Exhibit to
Agenda Item #1

Policy Committee and Special SMUD Board of Directors Meeting
August 10, 2022, scheduled to begin at 5:30 p.m.
Virtual Meeting (online)
Agenda

• Strategic Directive 5
• 2021 Results
  • Customer Satisfaction
  • Value for What you Pay (VFP)
  • Accomplishment highlights
• Request the Board accept the 2021 monitoring report
2021 Customer Relations
SD-5

Policy:

“Maintaining a high level of customer relations is a core value of SMUD. Therefore, the Board establishes an overall customer satisfaction target of 95 percent with no individual component measured falling below 85 percent.

In addition, the Board establishes an overall customer experience “value for what you pay” target of 70 percent by the end of 2025 and 80 percent by the end of 2030, with neither the average commercial customer score falling below 69 percent nor the average residential customer score falling below 65 percent in any year.

As part of this policy:

(a) SMUD customers shall be treated in a respectful, dignified and civil manner.
(b) SMUD shall communicate a procedure for customers who believe they have not received fair treatment from SMUD to be heard.
Updates to SD-5

SD-5 Measurement | Additions | Deletions
--- | --- | ---
2020 | New Connects, Tree Trimming, Bill Inquiry, Outage, IVR | Modification: VFP Target | N/A
2018 | New Connects, Tree Trimming, Bill Inquiry, Outage | Interactive Voice Response (IVR) Payment Arrangements | N/A
2016 | New Connects, Tree Trimming, Bill Inquiry, Outage | Customer Experience/VFP | N/A
2015 | New Connects, Tree Trimming, Bill Inquiry, Meter Services | N/A | Meter Services
2011 | New Connects, Tree Trimming, Bill Inquiry, Meter Services | Outage | N/A
2010 | New Connects, Tree Trimming, Meter Services | Bill Inquiry | New Construction New Design
2009 | New Connects, Tree Trimming, Meter Services, New Construction, New Design | N/A | Residential Audit
2008 | New Connects, Tree Trimming, Meter Services, New Construction, New Design, Residential Audit | N/A | N/A
Customer Satisfaction Scores

Policy:
“Therefore, the Board establishes an overall customer satisfaction target of 95 percent with no individual component measured falling below 85 percent.”
Value For What You Pay (VFP)

Policy:
“The Board establishes an overall customer experience “value for what you pay” target of 70 percent by the end of 2025 and 80 percent by 2030, with neither the average commercial customer score falling below 69 percent nor the average residential customer score falling below 65 percent in any year.”

VFP Segment Thresholds

<table>
<thead>
<tr>
<th>Year</th>
<th>Commercial</th>
<th>Residential</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>69% Minimum</td>
<td>65% Minimum</td>
</tr>
<tr>
<td>2020</td>
<td>79%</td>
<td>75%</td>
</tr>
<tr>
<td>2021</td>
<td>76%</td>
<td>73%</td>
</tr>
</tbody>
</table>

SMUD
Customer Experience Headwinds (updated 5/25/22)

- Expanded pay station options
- Residential MyEnergy Tools
- Year-to-year bill/usage comparisons
- Online payment arrangements
- Responsive mobile
- Solar calculators
- Commercial MyEnergy Tools
- Web moves
- Improved outage map
- Expanded credit card payments
- Digital rebate processing
- Commercial SolarShares
- SMUD Energy Store
- Web payment arrangements
- SHINE program
- All-electric new construction program
- New digital bill
- “Bill Pay Your Way”
- Digital rebate processing
- Commercial SolarShares
- CSR bill scenario tool
- Web auto reconnect
- Dedicated “Claims” web page
- Web move enhancements
- Text/email outage alerts
- Instant retail rebates
- Building electrification rebates
- Customer battery energy storage program
- Commercial new services website redesign
- Redesigned paper bill
- Launched Residential TOD
- Energy mgmt. info and tools for TOD
- Commercial MyAccount improvements
- Energy Assistance Program Rate (EAPR) benefit changes
- SMUD app
- Special population Energy Efficiency (EE) bundles
- EAPR automation
- Commercial zone “blitzes”
- Developer SolarShares
- COVID-19
- No shut-offs or late fees
- Proactive bill and COVID-19 support
- Real-time payment posting
- Pivot to virtual account mgmt
- EnergyStore record year
- Building/EV electrification rebates
- Self-service enhancements
- Chatbots
- Neighborhood SolarShares
- Commercial rate discussions (Q4)
- Customer evictions, state level (Q4)
- Rate increases
- 2030 Decarbonization launched
- No shut-offs or late fees
- Proactive bill support
- SERA/SHRA utility bill assistance
- Virtual servicing
- Business energy advisor self-service
- Building/EV electrification rebates & pilots
- Clean Cars for All
- Resume late fees, disconnects and collections
- Rate increases
- Commercial rate restructure
- Solar & Storage Rate
- Electricity rebates
- Outage notification
- Greenergy & Neighborhood SolarShares
- My Energy Optimizer/VPP
- Scaling up EV programs

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Jan-June: 72.6 (Target)
Commercial Overall Customer Satisfaction

Residential Overall Customer Satisfaction

Commercial California Ranking
- 2021CY: #1
- 2020CY: #1
- 2019CY: #1

West Midsize Ranking
- 2021CY: #2*
- 2020CY: #2
- 2019CY: #3

Residential California Ranking
- 2021CY: #1
- 2020CY: #1
- 2019: #1

West Large Ranking
- 2021CY: #2
- 2020CY: #2
- 2019: #2

*Ranking based on eligible brands with sufficient sample sizes in the 2021 study (>100 responses).
Value our residential customers & community

2,000+
took steps to electrify their homes (HVAC, cooktop, heat pump)

+3,385 EV residential rate participants

11,628 shade trees planted

155 electric lawn mower incentive pilot participants

$1.39M SMUD Energy Store sales (items sold +4%, site visits +16%)

+1,000,000 alerts sent (Outage, Threshold, and Mid bill)

Charge@Home residential EV incentive program developed and launched

32.4k SMUD app enrollments

2,000+ took steps to electrify their homes (HVAC, cooktop, heat pump)

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Value our commercial customers & community

Incentivized installations
- 242 Level II EVSE handles
- 58 DCFS

Self Service
Bill Estimator tool provided in My Account

Advisory services
to over 400 commercial customers through CES, EES, and ACS programs

Business Energy Advisor microsite
Resource of information organized by industry and technology available to all commercial segments

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2021 Status:
Customer experience supported by internal training and customer-centric experience design

- **806** Web/E-Learning training attendees
- **40** Journey mapping & *NEW* design Thinking sessions
- **111** Real time trainings (bulletin topics)
- **208** Virtual Classroom Training
Customer Relations
SD-5

Policy:
“(b) SMUD shall communicate a procedure for customers who believe they have not received fair treatment from SMUD to be heard.”

Status:
Hearing and appeal process is found in detail on smud.org
• smud.org/assets/documents/pdf/Board-Meeting-Procedures.pdf - Pg. 14 & 15
• The process is described on the back page of every bill
Customer Communication Process

+550,000 contacts

>99% resolved

CSR

Senior CSR

Less than 1% escalated

Customer Service Assistant

Contact Center Supervisor

Manager

Director

Board
2021 Awards & Recognitions - Suggestions

Safety Excellence
DEED Grant Project
Excellence in Communications

Recipient of $200,000 Blueprint Grant –
Clean Transportation Program

Building Hope Award

Best in Utilities and Services

Best Sustainability Campaign

Best Data Analytics Project - Commercial
Customer COVID-19 Response

EPRI Power Delivery & Utilization Technology
Transfer Award

Corporate Champion for
Environmental Preservation &
Sustainability Award

Named 1 of 10 utilities on SEPA’s
leaderboard

Corporate Community Champion for
the month of November

Promotional Video:
Business equipment & services

RAD Leadership Award for
our recycling efforts
Request the Board accept the SD-5 monitoring report.