



Howard/McAreavey

RESOLUTION NO. 6565

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 is taking reasonable and appropriate measures 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 is taking reasonable and appropriate measures to comply with the policy as stated.



EXHIBIT A

Monitoring Report SD-5: Customer Satisfaction

Mr. Tim McAreavey
Vice President, Customer Service
April 18, 2023

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) data 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

SD-5 ACCOUNTABILITIES

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

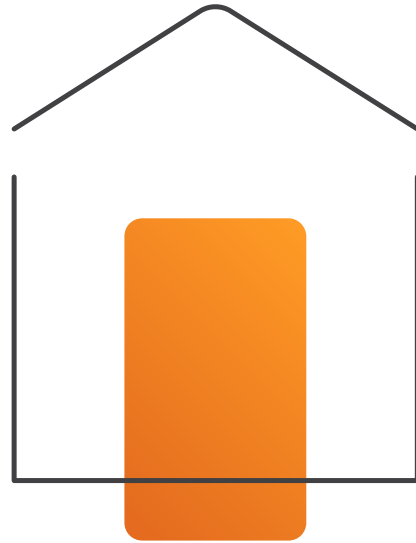
FOCUS GROUPS & EMPATHY INTERVIEWS

Allows in-depth exploration to gain a broader understanding of customer perceptions

DAILY CUSTOMER ENGAGEMENTS

From phone conversations to emails to in-person meetings, hundreds of daily customer interactions give us a pulse check

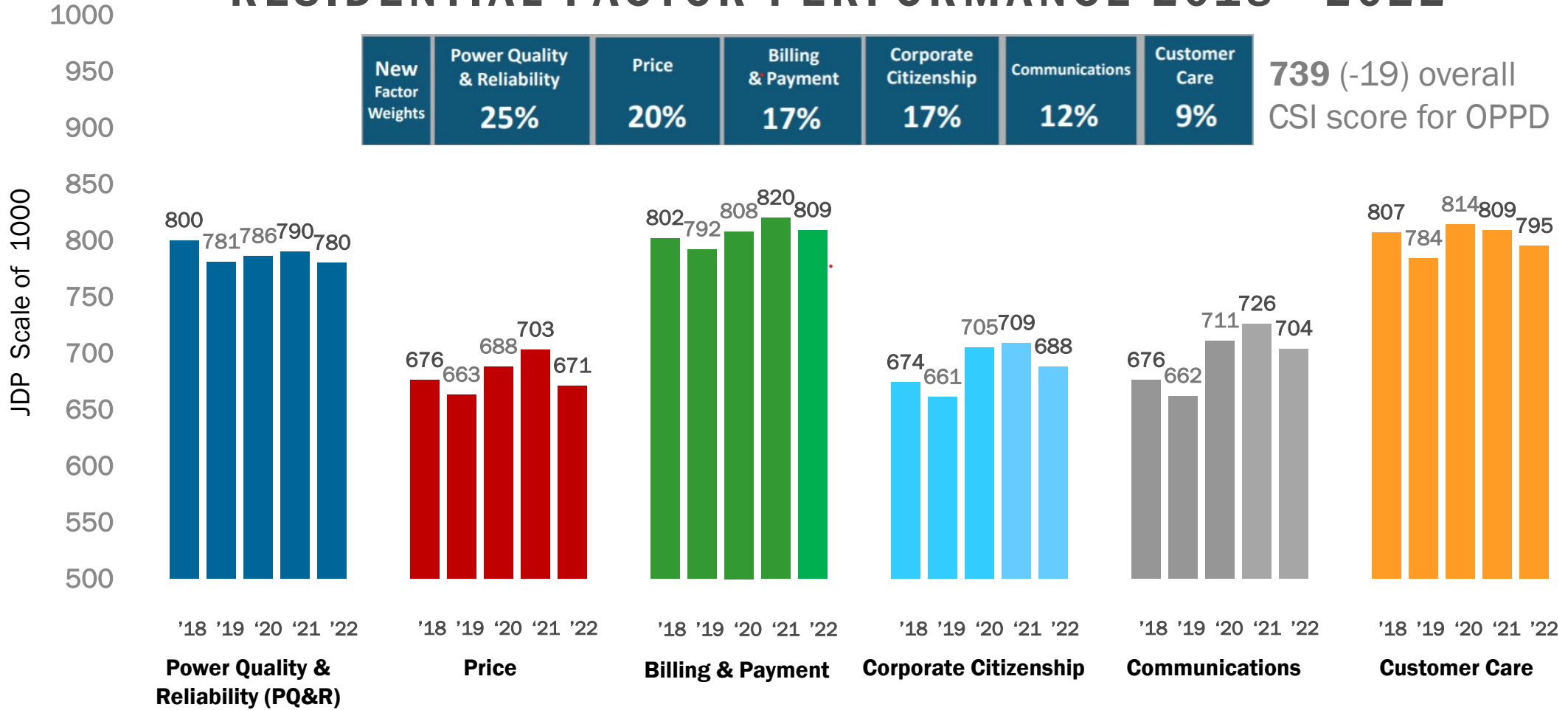
2) Measure customer satisfaction



2022 Residential Customer Satisfaction

2) Measure customer satisfaction

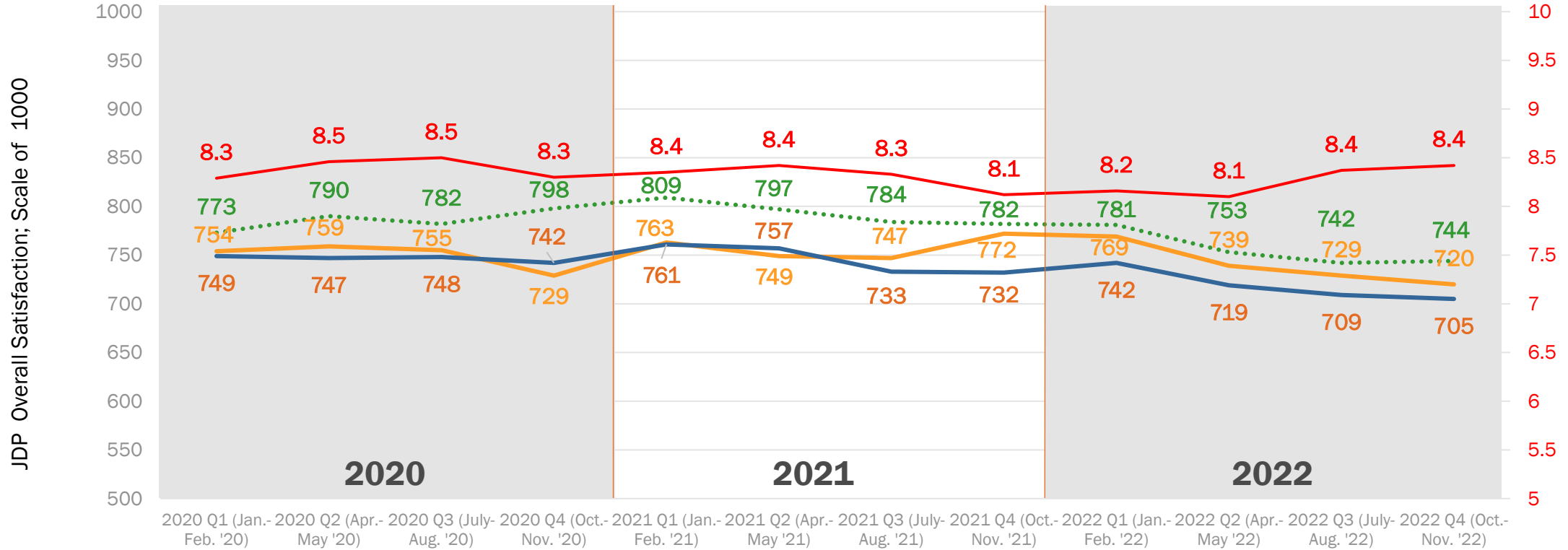
RESIDENTIAL FACTOR PERFORMANCE 2018- 2022



Source: 2018-2022 JD Power Associates Electric Utility Residential Customer Satisfaction StudySM
 OPPD annual sample sizes are sufficient for statistically meaningful analysis.

2) Measure customer satisfaction

2020-22 JDP RESIDENTIAL QUARTERLY WAVES V. OPPD PROPRIETARY TRACKING



MWMS / Industry
Quartile Ranking

2 / 3

1 / 2

2 / 2

of MWMS / Industry
Utilities

16 / 143

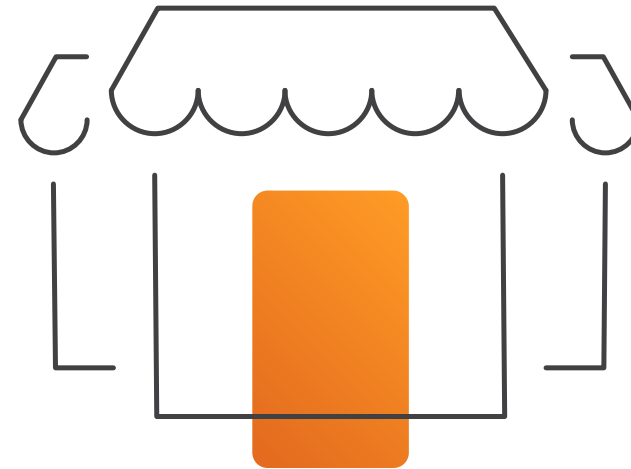
16 / 145

16 / 145

— JDP OPPD
 Highest score in JDP Midwest Midsize segment
 — JDP Midwest Midsize Average
 — OPPD's APECS (right vertical axis)

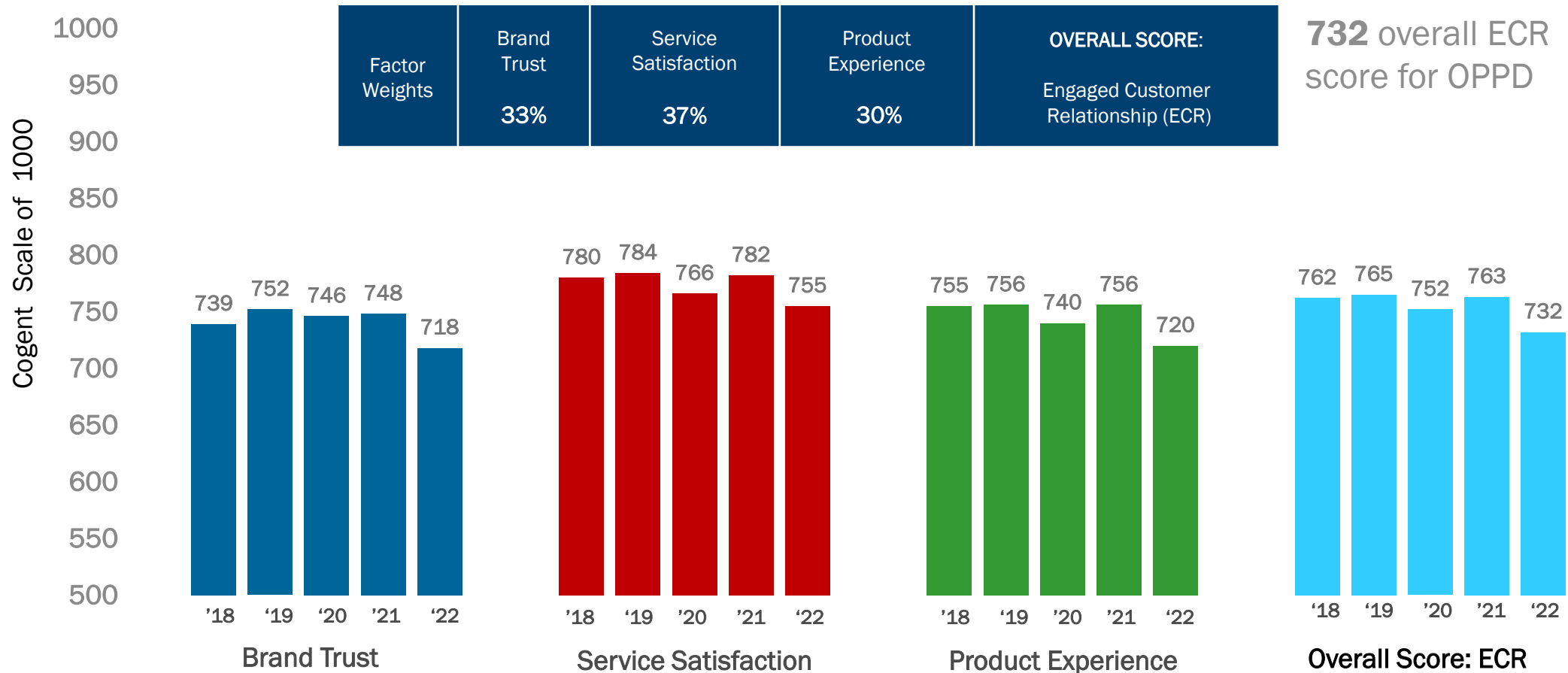
2) Measure customer satisfaction

2022 Business Customer Satisfaction



2) Measure customer satisfaction

BUSINESS FACTOR PERFORMANCE 2018-2022

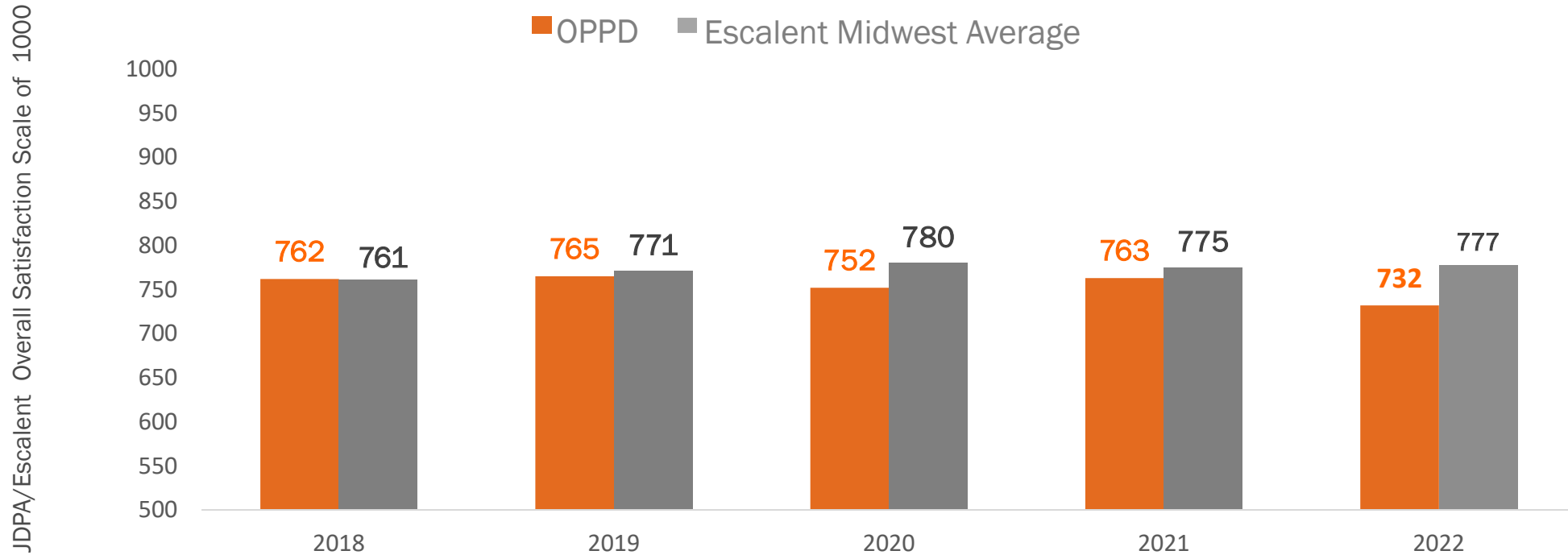


Source: 2018-2022 Escalent, Cogent Syndicated Electric Utility Business Customer Satisfaction StudySM

2) Measure customer satisfaction

BUSINESS CUSTOMER ENGAGED CUSTOMER RELATIONSHIP (ECR)

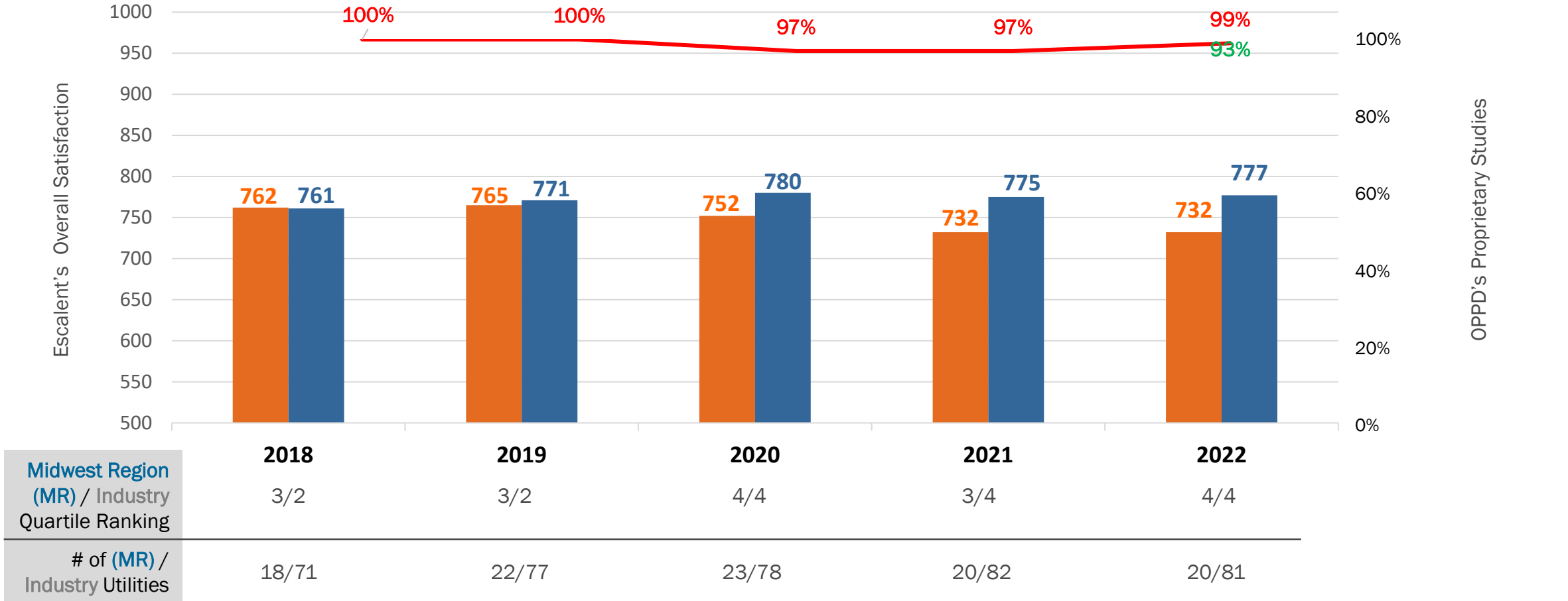
2018-2022 Historical Results



	2018	2019	2020	2021	2022
Midwest Region (MR) / Industry Quartile Ranking	3/2	3/2	4/4	3/4	4/4
# of (MR) / Industry Utilities	18/71	22/77	23/78	20/82	20/81

2) Measure customer satisfaction

BUSINESS CUSTOMER ENGAGED CUSTOMER RELATIONSHIP (ECR)



¹ Results are from 2018-2022 Escalent's Cogent Electric Utility Business Customer Satisfaction Study SM

² Customer Sales and Services Annual Product and Service Business Customer Satisfaction Study managed by OPPD's Market Research

³ Small to Medium Business Customer Relationship and Satisfaction Study managed by OPPD's Market Research.

.....SMB ³

— CS&S ²

■ OPPD

■ Midwest Region

IMPROVING CUSTOMER SATISFACTION

- Customer Engagement for the Future
- Maturation of Customer Experience function
- Annual business customer meeting
- Continued implementation of business customer strategy
- Collaboration with business and trade groups
- Mobilize internally around unique customer needs

EXECUTIVE SUMMARY

- 1) Overall, the utility industry saw a downturn in customer satisfaction in 2022.** Economic pressures have had a widespread impact on satisfaction, and both residential and business customers are more mindful of seeking value from their utilities.
- 2) We narrowly missed our residential goal, and we have a watchful eye on any trends.** Our performance is stable, though customers' pricing and value concerns are top of mind. We're focused on delivering with excellence and clearly demonstrating value to our customers.
- 3) Improving business customer engagement is marathon, not a sprint.** More data, more technology, more listening and more engagement are required, and we're developing our strategy.
- 4) We're optimistic that our customer engagement work will make a difference.** With our Customer Engagement for the Future strategic initiative moving to an operationalization, we're optimistic we'll lay the groundwork for improved satisfaction and engagement over the long-term.

SD-5 ACCOUNTABILITIES

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.

	1 HVAC Tune-up Rebates	2 Customer Engagement	3 Energy Education	4 Business Curtailment Program	5 Rate Design Principles
6 Residential & Fleet Electric Vehicle Rebates	7 Trade Ally Summit	8 Customer Solar Capacity Products	9 HVAC Smart Rebates	10 Marketing Messaging	11 Greener Together Program
12 SMB Energy Efficiency Tech Pilot	13 SMB Building Management System	14 C&I Outdoor Lighting	15 Solar Potentiality Study	16 Energy Assistance Donation Strategy	17 Customer Assistance Program

SD-5 ACCOUNTABILITIES

4) Interact respectfully - RESIDENTIAL

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

	Target GOAL	2021 Year End	2022 Year End
Courtesy of the representative	98%	97%	96%
Helpfulness of the representative	98%	94%	93%
“Thank you for being customer”	100%	96%	96%

5) Treat with fairness - RESIDENTIAL

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

Representative’s knowledge of OPPD’s policies	98%	94%	94%
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Results are from OPPD Market Research’s ongoing Residential CSR Transaction study
Responses with “very satisfied” or “somewhat satisfied”

SD-5 ACCOUNTABILITIES

4) Interact respectfully - BUSINESS

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

	2021 Year End	2022 Year End
Treating you as a valued business customer	NA	85% ^{*1}
The utility representative was courteous and professional	82% ^{*2}	72% ^{*2}
Their field service worker was courteous and professional	76% ^{*2}	61% ^{*2}
Their email responses were courteous and professional	83% ^{*2}	69% ^{*2}
Takes customer concerns into account when making business decisions	56% ^{*2}	54% ^{*2}

^{*1} Results are from Market Research hosted Small/Medium Business Relationship Study (August 2022)

^{*2} Responses for Top-Three Box Scores from Escalent's Syndicated Business Satisfaction Study

SD-5 ACCOUNTABILITIES

5) Treat with fairness - BUSINESS

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

	2021 Year End	2022 Year End
Is ethical in its dealings with customer	59% ^{*1}	59% ^{*1}
<i>I trust them to do the right thing for its customer</i>	61% ^{*1}	55% ^{*1}
Trust OPPD to “Do the Right Thing”	NA	88% ^{*2}

^{*1} Responses for Top-Three Box Scores from Escalent's Syndicated Business Satisfaction Study

^{*2} Results are from Market Research hosted Small/Medium Business Relationship Study (August 2022)

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

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 – Board/ELT Contact email is added
- 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:

- Customer Trends - Credit & Collections
- Product Development Update
- Annual SD-5 monitoring report

Recommendation

The Public Information Committee has reviewed and accepted this Monitoring Report for SD-5 and recommends that the Board finds OPPD is taking reasonable and appropriate measures to comply with Board Policy SD-5.

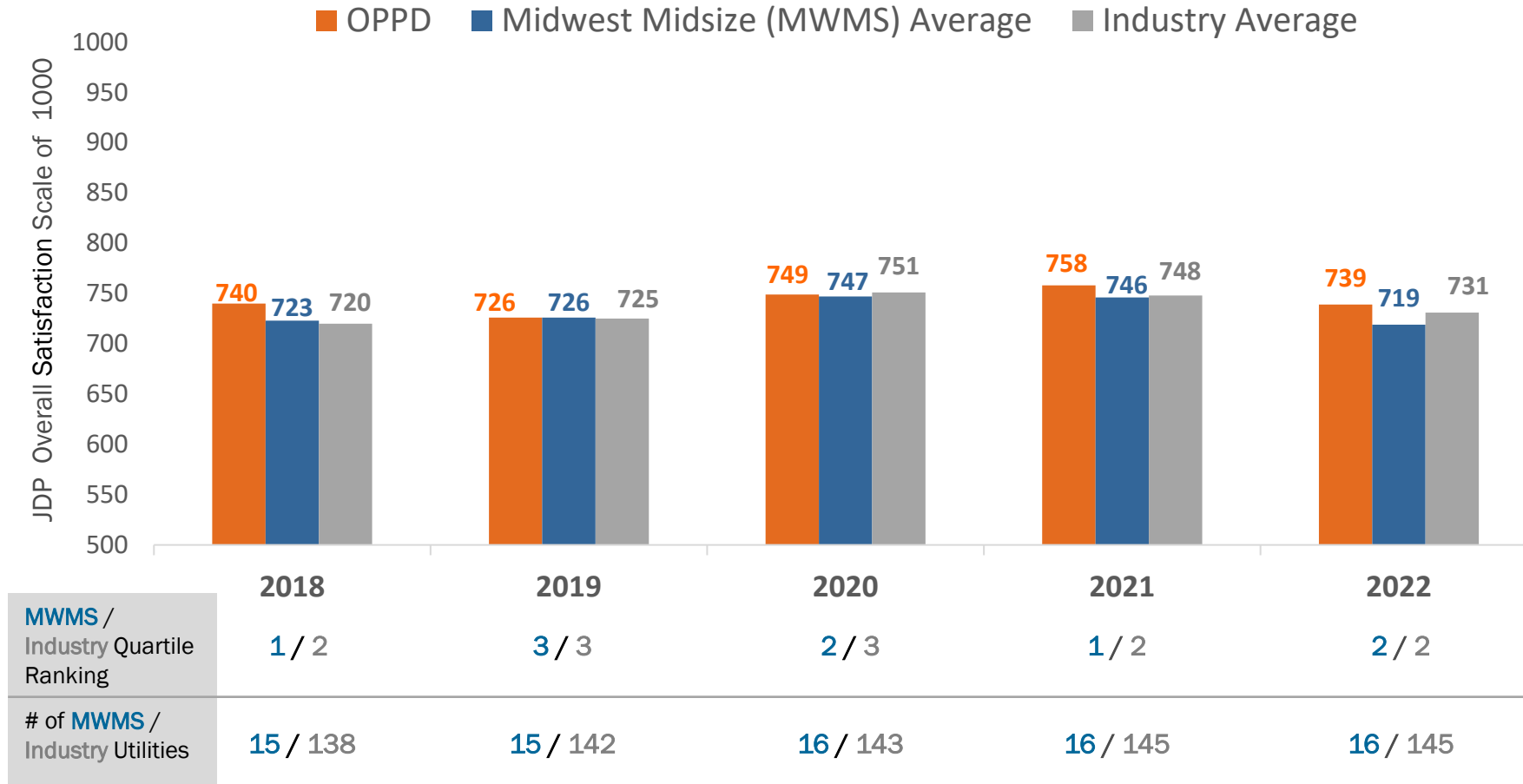
**Any additional reflections on
what has been
accomplished ... or
challenges or gaps**



APPENDIX

2) Measure customer satisfaction

RESIDENTIAL JDP CUSTOMER SATISFACTION INDEX 2018-2022 Historical Results¹



¹Results are from 2016-2022 JD Power Associates Electric Utility Residential Customer Satisfaction StudySM

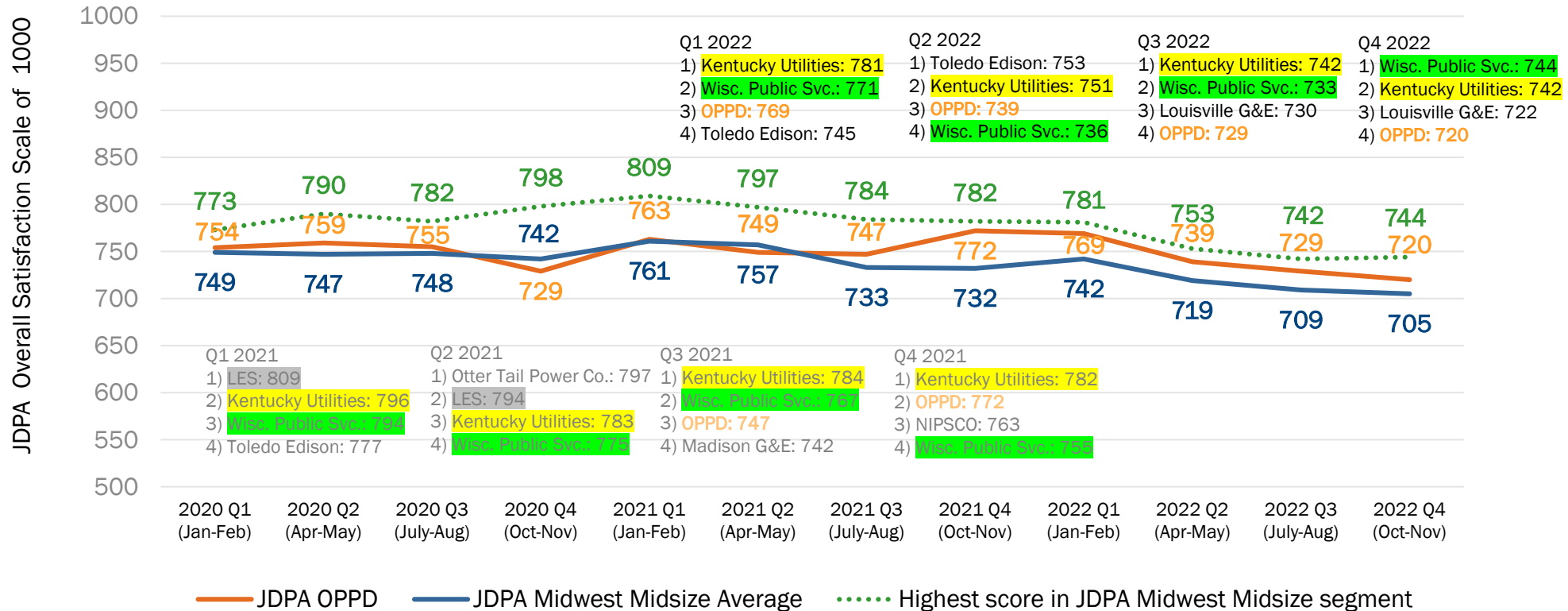
Customer Satisfaction Index Components and Attributes

Power Quality & Reliability	25%
Supply electricity during extreme temps	
Promptly restore power after outage	
Provide quality electric power	
Avoid brief interruptions	
Keep you informed about outage	
Avoid lengthy outages	
Price	20%
Total monthly cost of electric service	
Ease of understanding pricing	
Efforts of utility to help manage monthly usage	
Fairness of pricing	
Availability of pricing options that meet needs	
Billing & Payment	17%
Ease of paying bill	
Reasonableness of billing cycle	
Variety of methods to pay bill	
Clarity of information on bill	
Corporate Citizenship	17%
Involvement in community	
Actions to take care of the environment	
Variety of energy efficiency programs offered	
Efforts to develop energy supply plans for the future	

Communications	12%
Communicating how to be safe around electricity	
Variety of communications used	
Efforts to communicate changes	
Creating messages that get attention	
Customer Care	9%
Customer Care: Phone Contact	
Ease of using automated system	
Promptness in speaking to a person	
Courtesy of the representative	
Knowledge of the representative	
Representative's concern for needs	
Clarity of information provided	
Timeliness of resolving problem, question, or request	
Customer Care: Online Contact	
Appearance of the website/mobile app	
Clarity of the information provided	
Ease of navigating the website/mobile app	
Helpfulness of chat representative	
Timeliness of resolving problem, question, or request	

RESIDENTIAL: Looking at the top performers

Overall Satisfaction Index





Board Action

BOARD OF DIRECTORS

April 18, 2023

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 recommends that the Board find OPPD is taking reasonable and appropriate measures to comply with Board Policy SD-5.

ACTION

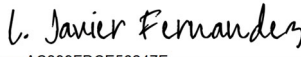
The Public Information Committee recommends Board approval of the SD-5: Customer Satisfaction Monitoring Report.

RECOMMENDED:

DocuSigned by:

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 Timothy D. McAreavey
 Vice President – Customer Service

APPROVED FOR BOARD CONSIDERATION:

DocuSigned by:

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 L. Javier Fernandez
 President and Chief Executive Officer

TM:rih

Attachments: Exhibit A – Monitoring Report
Resolution