
TOWN OF MONTEREY
COMMUNITY CHOICE POWER SUPPLY PROGRAM

EDUCATION AND INFORMATION PLAN

PREPARED BY

COLONIAL POWER GROUP, INC.

1 OVERVIEW AND PURPOSE

M.G.L. c. 164, § 134(a) requires that municipal aggregators “fully inform participating ratepayers in advance of automatic enrollment that they are to be automatically enrolled and that they have the right to opt-out of the aggregated entity without penalty. In addition, such disclosure shall prominently state all charges to be made and shall include full disclosure of the basic service rate, how to access it, and the fact that it is available to them without penalty.”

The Education and Information Plan (“Education Plan”) component of Monterey’s Community Choice Power Supply Program (“Program”) is two-pronged. The first is general education through which Colonial Power Group, Inc. (CPG) will provide information to eligible consumers by way of the media, electronic communications, and public presentations. The second is direct mail notification which will be mailed out to eligible consumers and will contain information regarding participation and rights.

In D.T.E. 00-47 (2000), at 26, the Massachusetts Department of Telecommunications and Energy (DTE) concluded that the education plan component of the Cape Light Compact, which also included general education and direct mail notification, satisfied the aforementioned statutory requirement. Moreover, in D.T.E. 04-32 (2004), the DTE concluded that the education plan component of the Cape Light Compact resulted in eligible consumers being satisfactorily informed of their rights to opt-out of the program, as well as other pertinent program information. Accordingly, the Town of Monterey’s (“Town”) Education Plan closely resembles that of the Cape Light Compact.

The purpose of the Education Plan is to raise awareness and provide eligible consumers with information concerning their opportunities, options and rights for participation in the Program.

The Education Plan consists of two parts:

- a) General Education: This will be conducted through the media, public meetings and presentations, and electronic communications and will inform eligible consumers about the Program.
- b) Direct Mail Notification: This will be mailed out to eligible consumers and will contain information regarding participation and rights, as well as comparative prices and terms.

The general education effort will provide a broad back drop for the direct mail notification, boosting awareness of the mailing and its purpose and providing reinforcement of key information.

1.1 GENERAL EDUCATION

The general education will provide a description of the Program for eligible consumers. It will consist of a public relations effort, advertising outreach, public presentations and electronic information sources (i.e. toll-free telephone number, websites, etc.). The general education will provide specific information about the Program and maximize the impact of the direct mail notification which will create an environment of public awareness.

1.1.1 Press Conference

The initial launch of the Program will be a media event featuring representatives from the Town, its Competitive Supplier, and CPG. This event will be designed to create an understanding of the Program as a whole including consumer rights and benefits. Representatives from local and regional print and broadcast sources will be invited to attend.

A press kit will be assembled to introduce the Program. Materials may include:

- a) news release;
- b) background information;
- c) deregulation and choice information; and
- d) frequently asked questions.

1.1.2 Media Outreach

Following the launch of the Program, media outreach will continue through local cable television shows, newspapers and internet sources to provide greater public education and to describe the Program, the opt-out process and the toll-free telephone number. Outreach will include public service announcements (PSAs), scheduling interviews of Program spokespersons with local media outlets and securing a positive media presence.

A series of news releases will be distributed to achieve the aforementioned goals. Follow-up news releases will update the media on the status of the Program's progress.

Sample Media List:

- a) The Berkshire Eagle
- b) Pittsfield Gazette
- c) North Adams Transcript
- d) WUPE 96
- e) WUHN 1110
- f) NECN
- g) CTSB-TV
- h) WFSB-TV
- i) WRGB-TV
- j) WTEN-TV
- k) WNYT-TV

1.1.3 Notices and Public Postings

Notices in newspapers and in Town Hall describing the Program, the opt-out process and the toll-free telephone number will further reinforce the Program's details. Postings will be placed in public buildings (i.e. library, Senior Center, etc.) which will create the necessary repetition of messages required to motivate consumer action and build awareness and understanding.

1.1.4 Customer Service Center

CPG will maintain a toll-free telephone number to address eligible consumer's questions regarding the Program, deregulation, the opt-out process, price information and other issues eligible consumers may raise.

1.1.5 Website

All information regarding the Program will be posted on CPG's website, which is linked to the Town's website. The website will note if the Town has chosen to fund personnel costs associated with an Energy Manager position(s) through an Operational Adder. CPG's website will have links to NGRID ("Local Distributor"), the Massachusetts Department of Energy Resources (DOER), the Massachusetts Department of Public Utilities ("Department"), and the Town's Competitive Supplier.

1.1.6 Public Presentations

CPG will provide presentations to the Select Board and to any interested community group (i.e. Chamber of Commerce, Rotary Club, Lions Club, Junior Women's Club, etc.).

1.2 DIRECT MAIL NOTIFICATION

1.2.1 Opt-Out

The opt-out notification will be sent via standard mail to the billing address of each eligible consumer receiving Basic Service. The notification envelope will be clearly marked as containing time sensitive information related to the Program. The notification will contain a letter describing the Program.

The letter will:

- a) introduce and describe the Program and provide information regarding participation and rights;
- b) inform eligible consumers they have the right to opt-out of the aggregated entity without penalty;
- c) prominently state all charges to be made and a comparison of price and primary terms of the Competitive Supplier and Basic Service;
- d) inform eligible consumers if the Town has chosen to fund personnel costs associated with an Energy Manager position(s) through an Operational Adder;
- e) explain the opt-out process; and
- f) include instructions for Spanish / Portuguese speaking consumers (i.e. toll-free telephone number).

The opt-out notification will also contain a pre-addressed postcard with a simple check off and signature line for eligible consumers who do not wish to participate. Eligible consumers will have 30 days from the date of the mailing to return the opt-out postcard. New eligible consumers will be enrolled in the Program in accordance with applicable Local Distributor rules. Upon initiation of service, these new eligible consumers will receive the same opt-out information as all other eligible consumers.

2 TIMELINE

The schedule below assumes timely preparation of mailing lists as well as space and time availability in the media. Meetings and public presentations will be scheduled upon mutually agreeable schedules. On-going education will continue beyond the 40-day period outlined below through the media and the toll-free telephone number.

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| Day 0: | Press conference held announcing the Program and introducing the Competitive Supplier |
| Day 1: | Customer service center (i.e. toll-free telephone number) opens |
| Day 1: | Press release issued on direct mail notification and start-up of the customer service center |
| Day 1: | Program information posted on the following websites: CPG, Town, and Competitive Supplier |
| Day 1-7: | Postings placed in public buildings |

- Day 1-40: Public presentations provided informing community groups about the Program and eligible consumer rights
- Day 1-40: Media interviews conducted with Program representatives, as needed
- Day 10: Direct mail notification sent to each eligible consumer (see Day 40)
- Day 12-35: Display ads placed in newspapers describing the Program and the opt-out process and providing the toll-free telephone number
- Day 14: Local cable television show airs describing the Program and the opt-out process and providing the toll-free telephone number
- Day 16-30: PSAs air describing the Program and the opt-out process and providing the toll-free telephone number
- Day 40: Deadline reached for eligible consumers returning the opt-out postcard
- Day 40+: On-going education continues through the media, the toll-free telephone number and individual opt-out mailings to new eligible Basic Service consumers
- Day 90+: Follow-up news releases issued summarizing the Program's status

3 BUDGET

Notification Method	Responsible Party	Estimated Cost
Direct Mailing	Competitive Supplier	\$1,500
Press Conference	CPG	\$100
Television Media	CPG	\$100
Newspaper Media	CPG	\$1,000
Electronic Communications	CPG	-----
Public Presentations	CPG	-----