



Aligning Your Public Safety Efforts with the Current State of Industry

September 21, 2023

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Culver Company: Uniquely Qualified to Provide Insights on Utility Public Safety Engagement Strategy and Tactics

Our Heritage: 46 years as utility industry partners and consultants

Our Expertise: Utility Public Safety Awareness

- Serving more than 750 electric, gas, and dual commodity utilities in all 50 states and Canada annually
- Distribute annual utility public safety awareness materials to:
 - As many as 15 million members of the Affected Public and customers along gas transmission and distribution rights of way
 - More than 4 million students and 215,000 educators
 - Over 1.5 million at-risk excavators, tree workers, and third-party contractors
 - Over 200,000 first responders
- Successfully support AEGIS Insurance Services, PHMSA, FERC, National Transportation Safety Board (NTSB), and numerous state and local regulators with pipeline public safety awareness audits and risk assessments

Our Expertise

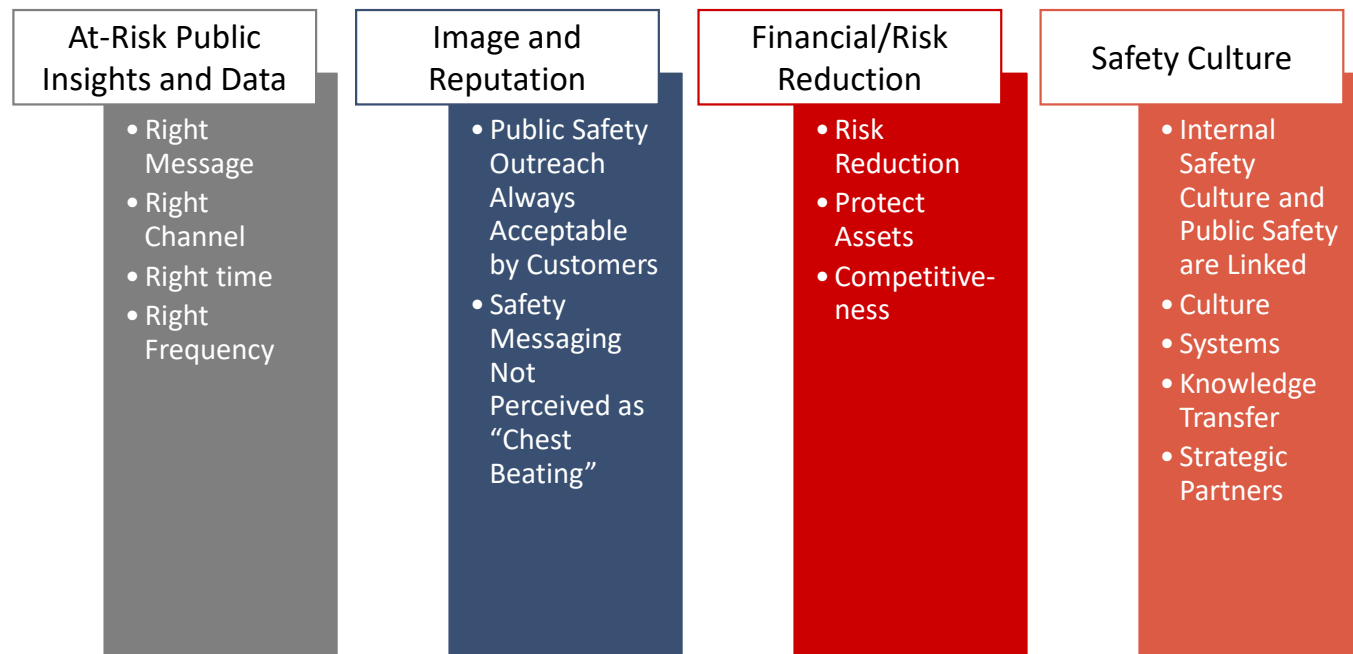
Culver Company: Experts in Solutions for Utility Public Safety

Culver Company's strategic framework for structuring and continuously improving your utility public safety awareness programs includes:

- Educational products and programs to meet all utility sizes
- Public safety awareness plan review
- Utility public safety awareness program design, implementation, evaluation, & refinement
- Primary research on program effectiveness (national benchmarks and company baseline)
- Public safety risk assessment and tactical solutions to fill gaps
- Data analytics
- Litigation and regulatory support
- Risk management reporting



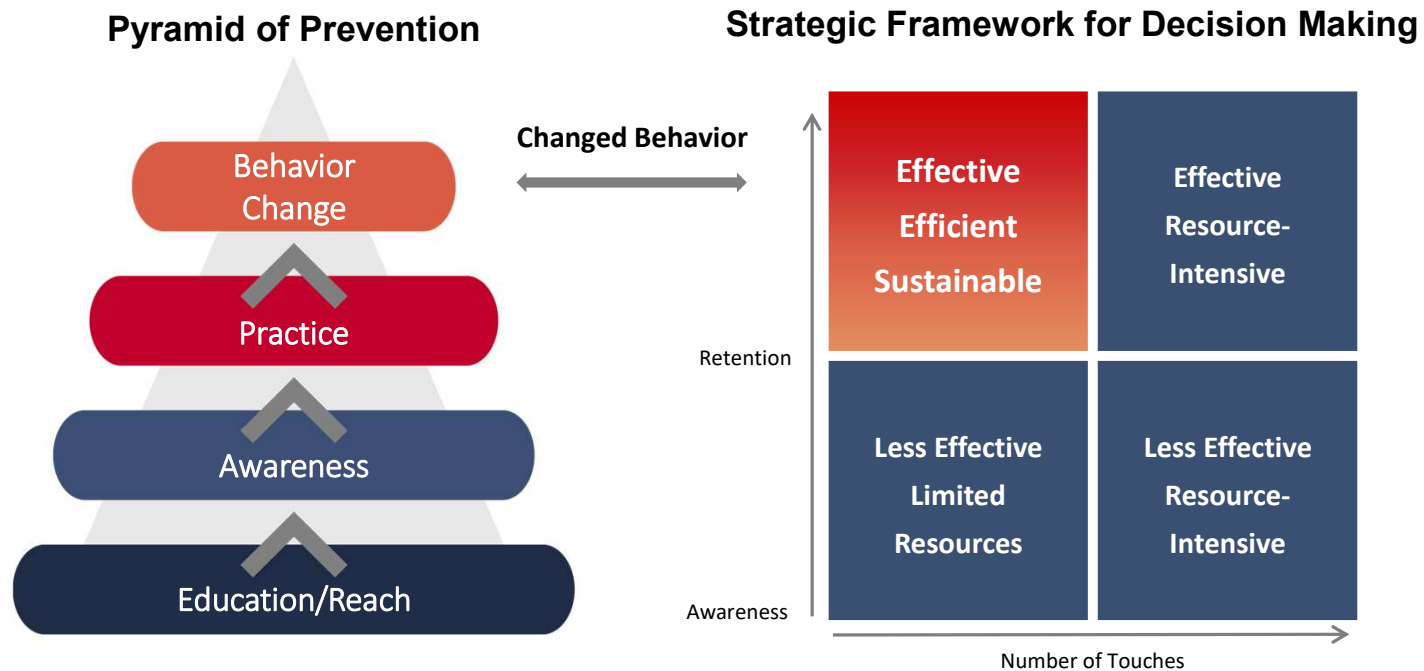
How Public Safety is Nurtured and Sustained Through the Industry



Utilities with the Most Effective Public Safety Outreach Rely on a Customer-Centric Approach



Data-Driven Public Safety Decisions Change Unsafe Behaviors Among At-Risk Audiences



A Prevention-Based Strategy Increases Engagement, Awareness, and Safe Behaviors Among Affected Audiences

Holistic Public Safety Approach

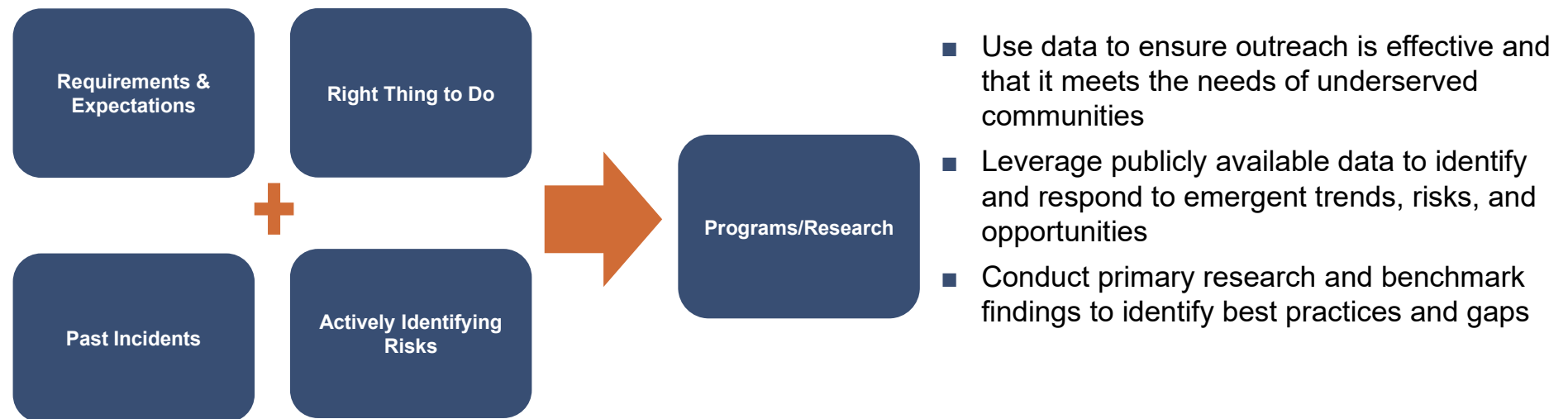
Understanding the whole picture:



What Gets Measured Matters



Our Industry's Commitment to Safety Outreach that Equitably Protects All Communities Elevates the Importance of Understanding Stakeholders' Needs and Behaviors



Stakeholder Insights

Credible Safety Education is Key to Lasting Behavior Change – At-Risk Workers Want to Hear from Us

Safety Message Receptivity Increased

- Increasingly focused on safety culture because it favorably impacts results
- Pay attention to safety messages

Not Just Information Exchange, But Behavior Change

- Study found that safety communication plays an essential role in reducing incidents
- Communication influences safety attitudes and behaviors



Assessing the Mediating Role of Safety Communication Between Safety Culture and Employees' Safety Performance, 2022

The Infrastructure Investment and Jobs Act (IIJA) Increased Major Construction Project Activity

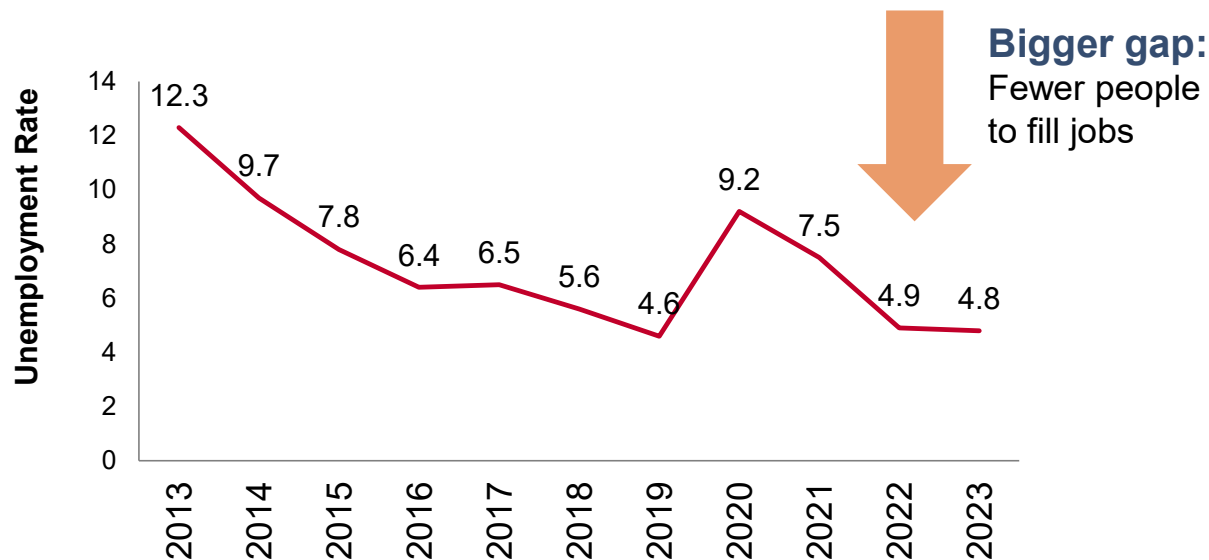


Construction Analytics, June 26, 2023

Dig Ins Common Ground Alliance DIRT Report

Unprecedented Retirements and Younger Generations' Lack of Interest in Joining the Construction Trades Foreshadow an Even Bigger Labor Gap

Construction Industry Unemployment Rate August YTD Average



Bureau of Labor and Statistics, 2023

Builder Magazine Labor Survey, accessed 2023

Influx of Younger and Less Experienced Workers, That Is If They'll Take the Jobs



1 out of 4
At-risk workers is 55+ years

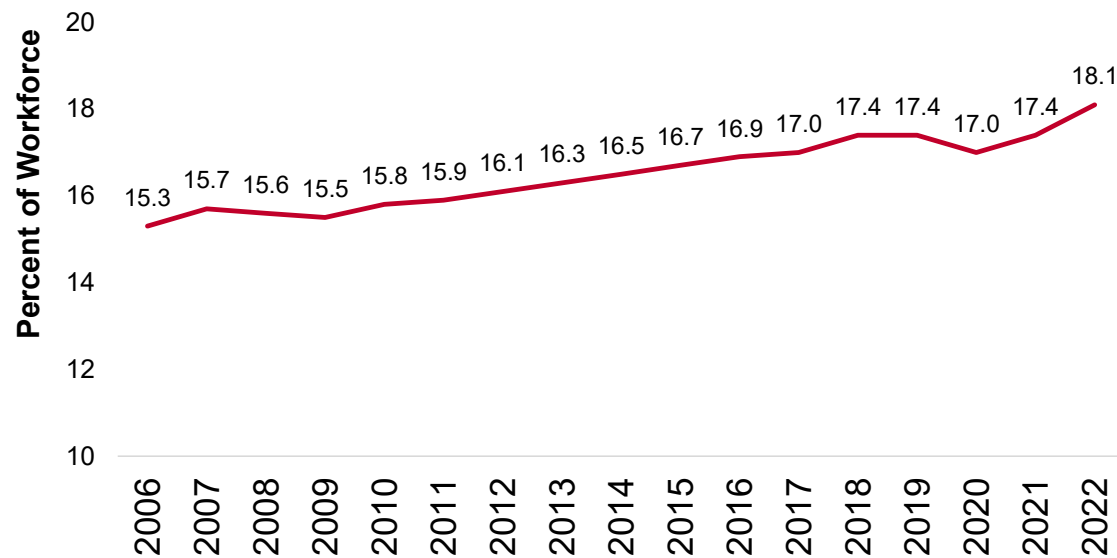
61 years
Average retirement age

74%
Of young adults who know what field they want to enter

3%
of them are interested in construction trades

As Foreign-Born Workers Fill the Labor Gap, Our Understanding and Response to Audience Needs Can Mean Life or Death Based on our Ability to Accommodate Their Diverse Languages and Their Experience with Previous Regulatory Standards

Foreign-Born Workers Have Been Joining the Workforce at Record-High Levels

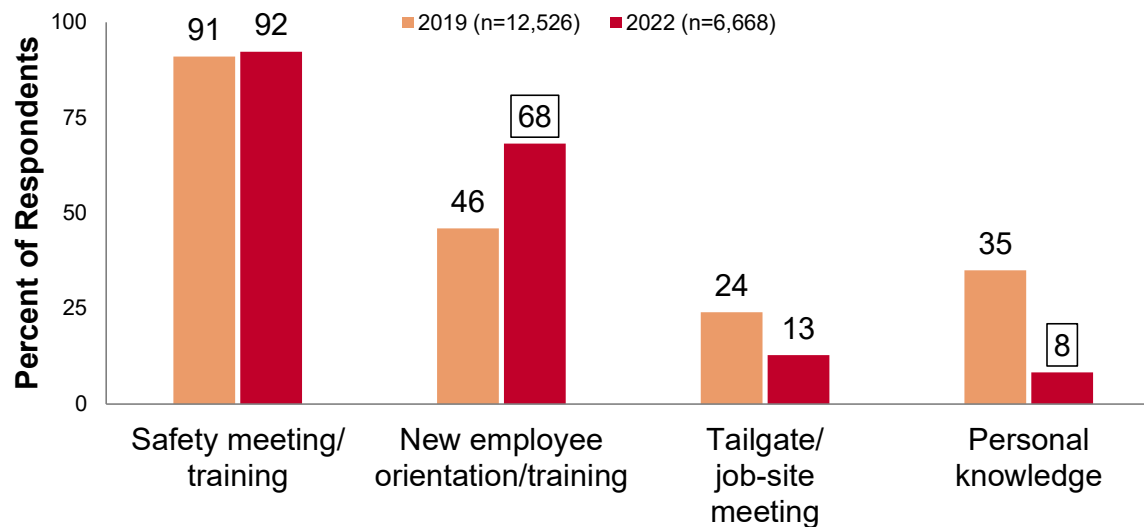


U.S. Bureau of Labor and Statistics, 2023

Implications

We Need to Meet the Needs of Tenured Workers and Inexperienced Laborers. Significantly More Trainers Ordered Utility Materials to Onboard New Employees in 2022 vs. 2019

How At-Risk Workers Use Detailed Utility Safety Materials Total Respondents



9 out of 10 At-Risk Workers Depend on Utility Educational Materials to Work More Safely



The workers at my company use the information to work more safely around utility infrastructure

The materials help me and/or my coworkers perform our jobs more safely

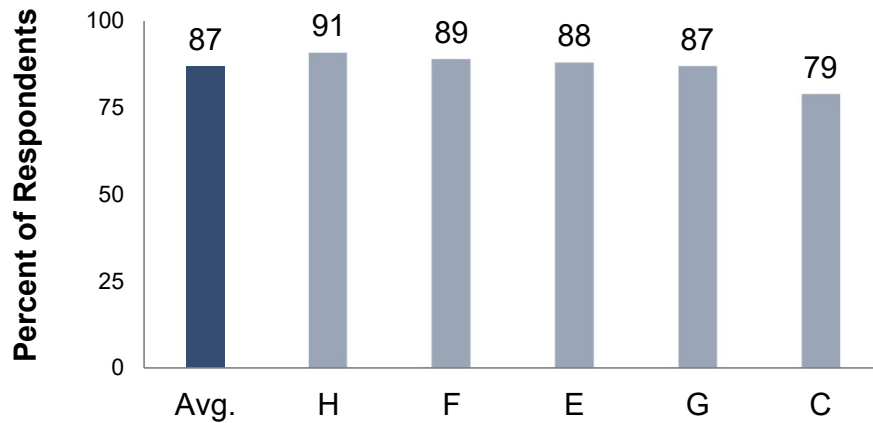
 Significantly differs at 95% confidence level (2022 vs. 2019)

Culver At-Risk Worker Program Data, 2019 and 2022

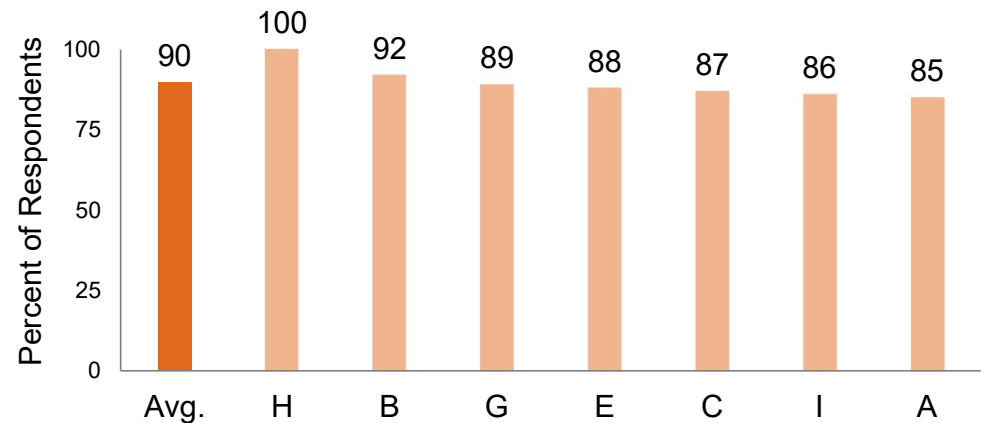
While the RP Addresses Natural Gas Safety, Third-Party Contractors Value Information from Their Local Utilities about How to Work Safely Around Gas and Electric

Agree Workers in Their Organizations Value Information About Working Safely Around Energy Infrastructure

Natural Gas Infrastructure
Base: Total Respondents



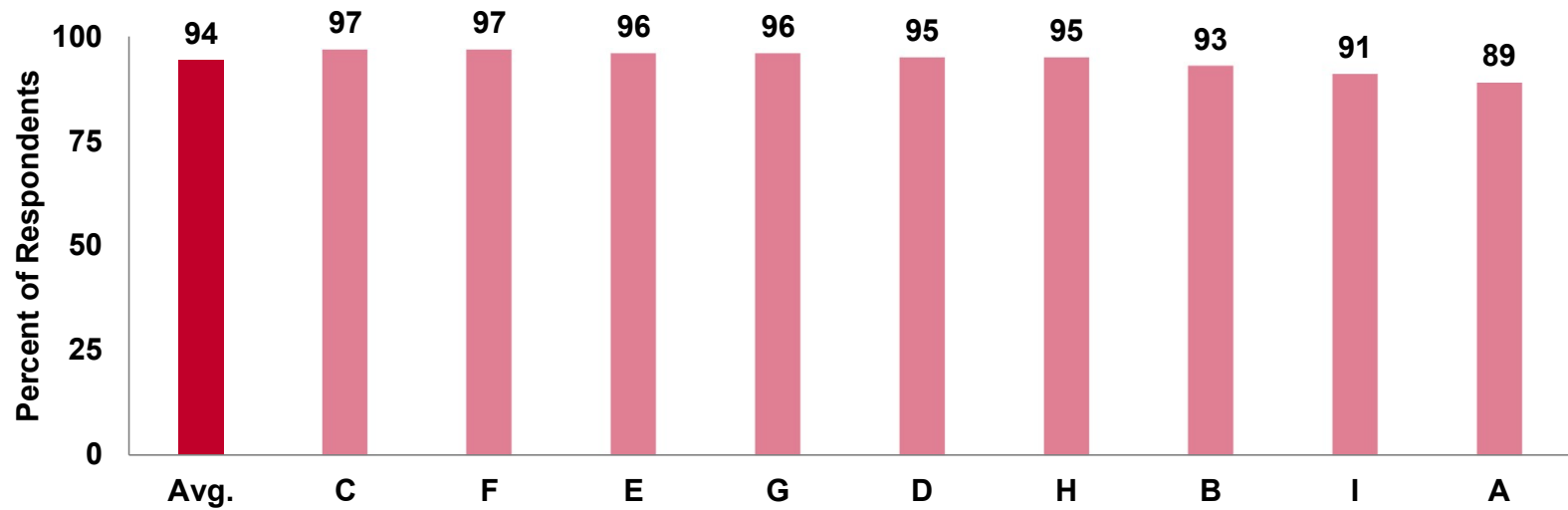
Electric Power Line Infrastructure
Base: Total Respondents



Damage Prevention

811 Awareness Isn't Universal, But Is High

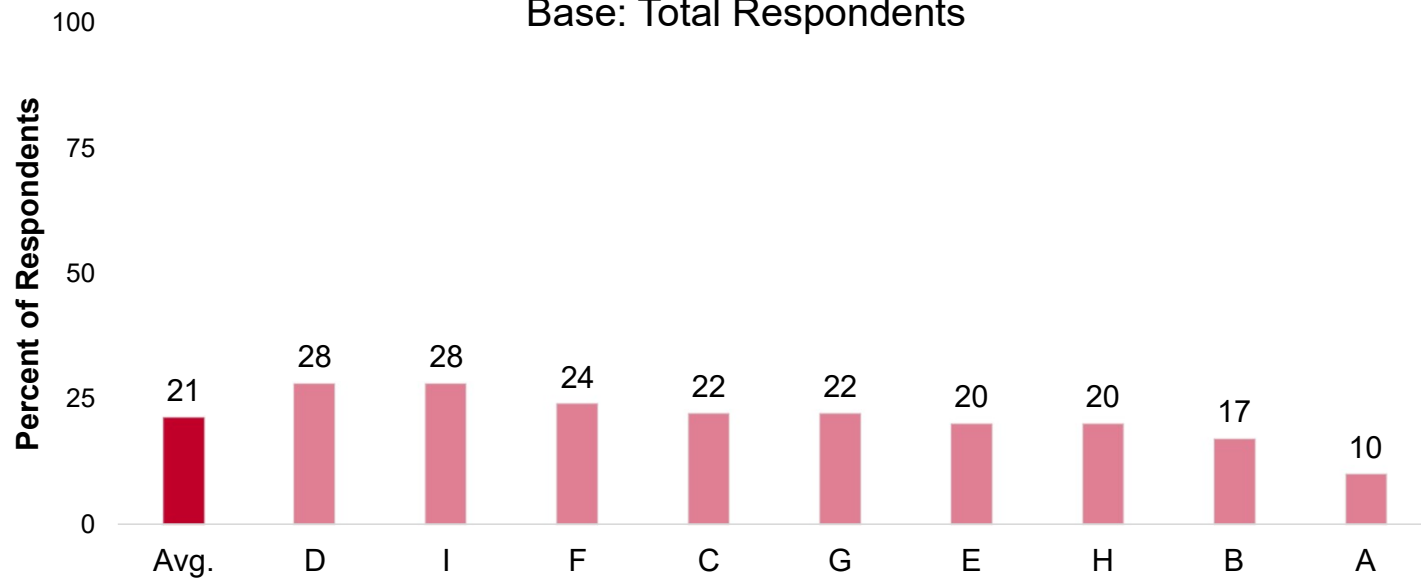
811 Awareness
Base: Total Respondents



Culver Effectiveness Study

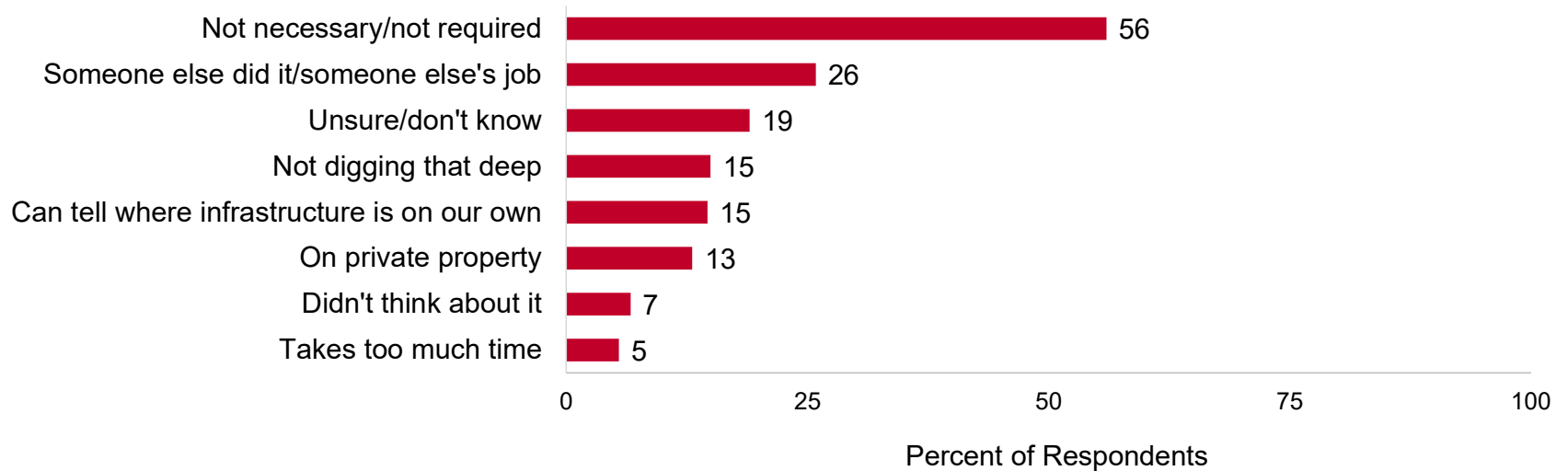
811 Awareness and Compliance Are Not Synonymous

Admit Someone in Their Organization Failed to Have Their Lines Located and Marked
Base: Total Respondents



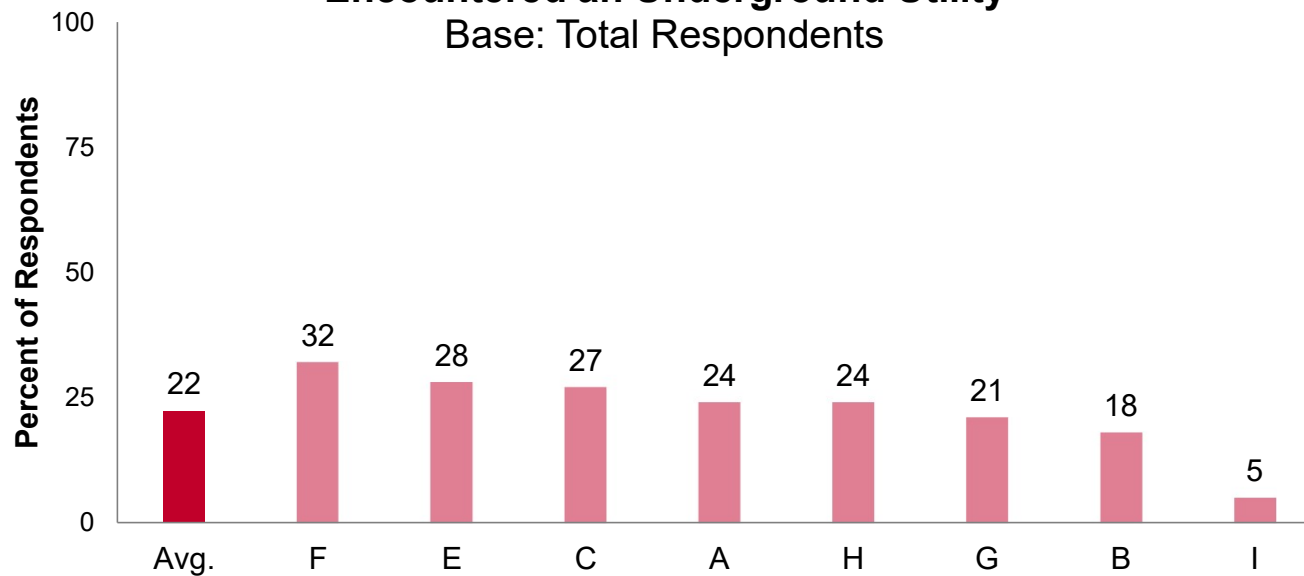
Third-Party Contractors May Fail to Request Line Locates Because They Believe It's Unnecessary. They May Assume That a Shallow Digging Job, An Area They Are Familiar With, or Private Property Doesn't Need to Be Marked

Why Someone in Their Organization Failed to Request Line Location
Base: Respondents Whose Organizations Don't Always Have Their Lines Located/Marked (n=227)



22% of Third-Party Contractors Admit Someone in Their Organization Struck an Underground Utility

Someone in Their Organization Unexpectedly Encountered an Underground Utility
Base: Total Respondents

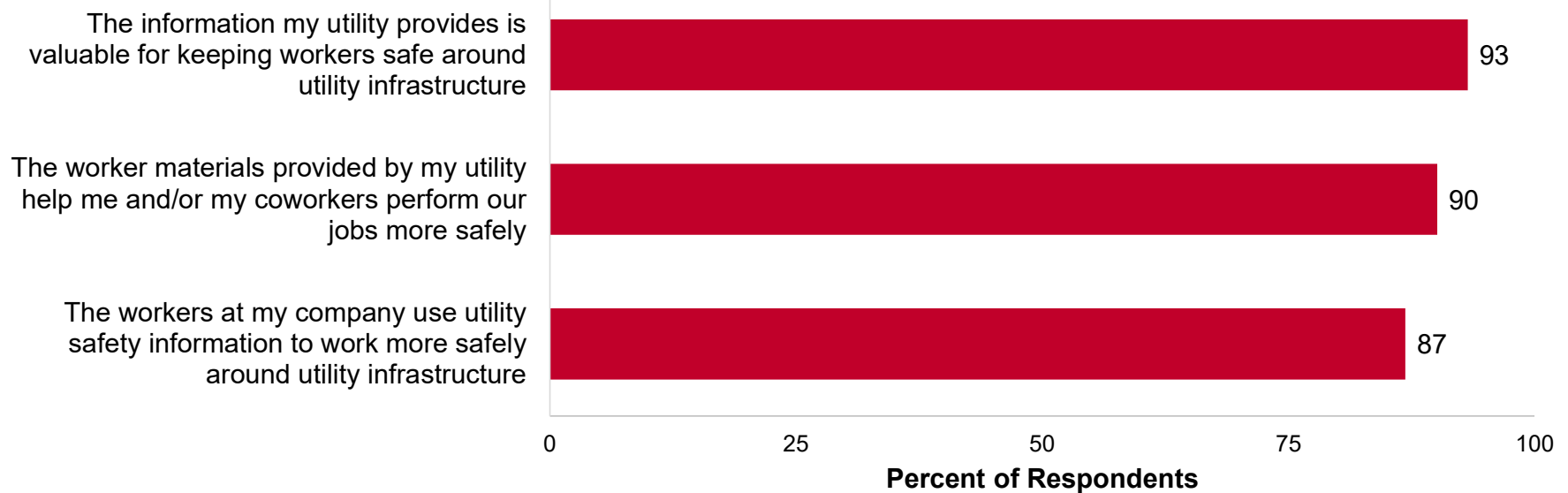


Safety Information Value

This Audience Depends on Utility Safety Information for Their Personal Safety as Well as That of Their Colleagues

Agree With This Statement About the Value of Utility Safety Training

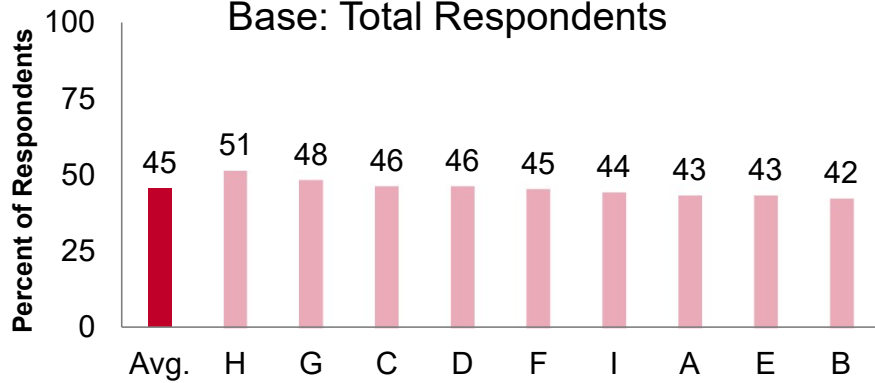
Base: Total Respondents (n=2,776)



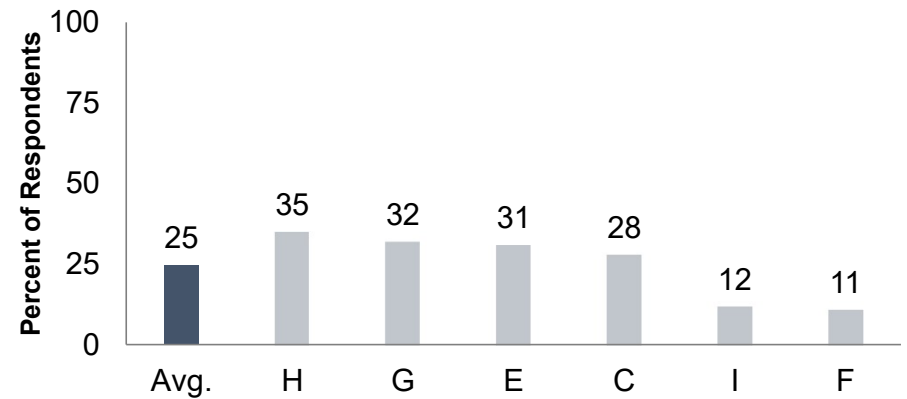
Culver At-Risk Worker Program Data 2022-23

Fewer Than Half of Contractors Recall Seeing Safety Information Over the Past Year

Recall Receiving Safety Information From This Utility Over the Past 12 Months At Least Once
Base: Total Respondents



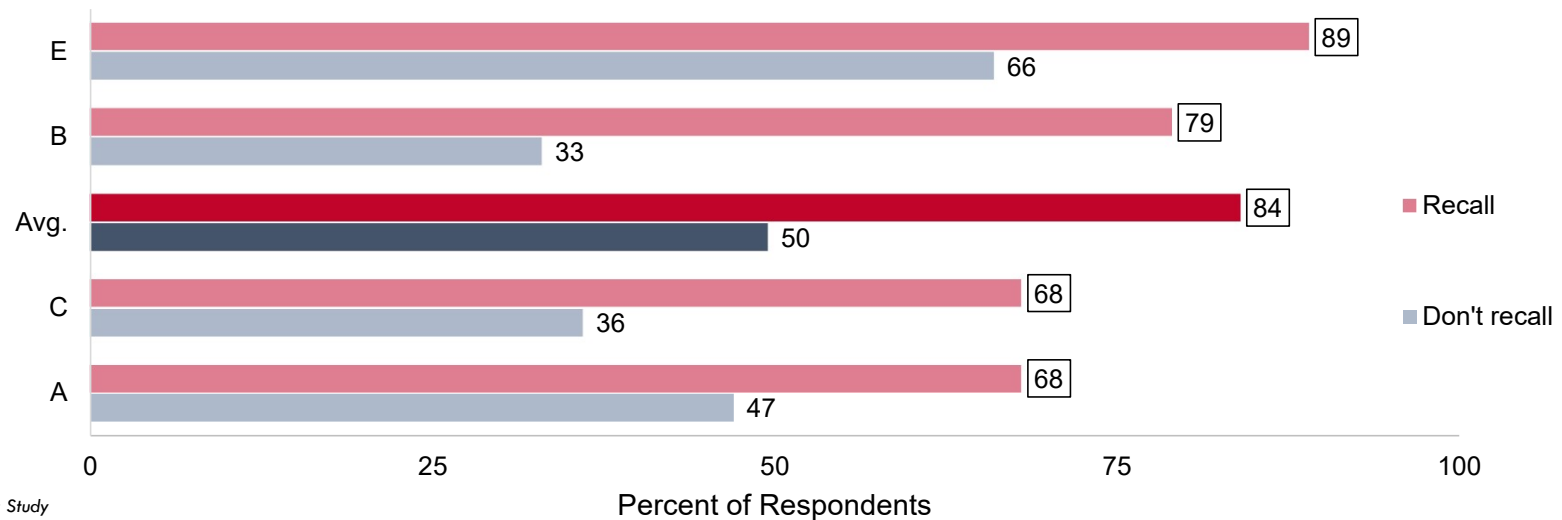
Recall Receiving a Safety Mailing Over the Past Three Months
Base: Total Respondents



Communication Impact

At-Risk Workers Who Recall Receiving Safety Information from Their Utility Over the Past 12 Months are Significantly More Likely Than Those Who Don't to Have Initiated a Safety Action, Such as Sharing the Information with Colleagues

Took a Safety Action By Whether Respondent Recalls Receiving Utility Safety Information Over the Past 12 Months Base: Total Respondents

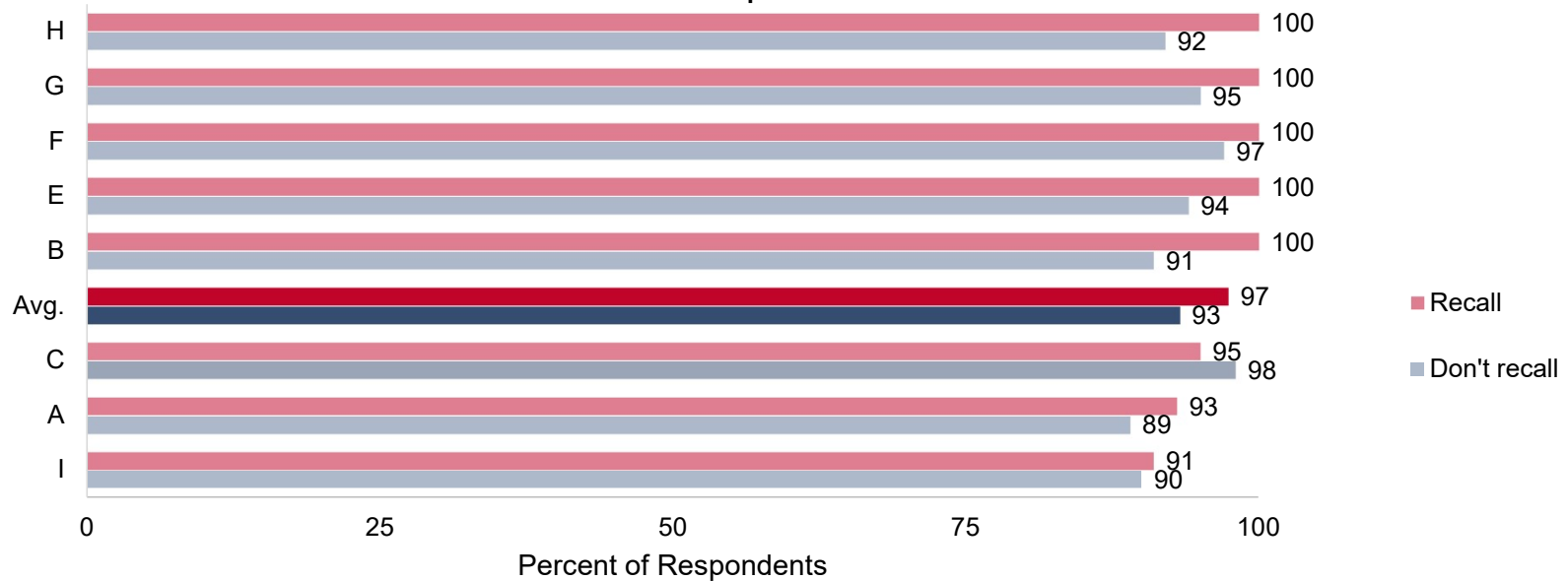


Culver Effectiveness Study

 Significantly differs at 95% confidence level (those who recall receiving safety information over the past 12 months vs. those who do not recall receiving any safety information)

Universal 811 Awareness is Achievable with Frequent Reminder Messaging

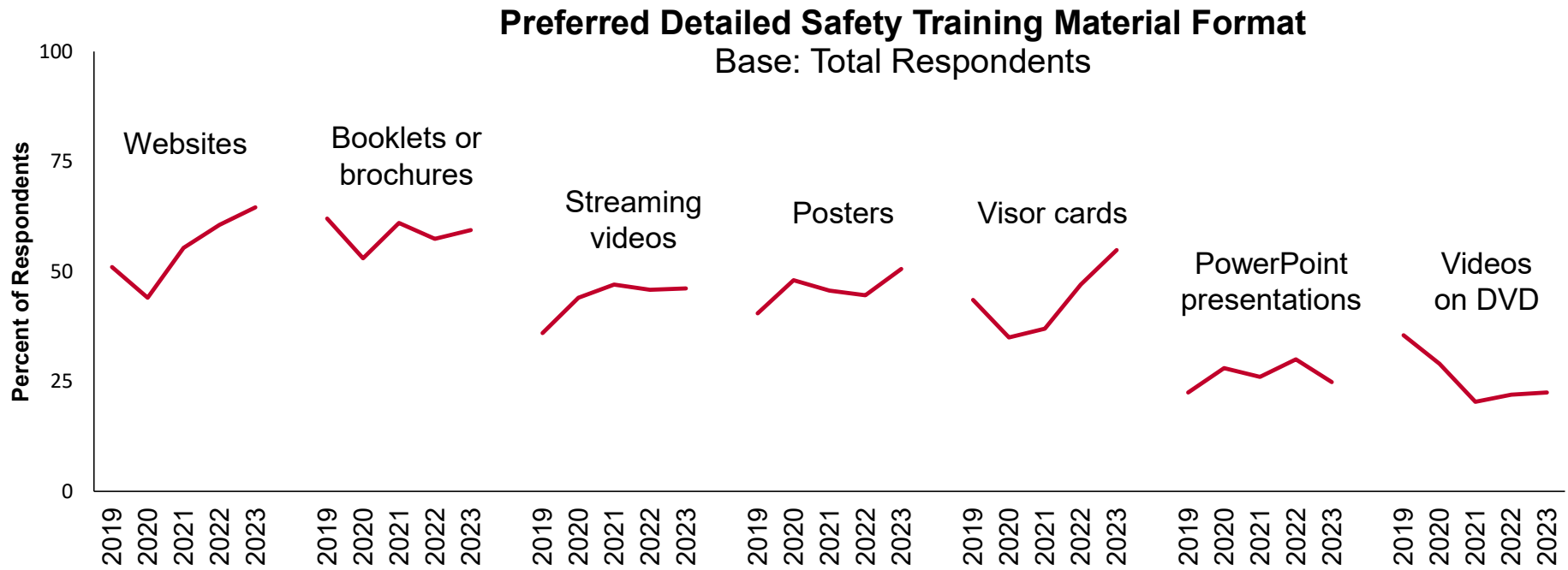
Aware of 811 By Whether Respondent Recalls Receiving Utility Safety Mailing Over the Past 3 Months Base: Total Respondents



Culver Effectiveness Study 2022-2023

Channel Preferences

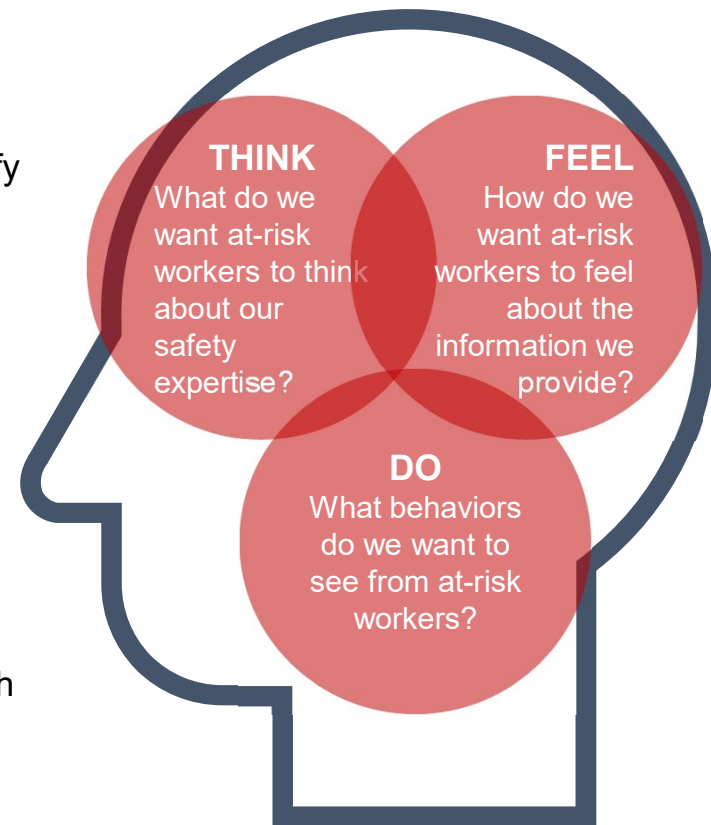
COVID Spurred Changing Communication Patterns. Interest in Web Content Has Increased, But Not at the Expense of Traditional Print Communication



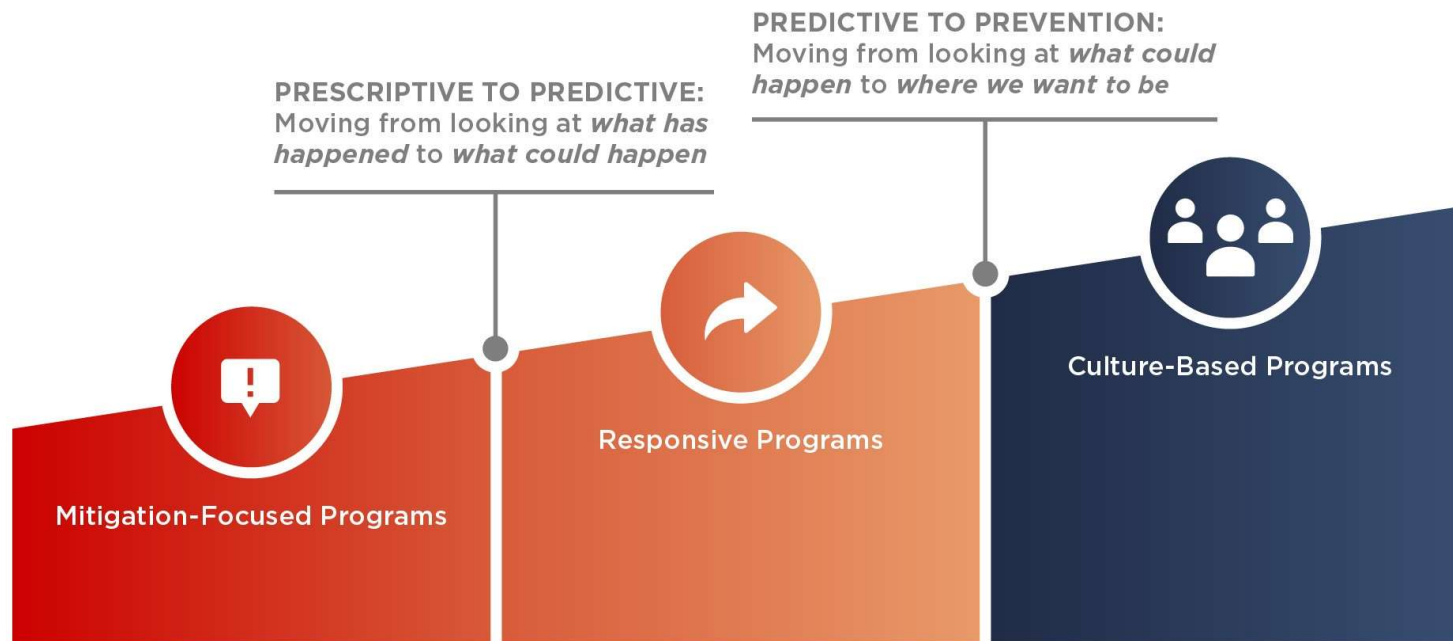
Culver Effectiveness Study

Key Takeaways

- **Talent shortages are impacting us all:** Leverage external expertise to overcome this
- **Time is of the essence:** Build the case for investment, identify potential future scenarios, and do what you can to start preparing
- **Know your audience and respond to their needs:** Regulatory compliance lags stakeholder needs, so don't just check the box
 - **Primary research**, including baselines and benchmarks, to identify gaps and recognize what good looks like
 - **Supplemental and enhanced communication** builds your brand's credibility, which is important for ensuring your accurate and trustworthy message cuts through the clutter
 - **Offer consistent messaging** (sisters, but not twins) through integrated print and digital channel selection
 - **Responding to demographics** ensures messaging resonates with stakeholders



Evolution of Public Safety Programs in a Changing Environment



Public Safety Outreach Contributes to Key Performance Metrics

