Appendix A: Letter inviting participants to market research survey

Seattle City Light
700 5th Ave
Seattle, WA 98124-4023

354 / 1-1-354

Seattle City Light Customer
2433 79th Ave NE
Medina WA 98039-1518

700 5th Ave. | P.O. Box 34023 | Seattle WA 98124-4023
TEL (206) 684-3000 TTY/TDD (206) 684-3225 FAX (206) 625-3709
seattle.gov/light
twitter.com/SEACityLight facebook.com/SeattleCityLight

Seattle City Light

Dear Seattle City Light Customer,

Seattle City Light has a six-year strategic plan that is updated every two years. The plan provides a blueprint for making informed decisions about the future by outlining strategies, objectives and initiatives that the utility will implement to ensure our mission: delivering customers affordable, reliable and environmentally responsible electricity services.

It is important to us that we hear from you as we develop the 2019-2024 Strategic Plan, and we invite you to take an online survey. We are using this survey to gather your input on key strategies identified to meet both utility and customer goals as well as feedback on how we are doing on meeting customers' expectations.

The survey is completely anonymous and should take less than 10 minutes to complete. Once you have submitted the survey, you will be given the option to enter to win one of six $100 gift cards. The survey is available online at: http://sgiz.mobi/s3/SCLPlanSurvey.

On the survey site, you'll be asked for a Login and Password. Please use the below Login and Password:

Login: [ID_NUM]
Password: [PASSWORD]

Please submit your survey by **Wednesday, October 18, 2017.**

If you have any questions or comments about the survey, please contact us at scl_strategicplan@seattle.gov.

Thank you in advance for your valued feedback.

Sincerely,

Larry Weis
CEO
Seattle City Light

An equal employment opportunity, affirmative action employer. Accommodations for people with disabilities provided upon request.

¿Desea dejar sus comentarios sobre las futuras estrategias de Seattle City Light? Solicite una encuesta en español enviando un correo electrónico a scl_marketing@seattle.gov.

Quý vị có muốn đóng góp ý kiến cho các chiến lược trong tương lai của Seattle City Light không? Hãy gửi email đến scl_marketing@seattle.gov để yêu cầu bản khảo sát bằng Tiếng Việt.

Gusto mo bang magbigay ng opinyon tungkol sa mga diskarte ng Seattle City Light sa hinaharap? Hilingin ang iyong survey sa Tagalog sa pamamagitan ng pag-email sa scl_marketing@seattle.gov.

향후 Seattle City Light 전략에 대한 의견을 제공하시겠습니까? scl_marketing@seattle.gov로 이메일을 보내셔서 한국어 설문조사를 요청하세요.

您是否想对 Seattle City Light 的未来战略提供意见？发送电子邮件至 scl_marketing@seattle.gov，请求获得中文版调查问卷。

您是否想要為 Seattle City Light 的未來戰略提供意見？ 寄電子郵件至 scl_marketing@seattle.gov，請求取得普通話版問卷調查。

Ma rabtaa inaad siisid tallo xeeladaha mustaqbalka Seattle City Light? Codsiga sahankaaga oo af Soomaali ah adiga oo i-meel usoo dirayo scl_marketing@seattle.gov.

Appendix B: Market Research/Survey instrument

Seattle City Light Strategic Plan Update Survey

(untitled)

Seattle City Light updates its Strategic Plan every two years. This survey is your opportunity to tell Seattle City Light what you think is most important for us to focus on as we update the Strategic Plan.

The survey will take about 10 minutes or less to complete and your answers are confidential. Please do not exit the survey until you have completed it. **Do not use the "Back" arrow in your browser. Use the "Back" button at the bottom of each page if you want to return to an earlier page.**

After completing the survey you can enter to become eligible to win one of six $100 Amazon gift cards.

Please complete the survey no later than October 13, 2017.

We thank you in advance for your participation!

(untitled)

Page exit logic: Skip / Disqualify Logic
IF: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Don't know","None of the above") **THEN:** Disqualify and display:
Sorry, you do not qualify to take this survey.

LOGIC Show/hide trigger exists.

1. Please identify yourself as one of the following for this survey: *

- Seattle City Light residential customer
- Seattle City Light commercial customer (this includes businesses that offer residentail services)
- Don't know
- None of the above

(untitled)

LOGIC Show/hide trigger exists.

2. How long have you been a Seattle City Light customer? *

- Less than 2 years
- 2 years to 5 years
- 6 years to 9 years
- 10 or more years

(untitled)

- **Since 2013, Seattle City Light has had a strategic plan to lay a foundation for meeting the current and future needs benefiting the public and our customers.**
- **The 2019-2024 Strategic Plan provides a blueprint for making informed decisions about the future.**
- **The existing plan will be updated to reflect current conditions, incorporate necessary adjustments, and provide a report on progress being made.**

LOGIC Show/hide trigger exists.

3. Were you aware ***before this survey*** that Seattle City Light has a Strategic Plan to guide our ability to meet customers' current and future electric needs? *

- No
- Yes

LOGIC Hidden unless: Question "Were you aware ***before this survey*** that Seattle City Light has a Strategic Plan to guide our ability to meet customers' current and future electric needs?" #3 is one of the following answers ("Yes")

4. How did you know about the Strategic Plan?

- [ ] Attended a meeting
- [ ] Read something about it/heard about it
- [ ] Participated in a previous survey or focus group
- [ ] Other (please specify)
- [ ] Don't know

(untitled)

5. List up to three things that you think Seattle City Light should focus on over the next six years as they update the Strategic Plan?

1.
2.
3.

(untitled)

6. Which one of the following is ***most important*** and which one is ***least important*** for Seattle City Light to focus on in the update of the Strategic Plan? If you like, you can use the "Comments" box to explain your choices.

IF TAKING THE SURVEY ON A PHONE, PLEASE TURN YOUR PHONE TO LANDSCAPE ORIENTATION SO THAT YOU CAN SEE ALL OF THE ITEMS. *

Please note: You will be evaluating 4 sets of statements. Click NEXT to advance to the next set.

Most important	Focus for Strategic Plan	Least important
○	Providing financial assistance to our low income customers	○
○	Attract and retain a high-quality workforce	○
○	Keep bills low	○

1 of 4 sets

Comments

(untitled)

7. Please rank the following key objectives of the Strategic Plan from ***most important*** to ***least important***.

If completing the survey on a tablet or a phone, just tap the objectives in order from most important to least important.

Drag items from the left-hand list into the right-hand list to order them.

- Increase workforce performance and safety
- Stronger environmental stewardship
- Leadership in clean energy solutions
- Improve customer service
- Improve rate predictability
- Enhance organizational performance

(untitled)

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light residential customer")

8. Which of the following statements describes your opinion about your electricity bill?

- My bill amount is reasonable
- My bill amount is too high
- I have no opinion about my bill amount

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light residential customer")

9. Which of the following is true for you regarding your electric bill amount? (select all that apply)

- [ ] My bill amount is lower than some places I have lived
- [ ] My bill amount is about the same as some places I have lived
- [ ] My bill amount is higher than some places I have lived
- [ ] I have not lived any other place where I had to pay an electric bill

(untitled)

10. If you have any additional comments or suggestions that you would like Seattle City Light to consider when developing the 2019-2024 Strategic Plan, please share them here.

(untitled)

11. On a scale of zero to ten, how likely would you be to provide a positive opinion of Seattle City Light to someone who was new to the Seattle City Light service area?

Not at all likely	○	○	○	○	○	○	○	○	○	○	○	**Extremely likely**
	0	1	2	3	4	5	6	7	8	9	10	

(untitled)

LOGIC Hidden unless: Question "How long have you been a Seattle City Light customer?" #2 is one of the following answers ("2 years to 5 years","6 years to 9 years","10 or more years")

12. Please indicate how much you agree or disagree with the following statements. Over the last two years, Seattle City Light has:

Established rates that are more predictable	Strongly disagree Disagree Neither disagree nor agree Agree Strongly agree Don't know
Increased customer energy efficiency and conservation programs	Strongly disagree Disagree Neither disagree nor agree Agree Strongly agree Don't know
Used technology to improve customer service and communication	Strongly disagree Disagree Neither disagree nor agree Agree Strongly agree Don't know
Enhanced existing and added new infrastructure to meet customer needs	Strongly disagree Disagree Neither disagree nor agree Agree

to meet customer needs	Agree Strongly agree Don't know
Increased focus on safety	Strongly disagree Disagree Neither disagree nor agree Agree Strongly agree Don't know
Improved power reliability and availability	Strongly disagree Disagree Neither disagree nor agree Agree Strongly agree Don't know
Increased efforts to enroll customers into our low income assistance programs	Strongly disagree Disagree Neither disagree nor agree Agree Strongly agree Don't know

(untitled)

As a reminder, your answers to all of the survey questions, including the following demographic questions, are confidential and will be grouped with the answers of other respondents to identify trends and patterns.

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light residential customer")

13. What is your *home* zip code?

98057
98101
98102
98103
98104
98105
98106
98107
98108
98109
98112
98115
98116
98117
98118
98119
98121
98122
98125
98126
98133
98134
98136
98144
98146
98148
98154
98155
98164
98166
98168
98177
98178
98188
98195
98199

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light commercial customer (this includes businesses that offer residentail services)")

14. What is your *business* zip code?

98057
98101
98102
98103
98104
98105
98106
98107
98108
98109
98112
98115
98116
98117
98118
98119
98121
98122
98125
98126
98133
98134
98136
98144
98146
98148
98154
98155
98164
98166
98168
98177
98178
98188
98195
98199

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light residential customer")

15. Do you own or rent where you live?

- Own
- Rent
- Other (please specify)

(untitled)

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light residential customer")

16. On average, how much is your electric bill?

- Less than $50, every two months
- Between $50 and $150, every two months
- More than $150, every two months
- Don't know

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light commercial customer (this includes businesses that offer residentail services)")

17. Including yourself, how many local employees does the company you work for have?

- 1 employee
- 2 to 9 employees
- 10 to 49 employees
- 50 to 249 employees
- 250 employees and over
- Don’t know

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light commercial customer (this includes businesses that offer residentail services)")

18. Which of the following best describes your business? (select all that apply)

- ☐ Transportation Services
- ☐ Retail / Food Sales
- ☐ Technology / IT
- ☐ Construction/ Manufacturing
- ☐ Professional / Legal Services
- ☐ Health Care / Social Services
- ☐ Arts / Entertainment /Recreation
- ☐ Real Estate
- ☐ Lodging/Hospitality
- ☐ Other - Write In

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light commercial customer (this includes businesses that offer residentail services)")

19. Is your company registered with the city as a certified Women and Minority Owned Business (WMBE)?

- ○ No
- ○ Yes
- ○ Don't know

20. How do you identify?

- Male
- Female
- I identify as (please specify)

21. What is your age?

- Under 18
- 18 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65 - 74
- 75+

22. How do you identify?

- White or Caucasian
- Black or African American
- American Indian or Alaska Native
- Asian or Asian American
- Native Hawaiian or Other Pacific Islander
- Other race or combination of races (please specify)

LOGIC Hidden unless: Question "Please identify yourself as one of the following for this survey:" #1 is one of the following answers ("Seattle City Light residential customer")

23. What was your total household income (before taxes) for 2016?

- Less than $25,000
- $25,000 to less than $35,000
- $35,000 to less than $50,000
- $50,000 to less than $75,000
- $75,000 to less than $100,000
- $100,000 to less than $150,00
- $150,000 to less than $200,000
- $200,000 or more

(untitled)

Page exit logic: Skip / Disqualify Logic
IF: Question "Seattle City Light is developing an online panel of customers who are interested in periodically responding to surveys or participating in focus groups. Would you be interested in being added to this online panel of Seattle City Light customers?" #24 is one of the following answers ("Yes") **THEN:** Redirect to: sgiz.mobi/s3/SCL-Online-Customer-Panel

24. Seattle City Light is developing an online panel of customers who are interested in periodically responding to surveys or participating in focus groups. Would you be interested in being added to this online panel of Seattle City Light customers? *

- No
- Yes

Thank you for taking our survey. Your response is very important to us.

Action: URL Redirect

SCL sweepstakes form

Appendix C: Market Research Final Report

Seattle City Light

STRATEGIC PLAN UPDATE SURVEY

Summary of Results

Prepared by **PRR** | November 2017

OBJECTIVES AND METHODOLOGY

- Research Objectives
  - Identify customer priorities for strategies laid out in the 2019-2024 strategic plan update
  - Measure how City Light is doing currently in meeting customer expectations
  - Measure awareness of the strategic plan
- Methodology
  - Residential and General Commercial: random sample, email/mail; oversampling of UDP customers
  - Key accounts: all contacts, email from account managers

	Residential Oct 9-23, 2017	General Commercial Oct 9-23, 2017	Key Accounts Oct 2-13, 2017
Response rate	4%	2%	7%
Qualified respondents	1377	230	58
Margin of error	+/-3%	+/- 6%	+/- 12%

KEY FINDING # 1

- **Customers want City Light to plan for the future while keeping costs down.**
- Their top three priorities for the utility are:
  - Be leaders in environmental and renewable energy
  - Invest in technology for operational improvements
  - Keep costs down

- **Recommendations**:
  - Ensure the updated strategic plan aligns with what is most important to customers
  - Use priorities to start a conversation with customers about what they want from the utility; continue to dig deeper

KEY FINDING # 2

- **City Light is outperforming many other gas and electricity utilities in customer satisfaction.**
- Based on the Net Promoter Score (NPS):
  - NPS among residential customers is **9**, among general commercial customers it's **2**, and among key accounts it's **3.**
  - Many other utility companies have lower or even negative NPS's.
- **Recommendations:**
  - Continue providing strong customer service to all customers
  - Invest in operational improvements to address concerns among commercial customers

KEY FINDING #3

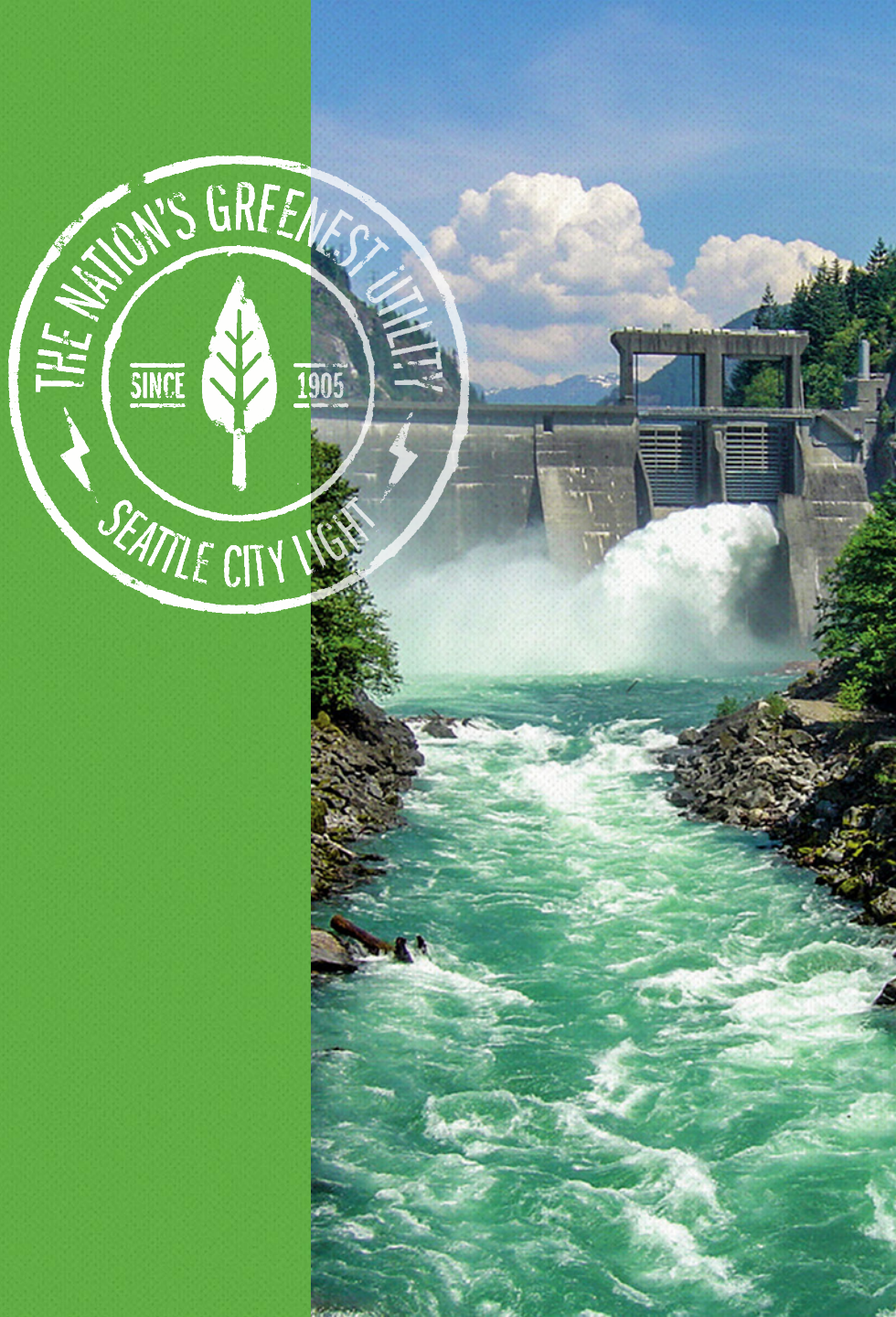
- **Customers see improvement in City Light's performance over the last two years, but there is still a lack of awareness about what City Light is working on.**
- The areas where the largest number of customers have seen improvement are:
  - Increased energy efficiency and conservation efforts
  - The use of technology to improve customer service and communications
  - Improved power reliability and availability

- **Recommendations**:
  - Increase communication about City Light performance outcomes, especially around areas where customers reported less improvement
  - Assess strategies and investment in areas where customers reported less improvement and decide if further action is needed
  - Build strategies and plans for increasing awareness of and involvement in the strategic plan

ADDITIONAL INSIGHTS

- Report back to participants what City Light learned from the survey and how this information informed the strategic plan's development
- Increase attention given to commercial customers (and to small-to-medium sized business in particular), both in terms of investment and customer service
- Develop communications strategies and programs that adapt and align to City Light's changing service territory (i.e. shifting demographics of age and home ownership)
- Use priorities identified through the online survey to test messaging about City Light programs and performance
- Recognize that different personas have different priorities and needs; address them accordingly

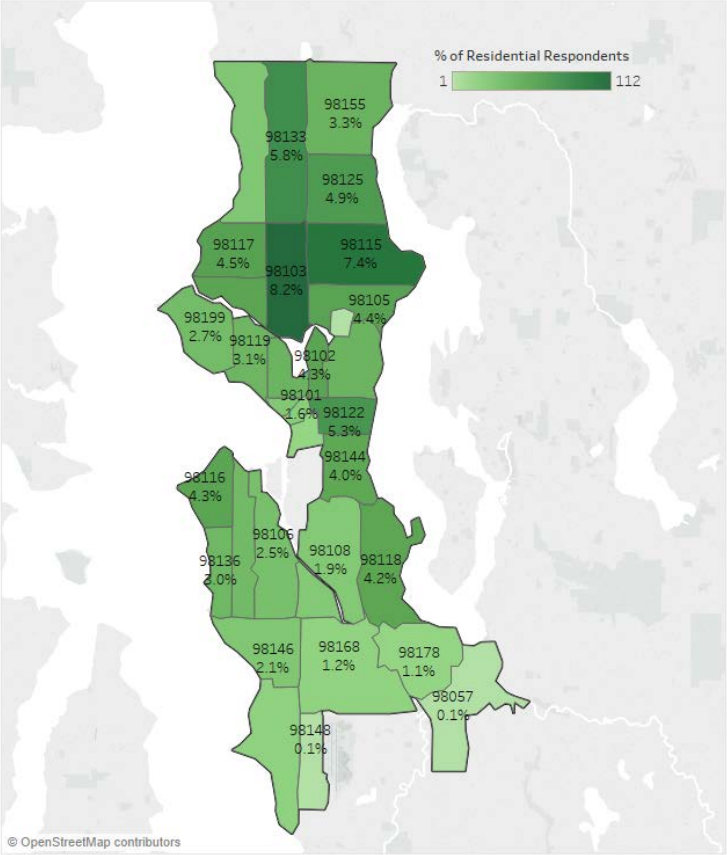
Seattle City Light



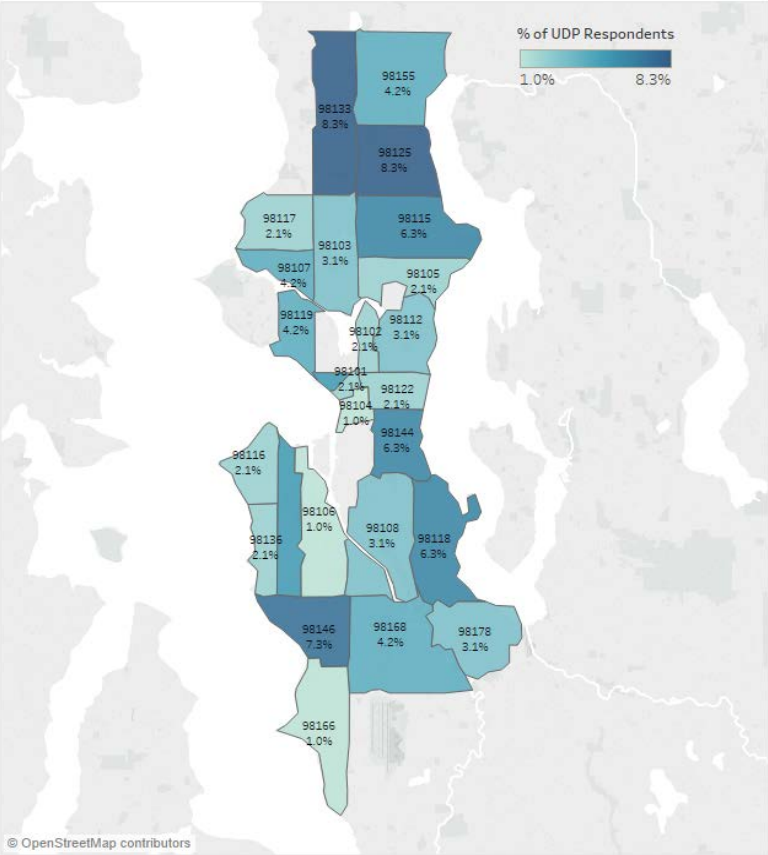
DEMOGRAPHICS

RESIDENTIAL RESPONDENTS BY LOCATION

Seattle City Light Strategic Plan Survey
Zip Code Distribution
Base: Residential Respondents (n = 1,363)



Seattle City Light Strategic Plan Survey
Zip Code Distribution
Base: UDP Participants (n = 96)

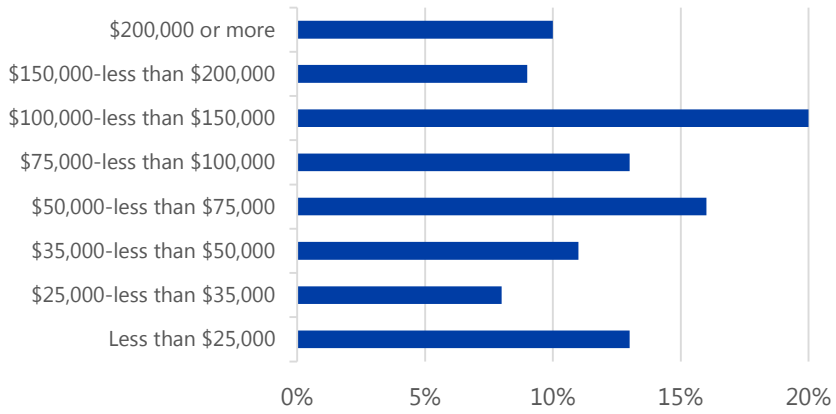


RESIDENTIAL CUSTOMERS (N=1,377)

48% female

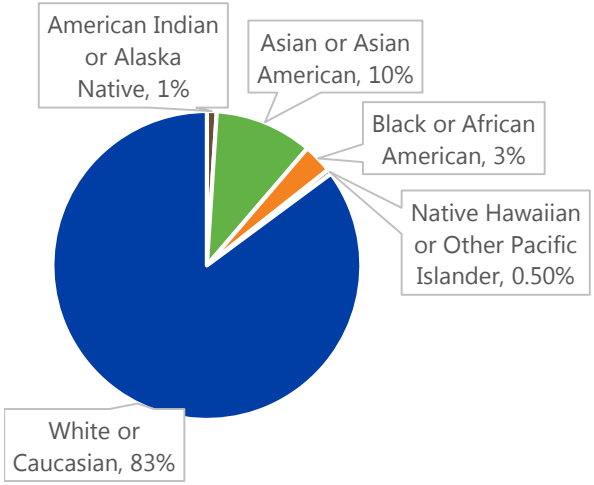
52% male

Income

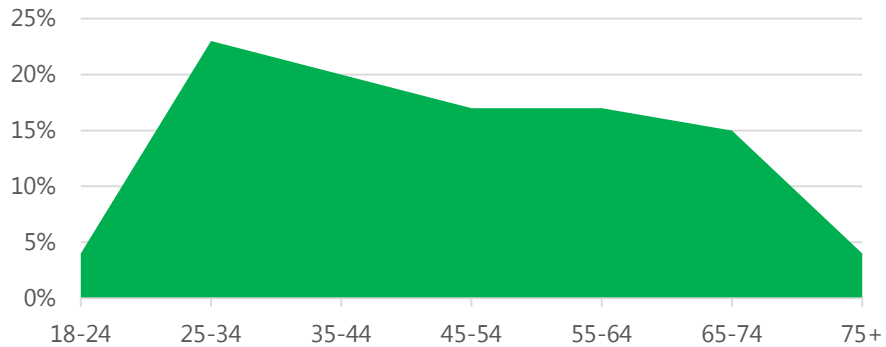


48% Own
52% Rent

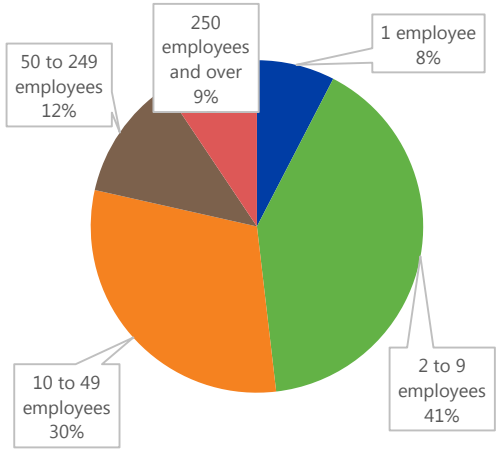
Race

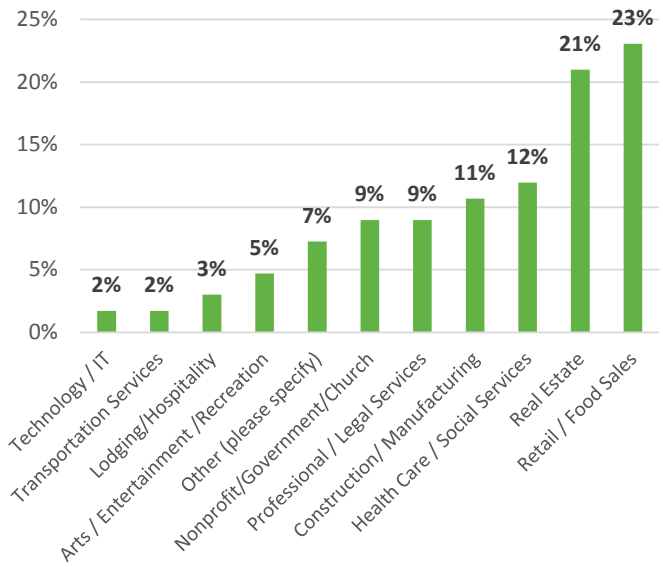


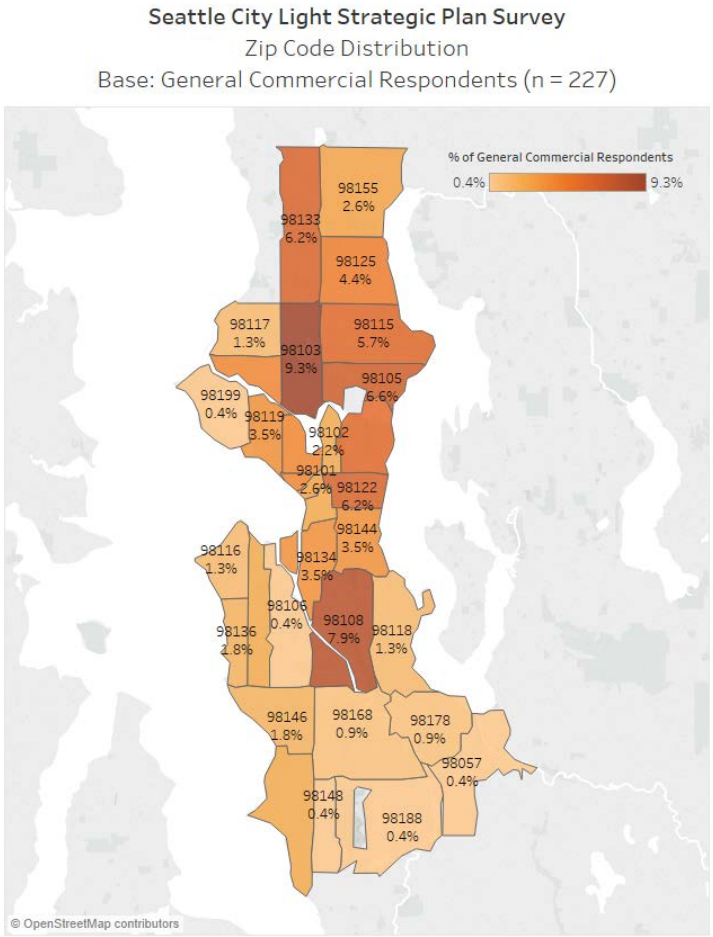
Age



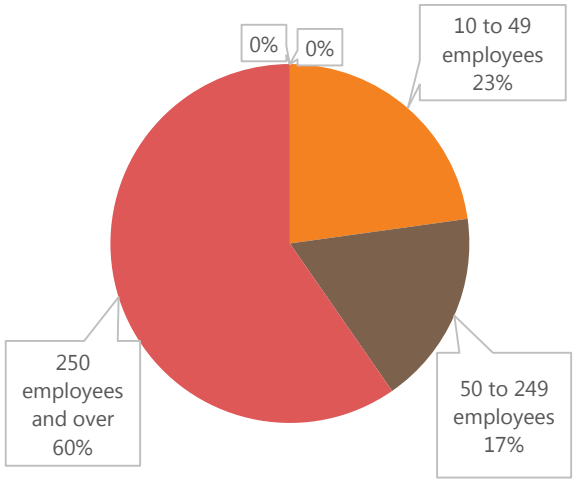
GENERAL COMMERCIAL CUSTOMERS (N=230)

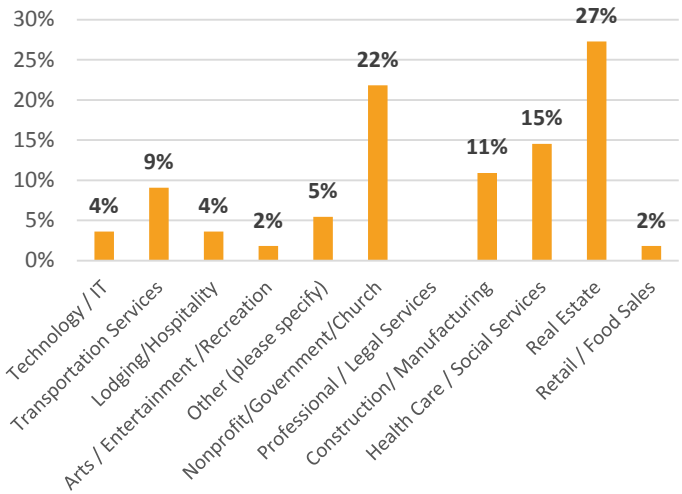


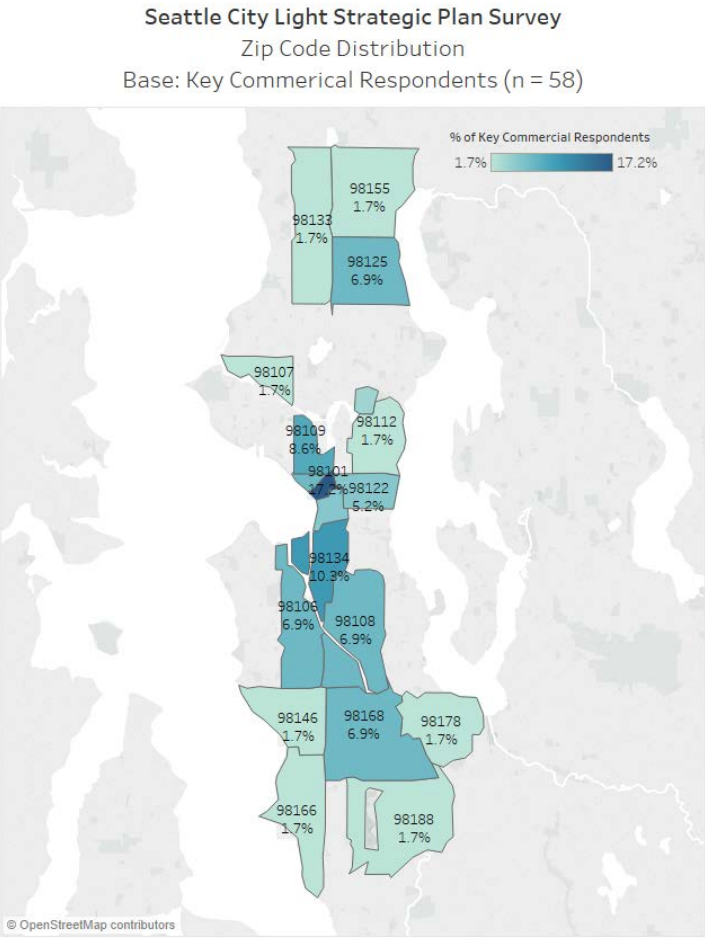




KEY ACCOUNTS (N=58)



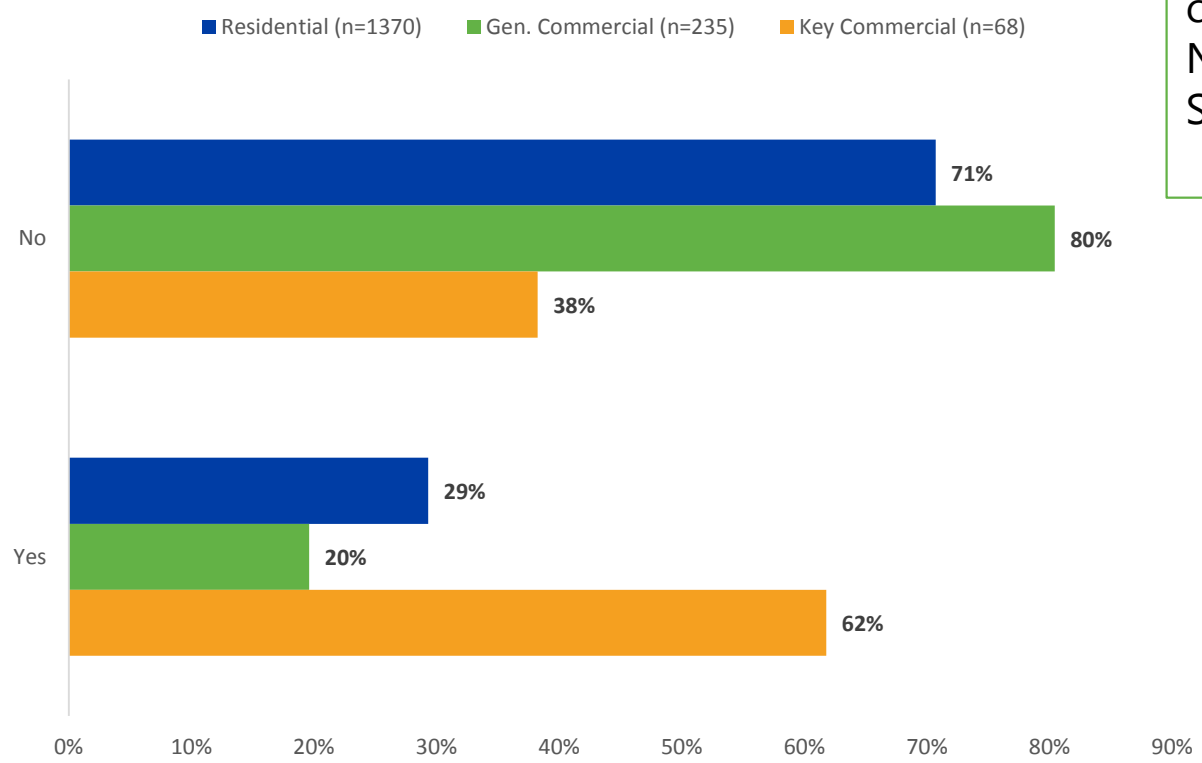




Seattle City Light

DETAILED FINDINGS

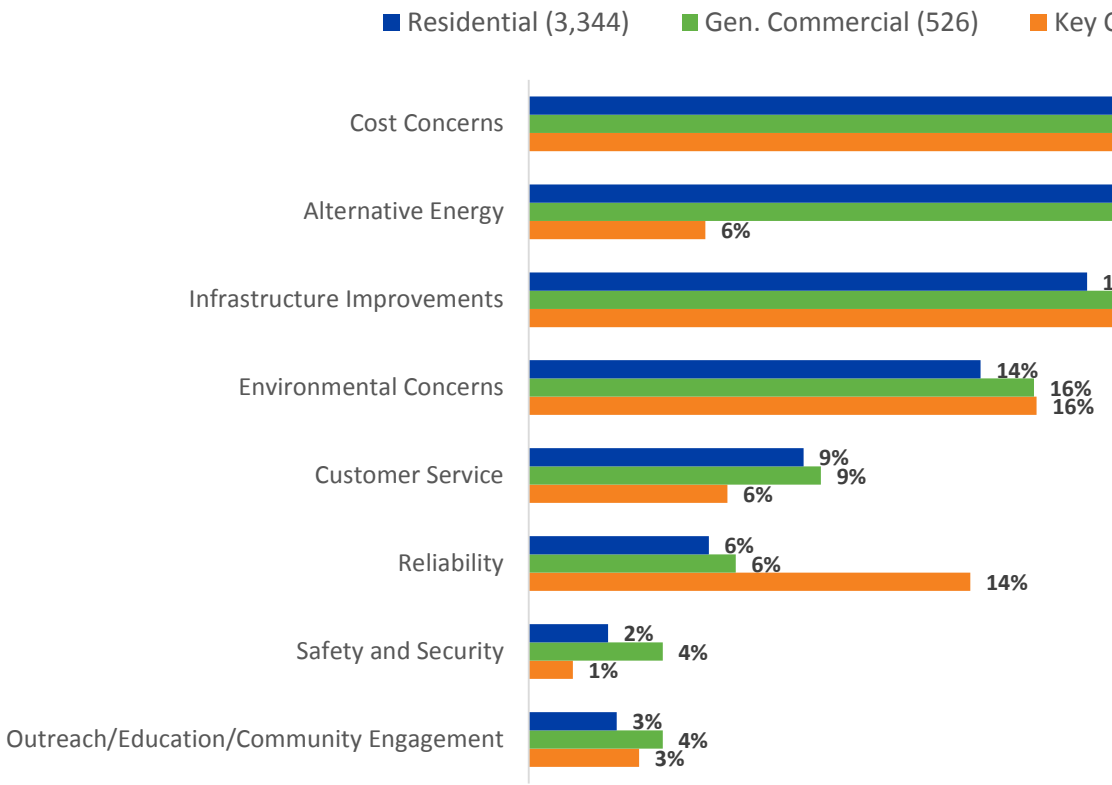
HOW AWARE ARE CUSTOMERS OF THE STRATEGIC PLAN?



Most residential and general commercial customers were NOT aware City Light had a Strategic Plan.

Q: Were you aware before this survey that Seattle City Light has a Strategic Plan to guide our ability to meet customers' current and future electric needs?
Base: All respondents.

WHAT DO CUSTOMERS WANT US TO FOCUS ON MOST?



Top 3 themes provided by Residential and General Commercial: cost concerns, alternative energy and infrastructure improvements

Top 3 for Key Accounts: infrastructure improvements, cost concerns, environmental concerns

Q: List up to three things that you think Seattle City Light should focus on over the next six years as they update the Strategic Plan.
Base: Comments by all respondents.

CUSTOMER INPUT ON THEIR TOP PRIORITIES

Residential

- *Realize not everyone in Seattle is earning 6 figures or is subsidized and can pay huge increases.*
- *Phase out the use of fossil fuels as a source of Seattle's electricity.*
- *Infrastructure repair and upkeep so people do not lose their electricity as much, as often, etc.*

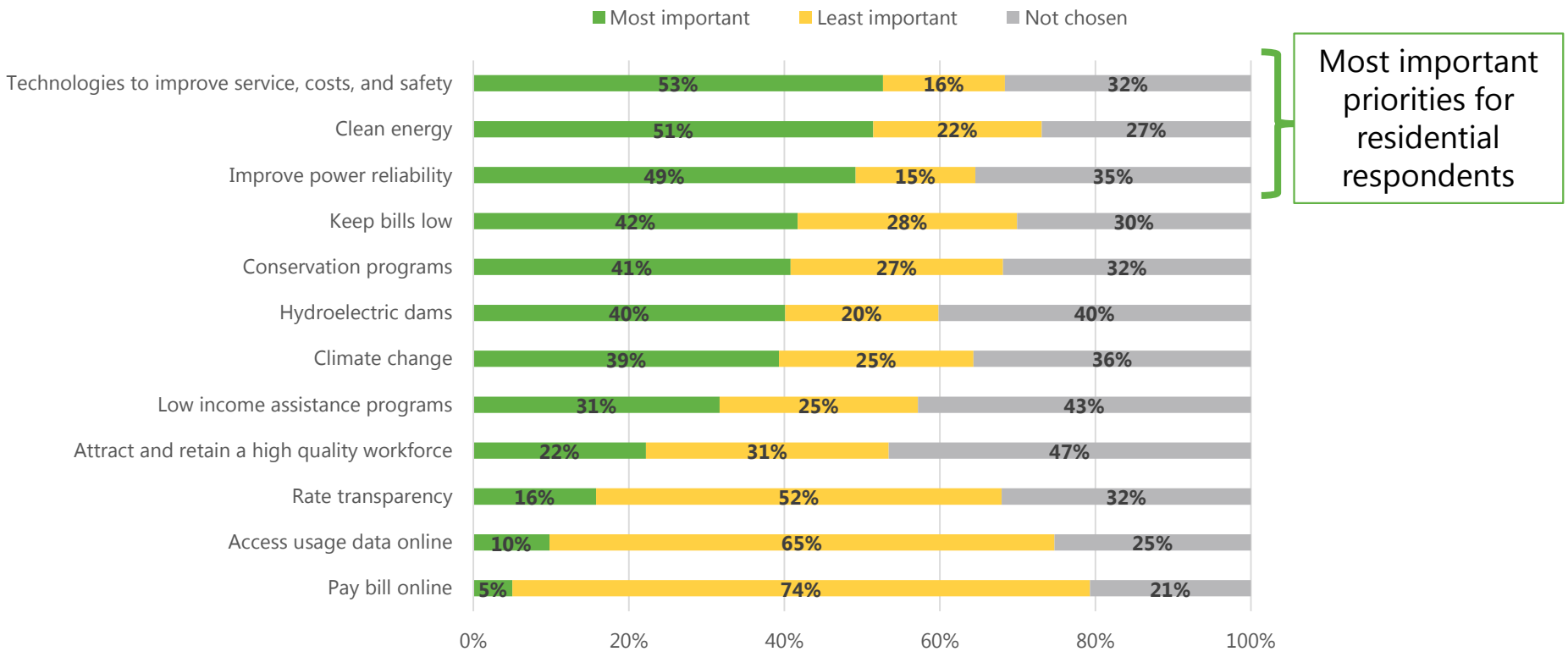
General Commercial

- *Consistent and correct billing on coordinated schedule.*
- *Promoting commercial and residential solar and wind installation.*
- *Upgrading and replacing infrastructure as needed to improve emergency response service.*

Key Accounts

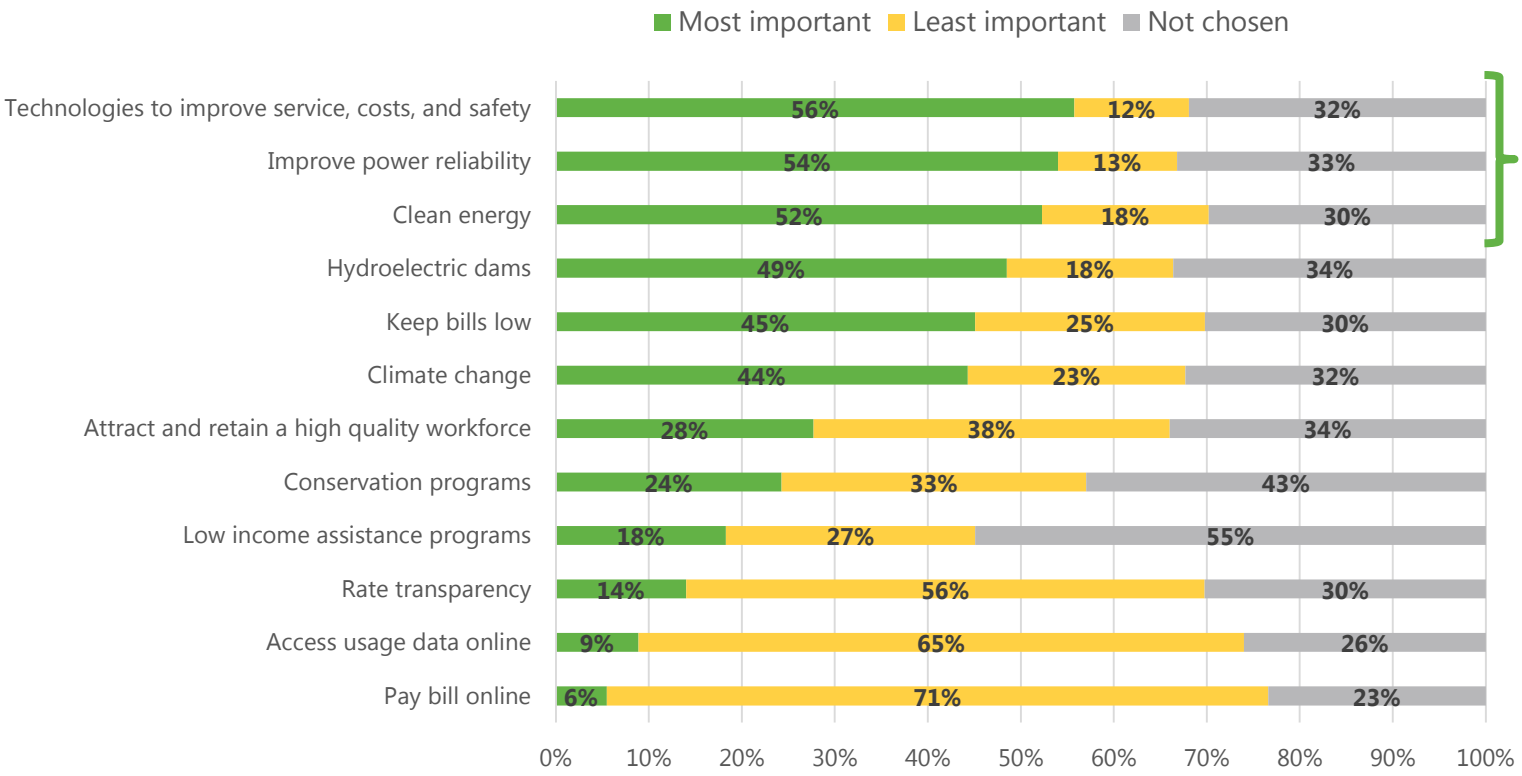
- *Long term investment in changing to underground wiring to decrease power outages.*
- *Minimize price increases.*
- *Developing clean energy solutions and renewable energy solutions.*

PRIORITIES FOR RESIDENTIAL CUSTOMERS



Q: Which one of the following is most important and which one is least important for Seattle City Light to focus on in the update of the Strategic Plan? [Respondents select "most" and "least" important priority out of 4 sets of 3 statements (they review 12 statements total)]
Base: All residential respondents (n=1,377)

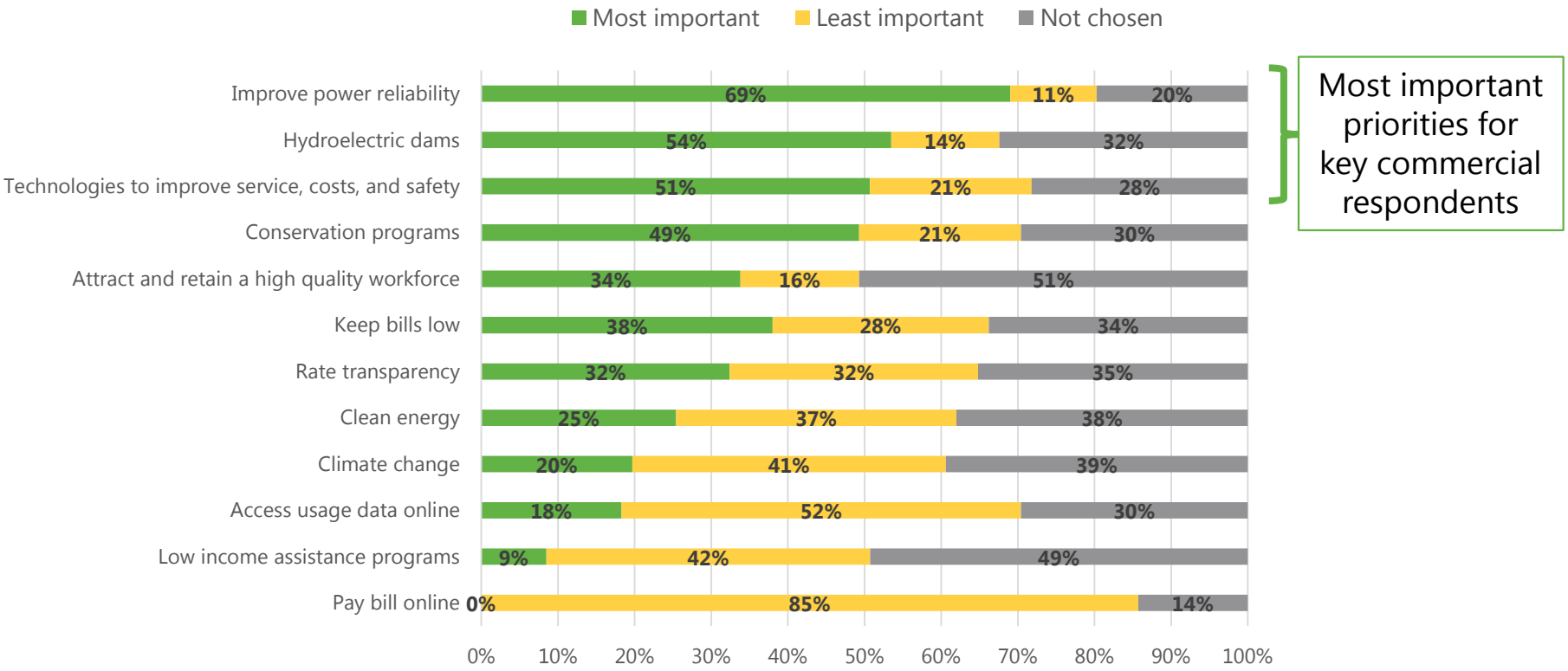
PRIORITIES FOR GENERAL COMMERCIAL



Most important priorities for general commercial respondents

Q: Which one of the following is most important and which one is least important for Seattle City Light to focus on in the update of the Strategic Plan? [Respondents select "most" and "least" important priority out of 4 sets of 3 statements (they review 12 statements total)]
Base: All general commercial respondents (n=230)

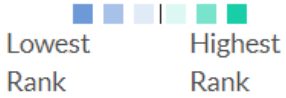
PRIORITIES FOR KEY CUSTOMERS



Q: Which one of the following is most important and which one is least important for Seattle City Light to focus on in the update of the Strategic Plan? [Respondents select "most" and "least" important priority out of 4 sets of 3 statements (they review 12 statements total)]
Base: All key account respondents (n=58)

RESIDENTIAL CUSTOMER RANK OBJECTIVES

Item	Overall Rank	Rank Distribution	Score	No. of Rankings
Leadership in clean energy solutions	1		6,088	1,307
Stronger environmental stewardship	2		5,462	1,309
Increase workforce performance and safety	3		4,476	1,307
Improve rate predictability	4		4,256	1,310
Improve customer service	5		3,691	1,304
Enhance organizational performance	6		3,552	1,301



Q: Please rank the following key objectives of the Strategic Plan from most to least important.
Base: All residential respondents (n=1,297)

GENERAL COMMERCIAL CUSTOMER RANK OBJECTIVES

Item	Overall Rank	Rank Distribution	Score	No. of Rankings
Leadership in clean energy solutions	1		899	210
Stronger environmental stewardship	2		744	209
Increase workforce performance and safety	3		728	210
Improve customer service	4		716	209
Improve rate predictability	5		709	209
Enhance organizational performance	6		604	209

Q: Please rank the following key objectives of the Strategic Plan from most to least important.
Base: All general commercial respondents (n=206)

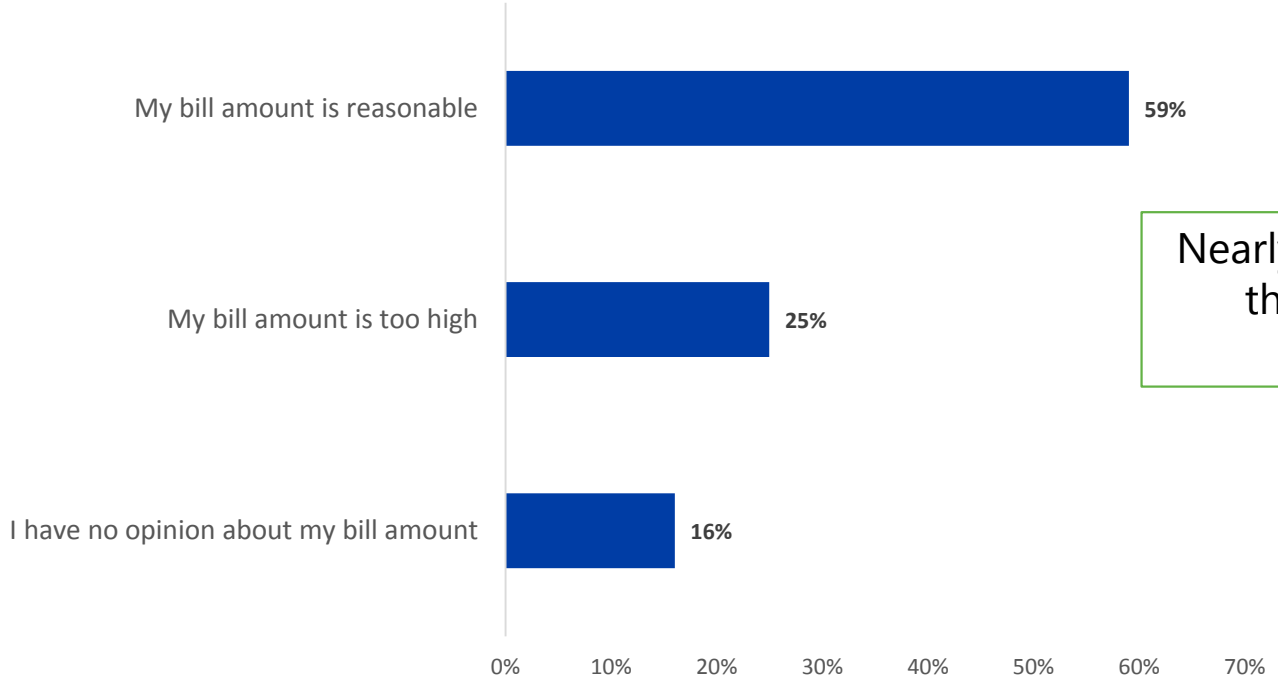
KEY ACCOUNT CUSTOMER RANK OBJECTIVES

Item	Overall Rank	Rank Distribution	Score	No. of Rankings
Improve rate predictability	1		241	62
Increase workforce performance and safety	2		227	61
Enhance organizational performance	3		212	60
Leadership in clean energy solutions	4		209	61
Improve customer service	5		201	61
Stronger environmental stewardship	6		196	61

Lowest Rank — Highest Rank

Q: Please rank the following key objectives of the Strategic Plan from most to least important.
Base: All key accounts respondents (n=52)

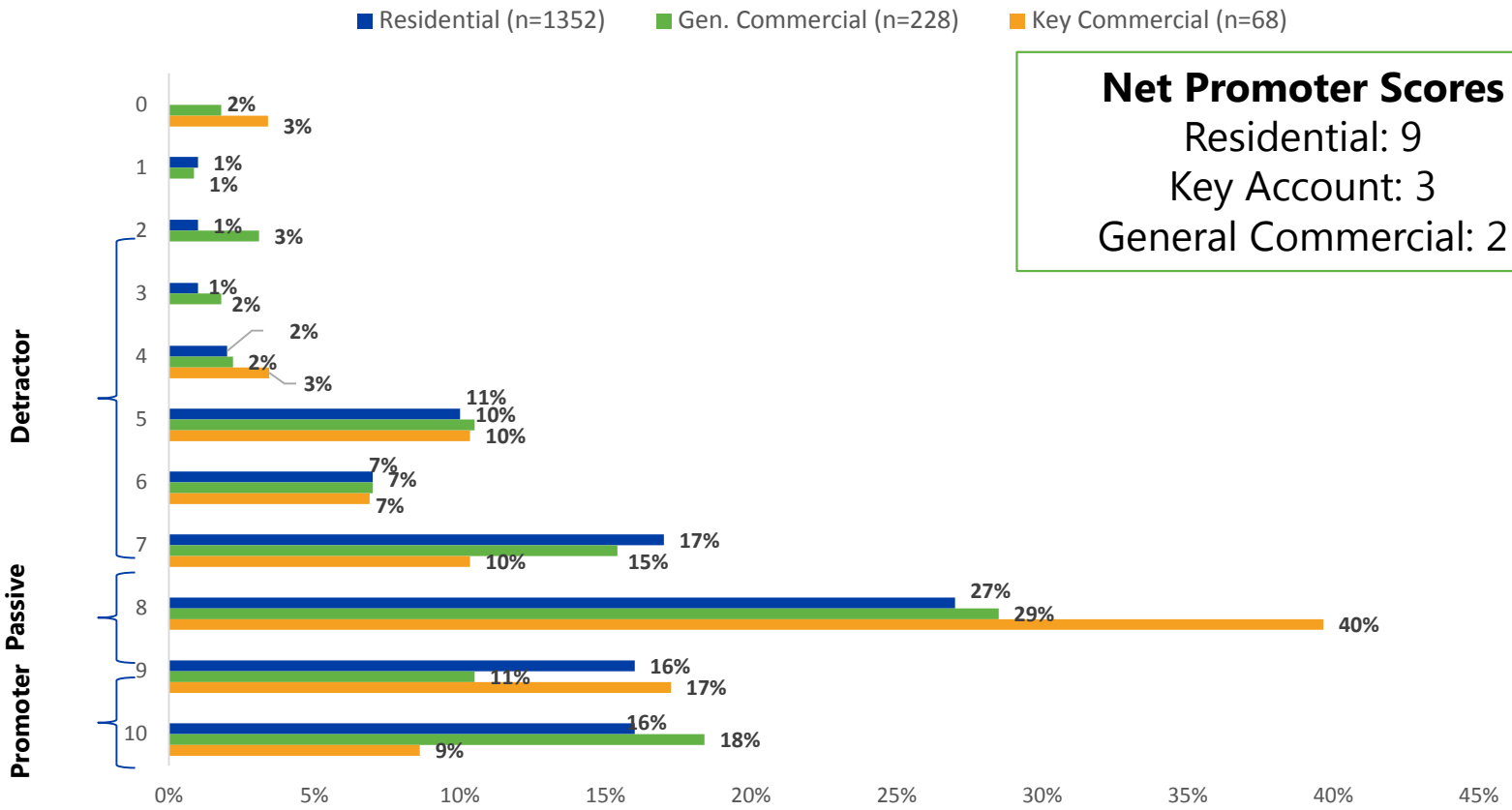
HOW DO RESIDENTIAL CUSTOMERS FEEL ABOUT THEIR BILL?



Nearly 2/3 of customers say their electricity bill is "reasonable"

Q: Which statement describes your opinion about your electricity bill?
Base: All residential respondents (n=1,352)

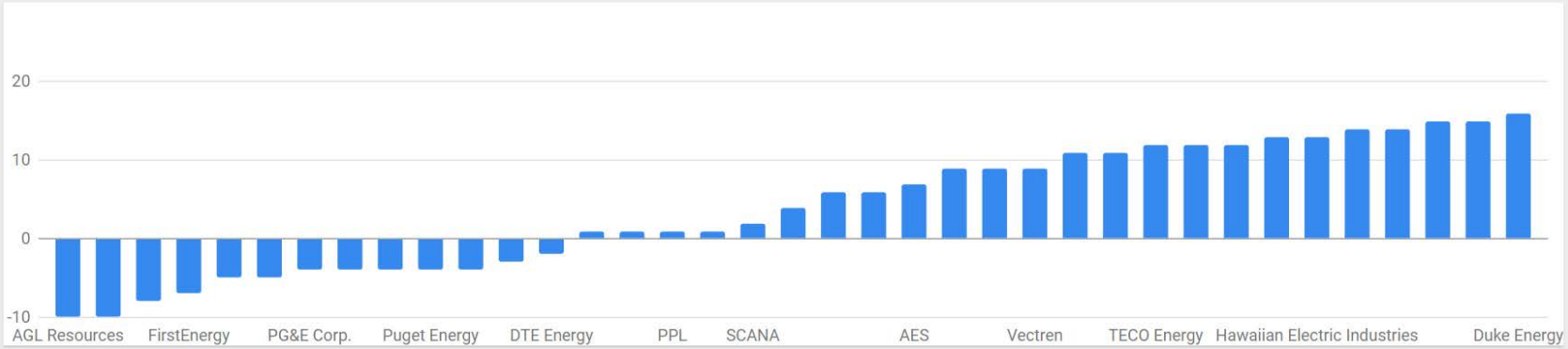
NET PROMOTER SCORES



Net Promoter Scores
Residential: 9
Key Account: 3
General Commercial: 2

Q: On a scale of zero to ten, how likely would you be to provide a positive opinion of Seattle City Light to someone who was new to the Seattle City Light service area?
Base: All respondents

UTILITIES: GAS AND ELECTRIC NPS 2017 BENCHMARKS



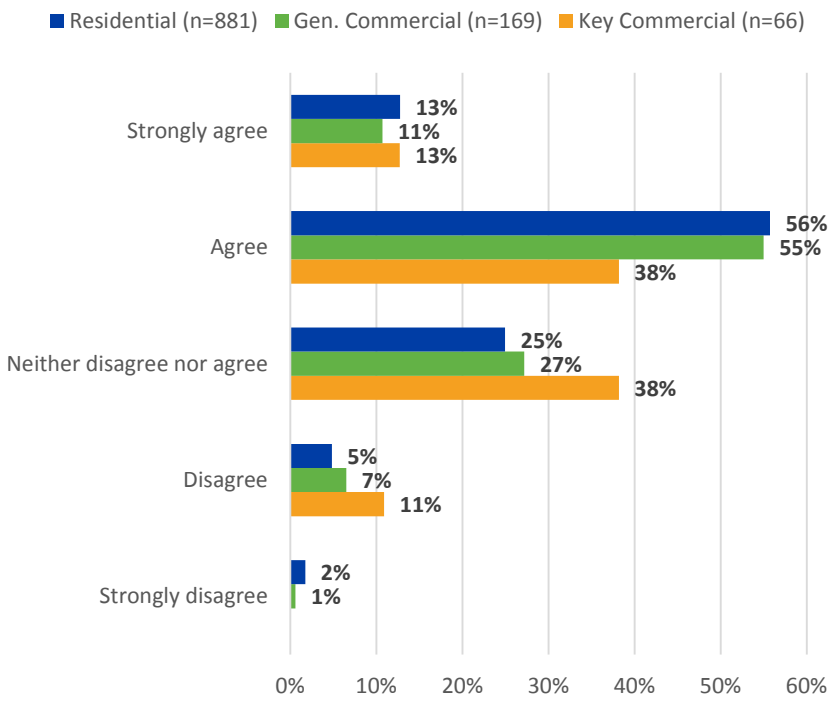
PG&E Corp. -4	Dominion Resources 9	Ameren 1	AGL Resources -10
Entergy -4	Consolidated Edison 1	FirstEnergy -7	CMS Energy 11
Atmos Energy 4	Southwest Gas 14	NextEra Energy 11	PPL 1
Integrys Energy Group 13	Vectren 9	Exelon -4	CenterPoint Energy 15
Edison International -4	Hawaiian Electric Industries 13	NiSource 15	Duke Energy 16
Alliant Energy 9	National Fuel Gas 6	Southern 12	Public Service Enterprise Group 1
Puget Energy -4	Pepco Holdings 14	Great Plains Energy -5	Xcel Energy -10
OGE Energy -3	SCANA 2	Westar Energy -8	DTE Energy -2
TECO Energy 12	Wisconsin Energy 12	Pinnacle West Capital -5	American Electric Power 6
AES 7			

https://customer.guru/net-promoter-score/industry/utilities-gas-and-electric

RESPONDENTS AGREE THAT EFFICIENCY AND CONSERVATION PROGRAMS HAVE INCREASED

Over the last two years, Seattle City Light has increased customer energy efficiency and conservation programs.

Base: respondents who have been customers for more than two years

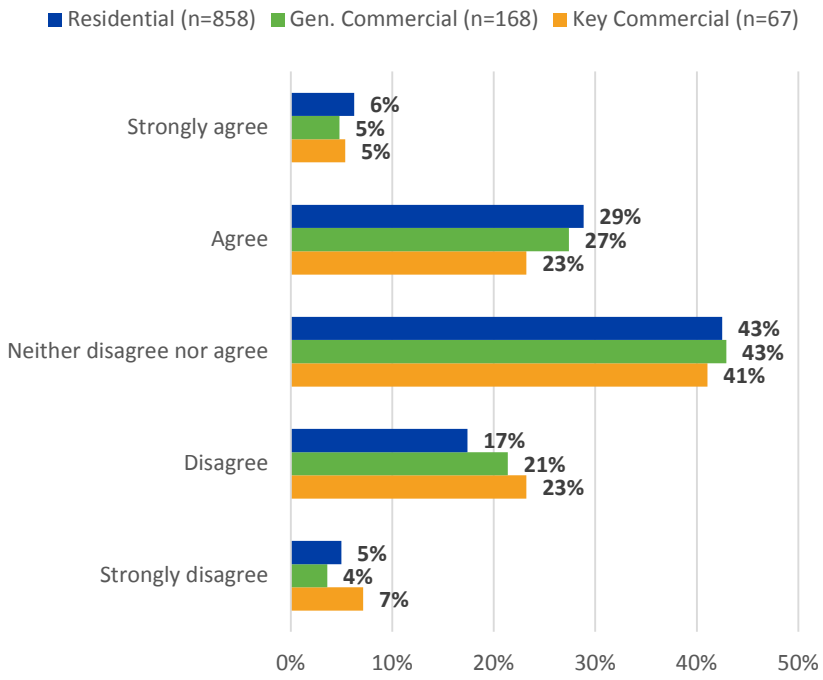


69% of residential, 66% of general commercial, and 51% of key commercial customers agree that City Light has increased energy efficiency and conservation programs over the last two years.

RESPONDENTS REPORT THAT RATES ARE MORE PREDICTABLE

Over the last two years, Seattle City Light has established rates that are more predictable.

Base: respondents who have been customers for more than two years

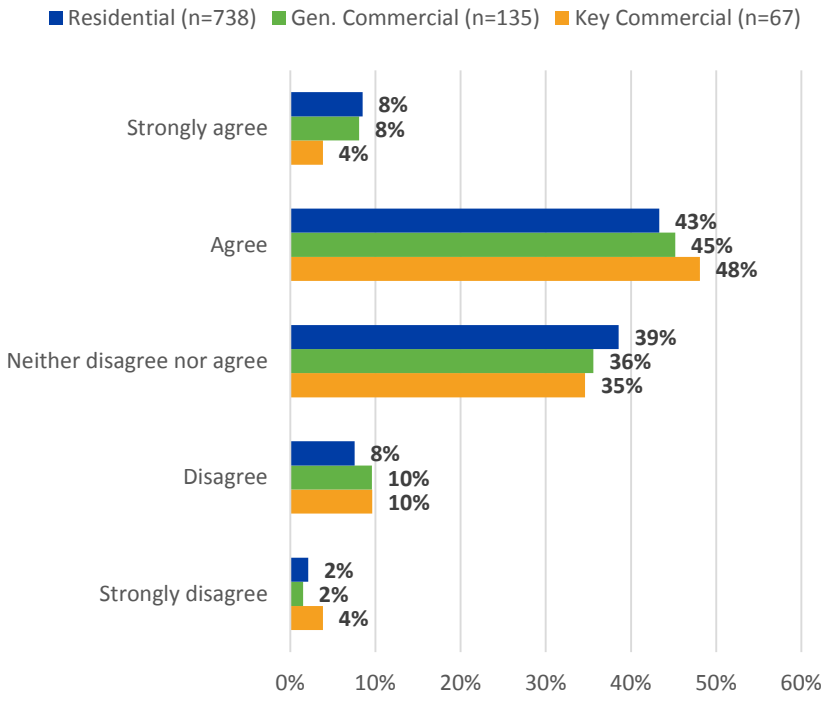


35% of residential, 32% of general commercial, and 28% of key commercial customers agree that City Light rates have become more predictable over the last two years.

RESPONDENTS RECOGNIZE THAT CITY LIGHT INVESTED IN NEW INFRASTRUCTURE

Over the last two years, Seattle City Light has enhanced existing and added new infrastructure to meet customer needs.

Base: respondents who have been customers for more than two years

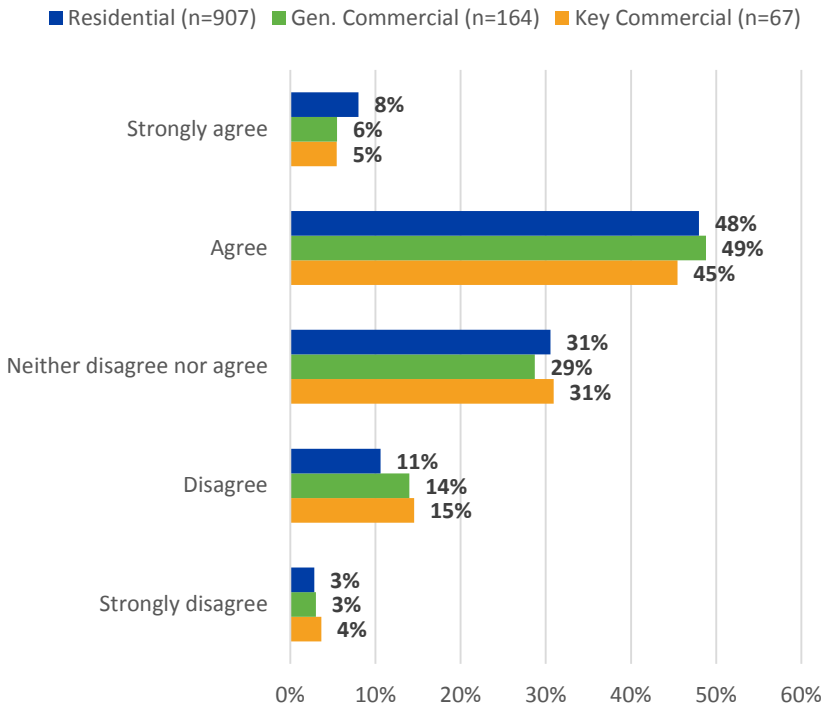


51% of residential, 53% of general commercial, and 52% of key commercial customers agree that City Light has enhanced or added new infrastructure over the last two years.

RESPONDENTS AGREE THAT TECHNOLOGY HAS IMPROVED CUSTOMER SERVICE

Over the last two years, Seattle City Light has used technology to improve customer service and communication.

Base: respondents who have been customers for more than two years

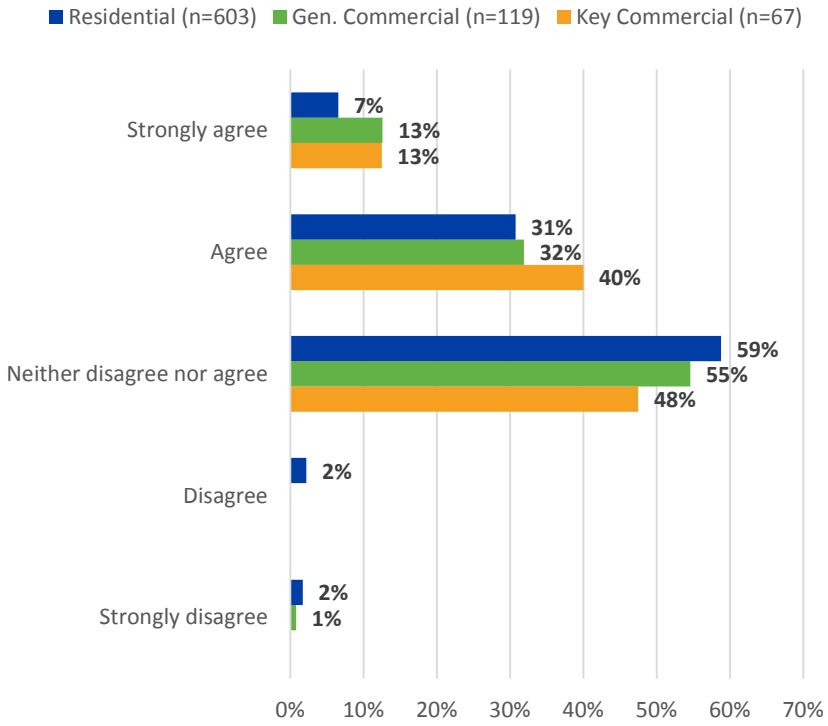


56% of residential, 55% of general commercial, and 50% of key commercial customers agree that City Light has used technology to improve customer service and communication over the last two years.

RESPONDENTS RECOGNIZE CITY LIGHT'S FOCUS ON SAFETY

Over the last two years, Seattle City Light has increased focus on safety.

Base: respondents who have been customers for more than two years

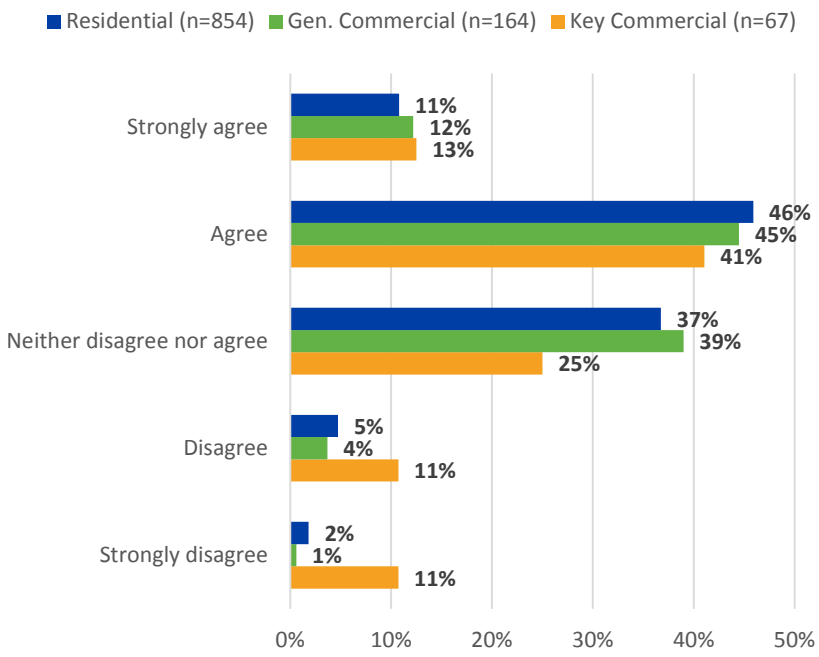


38% of residential, 45% of general commercial, and 53% of key commercial customers agree that City Light has increased their focus on safety over the last two years.

RESPONDENTS REPORT IMPROVED POWER RELIABILITY AND AVAILABILITY

Over the last two years, Seattle City Light has improved power reliability and availability.

Base: respondents who have been customers for more than two years

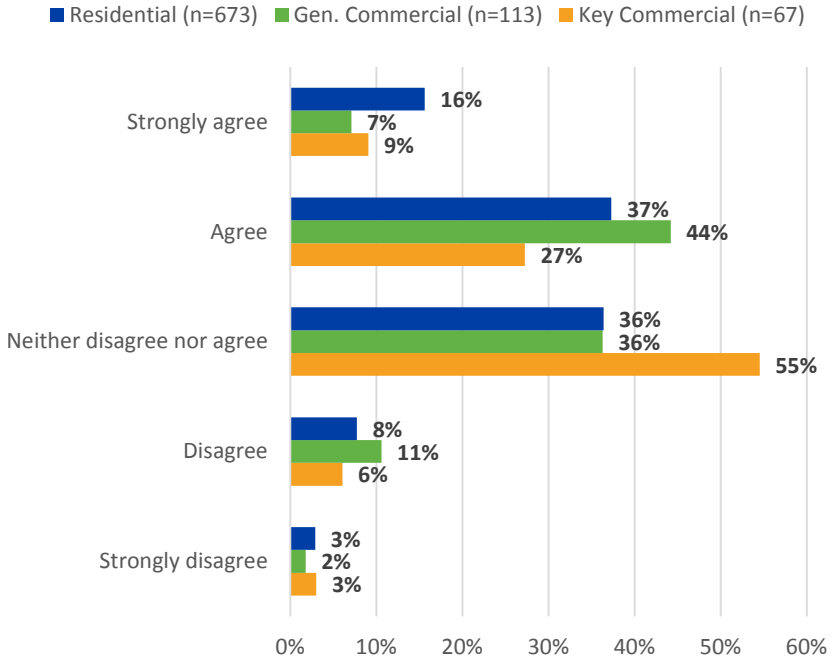


57% of residential, 57% of general commercial, and 54% of key commercial customers agree that City Light has improved power reliability over the last two years.

RESPONDENTS SAY CITY LIGHT HAS MADE PROGRESS IN ASSISTANCE PROGRAM OUTREACH

Over the last two years, Seattle City Light has increased efforts to enroll customers into our low income assistance programs.

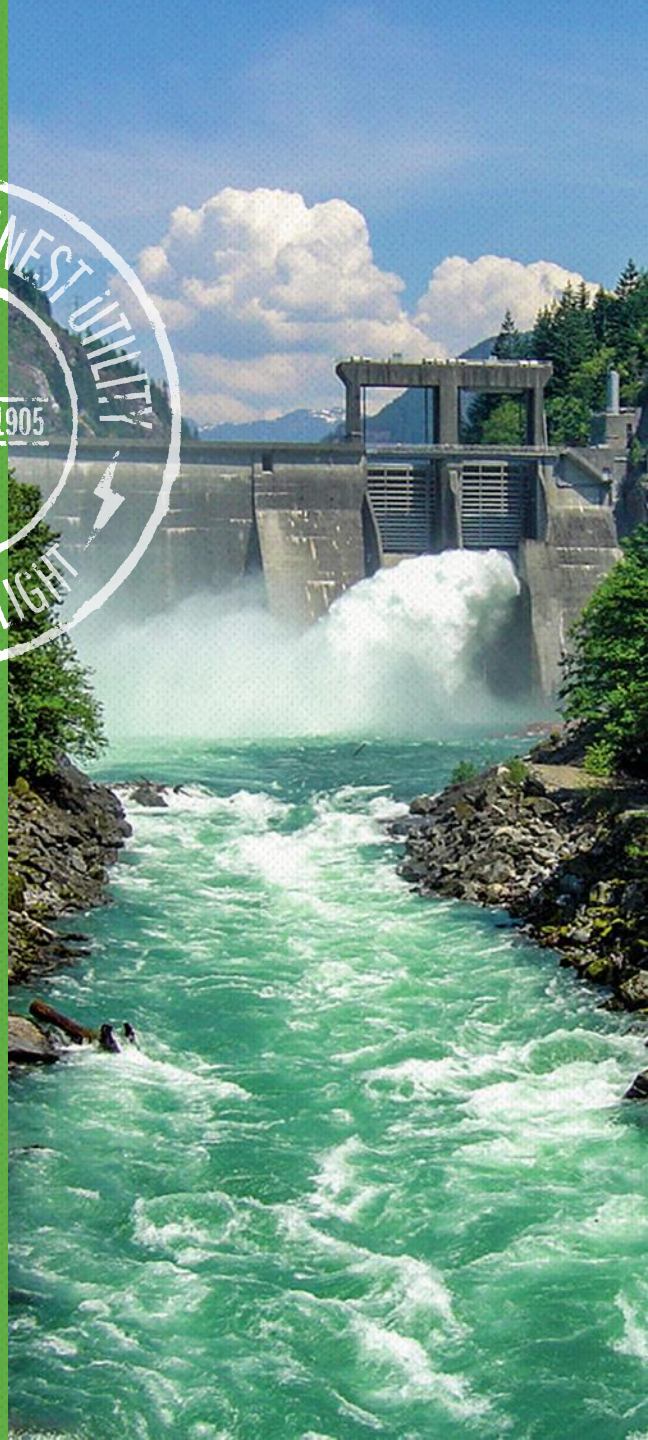
Base: respondents who have been customers for more than two years



53% of residential, 51% of general commercial, and 36% of key commercial customers agree that City Light has increased efforts to enroll customers in low income assistance programs over the last two years.

Appendix D: Sample strategic plan presentation to stakeholder

Seattle City Light



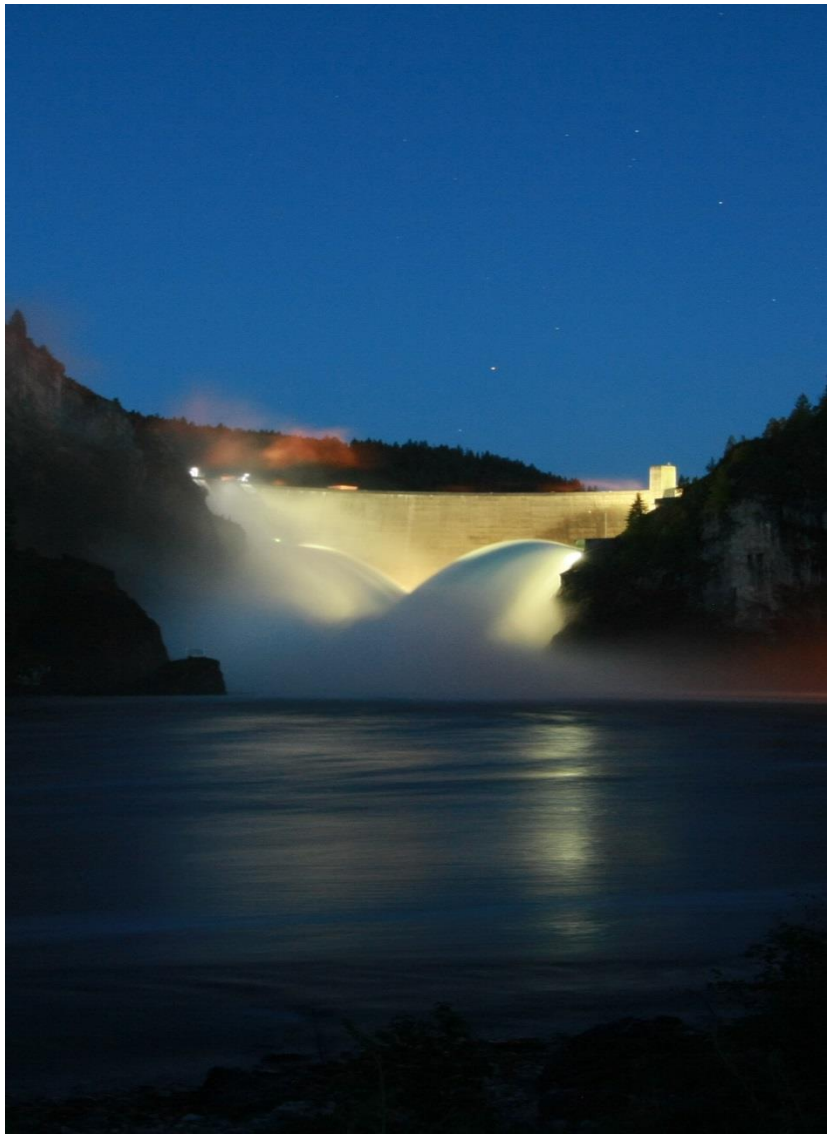
2019 – 2024 STRATEGIC PLAN
PRESENTATION TO FRANCHISE CITIES

February 26, 2018

WELCOME TO CITY LIGHT

Opening Comments

Jim Baggs, Interim
General Manager & CEO



Seattle City Light

Seattle City Light
Strategic Plan Survey – Summary of Results

Jenny Levesque, Community Outreach Manager

OBJECTIVES AND METHODOLOGY

- Research Objectives
  - Identify customer priorities for strategies laid out in the 2019-2024 strategic plan update
- Methodology
  - Residential and General Commercial: random sample, email/mail; oversampling of UDP customers
  - Key accounts: all contacts, email from account managers

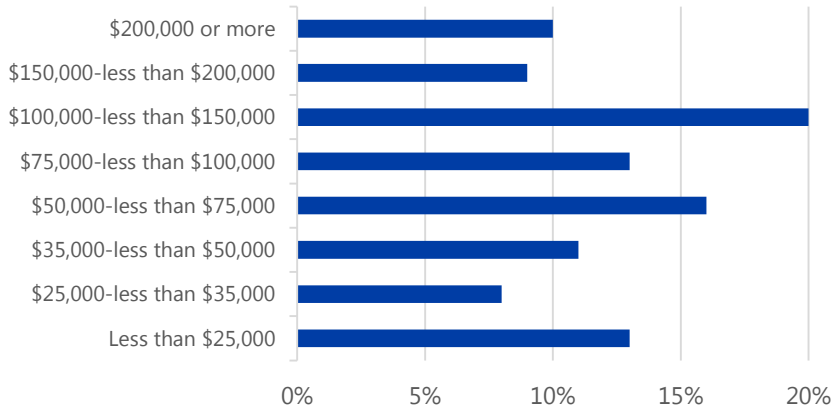
	Residential Oct 9-23, 2017	General Commercial Oct 9-23, 2017	Key Accounts Oct 2-13, 2017
Response rate	4%	2%	7%
Qualified respondents	1,377	230	58
Margin of error	+/-3%	+/- 6%	+/- 12%

RESIDENTIAL CUSTOMERS (N=1,377)

48% female

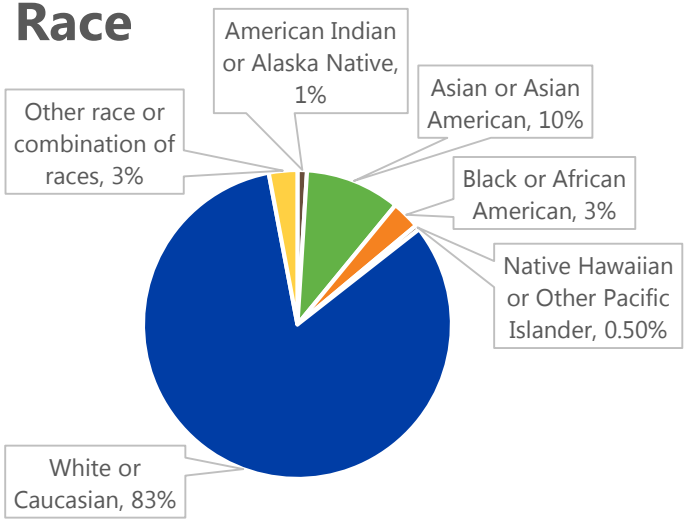
52% male

Income

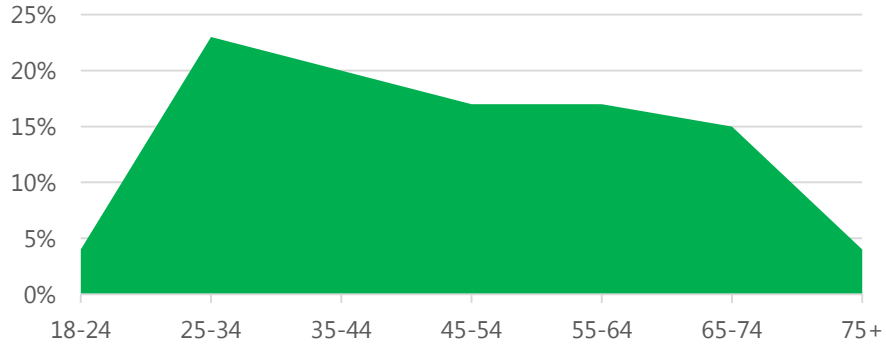


48% Own
52% Rent

Race

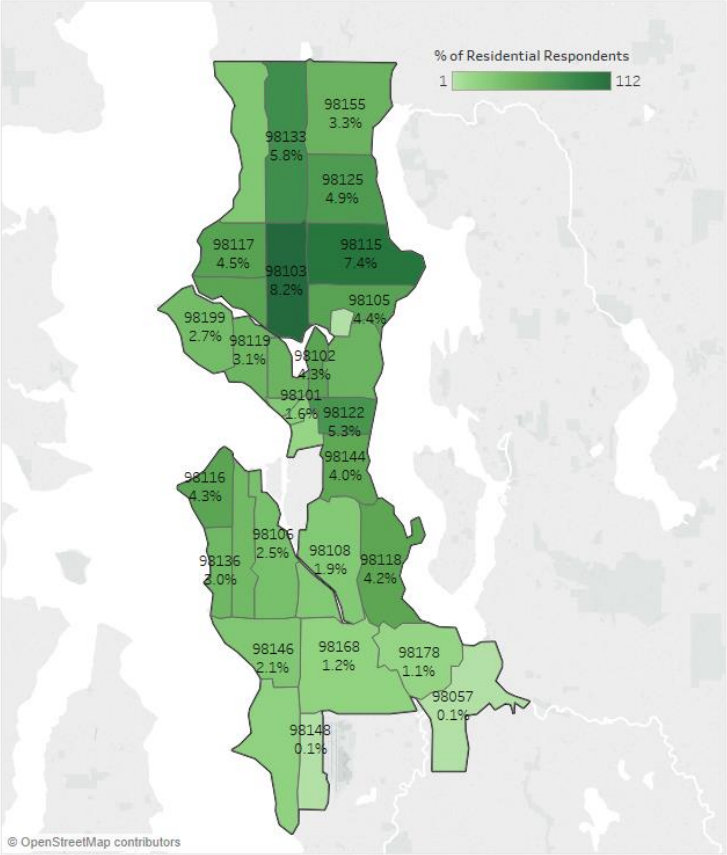


Age

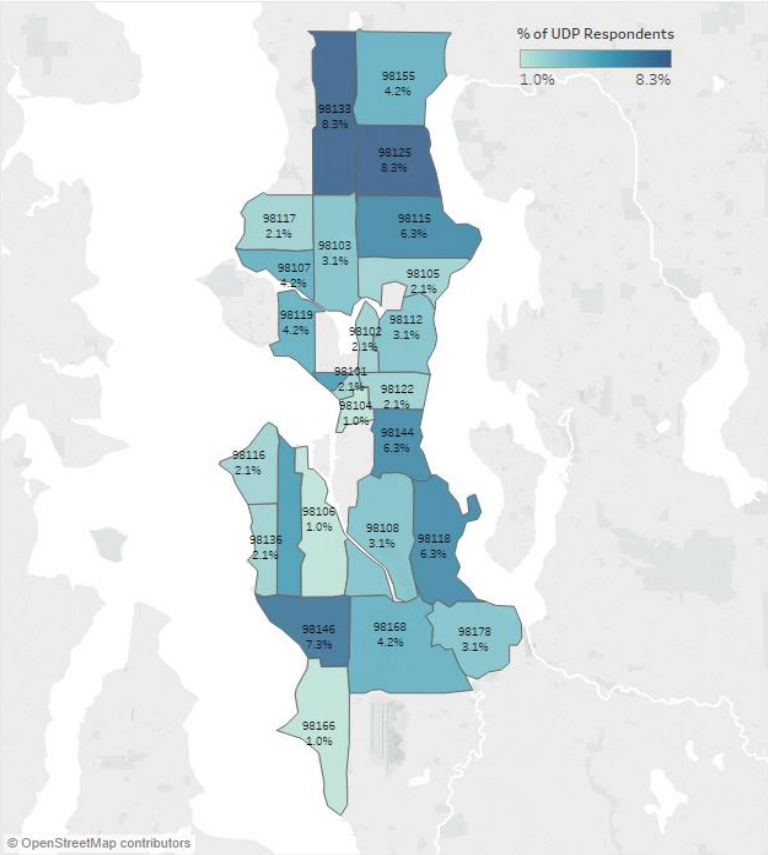


RESIDENTIAL RESPONDENTS BY LOCATION

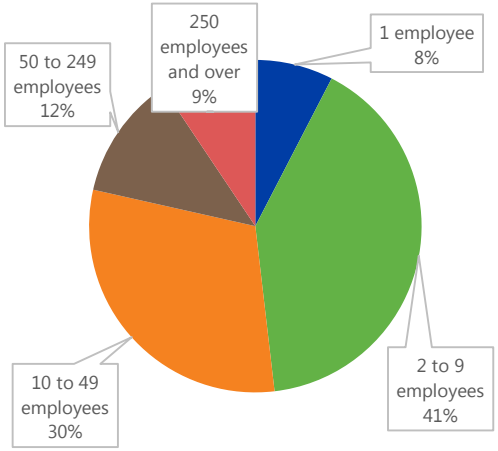
Seattle City Light Strategic Plan Survey
Zip Code Distribution
Base: Residential Respondents (n = 1,363)



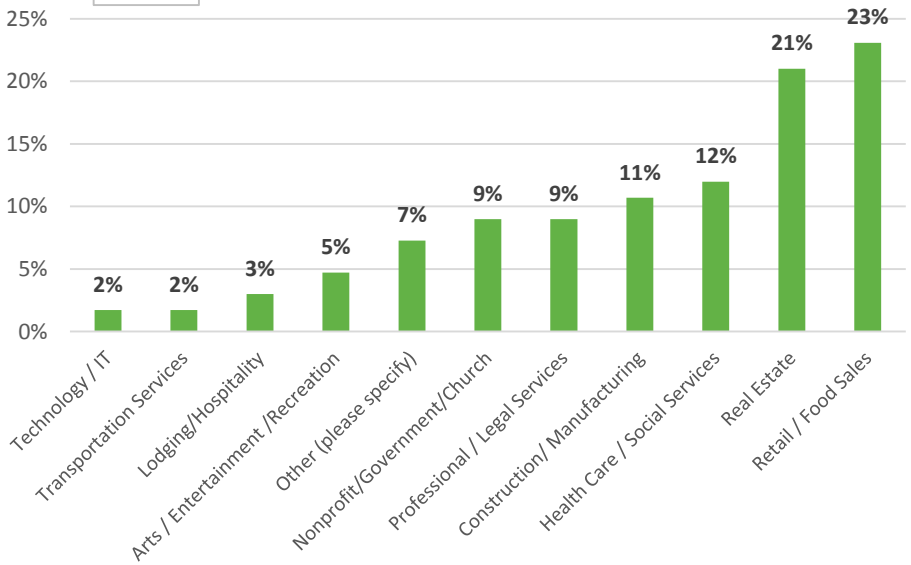
Seattle City Light Strategic Plan Survey
Zip Code Distribution
Base: UDP Participants (n = 96)



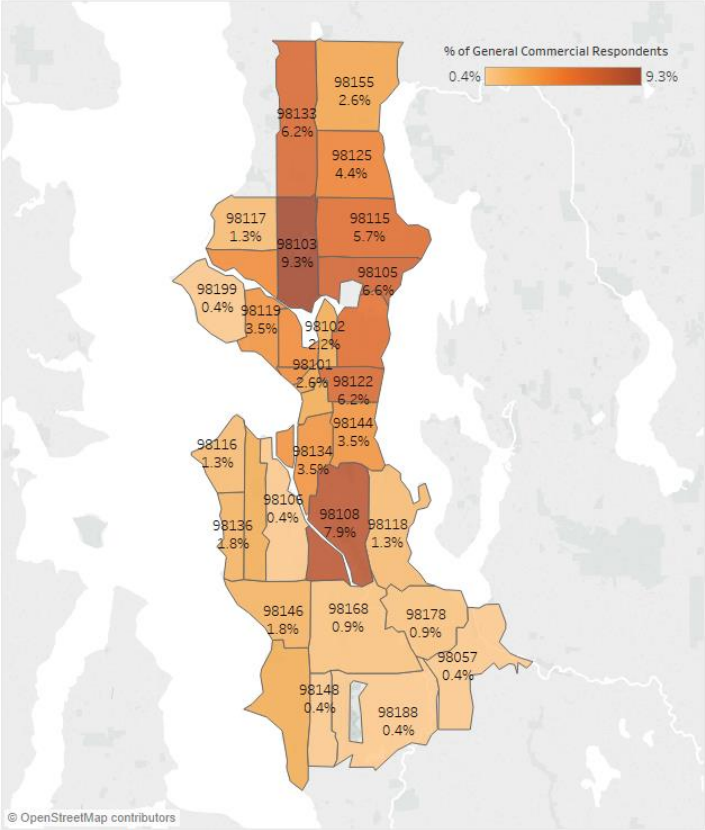
GENERAL COMMERCIAL CUSTOMERS (N=230)



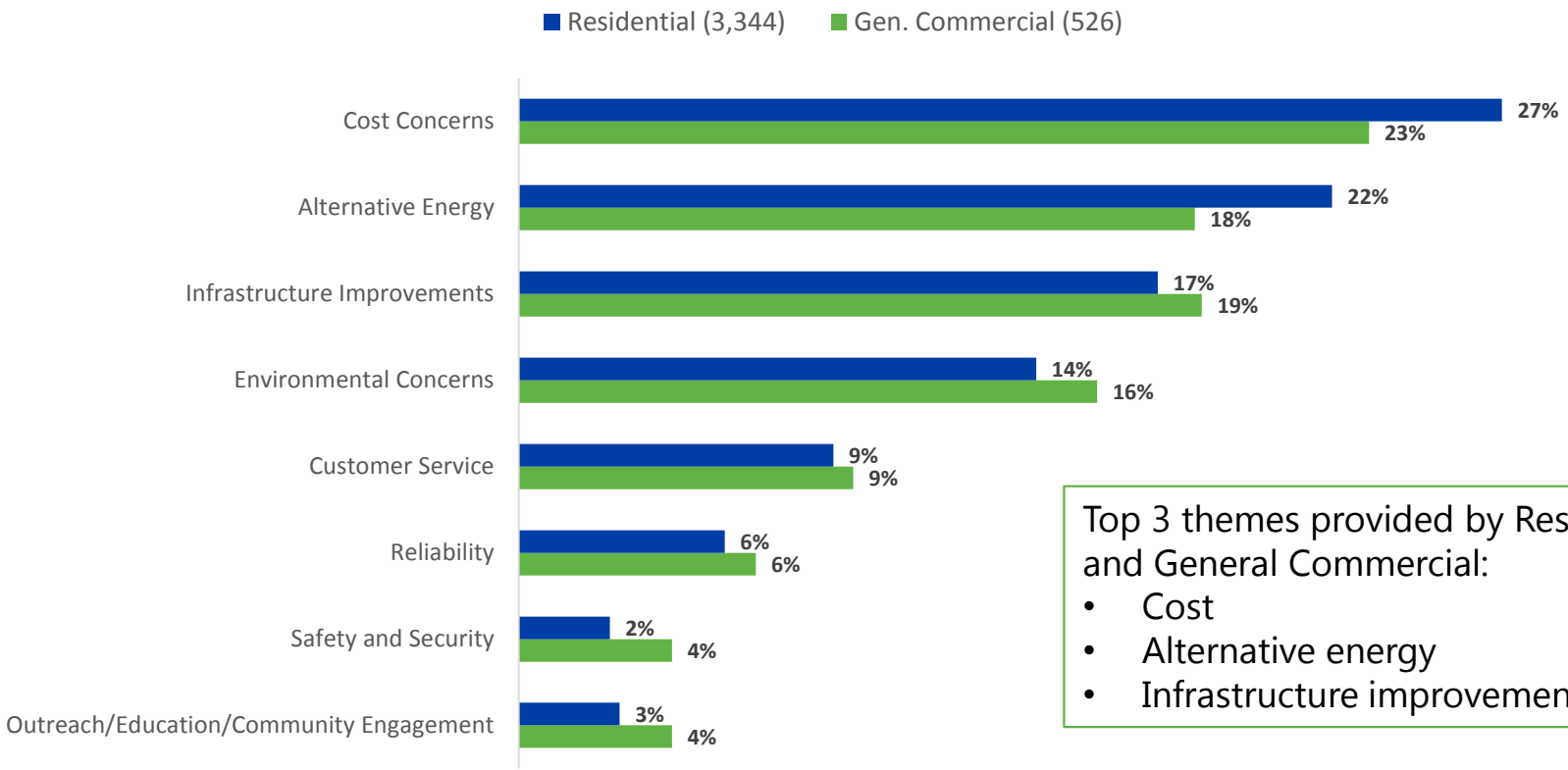
7%
Women and Minority Owned Businesses



Seattle City Light Strategic Plan Survey
Zip Code Distribution
Base: General Commercial Respondents (n = 227)



WHAT DO CUSTOMERS WANT US TO FOCUS ON?

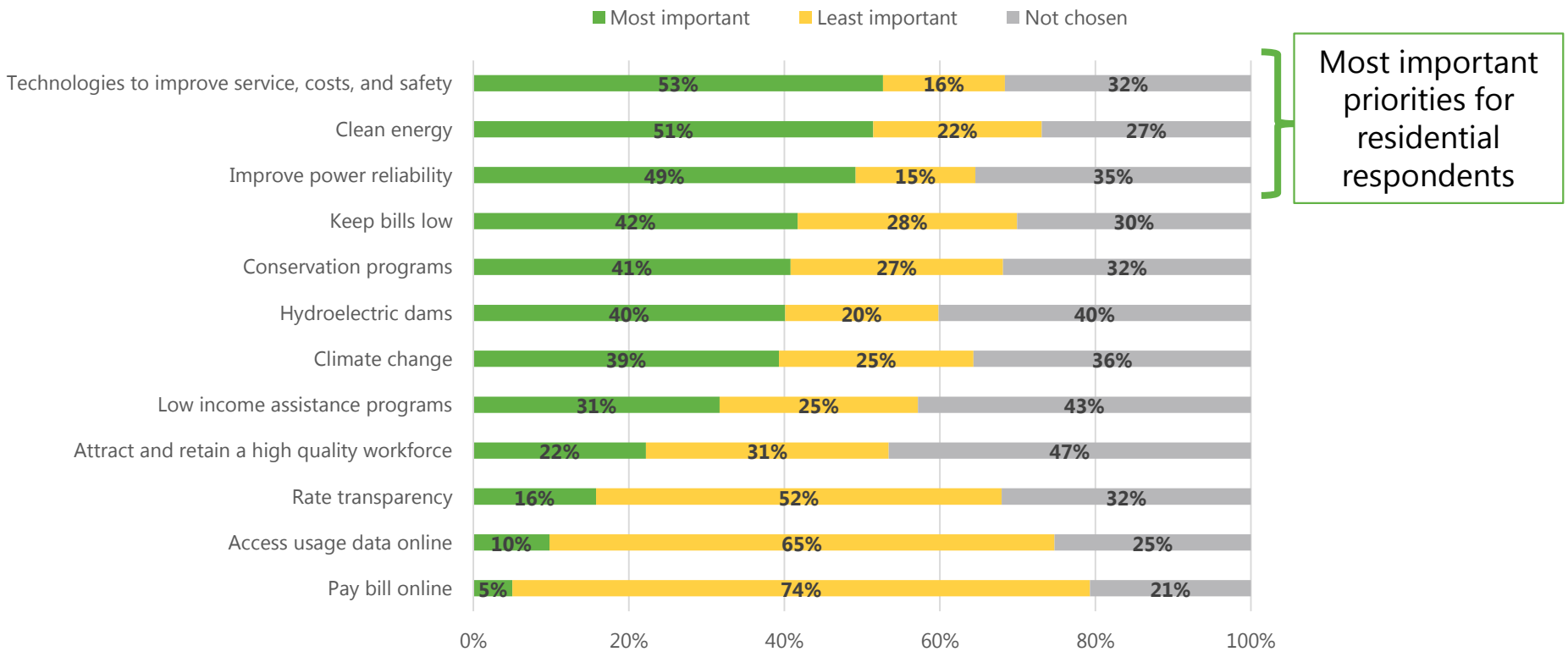


Top 3 themes provided by Residential and General Commercial:

- Cost
- Alternative energy
- Infrastructure improvements

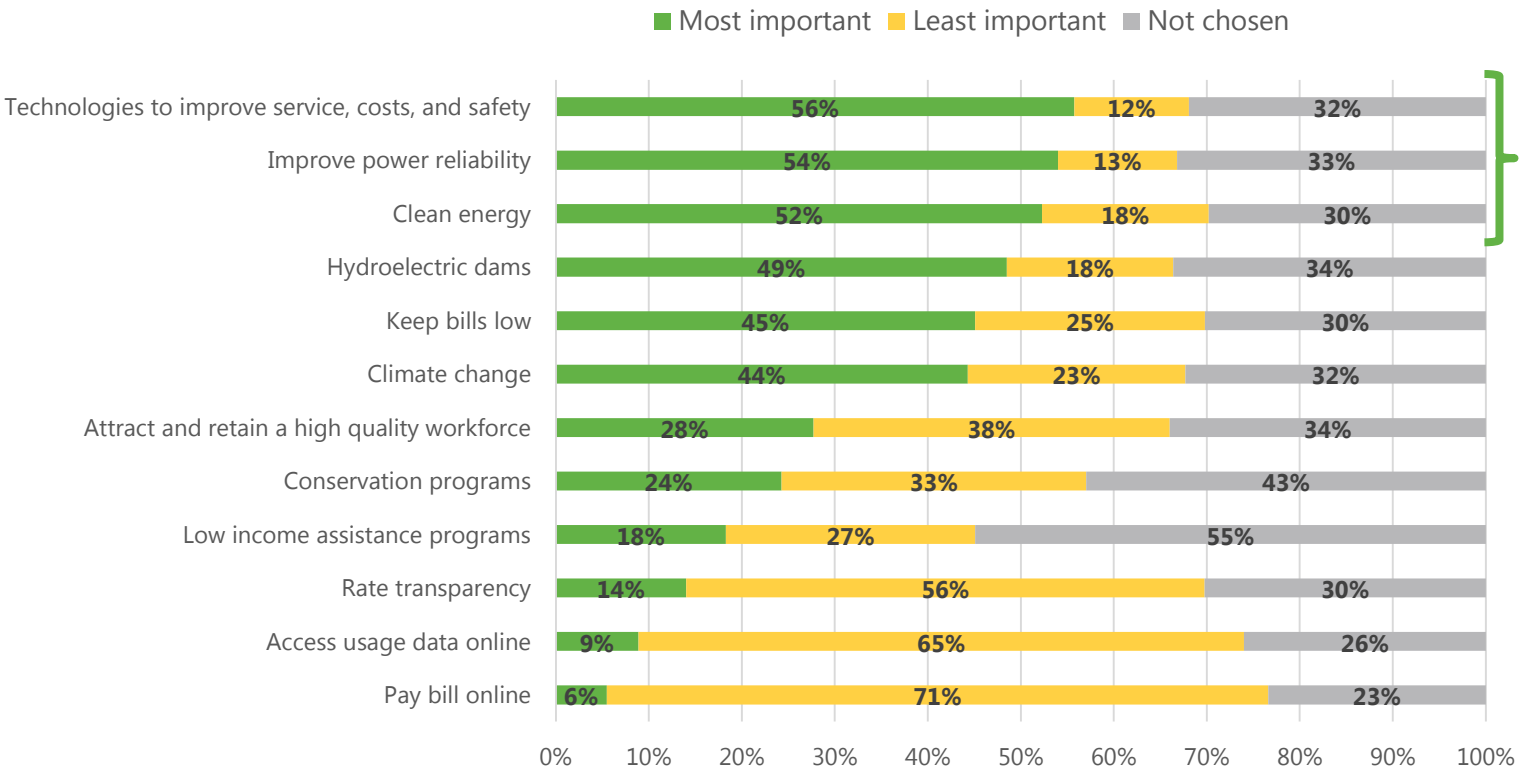
Q: List up to three things that you think Seattle City Light should focus on over the next six years as they update the Strategic Plan.
Base: Comments by all respondents.

IMPORTANT TO RESIDENTIAL CUSTOMERS



Q: Which one of the following is most important and which one is least important for Seattle City Light to focus on in the update of the Strategic Plan? [Respondents select "most" and "least" important priority out of 4 sets of 3 statements (they review 12 statements total)]
Base: All residential respondents (n=1,377)

IMPORTANT TO GENERAL COMMERCIAL



Most important priorities for general commercial respondents

Q: Which one of the following is most important and which one is least important for Seattle City Light to focus on in the update of the Strategic Plan? [Respondents select "most" and "least" important priority out of 4 sets of 3 statements (they review 12 statements total)]
Base: All general commercial respondents (n=230)

Seattle City Light

Seattle City Light
2019-2024 Strategic Plan Overview

Robert Cromwell, Power Contracts, Regional Affairs, and Strategic Planning Director

STRATEGIC PLANNING PROGRESSION

Seattle City Light 2013-2018 Strategic Plan

Your Power Future

First Strategic Plan (2012)

SEATTLE CITY LIGHT 2015-2020 STRATEGIC PLAN UPDATE

A PROGRESS REPORT ON YOUR POWER FUTURE

First 2-year Update (2014)

A Progress Report on the Future of Your Electric Service

Second 2-year Update (2016)

CURRENT SEATTLE CITY LIGHT AND REVIEW PANEL PLANNING PROCESS

CUSTOMER INPUT → STRATEGIC DIRECTION

Strategic Plan Highlights

Reliability

Preserve and upgrade power generation and delivery assets to ensure they perform reliably and efficiently for customers now and in the future

Infrastructure Safety and Security

Upgrade the operational technology infrastructure and energy grid to support grid operations and wholesale power marketing

CUSTOMER INPUT → STRATEGIC DIRECTION

Strategic Plan Highlights

Manage Costs

Enable customers to predict and manage their power costs through utility cost management and effective revenue collection

Environmental Stewardship

Delivery of robust and innovative programs to promote the efficient use of clean energy and protect our shared ecosystem

CUSTOMER INPUT → STRATEGIC DIRECTION

Strategic Plan Highlights

Customer Service

Meet evolving customer needs and expectations, while making improvements to service levels

Invest in Alternative Energy

Be a valued energy management partner, leading our communities to a clean energy future

KEY INITIATIVES IN DEVELOPMENT FOR THE 2019 – 2024 STRATEGIC PLAN

Improve customer service

- Implementation of a 24/7 Customer Relationship Hub
- Expand customer access to information and assistance
  - Shorter caller wait times
  - Increased first call response
  - Allow customers to choose their method of interaction
  - Provide multi-channel and 24/7 communication options
  - Provide specialized access and services to all customers

KEY INITIATIVES IN DEVELOPMENT

Environmental Stewardship

- Seek innovative ways to improve our ability to protect the ecosystems in which we operate
  - Implementation of Climate Adaptation Plan
  - Continued ecologically-sound vegetation management on City Light transmission line right-of-ways

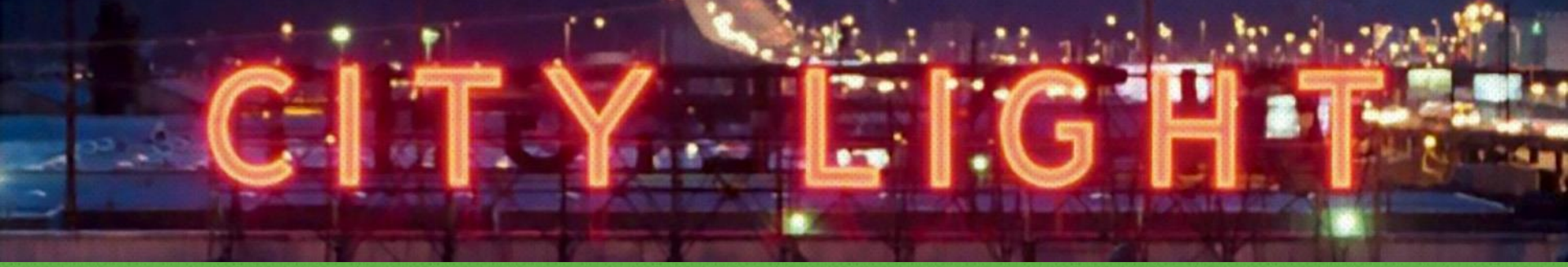
KEY INITIATIVES IN DEVELOPMENT

Clean, renewable-powered city

- City Light strives to be our customers most valued and trusted energy management partner
  - Create programs and service offerings that target whole building energy savings in commercial buildings
  - Pursue opportunities to work upstream in the product distribution chain
  - Support widespread adoption of electric transportation through increasing access to charging stations
  - Demonstrate how efficient buildings, connected technology, and distributed resources can work together
  - Bring a more specific equity focus to our portfolio of programs and services

HOW TO LEARN MORE:

- Visit www.seattle.gov/light/stratplan/
- Please send questions, comments, or requests for planning materials to: SCL_StrategicPlan@seattle.gov
- Phone contact:
  - Leigh Barreca, Program Manager, (206) 684-5072



OUR MISSION

Seattle City Light is dedicated to delivering customers affordable, reliable and environmentally responsible electricity services.

OUR VISION

We resolve to provide a positive, fulfilling and engaging experience for our employees. We will expect and reinforce leadership behaviors that contribute to that culture. Our workforce is the foundation upon which we achieve our public service goals and will reflect the diversity of the community we serve.

We strive to improve quality of life by understanding and answering the needs of our customers. We aim to provide more opportunities to those with fewer resources and will protect the well-being and safety of the public.

We aspire to be the nation's greenest utility by fulfilling our mission in an environmentally and socially responsible manner.

OUR VALUES

Safety, Environmental Stewardship, Innovation, Excellence, Customer Care

THE NATION'S GREENEST UTILITY
SINCE 1905
SEATTLE CITY LIGHT

Seattle City Light

Appendix E: Letter inviting participants to Community Partners Forum

700 5th Ave. | P.O. Box 34023 | Seattle WA 98124-4023
TEL (206) 684-3000 TTY/TDD (206) 684-3225 FAX (206) 625-3709
seattle.gov/light
twitter.com/SEACityLight facebook.com/SeattleCityLight

Seattle City Light

January 22, 2018

[ADDRESS (IN ALL CAPS)]

Dear [Name],

As an important part of the community, your organization is a contributor to the health, safety, and welfare of Seattle. Your perspective on the types of efforts that should be included in the Seattle City Light 2019-2024 Strategic Plan is key to making sure that the utility's strategic priorities and business stay aligned with the communities we serve.

I would appreciate the opportunity to share the development of strategic initiatives for the 2019-2024 Strategic Plan with you in more detail. Please join us for a meeting on Friday, February 16, 2018 at the Seattle Municipal Tower, 700 Fifth Avenue, Floor 32, Seattle, WA 98104 from 9:00am-10:30am.

Since City Light's Strategic Plan was first approved by the City Council in 2012, the utility has been improving its efforts to deliver affordable, reliable, and environmentally responsible electrical services to its customers. We have identified four focus areas for the 2019-2024 Strategic Plan:

- Customer Service
- Affordability and Rate Stability
- Clean Energy and Environmental Stewardship
- Continuing Progress on our Core Business

At the meeting, I look forward to meeting you and introducing myself as the new Interim General Manager and CEO. Your organization is a valuable partner and it is important to me to share City Light's vision for the next six years.

If you have any questions or would like additional information about our Strategic Planning Process, please contact Program Manager Leigh Barreca at (206) 684-5072 or SCL_StrategicPlan@seattle.gov.

Sincerely,

Jim Baggs
Interim General Manager & CEO
Seattle City Light

An equal employment opportunity, affirmative action employer. Accommodations for people with disabilities provided upon request.

Appendix F: Email re: Community Partners Forums

Good Morning,

This email is a follow up to a letter I recently sent to you. As an important part of the community, your organization is a contributor to the health, safety and welfare of Seattle. Your perspective on the types of efforts that should be included in the Seattle City Light 2019-2024 Strategic Plan is key to making sure that the utility's strategic priorities and business plan are aligned with the communities we serve.

I would appreciate the opportunity to share the development of our updated Strategic Plan for 2019-2024 in more detail. Please join me for a meeting on Friday, February 16, 2018 at the Seattle Municipal Tower, 700 Fifth Avenue, Conf room 3205 (Floor 32), Seattle, WA 98104 from 9:00am-10:30am.

Since City Light's Strategic Plan was first approved by the City Council in 2012, the utility has been striving to keep costs under control and increasing the efficiencies of our operations while improving our efforts to deliver affordable, reliable, and environmentally responsible electrical services to our customers. We have identified four focus areas for the 2019-2024 Strategic Plan:

- Customer Service
- Affordability and Rate Stability
- Clean Energy and Environmental Stewardship
- Continual Progress of our Core Business

At the meeting, I look forward to meeting you and introducing myself as the new Interim General Manager and CEO. Your organization is a valuable partner and it is important to me to share City Light's vision for the next six years.

If you have any questions or would like additional information about our Strategic Planning Process, please contact Program Manager Leigh Barreca at (206) 684-5072 or SCL_StrategicPlan@seattle.gov.

Thank you,
Jim Baggs

JIM BAGGS
INTERIM GENERAL MANAGER AND CEO
SEATTLE CITY LIGHT

Appendix G: Strategic Plan Preview

WE POWER Seattle

The 2019–2024 Strategic Plan Preview

WE POWER Resiliency

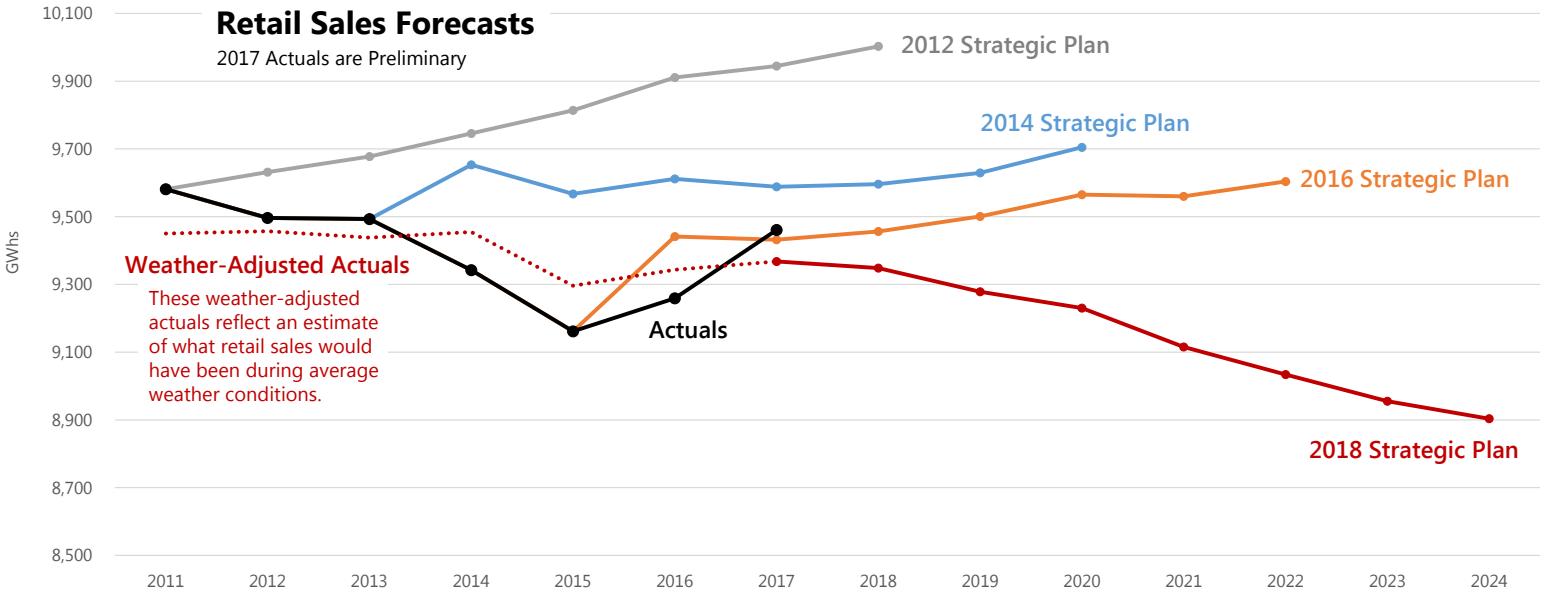
As a pioneering city of the information age, Seattle is no stranger to change. With the pace of technological advancements accelerating, City Light is at another pivotal moment in its history. The 2019-2024 Strategic Plan builds on the utility's legacy of bold, visionary action by candidly addressing these challenges and developing solutions befitting our adaptive, resilient organization.

Despite serving one of the fastest-growing cities in the nation, City Light's retail sales have been less than forecast because of the success of its energy-efficiency efforts and stringent local building codes. The new strategic plan forecasts that the downward trend will continue as seen below. Unfortunately, lower sales of electricity do not result in lower operating costs.

One thing hasn't changed for City Light: The utility still strives to ensure its customers receive the highest possible level of service. Through strategic initiatives in the 2019-2024 Strategic Plan, City Light is developing a comprehensive, multi-pronged response to the challenges faced by the utility.

From standing up enterprise-wide process improvement teams to building a customer relationship hub to exploring additional opportunities for clean energy, City Light is investing heavily in a more flexible and responsive organization. As customer demand for new products and services continues to increase, so will the utility's unwavering dedication to answering that demand. And, as always, City Light's efforts to combat climate change and advance social equity guide the utility's work.

Together, these initiatives will maintain City Light's status as a reliable, values-driven nonprofit energy partner and deepen its commitment to community and the environment—a utility of the future, working for you today.



WE POWER *Progress*

The 2019–2024 Strategic Plan includes initiatives in support of four priorities.

1 Customer Service

Improve Customer Service

Provide excellent customer service while addressing customer needs and expectations, City Light will implement a 24/7 customer relationship hub expanding customer access to information and assistance. This full-service hub will allow customers to choose their method of interaction, with access to a full range of services through multiple touchpoints.

2 Affordability and Rate Stability

Revenue Recovery

Improve bill transparency and combat revenue volatility exacerbated by declining retail sales of electricity, City Light will restructure rates to better reflect the cost of serving its customers.

Business Process Improvement

Deploy strategies to identify and capture opportunities for improved efficiency and reduction in costs on an ongoing basis, both in the delivery of customer services and for internal operations.

3 Clean Energy and Environmental Stewardship

Environmental Stewardship

Continue its industry leadership in improving the protection of the ecosystems in which it operates.

Clean, Renewable Power for the City

Continue to lead the community towards a clean energy future. The utility will work with its customers and community partners to increase the energy productivity of buildings, equipment and transportation, preserving and extending the benefits of our low-cost, carbon-neutral electricity system.

4 Continuing Progress on Our Core Business

Safety Culture

City Light will continue to improve its Safe Work Environment program, which has decreased employee injuries by 23 percent since its implementation.

Secure, Resilient Work Environment

City Light will implement best practices to enhance security, emergency preparedness/disaster recovery programs and improve the resiliency of facilities and services.

Attract, Train and Retain Employees

To ensure a knowledgeable and robust workforce for the future, City Light will continue to implement a comprehensive strategy to attract qualified candidates while retaining its current staff.

Relicensing Current Hydroelectric Projects

The utility's hydroelectric dams are central to its ability to deliver reliable and low-cost power. License renewal applications for the Skagit, Newhalem and South Fork Tolt hydroelectric projects will be filed in 2023, 2025 and 2027, respectively.

Enhanced Grid Performance and Cybersecurity

City Light will continue to upgrade the operational technology infrastructure and energy grid it operates to address cybersecurity risks and support power grid operations and wholesale power marketing.

Preserve Hydroelectric Generation Assets

City Light will enhance its programs with a strategic focus on multiple areas of generation investment and maintenance. These enhancements include implementing dam safety enhancements, improving outage management processes and long-term planning for the sustainability of its hydroelectric assets.

While the work of the initiatives is important, each will fail to achieve its optimal results if not first examined through an equity lens. With this in mind, each initiative was intentionally designed to align with City Light's commitment to environmental equity, race and social justice.

Seattle City Light

Web: seattle.gov/light/stratplan

Email: SCL_StrategicPlan@seattle.gov

Appendix H: Translated Outreach Advertisements

Have you ever wondered what your electric utility is working on?

Seattle City Light's Strategic Plan is a report on the future of your electric service.

To learn more, visit seattle.gov/light/stratplan and read about City Light's plan for the next six years.

Seattle City Light

您可曾想過您的電力公司正在做些什麼?

Seattle City Light 策略規劃是一份關於您的電力服務未來的報告。若要了解更多資訊, 請造訪 seattle.gov/light/stratplan 並閱讀 City Light 對未來六年的規劃。本文件可提供繁體中文版本。

Seattle City Light

Quý vị có bao giờ băn khoăn không biết đơn vị cung cấp điện của quý vị đang hoạt động như thế nào không?

Kế Hoạch Chiến Lược của Seattle City Light là bản báo cáo về tương lai dịch vụ điện của quý vị. Để tìm hiểu thêm, hãy truy cập seattle.gov/light/stratplan và đọc kế hoạch của City Light cho sáu năm tới. Tài liệu có sẵn bằng Tiếng Việt.

Seattle City Light

¿Alguna vez se preguntó en qué está trabajando su servicio público de energía?

El plan estratégico de Seattle City Light es un informe sobre el futuro del servicio eléctrico. Para obtener más información, visite seattle.gov/light/stratplan y lea sobre el plan de City Light para los próximos seis años. Este documento está disponible en Español.

Seattle City Light

Appendix I: Ethnic Publication Schedule

Ethnic Newspaper Publications

Strategic Plan Ads: April/May 2018

Publication	Online/Print	Language	Audience	Circulation	Color/B&W	Publication Date	Status
NW Asian Weekly	Print	English	Asian/Pacific Islander	9,500	B&W	Thursday, May 3	Ad submitted
Seattle Chinese Post	Print	Traditional Chinese	Chinese	3,300	B&W	Thursday, May 3	Ad submitted
International Examiner	Print	English	Asian/Pacific Islander	20,000	Color	Wednesday, May 2	Ad submitted
The Seattle Medium	Print	English	African-American	37,500	B&W	Wednesday, May 2	Ad submitted
La Raza del Noroeste	Print	Spanish	Hispanic	20,000	Color	Friday, May 4	Ad submitted
Northwest Vietnamese News	Print	Vietnamese	Vietnamese	5,000	Color	Friday, May 4	Ad submitted
Seattle Chinese News	Print	Traditional Chinese	Chinese	15,000	B&W	Wednesday, May 2	Ad submitted
Runtanews.com	Online/Social	Somali/English	Somali, African, Muslim	15,888 (Facebook followers)	Color	April 26 - May 26	Ads were submitted in English & Somali. The ads will be published on four sites, including Runta News' Facebook page.
Seattle Korean Weekly	Print	Korean	Korean	10,000	Color	Friday, May 4	Ad submitted