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RESOLUTION NO. 6430

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 Public Information 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

Public Information Committee Report
April 13, 2021

Ms. Juli Comstock, Vice President Customer Service

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

Aligned with OPPD's Core Values, we are committed to the following actions as part of this policy:

- 1)** Regularly obtain feedback from customer-owners
- 2)** Measure customer satisfaction
- 3)** Use voice of customer (VOC) to prioritize investments and operational activities
- 4)** Interact with customer-owners in a respectful, dignified manner
- 5)** Communicate a procedure to customers who believe they have not received fair treatment from OPPD.
- 6)** Provide periodic customer-owner trend updates to the Board

1) Regularly obtain feedback from customer-owners

Syndicated Customer Satisfaction Studies

Provides national satisfaction benchmark data on a wide range of electric service attributes

Online Power Panel & Oppdcommunityconnect.com

Allows OPPD to get rapid feedback on pertinent issues that is projectable to the customer base

Transactional and Journey Surveys

Provides rapid feedback on service interactions

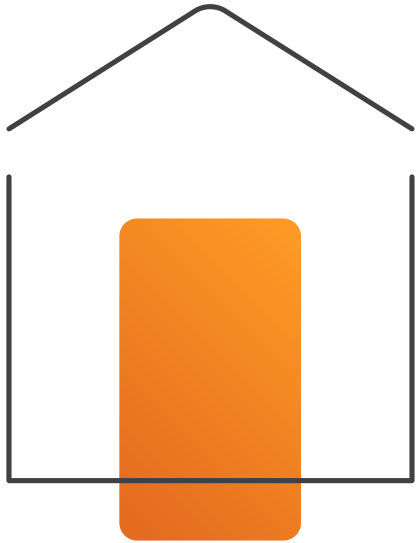
Communications tracking study

Allows for broad sentiment and awareness tracking on key messages and events

Qualitative, in-person and virtual sessions

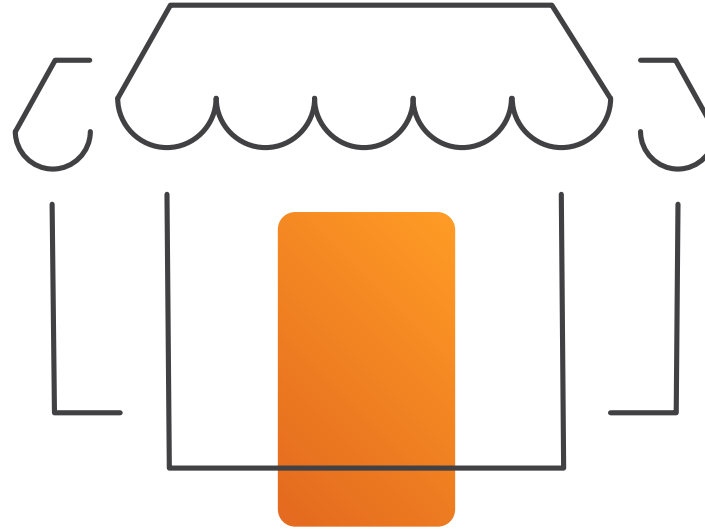
Provides nuanced initial insights, opportunities for dialogue and engagement

2) Measure customer satisfaction



Residential

customer
satisfaction
measured via J.D.
Power syndicated
study



Commercial & industrial

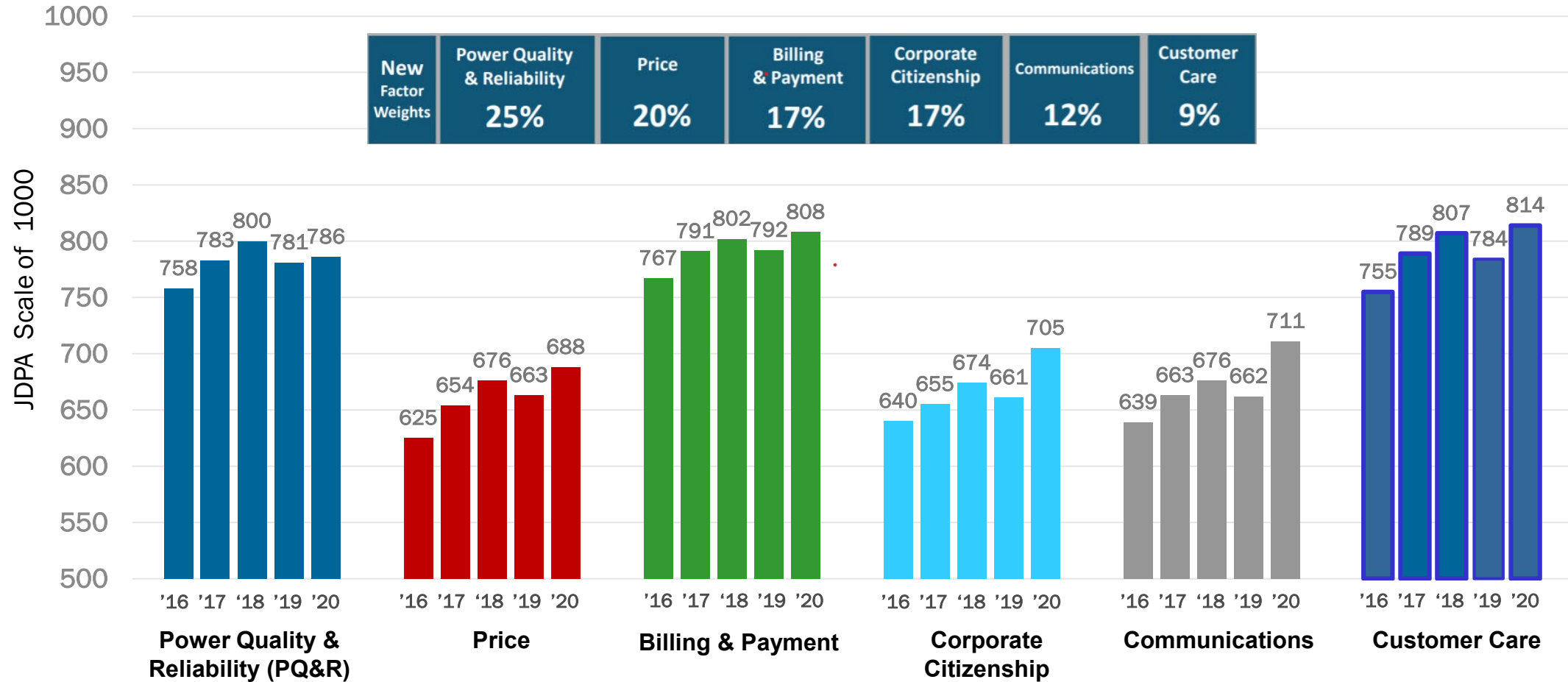
customer
satisfaction
measured via
Escalent's Cogent
syndicated study.



2020 Residential customer satisfaction

OPPD Factor Performance Recovery in 2020

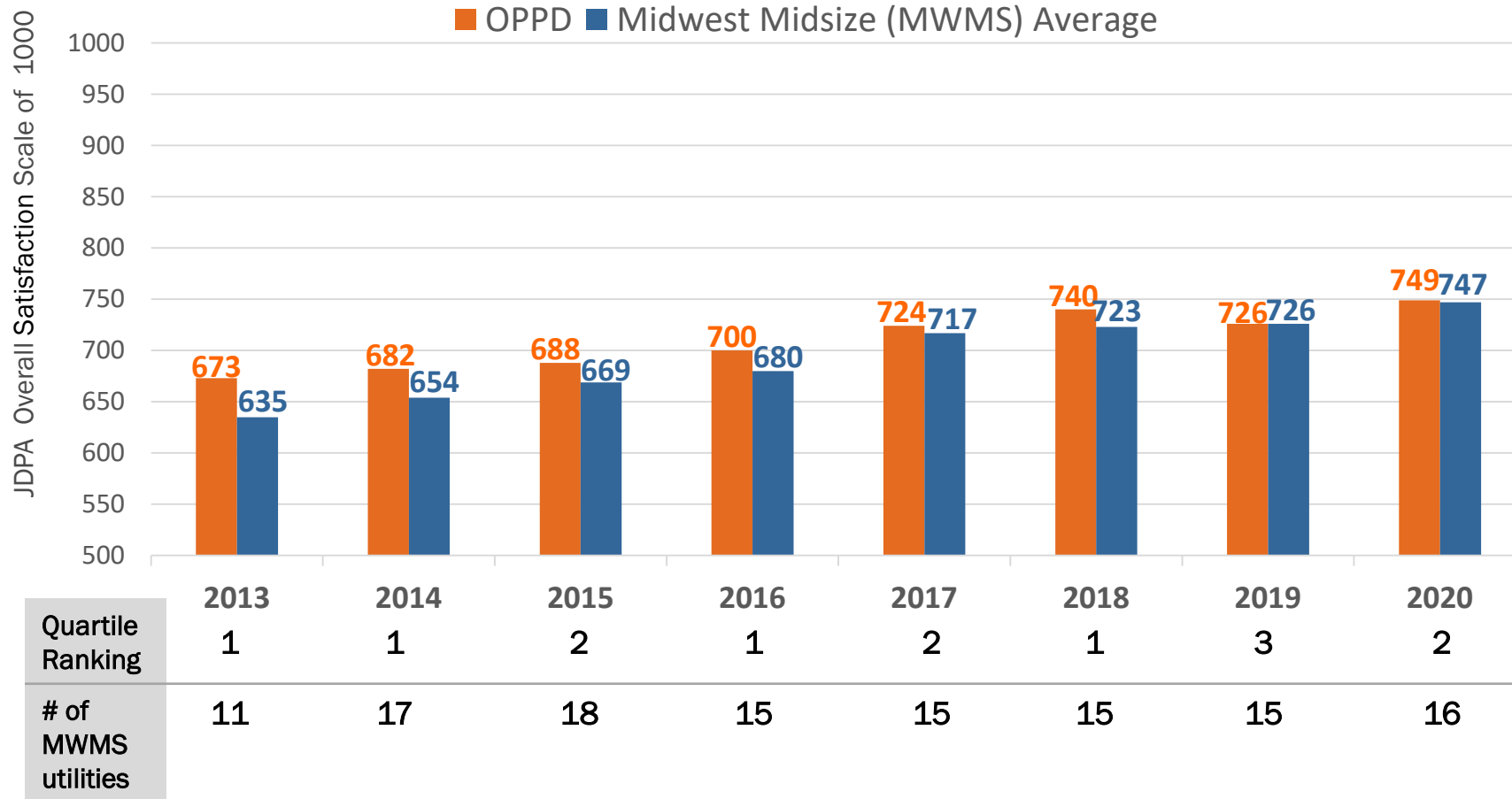
Factor Performance 2016 – 2020



Source: 2016-2020 JD Power Associates Electric Utility Residential Customer Satisfaction StudySM

In 2020, OPPD continued to regain ground with overall satisfaction

Residential JDPA Customer Satisfaction Index 2013-2020 Historical Results¹

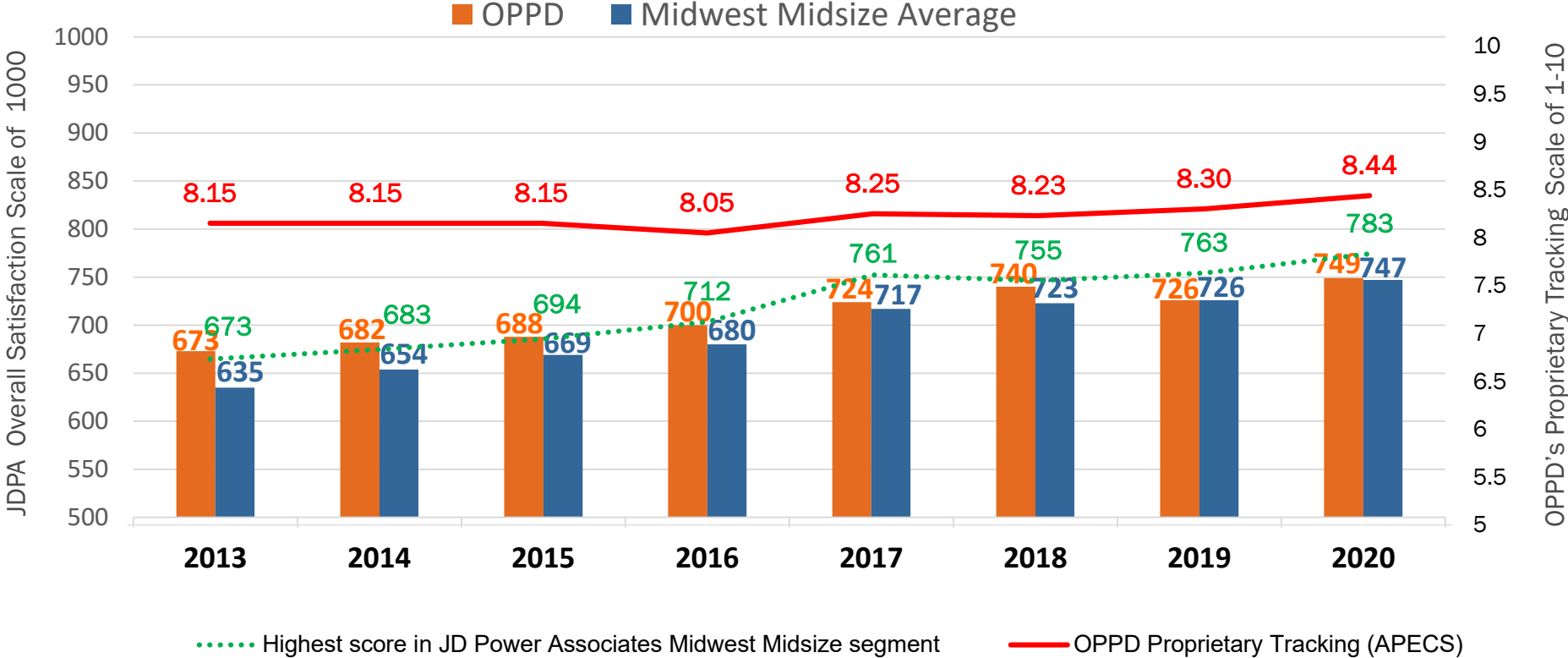


¹Results are from 2013-2020 JD Power Associates Electric Utility Residential Customer Satisfaction StudySM

Satisfaction is trending upward, and our own tracking results show greater satisfaction compared to JDP

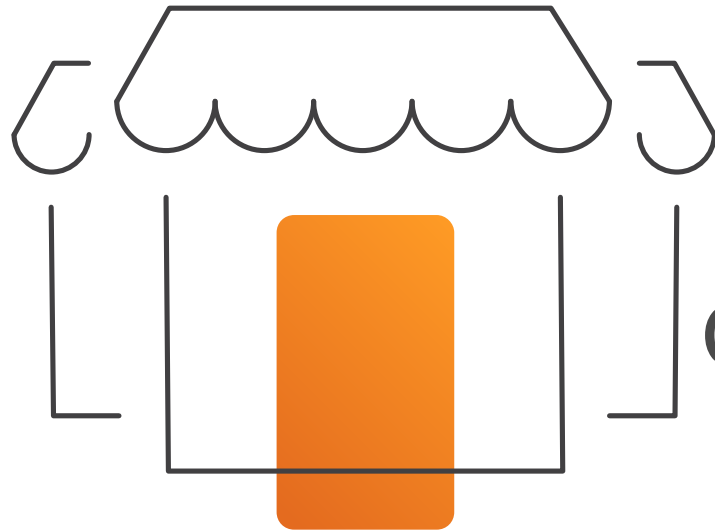
Residential JDPA Customer Satisfaction Index

2013-2020 Historical Results¹



¹Results are from 2013-2020 JD Power Associates Electric Utility Residential Customer Satisfaction StudySM

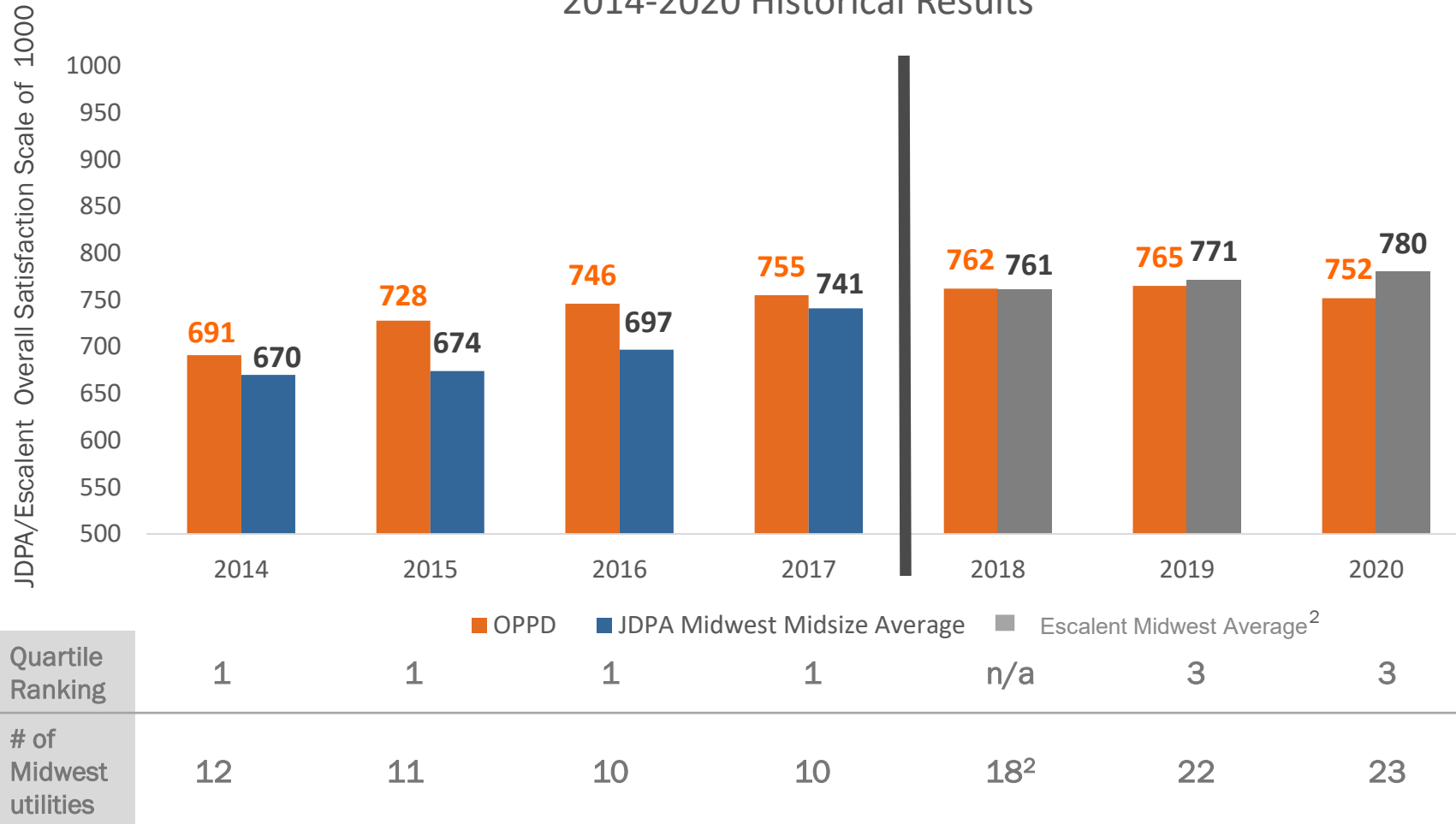




2020 Business customer satisfaction

Overall Business Customer Satisfaction is down, but we have direction moving forward

Business JD Power/Escalett Customer Satisfaction Index
2014-2020 Historical Results¹



¹ Results are from 2014–2017 JD Power Electric Utility Business Customer Satisfaction StudySM and 2018–2020 Escalett Business Customer Engagement Study

² Midwest Midsize utility scores were not available at this point so comparison is to Midwest overall

3) Prioritize using Voice of the Customer (VOC)

Use VOC to prioritize strategic plans, investments, and operational activities to ensure high satisfaction in all aspects of OPPD's interactions with our customer-owners.

Customer feedback has influenced the following initiatives in positive ways:

- ❖ **Customer First Solutions** package
- ❖ **Green Power** – ‘What Does Green Mean to You’ customer workshop
- ❖ **Green Power** – Phase I and II product testing with Power Panel
- ❖ **Customer-Owned Generation** – Customer outreach efforts for launch of new COG process(es)
- ❖ **Electric Line Plan** – research around program value, benefits, and desired price (for the price increase)
- ❖ **Rates Project** – Power Panel, external customer focus groups and internal employee focus groups
- ❖ **New EAP Administrator** – Dollar Energy Fund – Survey and discussions
- ❖ **CARES Act** – **Outreach with non-profits to figure** out how to best implement new funding
- ❖ **Empathy interviews** for customer-owned generation and solar calculator
- ❖ Auto-calls, door hangers
- ❖ Reliability improvement webpage

4) Interact respectfully

Interact with customer-owners in a respectful, dignified and civil manner.

- OPPD's Core Values
- Robust Call Monitoring Program
- Customer Surveys
- Customer Service Training

Customer First Solutions Overview

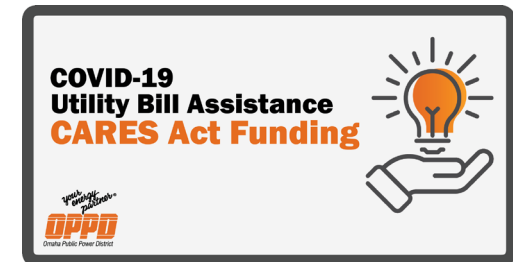
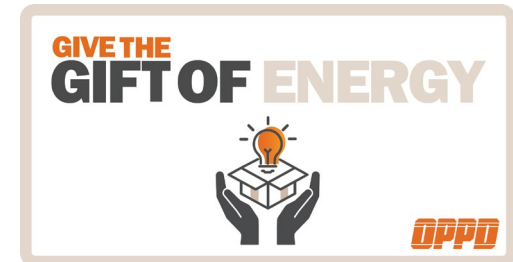


Objective:

Reduce the financial burden of those impacted from the pandemic by providing simple, effective and financially responsible solutions for all Customers.

Areas of Focus:

- *Monitoring Economic and OPPD Impact*
- *Offer New Billing & Payment Solutions*
- *Expand the Flexibility of Existing Offerings*
- *New and Improved Utility Assistance Options*
- *Providing Customer Education*



5) Treat with fairness

OPPD shall communicate a procedure to customer-owners who believe they have not received fair treatment from OPPD.

Escalation Options

- Account Supervisor
- OPPD.com
- Dispute process on disconnect notice

6) Provide trends and updates

Provide periodic customer-owner trend updates to the Board.

Trends in the following topics have been reported to the Board:

- Credit & Collections
- Customer Experience
- Income Qualified Programs
- LED Street Lights
- Electric Vehicles

Summary

1) **We're making gains.**

Overall, OPPD continues to make progress to meeting its SD-5 objective of top quartile performance within its regional segment(s).

2) **Residential customer satisfaction continues to rebound.**

OPPD moved up to 2nd quartile in 2020 with above average overall performance within our peer segment.

3) **Business customer engagement is down, and we're learning more about what that means.**

OPPD is tasked with improving a few key areas – digital customer experience, reducing customer effort and focusing on communications. That being said, we're looking even more closely at the measurement tools themselves.

4) **Additional OPPD efforts have correlated to higher scores.**

Correlation is not causation, but areas in which we've invested have shown improvement.

5) **The industry continues to evaluate the impact of the pandemic on customer satisfaction.**

Many utilities reported higher satisfaction earlier in 2020 only to have scores fade over the course of the year. OPPD's performance is relatively stable and is slightly ahead of the industry average in perceptions of utility response to the pandemic.

6) **The team is nearing the end of its residential analysis and recommendations on next steps to continue our climb.** We'll partner across the business to present and implement recommendations.

Recommendation

The Public Information 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.



Board Action

BOARD OF DIRECTORS

April 13, 2021

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 Public Information Committee is responsible for evaluating Board Policy SD-5: Customer Satisfaction.
- d. The Public Information Committee has reviewed and accepted the SD-5: Customer Satisfaction Monitoring Report as outlined on Exhibit A, and is recommending that OPPD be found to be sufficiently in compliance with the policy as stated.

ACTION

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

RECOMMENDED:

DocuSigned by:

Juli A. Comstock

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Juli A. Comstock
Vice President – Customer Service

APPROVED FOR BOARD CONSIDERATION:

DocuSigned by:

Timothy J. Burke

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Timothy J. Burke
President and Chief Executive Officer

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Attachments: Exhibit A – Monitoring Report
Resolution