RESOLUTION NO. 6500

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.
Monitoring Report
SD-5: Customer Satisfaction

Public Information Committee Report
April 19, 2022

Tim McAreavey, Vice President Customer Service
Steve Fanslau, Director, Customer Service Government Infrastructure
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 the voice of customer (VOC) to prioritize investments and operational activities

4) Interact with customer-owners in a respectful, dignified manner

5) Provide ways for customer-owners to indicate if they believe they have not received fair treatment

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

**OPPD Online Power Panel and Online Chat**
- 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

**Focus Groups & Empathy Interviews**
- Allows in-depth exploration to gain a broader understanding of customer perceptions
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
2021 Residential Customer Satisfaction
2) Measure customer satisfaction

**FACTOR PERFORMANCE 2017 – 2021**

<table>
<thead>
<tr>
<th>New Factor Weights</th>
<th>Power Quality &amp; Reliability</th>
<th>Price</th>
<th>Billing &amp; Payment</th>
<th>Corporate Citizenship</th>
<th>Communications</th>
<th>Customer Care</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25%</td>
<td>20%</td>
<td>17%</td>
<td>17%</td>
<td>12%</td>
<td>9%</td>
</tr>
</tbody>
</table>

758 overall CSI score for OPPD

Source: 2017-2021 JD Power Associates Electric Utility Residential Customer Satisfaction Study\textsuperscript{SM}

JDPA Scale of 1000

Power Quality & Reliability (PQ&R) | Price | Billing & Payment | Corporate Citizenship | Communications | Customer Care

'17 '18 '19 '20 '21 | '17 '18 '19 '20 '21 | '17 '18 '19 '20 '21 | '17 '18 '19 '20 '21 | '17 '18 '19 '20 '21 | '17 '18 '19 '20 '21

783, 780, 781, 786, 790 | 654, 676, 663, 688, 703 | 791, 802, 792, 808, 820 | 655, 674, 661, 705, 709 | 663, 676, 662, 711, 726 | 789, 807, 814, 818, 809

Source: 2017-2021 JD Power Associates Electric Utility Residential Customer Satisfaction Study\textsuperscript{SM}
RESIDENTIAL JDPA CUSTOMER SATISFACTION INDEX
2014-2021 Historical Results\(^1\)

<table>
<thead>
<tr>
<th>Year</th>
<th>OPPD</th>
<th>Midwest Midsize (MWMS) Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>682</td>
<td>654</td>
</tr>
<tr>
<td>2015</td>
<td>688</td>
<td>669</td>
</tr>
<tr>
<td>2016</td>
<td>700</td>
<td>680</td>
</tr>
<tr>
<td>2017</td>
<td>724</td>
<td>717</td>
</tr>
<tr>
<td>2018</td>
<td>740</td>
<td>723</td>
</tr>
<tr>
<td>2019</td>
<td>726</td>
<td>726</td>
</tr>
<tr>
<td>2020</td>
<td>749</td>
<td>747</td>
</tr>
<tr>
<td>2021</td>
<td>758</td>
<td>746</td>
</tr>
</tbody>
</table>

**Quartile Ranking**
- 2014: 1
- 2015: 2
- 2016: 1
- 2017: 2
- 2018: 1
- 2019: 3
- 2020: 2
- 2021: 1

\(^1\)Results are from 2014-2020 JD Power Associates Electric Utility Residential Customer Satisfaction Study\(^{SM}\)
2018–21 JD Power Residential Quarterly Waves V. OPPD Proprietary Tracking

Overall Satisfaction Index

JDPA Overall Satisfaction Scale of 1000

8.2 8.5 8.1 8.3 8.3 8.5 8.5 8.3 8.4 8.4 8.3 8.1

770 765 757 758 773 790 782 798 809 797 784 782

730 724 729 749 747 748 742 763 757 747 747 772

720 704 721 729 749 747 729 761 749 733 732


JDPA OPPD  JDPA Midwest Midsize Average  Highest score in JDPA Midwest Midsize segment  OPPD's APECS
2021 Business
Customer Satisfaction
BUSINESS CUSTOMER SATISFACTION IMPROVED MODESTLY


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

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

1) **Overall, we’ve continued to make gains, and just reached a residential customer satisfaction goal.** We’ve achieved top quartile performance in residential scores, and made modest improvements in our business segment.

2) **From a residential perspective, reliability is top of mind.** Experiencing high power quality and understanding utility efforts around maintaining reliability remain areas of focus.

3) **Business customer engagement made modest improvements in 2021.** Scores are up slightly, and we’re working to understand how sample sizes impact our relative rankings.

4) **The team will continue with efforts correlated with higher scores, then re-group at year-end.** We’re finalizing analysis on areas of focus for the near-term that are not dependent on technology progress.
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 many initiatives this past year:

1. Polar vortex sentiment study
2. Block rates
3. Customer-owned generation
4. Energy education
5. Overall product marketing refresh project
6. Greener together
7. Energy burden solutions
8. Pathways to Decarbonization
9. EV managed charging
10. Future product features
4) Interact respectfully

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

- OPPD’s Core Values
- Robust Call Monitoring Program
- Customer Surveys
- Customer Service Training
Interact respectfully

*Interact with customer-owners in a respectful, dignified and civilized manner*

<table>
<thead>
<tr>
<th></th>
<th>Target GOAL</th>
<th>2021 Year End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courtesy of the representative</td>
<td>98%</td>
<td>97%</td>
</tr>
<tr>
<td>Helpfulness of the representative</td>
<td>98%</td>
<td>94%</td>
</tr>
<tr>
<td>“Thank you for being customer”</td>
<td>100%</td>
<td>96%</td>
</tr>
</tbody>
</table>

NOTE: Only for Residential customers. The work is planned to survey the Business customers.

*1 Responses with “very satisfied” or “somewhat satisfied”*
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
### SD-5 ACCOUNTABILITIES

#### 5) Treat with fairness

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

<table>
<thead>
<tr>
<th>Target GOAL</th>
<th>2021 Year End</th>
</tr>
</thead>
</table>

| Representative’s knowledge of OPPD’s policies | 98% | 94% |

**NOTE:** Only for Residential customers. The work is planned to survey the Business customers.

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*1 Responses with “very satisfied” or “somewhat satisfied”*
Provide periodic customer-owner trend updates to the Board.

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

• Customer Trends - Credit & Collections
• Product Development Update
RECOMMENDATION

The Public Information Committee has reviewed and accepted this monitoring report for SD-5 and recommends the Board find OPPD sufficiently in compliance with Board Policy SD-5.
BOARD OF DIRECTORS

April 19, 2022

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:  

APPROVED FOR BOARD CONSIDERATION:

Tim D. McAreavey  
Vice President – Customer Service  

L. Javier Fernandez  
President and Chief Executive Officer

Attachments: Exhibit A – Monitoring Report

Resolution