



# MEMORANDUM

EUGENE WATER & ELECTRIC BOARD



TO: Commissioners Brown, Carlson, Mital, Simpson and Helgeson  
FROM: Sue Fahey, Chief Financial Officer; Gene Austin, Appeals Officer  
DATE: July 27, 2018  
SUBJECT: Billing Appeals Process Update  
OBJECTIVE: Information Only

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## Issue

In August 2017, EWEB introduced a new approach to review and resolve customer billing appeals. The focus of this new approach was to simplify the internal review process without sacrificing the effectiveness of the outcome, and to maintain fair and equitable results. This memorandum is a one-year review of these changes.

## Background

In accordance with Customer Service Policy 2.3, an account holder in disagreement with a utility bill or other charge has the right to file an appeal. The majority of the appeals received have been for water leak credits. Last year the process was changed to allow customer service staff to authorize a bill credit as a result of a water leak once every five years instead of sending the request to the Appeals Committee. For billing issues that cannot be resolved by customer service staff, appeals are reviewed and resolved by a customer service lead, applicable subject matter experts, and the Appeals Officer. The goal is to provide a response within ten days although the procedure allows for thirty days in case resources are constrained.

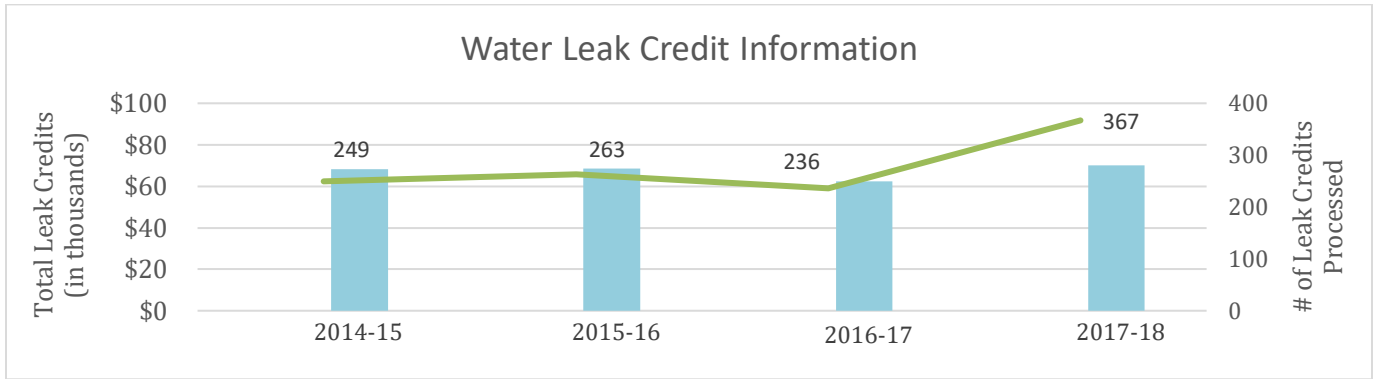
## Discussion

As shown below, these process changes have resulted in fewer appeals.

	<b>June 2016 - May 2017</b>	<b>August 2017 - July 2018</b>
<b>Total Number of Appeals</b>	57	25
<b>Appeals related to Water Leaks</b>	72%	44%
<b>Number of Bills Adjusted through Appeals</b>	32	10
<b>Amount of Appeals Bill Adjustments</b>	\$6,700	\$2,100

The chart below indicates that the total amount of bill credits issued over the last year remained relatively consistent compared to prior years. However, as a result of the requests being resolved at the customer service staff level, the total volume of leak credits increased noticeably. This increase in

requests being resolved outside of the appeals process contributes to a faster response and an overall improved customer experience.



Staff believes that the goals of these process changes were met satisfactorily. The process continues to be reviewed for improvements that simplify our customer-owners' experience while maintaining fair and equitable results.

**Recommendation/Requested Board Action**

Information only. There is no recommendation or requested Board action.



# MEMORANDUM

EUGENE WATER & ELECTRIC BOARD

*Rely on us.*

TO: Commissioners Brown, Carlson, Mital, Simpson and Helgeson  
FROM: Sue Fahey, Chief Financial Officer; Julie McGaughey, Customer Operations Manager  
DATE: July 27, 2018  
SUBJECT: Record of Decision: Customer Service Policy and Procedures

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The following operational decisions are hereby formalized and communicated. A Record of Decision is a tool to communicate, within EWEB and/or the Board of Commissioners, decisions that management may make that could have public interest.

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**RECORD OF DECISION**

**Title:** Customer Service Policy Changes

**Decision:**

- Appendix A – Utility Service Charges and Prices
  - There is no charge for Suspension or Restoration of Service; Move In/Out if a smart meter eliminates the need for a truck roll.
  - The penalty for tampering with a meter is a flat \$500 charge.
  - The Customer Requested Meter Test fee of \$180 is only charged if the meter is found to be functioning correctly.

**Effective Date:** Board approval June 5, 2018

**Title:** Customer Service and Credit & Collections Process Changes

**Decision:**

- Customers will not be disconnected for non-payment on Fridays to provide customers additional time to make payment arrangements during EWEB business hours.  
Effective: April 4, 2018
- The threshold for referral to third party collections has increased from \$30 to \$100 which will reduce the number of customers negatively impacted by adverse credit action.  
Effective: May 1, 2018
- The timeframe to disconnect water service for non-payment has been extended from two weeks after electric service disconnect to a minimum of 12 weeks after electric service disconnect. This change will allow customers extra time to make payment arrangements before turning off service.

Effective: July 18, 2018

- When required for account security, the deposit amount will be two times the average bill instead of the current deposit of two times each highest service amount. This better aligns EWEB's risk with the customer deposit requirement.  
Effective: TBD pending CIS calculation changes
- Contact center hours extended from 5:30 p.m. to 6:30 p.m. to provide additional time for customers to contact EWEB after standard business hours.  
Effective: July 23, 2018
- An accelerated billing and collections schedule has been postponed until after a decision is made regarding the timing of the CIS upgrade.

**Method of Implementation:** Record of Decision

**Decision Makers:** Chief Financial Officer, Customer Service Manager, Cash Accounting Supervisor



# MEMORANDUM

EUGENE WATER & ELECTRIC BOARD

*Rely on us.*

TO: Commissioners Brown, Carlson, Mital, Simpson and Helgeson and Frank Lawson, General Manager

FROM: Jeannine Parisi, Customer Relationship Manager; Rachael Chilton, Communications Specialist; Holly Shugart, Administrative Assistant and Anne Kah, Executive Assistant

DATE: June 28, 2018

SUBJECT: Record of Decision: Discretionary Education Sponsorships

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The following operational decision(s) are hereby formalized and communicated. A Record of Decision is a tool to communicate, within EWEB and/or the Board of Commissioners, decisions that management may make that could have public interest.

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## RECORD OF DECISION

**Title:** Discretionary Education Funding

**Background:** Budget authority for education grants and intergovernmental agreements is board directed and is budgeted in Department 144, Communications, Marketing & Research. The effects of this Record of Decision will not result in any changes to the board directed funding provided directly to school districts.

Distinct from board directed funding as described above, Department 144 holds a discretionary budget for STEM related activities. As of June 2018, the current year's commitments include Salmon Watch, Electrathon Blast/Kilowatt Classic, South Eugene Robotics team, FWEE Hydro Academy @ Rocky Reach Dam, BRING (1 yr. contract), and the Solar Challenge (supported through Greenpower contributions).

**Decision:** The above discretionary commitments will be honored in 2018. In future years, EWEB will continue to fund the Salmon Watch program through the Department 144 discretionary education budget and the Solar Challenge will be funded through Greenpower.

All new requests for recurring, multi-district sponsorships will be vetted with the General Manager, and added to this Record of Decision if approved. The budgetary source will be determined on a case by case basis.

One-time requests for educational sponsorships will be managed through the community investment application process. The General Manager's Office will evaluate the events by their STEM merits and the reach of their benefits to multiple school districts. In accordance with the strategic plan, we will focus our efforts on maximizing the broadest benefits of our services for all customers; activities that are specific to a particular school rather than providing a broad benefit will be evaluated on a case-by-case basis through the community investment review process. Approved requests will be funded by the discretionary community investment budget which is held in Department 110, General Manager.

**Decision/Effective Date:** June 12, 2018

**Expected Impact:** Future funding levels for discretionary education spending may vary, and for the most part, will be financed through the General Manager's budget.

**Method of Implementation:** Record of Decision

**Decision Maker(s):** General Manager