

# **STOUGHTON UTILITIES**

## **Utility Billing Statement Messages and Inserts**

*Last Revised: April 6, 2017*

*Reviewed by the Community Affairs and Council Policy Committee: April 6, 2017*

*Approved by the Stoughton Utilities Committee: April 17, 2017*

*Approved by the City of Stoughton Common Council: April 25, 2017*

### **INFORMATION**

This document is the property of Stoughton Utilities, containing information that is considered public policy, and is subject to release pursuant to public records statutes, Wis. Stat. §§ 19.31-19.39. Copying or use of this document in whole or in part is strictly prohibited without prior written permission of Stoughton Utilities.

## Introduction

To better serve our customers, it is the goal of Stoughton Utilities (SU) to provide ratepayers with timely information relevant to their utility. To accomplish this goal, SU utilizes numerous communication conduits to convey information, including the monthly utility billing statements that are provided to all customers.

Information is provided using messages contained on the front and back of the utility billing statements, as well as printed materials inserted into the billing statement mailing. This information is then delivered to the customer, either on paper through the United States Postal Mail, or digitally using electronic mail and the *My Account* online customer portal.

## Purpose

This policy cannot lay down rules to cover every possible situation. The purpose of this policy is to express SU's philosophy and set forth general guidelines governing the use of SU's billing statements to communicate with its customers. As a regulated utility, SU is bound to the requirements set forth in the Wisconsin Public Service Commission (PSC) Administrative Code and Wisconsin State Statutes; this policy is not intended to supersede any such regulatory rules or requirements.

By adopting this policy, it is SU's intent to ensure communications are timely, relevant, and professionally presented, and are not used in a way that is disruptive to SU's mission of providing quality services in a fiscally responsible manner, offensive to others, or contrary to the best interest of SU and its ratepayers.

## Policy

### Messages Included on the Utility Billing Statement:

1. Any text, image, symbol, artwork, or logo included on the utility billing statement must be specifically related to SU and its core services of Electric, Water, and/or Wastewater.
2. No offer, advertisement, solicitation, announcement, statement, representation, or other material shall be included on the utility billing statement unless the message meets one or more of the following criteria:
  - a. Demonstrates energy or water conservation methods;
  - b. Conveys safety information on the use of energy;
  - c. Demonstrates methods of reducing ratepayer costs;
  - d. Otherwise directly and substantially benefits ratepayers in regard to the services offered by the utility; or
  - e. Is required by law.
3. No more than three variable, non-permanent messages shall be included on the utility billing statement. Content length and formatting is limited by the format of the billing statement design; messages should be tailored to the appropriate length for the location in which they are desired to be located. One message is presented to the customer on the front of the billing statement, and two messages are presented to the customer on the back of the billing statement.
4. The Utilities Director or their designee shall review the content of all message text to verify the content meets the criteria set forth in this policy, and shall have final approval of the text.
5. Approved message text is to be submitted to the Utilities Billing and Metering Specialist no later than four business days prior to the scheduled mailing of the billing inserts.

**Inserts Included with the Utility Billing Statement:**

1. At the beginning of each calendar year, SU staff shall establish a tentative schedule of planned bill inserts for the year. This schedule should include all notifications required by the Wisconsin Public Service Commission, Department of Natural Resources, and other regulatory agencies, as well as seasonal energy efficiency advertising campaigns, coordinated marketing efforts, and other SU priorities.
2. All bill inserts are to be professionally designed, with the exception of inserts provided by the Wisconsin Public Service Commission, Department of Natural Resources, or other State of Wisconsin regulatory agency. Inserts shall be designed and printed in full-color to attract the customer's attention, and printed on coated 80# paper, or higher. Whenever possible, inserts should be created with crop marks included.
3. Inserts shall be sized 8.5x11" (letter) or 8.5x3.66" (one-third of a letter page), and folded using a letter fold, or "C-fold."
4. Any images, symbols, artwork, or logos that are included on the insert are to be properly licensed with the appropriate trademark or copyright holder. Licensing must include both digital and print distribution. If required by the owner, licenses are to be transferred to Stoughton Utilities prior to distribution of the insert.
5. If the inserts are to be printed by SU's contracted bill statement print and mail service, the digital copy of the insert is to be provided to the Utilities Billing & Metering Specialist prior to the 25<sup>th</sup> of the month prior to which the insert is scheduled to be mailed.
6. If inserts are not to be printed by SU's contracted billing statement print and mail service, printed inserts are to be delivered to the contractor prior to the 1<sup>st</sup> of the month in which the insert is scheduled to be mailed. Each shipped package of inserts should be labeled with Stoughton Utilities name, and include an insert quotation form to be provided by the Utilities Billing & Metering Specialist. Printed inserts can be shipped either folded (see fold requirements above) or unfolded; unfolded inserts will accrue an additional insertion charge.
7. SU shall not charge its ratepayers for any expenditure related to bill inserts unless the insert is specifically related to SU and its core services of Electric, Water, and/or Wastewater, and produces a demonstrated, direct, and substantial benefit for its ratepayers.
8. Any utility billing insert that is funded by utility ratepayers shall meet one or more of the following criteria:
  - a. Demonstrates energy or water conservation methods;
  - b. Conveys safety information on the use of energy;
  - c. Demonstrates methods of reducing ratepayer costs;
  - d. Otherwise directly and substantially benefits ratepayers in regard to the services offered by the utility; or
  - e. Is required by law.
9. For any bill insert that does not meet the requirements for ratepayer funding set forth in section 8, the following shall apply:
  - a. SU shall not include any bill insert that is funded by any entity or person outside of the City of Stoughton municipal governance.
  - b. All bill inserts shall be for informational purposes only, and shall not include language, pictures, or symbols that could be interpreted to:
    - i. Promote, advocate, or endorse a particular cause or position;

- ii. Fundraise, or advertise for paid programs or events; or
  - iii. Solicit for goods, services, or employment; or
  - iv. Advertise or promote any entity or program outside of the City of Stoughton municipal governance.
- c. No more than four bill inserts not funded by ratepayers shall be included in the utility statement mailings during any calendar year, unless approved by the Stoughton Utilities Committee on a case-by-case basis.
- d. The final version of any bill insert, along with documentation of the licensing of any image, artwork, symbol or logo contained within the insert, shall be submitted at least 30 days prior to the 1<sup>st</sup> day of the month in which the insert is to be mailed. Submissions shall be reviewed by the Utilities Director or their designee for approval, in accordance with the guidelines set forth in this policy.

If the reviewer determines that the content of the insert does not conform to this policy, they shall provide the requester with a written denial and justification for such, and include a copy of this policy.

The submitter can then either modify the insert and resubmit for approval, or request that the denial be reviewed by the Stoughton Utilities Committee at their next regularly scheduled meeting. The committee will then make the final decision to uphold or overturn the denial.

- e. SU shall invoice the requestor of any insert for all costs incurred by SU for the printing and mailing of the insert. These costs shall include, but are not limited to:
  - i. A standard administration fee, set annually by the Utilities Director, to cover the staff costs of review, communication, scheduling, and processing of the insert;
  - ii. Any staff time associated with the insert or mailing in excess of that covered by the standard administrative fee;
  - iii. Design and layout;
  - iv. Image and artwork licensing;
  - v. Printing;
  - vi. Folding and inserting;
  - vii. Postage, if in excess to a standard SU billing statement mailing; and/or
  - viii. Return shipping of unused inserts.