



Howard/McAreavey

**RESOLUTION NO. 6641**

**WHEREAS**, the Board of Directors has determined it is in the best interest of the District, its employees, and its customer-owners to establish written policies that describe and document OPPD's corporate governance principles and procedures; and

**WHEREAS**, each policy was evaluated and assigned to the appropriate Board Committee for oversight of the monitoring process; and

**WHEREAS**, the Board's Customer and Public Engagement Committee (the "Committee") is responsible for evaluating Board Policy SD-5: Customer Satisfaction on an annual basis. The Committee has reviewed the SD-5: Customer Satisfaction Monitoring Report and finds OPPD to be sufficiently in compliance with the policy as stated.

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Directors accepts the SD-5: Customer Satisfaction Monitoring Report, in the form as set forth on Exhibit A attached hereto and made a part hereof, and finds OPPD to be sufficiently in compliance with the policy as stated.



Exhibit A

# Monitoring Report SD-5: Customer Satisfaction

April 16, 2024



# SD-5: CUSTOMER SATISFACTION

Achieving a high level of customer satisfaction is key to OPPD's vision.

The Board will ensure that OPPD shall obtain feedback from its customer-owners through nationally syndicated studies, which allow OPPD to evaluate and prioritize its strategic plans, and to guide investments and operational activities to ensure high satisfaction in all aspects of OPPD's interactions with our customer-owners.

OPPD establishes a goal to achieve top quartile performance in customer satisfaction for similar-sized utilities in the region across customer classes.

## **AS A PART OF THIS POLICY:**

- Interact with customer-owners in a respectful, dignified and civilized manner.
- Communicate a procedure to customers who believe they have not received fair treatment from OPPD.
- Provide periodic customer-owner trend updates to the Board.

# SD-5 ACCOUNTABILITIES TO ACHIEVE EXCELLENT CUSTOMER SATISFACTION



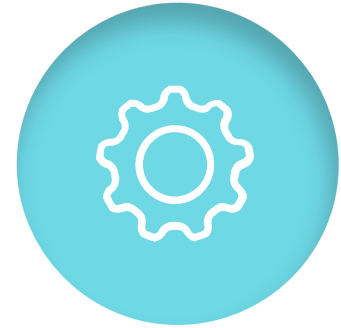
## Share the big picture

Provide periodic customer-owner trend updates to the Board.



## Give customers a voice

Communicate a procedure to customers who believe they have not received fair treatment from OPPD.



## Measure, learn, respond

Achieve top quartile performance in customer satisfaction for similar-sized utilities in the region across customer classes.



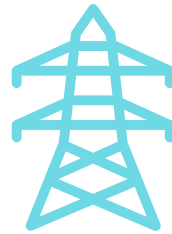
## Share the big picture

Provide periodic customer-owner trend updates to the Board.



### Macro

Inflation, decreased energy assistance funding and other economic pressures continue to have an impact on customers' lives.



### Industry

Industrywide, total customer satisfaction was down in 2023, largely due to perceptions of price and affordability.



### OPPD

OPPD performed well in customer satisfaction in 2023 but has not been immune from the impacts of macro economic forces.

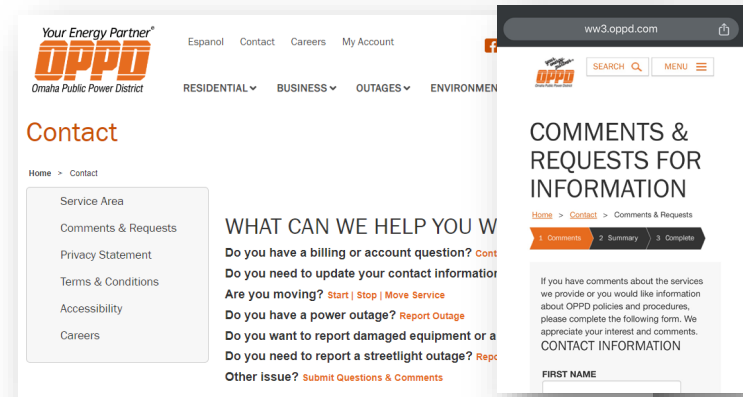


## Give customers a voice

Communicate a procedure to customers who believe they have not received fair treatment from OPPD.



Online, mobile, email

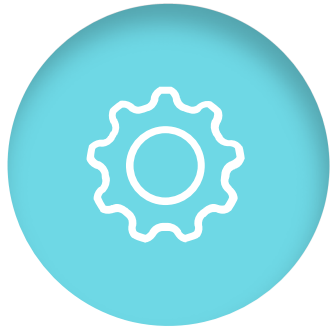


Phone



In-person





## Measure, learn, respond

Achieve top quartile performance in customer satisfaction for similar-sized utilities in the region across customer classes.



### Residential

- JD Power Associates Electric Utility Residential Customer Satisfaction Study<sup>SM</sup>
- Customer care representative transaction study
- Customer communication study
- Custom studies related to brand, customer experience and product development

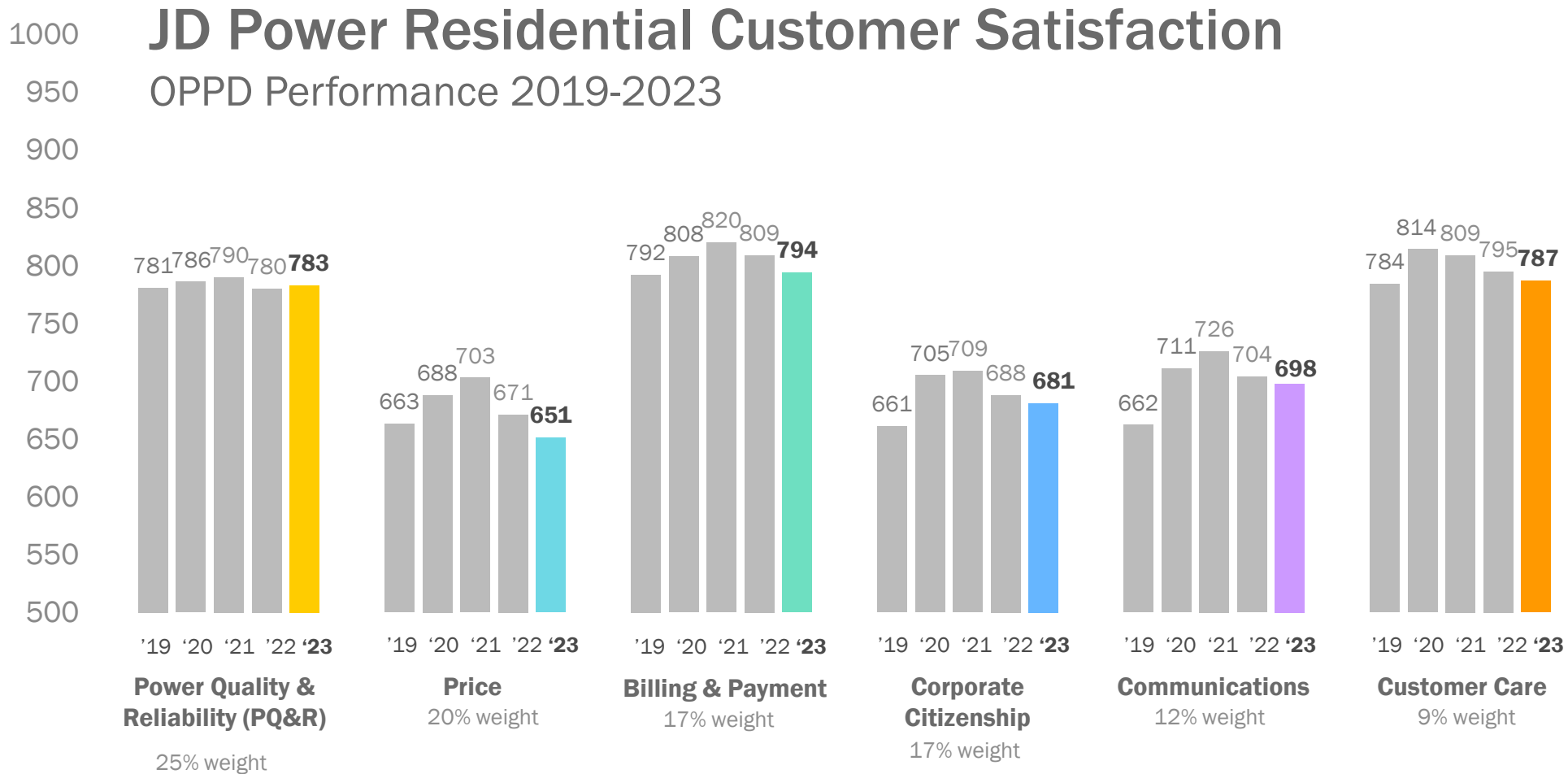


### Business

- Escalent, Cogent Syndicated Electric Utility Business Customer Satisfaction Study<sup>SM</sup>
- Small to medium business study
- Daily account executive business interactions and insights



- 731 (-8) total Customer Satisfaction Index for OPPD
- Ranked **first quartile** in Midwest Midsize Utility segment for 2023

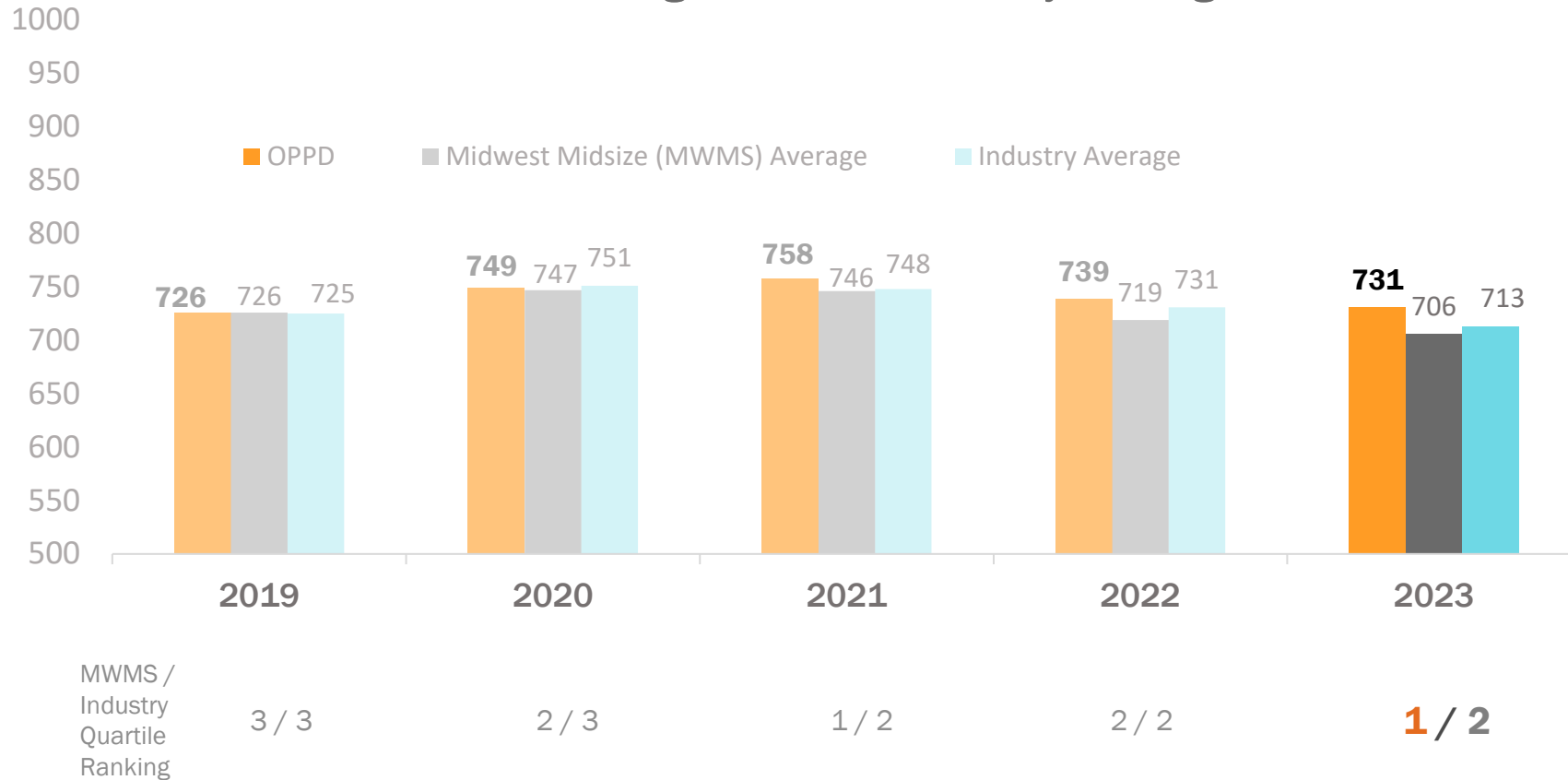


Source: 2019-2023 JD Power Associates Electric Utility Residential Customer Satisfaction Study<sup>SM</sup>. OPPD annual sample sizes are sufficient for statistically meaningful analysis.



# JD Power Residential Customer Satisfaction

## OPPD Performance v. Segment and Industry Averages 2019-2023

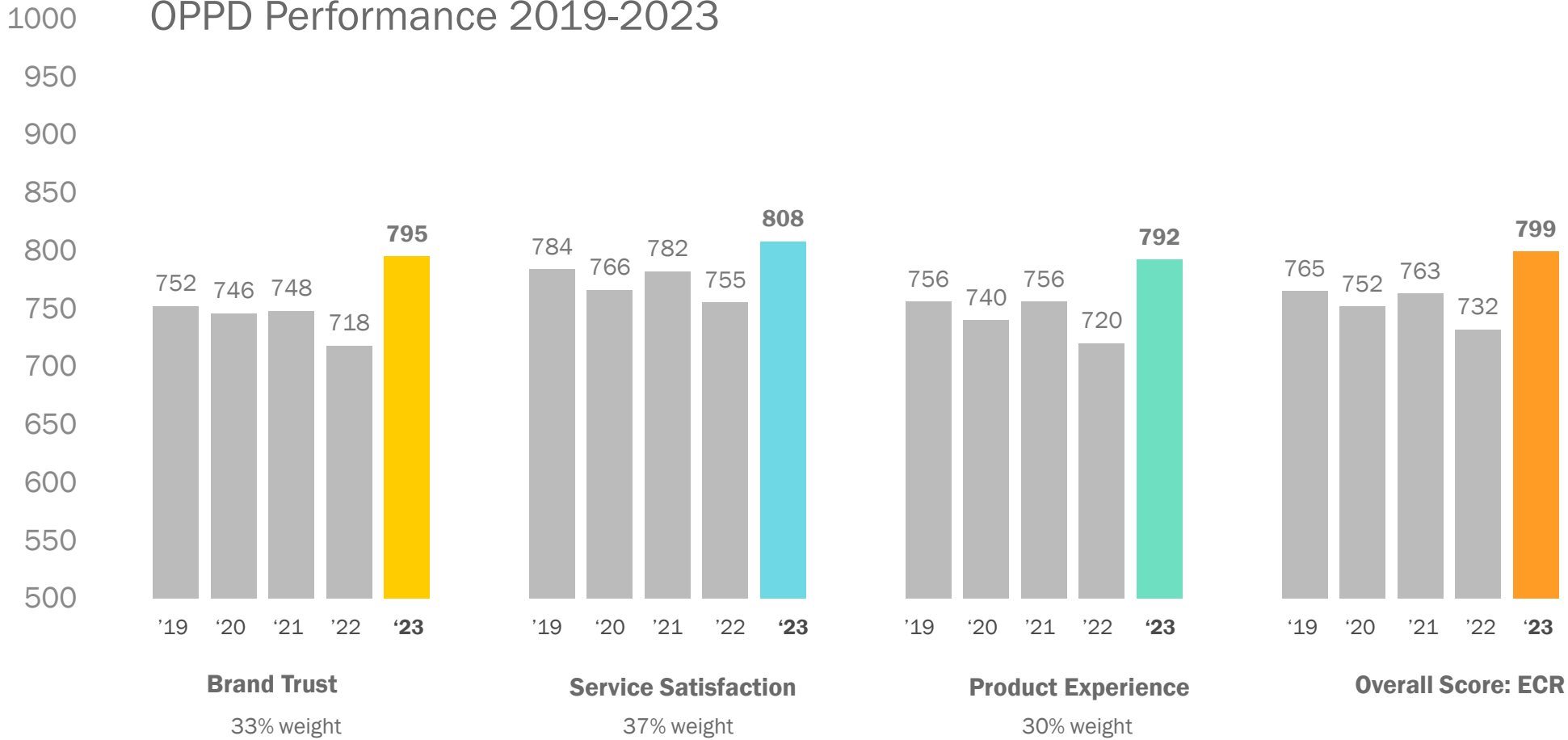


- Ranked **first quartile** in segment, ranking third in comparative set.
- Ranked second quartile across all ranked utilities.

Source: 2019-2023 JD Power Associates Electric Utility Residential Customer Satisfaction Study<sup>SM</sup>. OPPD and peer set annual sample sizes are sufficient for statistically meaningful analysis.

# Escalent Business Customer Engagement

## OPPD Performance 2019-2023

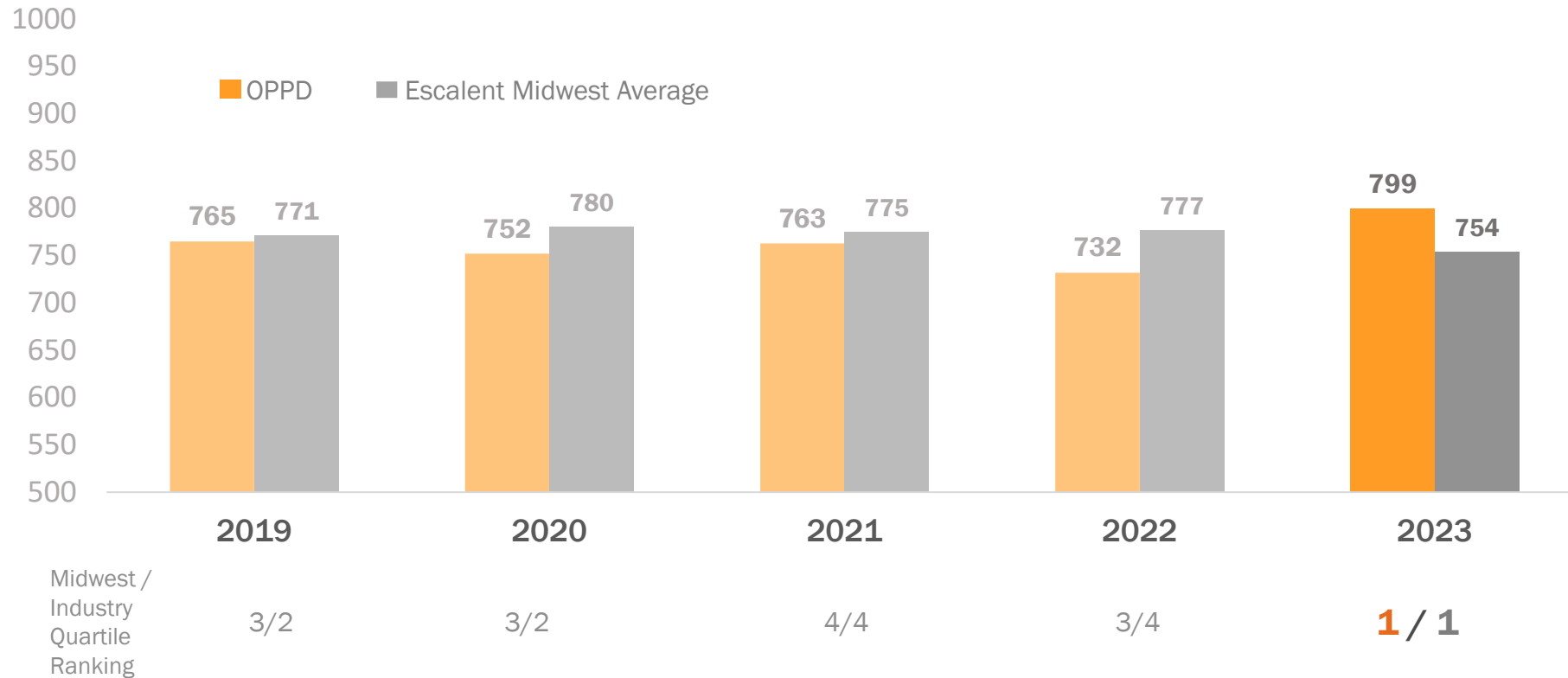


- 799 total Engaged (Business) Customer Relationship Score
- Ranked **first quartile** in Midwest Region segment for 2023

Source: 2019-2023 Escalent, Cogent Syndicated Electric Utility Business Customer Satisfaction Study<sup>SM</sup>

# Escalent Business Customer Engagement

OPPD Performance v. Segment Averages 2019-2023



- Ranked **first quartile** in Midwest Region segment for 2023
- Ranked **first quartile** across all ranked utilities

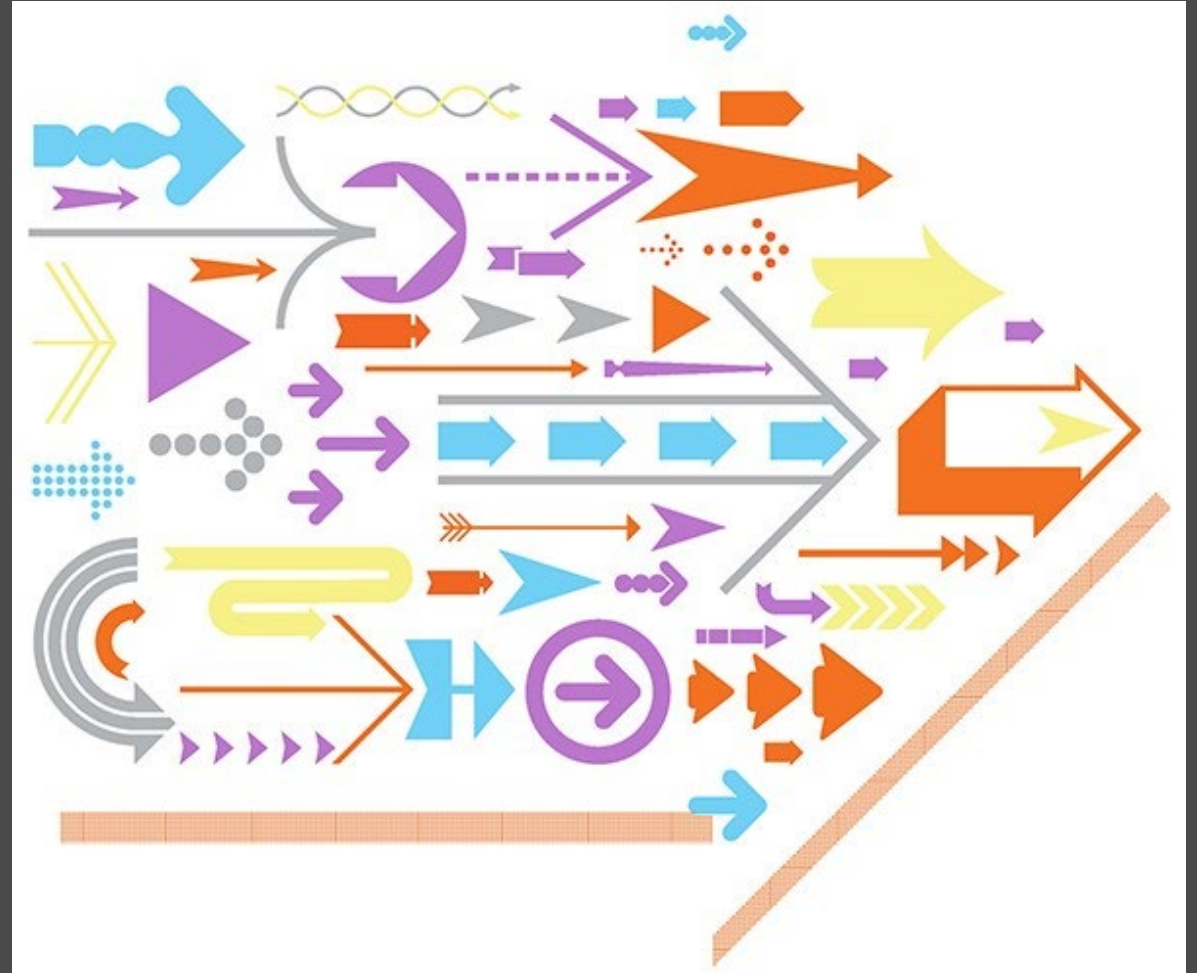
Source: 2019-2023 Escalent, Cogent Syndicated Electric Utility Business Customer Satisfaction Study<sup>SM</sup>

# Recommendation

The Customer & Public Engagement Committee has reviewed and accepted this Monitoring Report for SD-5 and recommends that the Board find OPPD to be sufficiently in compliance with Board Policy SD-5.

**Any reflections on**

**what has been  
accomplished, challenges  
and/or strategic  
implications?**





# Board Action

## BOARD OF DIRECTORS

April 16, 2024

### ITEM

SD-5: Customer Satisfaction Monitoring Report

### PURPOSE

To ensure full board review, discussion and acceptance of the SD-5: Customer Satisfaction Monitoring Report

### FACTS

- a. The first set of Board policies, including SD-5: Customer Satisfaction, was approved by the Board on July 16, 2015.
- b. Each policy was evaluated and assigned to the appropriate Board Committee for oversight of the monitoring process and revised as needed. SD-5 was amended by the Board on November 16, 2017.
- c. The Customer and Public Engagement Committee is responsible for evaluating Board Policy SD-5: Customer Satisfaction.
- d. The Customer and Public Engagement Committee has reviewed and accepted the SD-5: Customer Satisfaction Monitoring Report as outlined on Exhibit A and recommends that the Board find OPPD to be sufficiently in compliance with Board Policy SD-5.

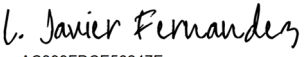
### ACTION

The Customer and Public Engagement Committee recommends Board approval of the SD-5: Customer Satisfaction Monitoring Report.

#### RECOMMENDED:

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9426AD61477A435...  
 Timothy D. McAreavey  
 Vice President – Customer Service

#### APPROVED FOR BOARD CONSIDERATION:

DocuSigned by:  
  
AC399FD0E56247E...  
 L. Javier Fernandez  
 President and Chief Executive Officer

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Attachments: Exhibit A – Monitoring Report  
Resolution