body of the Order. The Commission further directs such reports to be included in an update to the Managed Charging Implementation Plans." [29] The Companies will comply with the EV Managed Charging Order and assess the effectiveness of incentive levels and will meet with Staff on at least an annual basis. The Companies believe evaluation periods shorter than one year will not provide any significant insights, especially if program changes are implemented annually as a result of surveys or other program evaluation methods. The Companies will plan to consult with Staff well in advance of any MCIP filing and these results will be included in the annual MCIP.

[28] Case 18-E-0138, Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure, JU TATF Report 09-12-2024 (filed September 12, 2024) ("TATF Report").
[29] Id.at page 60.

6. APPENDICES

6.1 APPENDIX 1: QUALIFIED TELEMATICS AND EVSE

Compatible Level 2 Smart Chargers

Charger Make	Charger Model	Eligible Tier	
		Baseline	Advanced
ChargePoint	All Home Flex Models	√	√
Emporia	Level 2 EV Charger	√	√
Wallbox	Pulsar Plus	√	√

Compatible Vehicle Connections (Telematics)

Car Make	Car Model and Year	Eligible Tier	
		Baseline	Advanced
Acura	ZDX 2024+	√	√
Alfa Romeo	Tonale 2023+	√	√
Audi	A5 2022+	√	
	A7 2021+	√	
	A8 2020+	√	
	e-tron 2019+	√	√
	Q4 e-tron 2022+	√	√
	Q5 2020+	√	
BMW	3 Series 2016+	√	√
	5 Series 2017+	√	√
	7 Series 2017+	√	√
	i3 2016 - 2021	√	√
	i3 REX 2016 - 2021	√	
	i4 2021+	√	√
	i5 2024+	√	√
	i7 2023+	√	√
	i8 2016 - 2020	√	
	iX 2021+	√	√
	X3 2020 - 2021	√	√
	X5 2016+	√	√

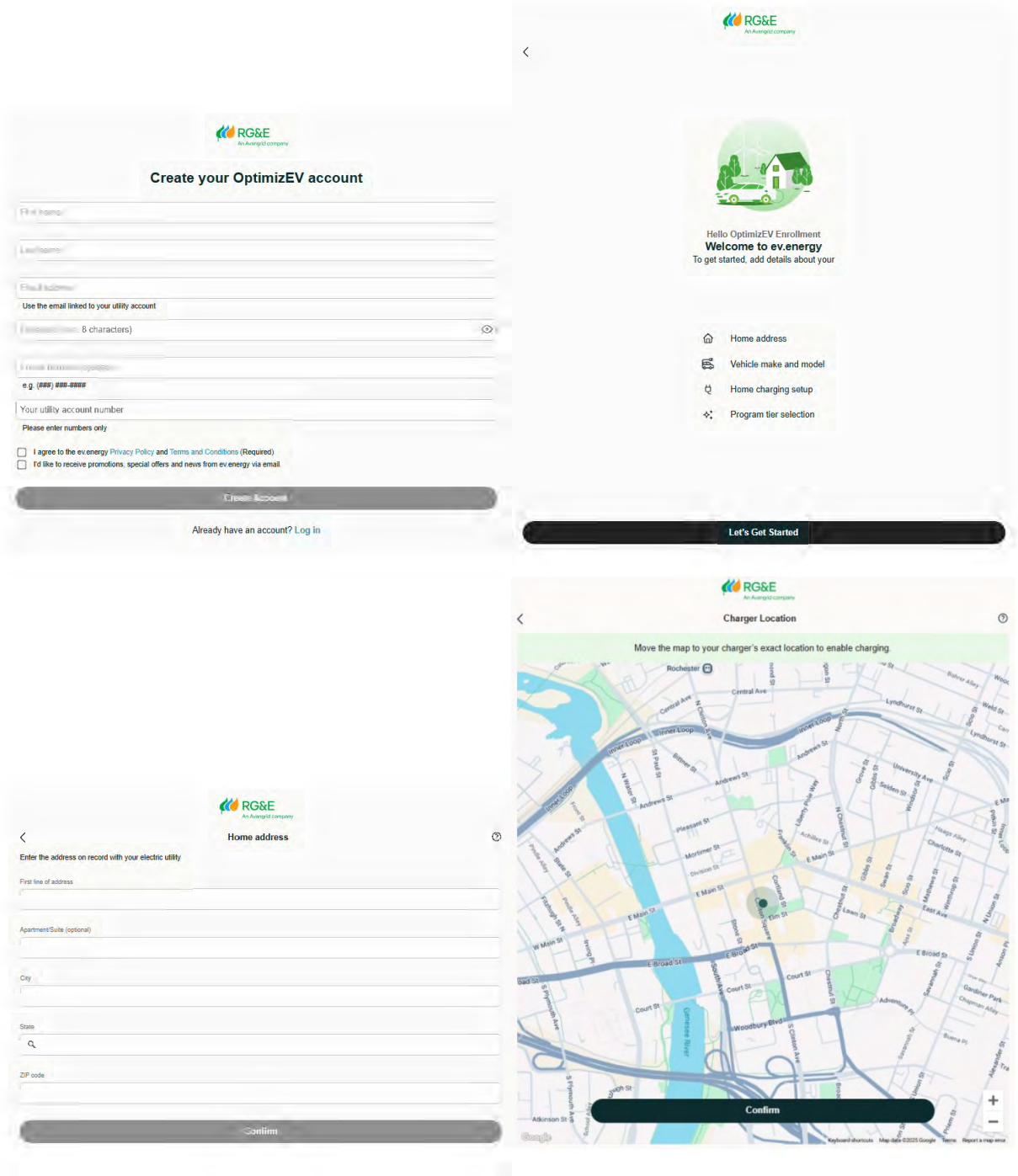
Car Make	Car Model and Year	Eligible Tier	
		Baseline	Advanced
Cadillac	CT6 2017 - 2018	√	
	ELR 2015 - 2016	√	
	LYRIQ 2023+	√	√
Chevrolet	Blazer EV 2024+	√	√
	Bolt EUV 2022+	√	√
	Bolt EV 2017+	√	√
	Equinox EV 2024+	√	√
	Silverado EV 2024+	√	√
	Spark EV 2015 - 2016	√	√
	Volt 2015 - 2019	√	
Dodge	Hornet 2023+	√	√
Fiat	500e 2024+	√	√
GMC	Hummer EV 2022+	√	√
Honda	Prologue 2024+	√	√
Hyundai	Ioniq 5 2022+	√	√
	IONIQ 6 2023+	√	√
	IONIQ Electric 2017 - 2021	√	√
	IONIQ PHEV 2018+	√	√
	Kona Electric 2019+	√	√
	Santa Fe PHEV 2022+	√	√
	Sonata PHEV 2017 - 2019	√	√
	Tucson 2022+	√	√

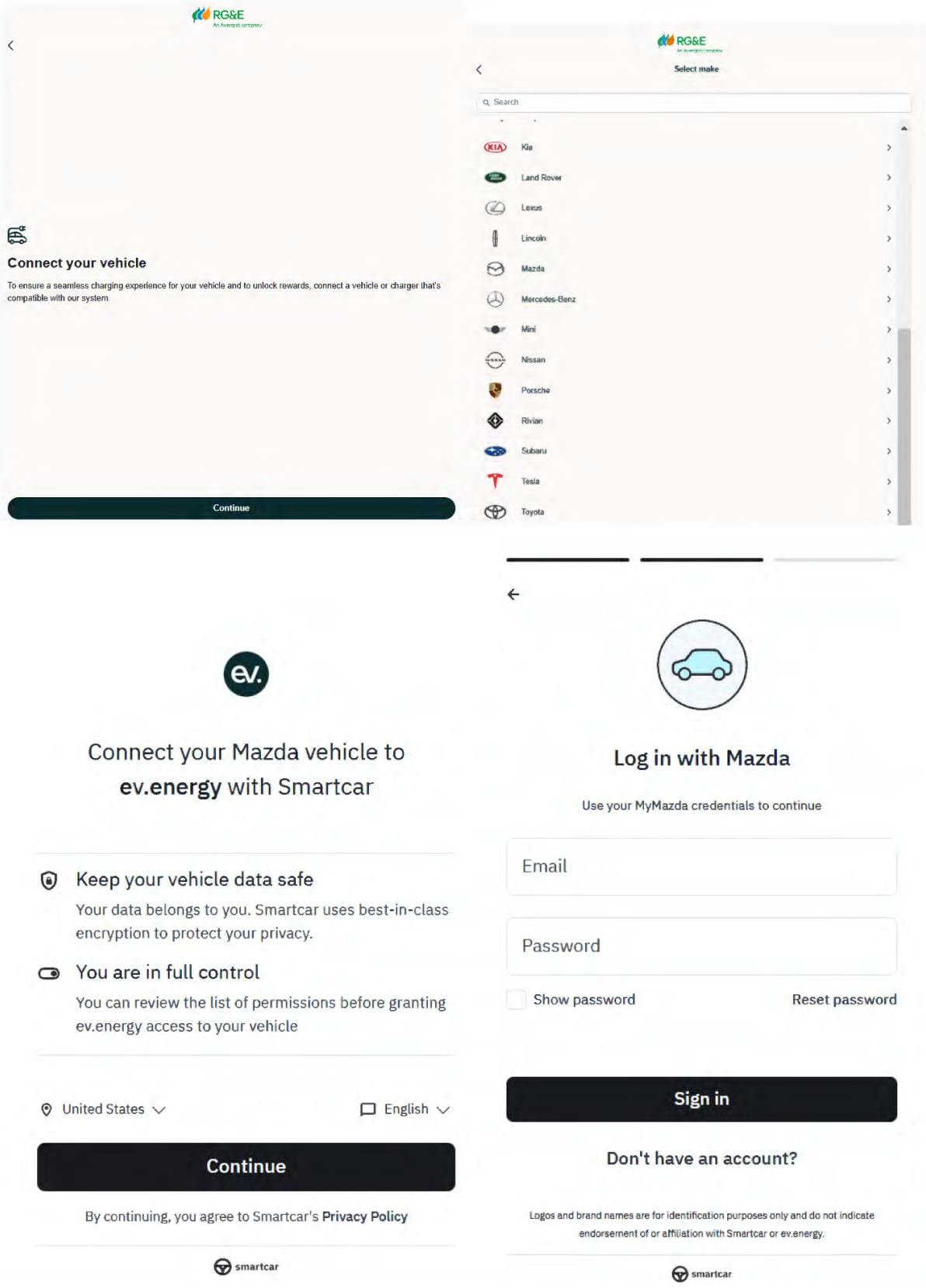
Compatible Vehicle Connections (Telematics) cont.

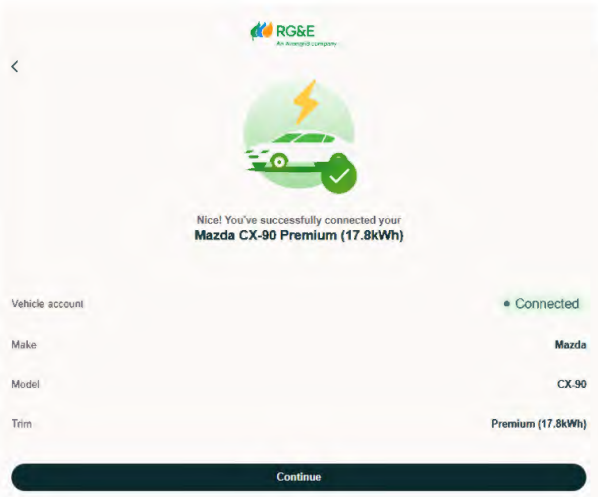
Car Make	Car Model and Year	Eligible Tier	
		Baseline	Advanced
Jaguar	I Pace 2019+	√	√
Kia	EV6 2022+	√	√
	EV9 2024+	√	√
	Niro EV 2019+	√	√
	Niro PHEV 2018+	√	√
	Optima PHEV 2017 - 2020	√	√
	Sorento 2022+	√	√
	Soul EV 2017 - 2020	√	√
	Sportage PHEV 2023+	√	√
Land Rover	RR P 400 E 2019 - 2021	√	√
	RR Sport P 400 E 2019 - 2021	√	√
Lexus	RX 450 H 2023+	√	√
	RZ 2023+	√	√
Lincoln	Aviator Grand Touring 2020+	√	
	Corsair Grand Touring 2021+	√	
Mazda	CX-60 2024+	√	√
	CX-90 2024+	√	√
	MX-30 2022+	√	√
Mercedes-Benz	EQ Series 2022+	√	
	S-CLASS PHEV 2019+	√	
	GLC PHEV 2019 - 2020	√	
Mini	SE Countryman 2018+	√	√
	SE Hardtop 2020+	√	√
Nissan	Ariya 2023+	√	√

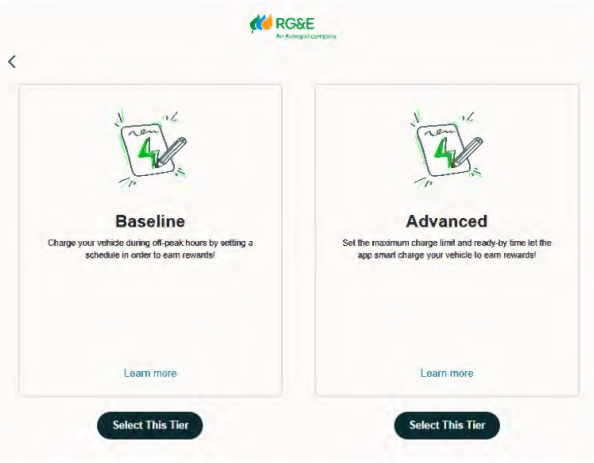
Car Make	Car Model and Year	Eligible Tier	
		Baseline	Advanced
Porsche	992 2022+	√	√
	Cayenne 2020+	√	√
	Taycan 2020+	√	√
Ram	1500 REV 2025+	√	√
Rivian	R1S 2022+	√	
	R1T 2022+	√	
Subaru	Crosstrek-Hybrid 2019+	√	
	Solterra 2023+	√	√
Tesla	Cybertruck 2024+	√	√
	Model 3 2017+	√	√
	Model S 2012+	√	√
	Model X 2016+	√	√
	Model Y 2020+	√	√
Toyota	bZ4X 2023+	√	√
	Prius Prime 2017+	√	√
	RAV 4 Prime 2021+	√	√
Volkswagen	e-Golf 2020 - 2020	√	√
	ID 4 2021+	√	√
	Tiguan 2023+	√	√
Volvo	S60 2019 - 2022	√	
	S90 2018 - 2021	√	
	V60 2020 - 2022	√	
	XC60 2018 - 2021	√	
	XC90 2016 - 2022	√	

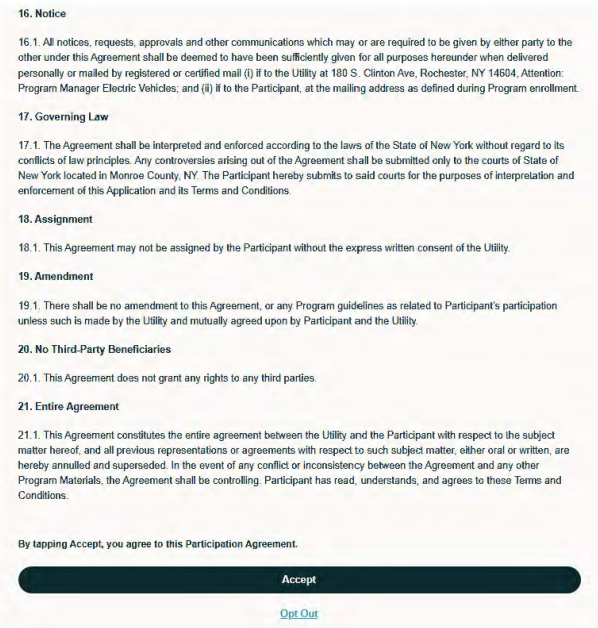
6.2 APPENDIX 2: PROGRAM ENROLLMENT SCREENS

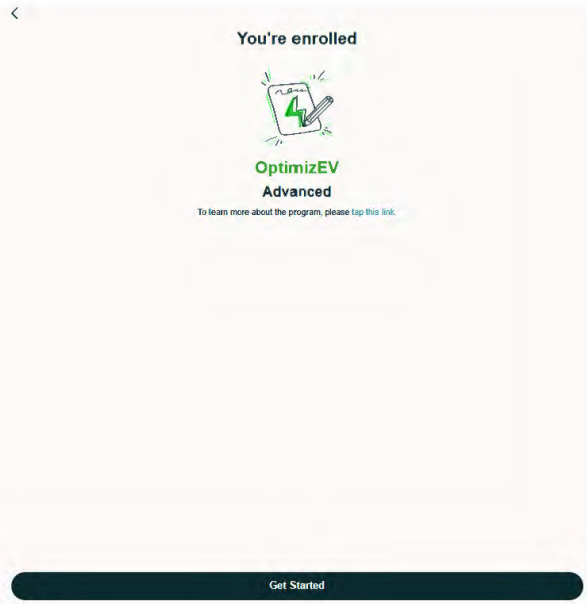



RG&E
Connect your vehicle
To ensure a seamless charging experience for your vehicle and to unlock rewards, connect a vehicle or charger that's compatible with our system.
Continue
RG&E
Select make
Search
Kia
Land Rover
Lexus
Lincoln
Mazda
Mercedes-Benz
Mini
Nissan
Porsche
Rivian
Subaru
Tesla
Toyota
Connect your Mazda vehicle to ev.energy with Smartcar
Keep your vehicle data safe
Your data belongs to you. Smartcar uses best-in-class encryption to protect your privacy.
You are in full control
You can review the list of permissions before granting ev.energy access to your vehicle
United States
English
Continue
By continuing, you agree to Smartcar's Privacy Policy
smartcar
Log in with Mazda
Use your MyMazda credentials to continue
Email
Password
Show password
Reset password
Sign in
Don't have an account?
Logos and brand names are for identification purposes only and do not indicate endorsement of or affiliation with Smartcar or ev.energy.
smartcar


RG&E
Nice! You've successfully connected your
Mazda CX-90 Premium (17.8kWh)
Vehicle account
Connected
Make
Mazda
Model
CX-90
Trim
Premium (17.8kWh)
Continue


RG&E
Baseline
Charge your vehicle during off-peak hours by setting a schedule in order to earn rewards!
Learn more
Select This Tier
Advanced
Set the maximum charge limit and ready-by time let the app smart charge your vehicle to earn rewards!
Learn more
Select This Tier


16. Notice
16.1. All notices, requests, approvals and other communications which may or are required to be given by either party to the other under this Agreement shall be deemed to have been sufficiently given for all purposes hereunder when delivered personally or mailed by registered or certified mail (i) if to the Utility at 180 S. Clinton Ave, Rochester, NY 14604, Attention: Program Manager Electric Vehicles; and (ii) if to the Participant, at the mailing address as defined during Program enrollment.
17. Governing Law
17.1. The Agreement shall be interpreted and enforced according to the laws of the State of New York without regard to its conflicts of law principles. Any controversies arising out of the Agreement shall be submitted only to the courts of State of New York located in Monroe County, NY. The Participant hereby submits to said courts for the purposes of interpretation and enforcement of this Application and its Terms and Conditions.
18. Assignment
18.1. This Agreement may not be assigned by the Participant without the express written consent of the Utility.
19. Amendment
19.1. There shall be no amendment to this Agreement, or any Program guidelines as related to Participant's participation unless such is made by the Utility and mutually agreed upon by Participant and the Utility.
20. No Third-Party Beneficiaries
20.1. This Agreement does not grant any rights to any third parties.
21. Entire Agreement
21.1. This Agreement constitutes the entire agreement between the Utility and the Participant with respect to the subject matter hereof, and all previous representations or agreements with respect to such subject matter, either oral or written, are hereby annulled and superseded. In the event of any conflict or inconsistency between the Agreement and any other Program Materials, the Agreement shall be controlling. Participant has read, understands, and agrees to these Terms and Conditions.
By tapping Accept, you agree to this Participation Agreement.
Accept
Opt Out


You're enrolled
OptimizEV
Advanced
To learn more about the program, please tap this link.
Get Started

6.3 APPENDIX 3: 2024 PROGRAM COMMUNICATIONS



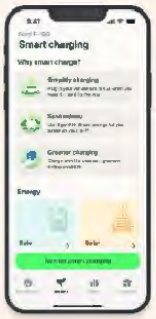
Dear Customer,

Thank you for using the ev.energy app for OptimizEV, we hope you have enjoyed your experience so far!

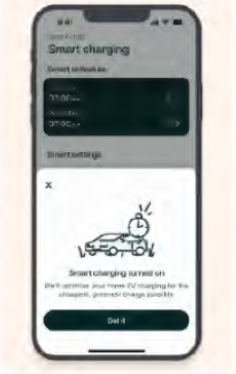
We noticed that you do not have the Smart Charging feature turned on. To ensure you're earning your monthly incentive benefit, please enable smart charging.

Here are steps to enable smart charging:

In the ev.energy app:



1. Navigate to the "Smart" tab



2. Tap the "Turn on smart charging" button towards the bottom of the screen

3. Set your smart schedule by tapping "Full schedule" in the Smart schedule box and set your daily ready-by times





4. Ensure the 'Only charge off-peak' feature is turned on to maximize your monthly incentive.

This feature is located under the Smart tab under Smart settings and allows you to prioritize and get the most out of off-peak charging (9 p.m. - 7 a.m. Monday - Friday, all day Saturday & Sunday).

Note: Remember the Boost feature (located under the Dashboard Tab) is available to override your Smart Schedule and charge immediately when needed, but Boosting more than 2 times a month during on peak times will result in not earning your monthly incentive.

Let us know if you need any assistance with the app. Our Customer Success team is available by email Monday through Friday, 9 a.m. – 5 p.m., (excluding US Federal holidays) at **rge@ev.energy**.

The OptimizEV team

As an RG&E customer, you've been selected to receive electronic communications from the OptimizEV program.

Important Note on Privacy: Your personal information will not be disclosed in any way. Maintaining your privacy is our priority. The links provided will take you to the website of https://www.ev.energy/privacy, where the Terms of Service and Privacy Policy of the program's authorized vendor, ev.energy, will apply.

This email was sent by: ev.energy, 2100 Geng Road, Suite 210, Palo Alto, California 94303

Email: rge@ev.energy

To stop receiving email communications from RG&E OptimizEV, please click "Unsubscribe" below. Note that this will not unsubscribe you from other RG&E communications.

Unsubscribe



Dear Customer,

Success! Your account verification for OptimizEV has been successfully completed.

Be sure you've completed onboarding on the ev.energy app so you can enjoy all the EV charging features and benefits of OptimizEV.

Benefits of OptimizEV:

- Charge your EV during off-peak hours (9 p.m. - 7 a.m. Monday - Friday, all day Saturday & Sunday) at least 80% of the time to earn rewards* each month.
- A $25 enrollment incentive earned for each EV or L2 charger enrolled.

If you have any questions or encounter any issues with your account, please don't hesitate to reach out. Our Customer Success team is available by email Monday through Friday, 9 a.m. – 5 p.m., (excluding US Federal holidays) at rge@ev.energy.

The OptimizEV Team

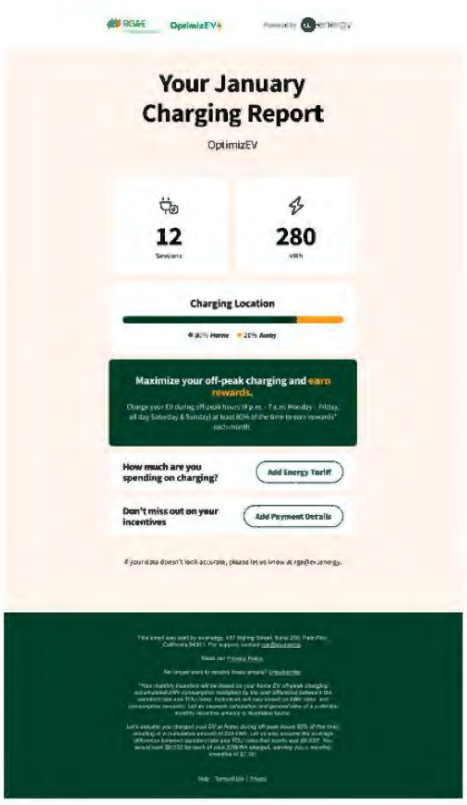
*Your monthly incentive will be based on your home EV off-peak charging (customized kWh consumption multiplied by the cost difference between the standard rate and TOU rates). Incentives are only based on kWh totals and consumption amounts, but not energy cost amounts after, of a potential monthly incentive amount of $37.50.

Let's assume you charged your EV at home during off-peak hours 80% of the time - resulting in a cumulative amount of 225 kWh. Let us also assume the average difference between standard rate and TOU rates (total month) was $0.017. You would earn $0.017 for each of your 225 kWh - or more, earning you a monthly total of $3.83.

This email was sent by ev.energy, 437 Kipling Street, Suite 200, Palo Alto, California 94301. For support, contact support@ev.energy

Read our Privacy Policy

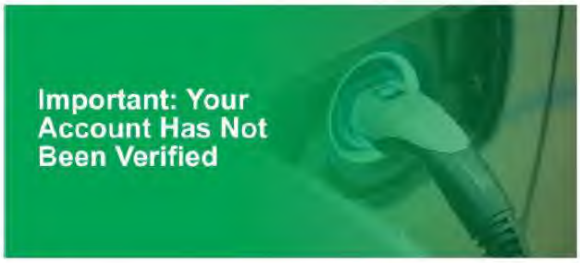
No longer want to receive these emails? Unsubscribe





RG&E | OptimizEV

Powered by ev energy



Dear Customer,

Your account verification for OptimizEV is currently incomplete. In order to continue participating in the program and access the full EV charging benefits and features, please complete the following steps:

How to verify your account:

Add Your RG&E Electric Utility Account Number

Please log into the ev.energy app and navigate to the **Incentives Tab**. Select the "**Go to verification**" pop-up button and enter your utility account number. Then select "**Get verified**"

Check Your Verification Status

After you enter your utility account number and hit "Get verified", the status of your account verification will become **Pending**. Please allow for 10 business days for our partners at RG&E to re-process your verification. Once it has been approved, your status will change to **Verified** and you will be notified.

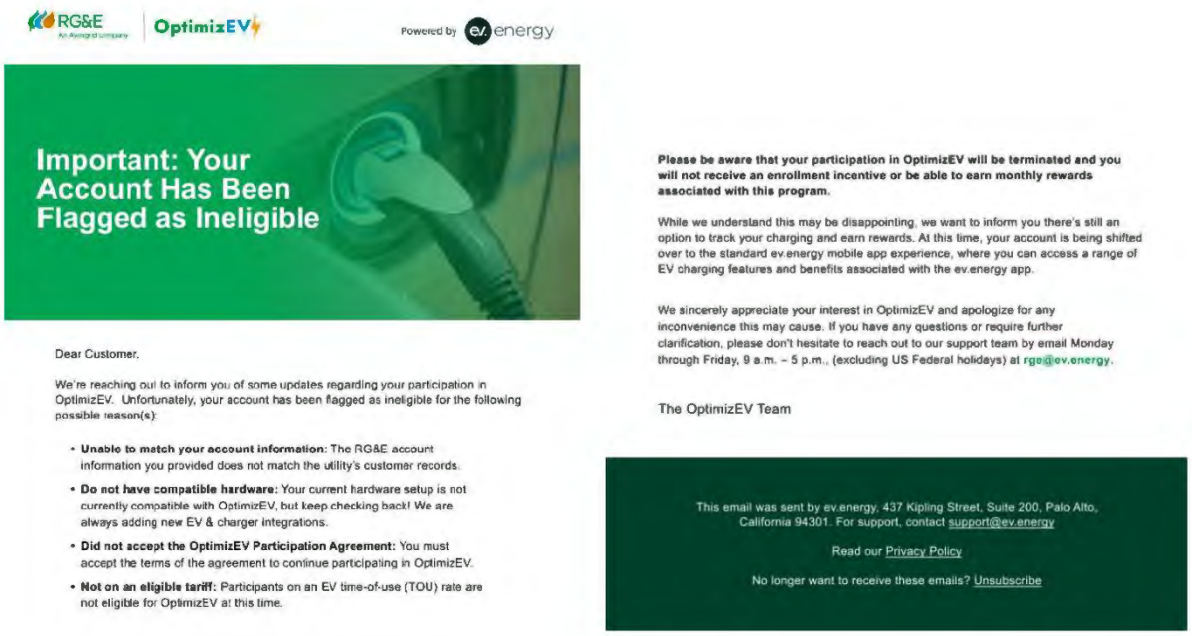
If you have any questions or encounter any issues with your account, please don't hesitate to reach out. Our Customer Success team is available by email Monday through Friday, 9 a.m. – 5 p.m., (excluding US Federal holidays) at rge@ev.energy.

The OptimizEV Team

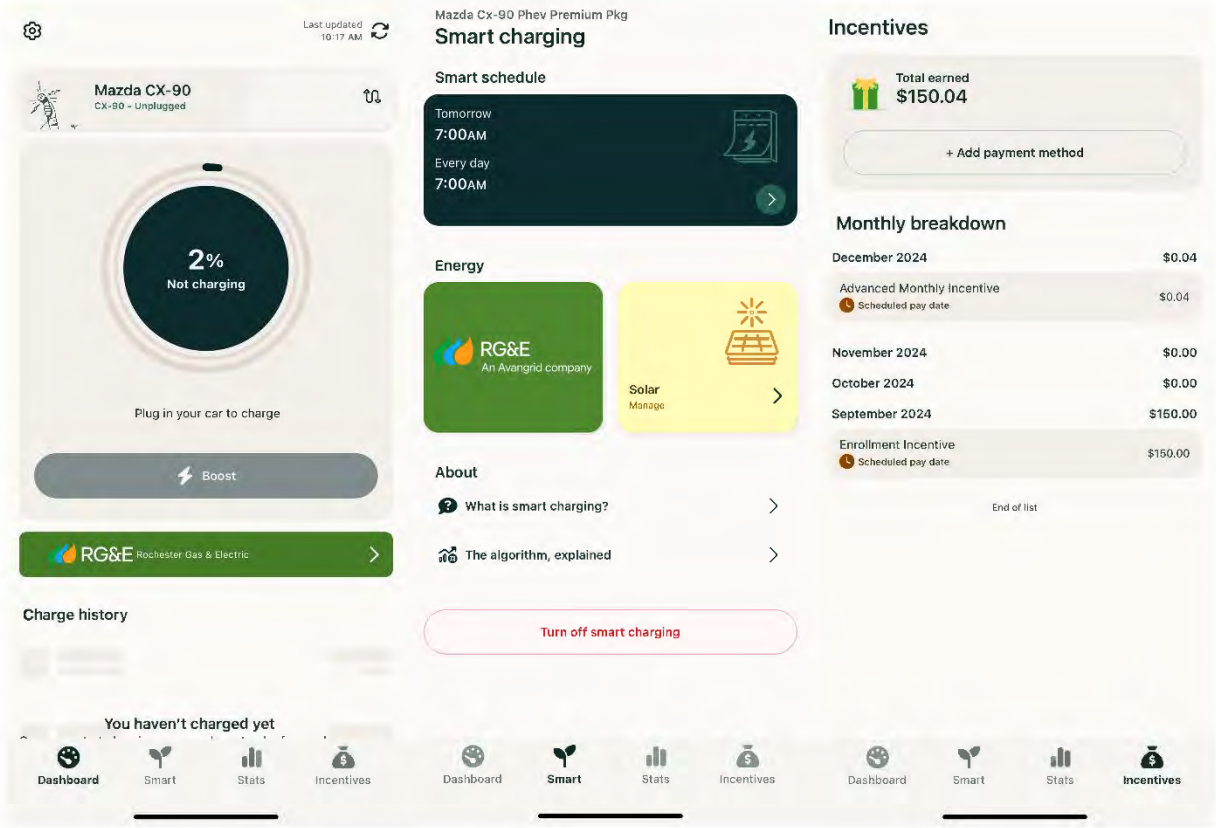
This email was sent by ev.energy, 437 Kipling Street, Suite 200, Palo Alto, California 94301. For support, contact support@ev.energy

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No longer want to receive these emails? Unsubscribe



6.4 APPENDIX 4: PARTICIPANT PORTAL SCREENS



6.5 APPENDIX 5: PROGRAM PROMOTION ON PLATFORM PROVIDER WEBSITE



6.6 APPENDIX 6: NYSERDA MARKETING EMAILS



NYSEG | OptimizEV

Powered by ev energy

Receive up to $150 for enrolling in OptimizEV

There's a new way you can save by charging your EV at home.

Introducing OptimizEV

OptimizEV is powered by a free mobile app, ev energy, that helps you earn maximum rewards for charging your EV during off-peak times. You can earn monthly rewards by charging your EV when electricity demand is less during off-peak times, while also ensuring your EV is fully charged and ready when you need it.

This program consists of two program tiers: **Baseline** and **Advanced**. Continue reading for details on the different tier benefits.

Benefits of OptimizEV Program Tiers:

Baseline

- You will receive a one-time enrollment incentive of $25 for activating an eligible EV or L2 charger.
- Be sure to shift at least 80% of your charging to off-peak times by the end of each calendar month to earn monthly incentives.

Advanced

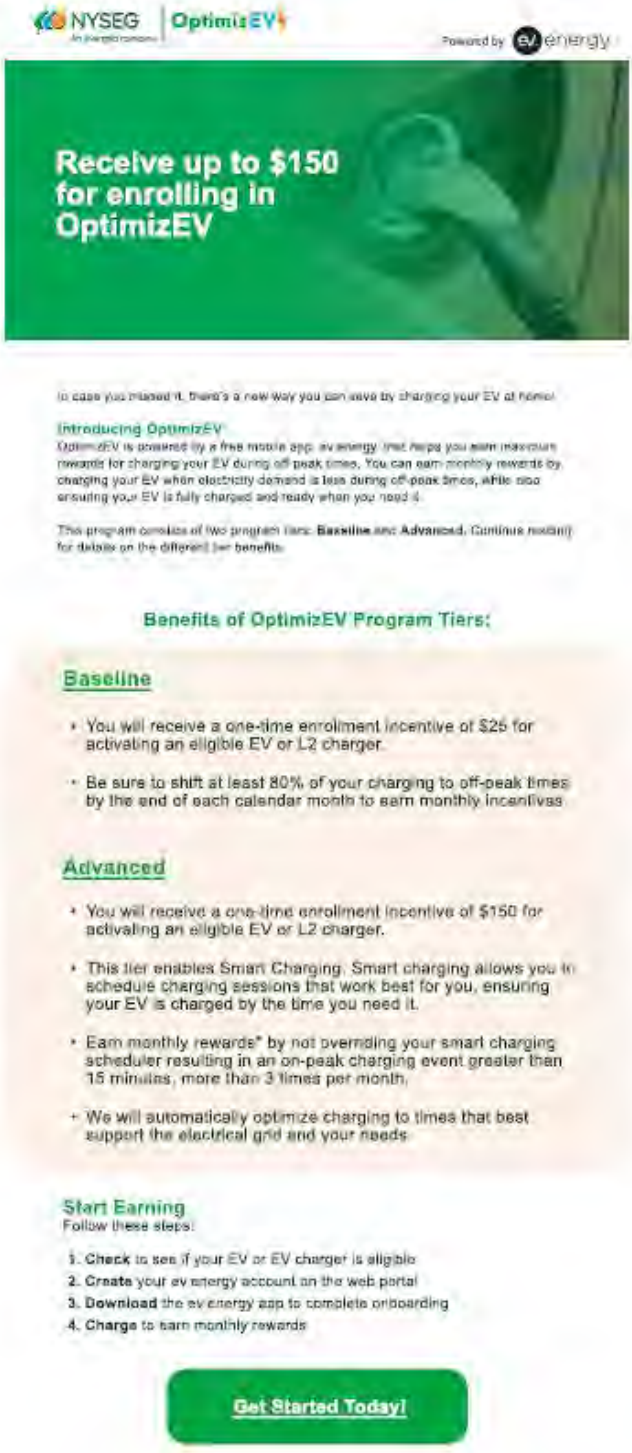
- You will receive a one-time enrollment incentive of $150 for activating an eligible EV or L2 charger.
- This tier enables Smart Charging. Smart charging allows you to schedule charging sessions that work best for you, ensuring your EV is charged by the time you need it.
- Earn monthly rewards* by not overriding your smart charging scheduler resulting in an on-peak charging event greater than 15 minutes, more than 3 times per month.
- We will automatically optimize charging to times that best support the electrical grid and your needs.

Start Earning

Follow these steps:

1. **Check** to see if your EV or EV charger is eligible
2. **Create** your ev energy account on the web portal
3. **Download** the ev energy app to complete onboarding
4. **Charge** to earn monthly rewards

Get Started Today!



NYSEG | OptimizEV

Powered by ev energy

Receive up to $150 for enrolling in OptimizEV

In case you missed it, there's a new way you can save by charging your EV at home.

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- Earn monthly rewards* by not overriding your smart charging scheduler resulting in an on-peak charging event greater than 15 minutes, more than 3 times per month.
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6.7 APPENDIX 7: NPS SURVEY



OptimizEV Program Customer Survey 2024

Thank you for your participation in the RG&E OptimizEV program. We want to be sure you've had a good experience participating in the program so far and would appreciate it if you could respond to this very brief survey. There are only eight questions and the survey only takes a few minutes. Your feedback is greatly appreciated.

Tell us about your experience.

1.) On a scale of 0 to 10, how likely are you to recommend the RG&E OptimizEV program? (0=Not at all likely and 10=Extremely likely)

- ◯ 1
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5
- ◯ 6
- ◯ 7
- ◯ 8
- ◯ 9
- ◯ 10

2.) How was your experience enrolling in the program?

- ◯ Very satisfied
- ◯ Somewhat satisfied
- ◯ Neither satisfied nor dissatisfied
- ◯ Somewhat dissatisfied
- ◯ Very dissatisfied

3.) How was your experience downloading and setting up the ev.energy app?

- ○ Very satisfied
- ○ Somewhat satisfied
- ○ Neither satisfied nor dissatisfied
- ○ Somewhat dissatisfied
- ○ Very dissatisfied

4.) How has your experience been using the ev.energy app?

- ○ Very satisfied
- ○ Somewhat satisfied
- ○ Neither satisfied nor dissatisfied
- ○ Somewhat dissatisfied
- ○ Very dissatisfied

5.) How satisfied are you with the rewards structure offered by the program?

- ○ Very satisfied
- ○ Somewhat satisfied
- ○ Neither satisfied nor dissatisfied
- ○ Somewhat dissatisfied
- ○ Very dissatisfied

6.) Was there anything that did not perform as expected?

7.) Please describe the experience you have had in meeting the requirements of your Participation Tier (Baseline or Advanced). Please specify your tier.

8.) Is there any other feedback you would like to share about your experience participating in the RG&E OptimizEV program?

Submit