

# Exhibit to Agenda Item #1f

Customer & Community Services 2022 Proposed Budget.

Board Finance & Audit Committee and Special SMUD Board of Directors Meeting  
Tuesday, November 9, 2021, scheduled to begin at 5:30 p.m.

Virtual Meeting (online)

# Customer & Community Services

## 2022 Proposed Budget & Initiatives

Brandy Bolden  
Chief Customer Officer



# Business Segments & Functions



Customer Experience Delivery	Customer Services & Operations	Revenue Services & Operations	Community Energy Services	Commercial Development & Business Attraction
Customer Experience	Contact Center Operations	Billing Operations	Billing Operations	Commercial Development
Customer Interconnections	Digital Operations	Revenue Assurance	Contact Center Operations	Business Attraction
Market Development & Account Management	Customer Operations Support	Revenue Operations Support	Program Design & Delivery	Retention & Expansion
Residential & Assistance Delivery	Customer Systems & Planning	Revenue Systems & Planning	Wholesale Energy Services	

# Supporting our Customer and Community



Customers' pressures



- Supporting our employees
- Economic recovery
- Clean energy education & understanding

SMUD's efforts





# Safety & Reliability

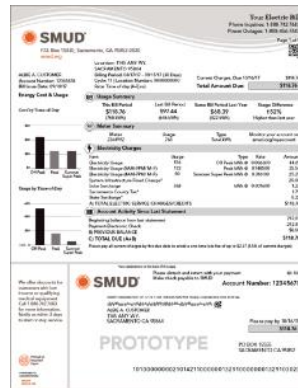
- Adapt and continue focus on achieving **zero safety incidents** with more focus on strategies in support of hybrid and inclusive work environments. (SD-6)
- Prioritize **emotional wellness** through stress and anxiety reduction tools and resources. (SD-6)
- **Leverage technology** to ensure the physical safety and wellbeing of remote and hybrid employees. (SD-6)
- **Enhance operations reliability** through dispersed remote workforce. (SD-6)





# Affordability

- **Support our community** through COVID-19 and economic recovery. (SD-2)
- **Reinstate collections** with a priority on customer empathy, fiscal responsibility and operational excellence. (SD-2)
- Continue to provide **energy savings education** to all customer segments through virtual and in-person audits. (SD-2)
- Offer **commercial incentives** to stimulate load growth and revenue while reducing cost barriers to market. (SD-2)





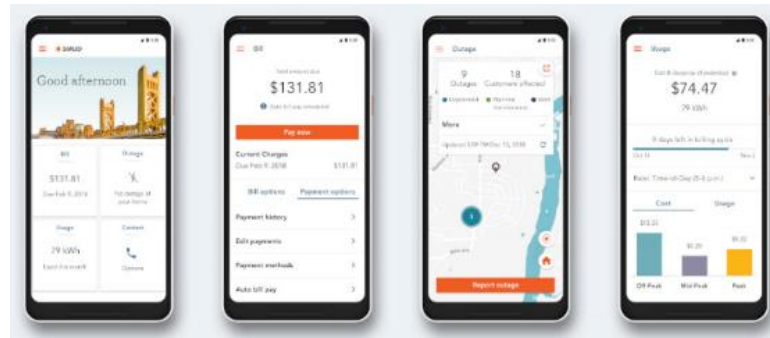
# Community Vitality

State, Federal, and City Assistance Programs for Customer Arrears	Loan Portfolio Sale	Operational Excellence Savings
<ul style="list-style-type: none"><li>❑ <b>~ \$41.3M funding</b><ul style="list-style-type: none"><li>• California Arrearage Payment Program (CAPP) funding for residential customers in arrears</li></ul></li><li>❑ <b>\$10M funding</b><ul style="list-style-type: none"><li>• Additional assistance from other agencies (LiHEAP, Tribes, Churches, Community Organizations, EnergyHELP donors, etc.)</li></ul></li><li>❑ <b>\$4.5M funding</b><ul style="list-style-type: none"><li>• Sacramento Emergency Rental assistance (SERA) administered to more than 5,400 customers in bill assistance</li></ul></li></ul>	<ul style="list-style-type: none"><li>❑ <b>\$17.2M sales proceeds</b><ul style="list-style-type: none"><li>• Transition of energy efficient loans to Five Star bank</li></ul></li></ul>	<ul style="list-style-type: none"><li>❑ <b>\$320K annual savings</b><ul style="list-style-type: none"><li>• Projected annual savings over the next 5 years related to right sourcing remittance processing and establishing a new collections agency partnership</li></ul></li></ul>



# Community Vitality

- Consolidate and **optimize data management, reporting and analyses** to deliver programs, products and services in an equitable way. (SD-10)
- Capitalize on **operational excellence** initiatives to further improve internal coordination, increase efficiencies and reduce costs. (SD-2)
- Further enhance **digital operations** to improve customer experience and utilization of self-service channels. (SD-10,11)
- Leverage **automated tools** to increase awareness and communication for our most vulnerable customers. (SD-10,11)
- Successfully **support rollout of 2021 rate process** deliverables. (SD-2)







# Environmental Leadership

- Develop and launch **clean energy information tools** and calculators. (SD-7,9)
- Increase **participation in new and existing products and services** available to our commercial and residential customers. (SD-7,9)
- Support public power clean energy initiatives by developing and delivering **carbon reduction programs for CCA clients**. (SD-7,9)





# Community Vitality

- Deliver **special assistance programs through our community partners** to reduce bill burdens for customers. (SD-5,13,15)
- Leverage business attraction, retention and expansion efforts to **encourage economic growth and increase jobs in the region.** (SD-5,13,15)
- Expand **2030 Zero Carbon Plan awareness** by supporting our diverse communities. (SD-5,15)



# 2022 Proposed Budget

