



# MEMORANDUM

EUGENE WATER & ELECTRIC BOARD



TO: Commissioners Brown, Carlson, Barofsky, McRae and Schlossberg

FROM: Julie McGaughey, Chief Customer Officer; Greg Kelleher, Customer Operations Manager; Marianne McElroy, Billing Operations Manager

DATE: August 2, 2022

SUBJECT: Locations for In-Person Customer Service and Payment Services

OBJECTIVE: Information and feedback

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## Issue

EWEB Customer Operations is exploring location(s) to provide certain in-person services for customers once the Headquarters (HQ) building at 500 East 4<sup>th</sup> Avenue is vacated later this year. These services are non-cash, by appointment, and provide a short-term solution to continue serving customers while a long-term strategy is developed. This memo discusses the site selection process.

In addition, EWEB has entered into an agreement with Walmart to conduct in-person transactions for customers who pay by cash. This memo provides a status update on these services.

## Background

In March 2020, EWEB temporarily closed the lobby at the Headquarters building due to Covid-19 safety precautions. Customer Service and Billing Operations streamlined ways for customers to conduct business online, over the phone, through the mail, using the secure drop box, and by appointment outside in front of the Headquarters building when required. Because customers were able to complete their business through these channels, EWEB made the decision to permanently close the lobby to customers in February 2021.

Although all known customer needs are being met with alternative methods, a few customers have continued to express a desire to visit a Customer Service Analyst (CSA) in person for several reasons. Those reasons include lack of access to technology or internet service, complex billing situations, receiving instruction on how to use the customer portal, preference for an in-person interaction when communication differences exist, and others.

In addition to customer preferences, there are several scenarios that still require a customer's physical signature, photo ID, or to exchange paperwork when the issue is time sensitive or a customer lacks access to email, or when a customer needs to pay their bill in cash. EWEB staff currently meet customers by appointment outside of Headquarters. Today we strictly limit appointments to required transactions and serve approximately 20 customers each week.

Staff will need an alternate location to conduct business that can bridge the gap between the impending sale of the Headquarters building and a longer-term plan for customer and community engagement. Based on customer feedback, the criteria for an appointment would be expanded and approximately 75 customers could be seen each week by appointment for purposes described above, with the exception of cash payments,

which will be discussed separately. A limited number of walk-ins could be served, and the location could also house a drop box for payments as well as a possible future ATM-style payment kiosk. This volume of by-appointment meetings and facilitation of a drop box would utilize existing staffing of three Customer Service Analysts (CSAs) plus a Lead/Supervisor, who would be taking phone calls between in-person customers. Roosevelt Operations Center (ROC) is not set up for customer access.

## **Discussion**

### **Payment Options**

For customers who choose to pay their bill in cash, this service will initially be made available via Wal-Mart Bill Pay. This means that customers will be able to pay their EWEB bill, in cash or with a debit card, at over 4,000 Wal-Mart stores across the U.S. Once at the store, the Walmart associate will select EWEB as the biller and the Customer simply needs to provide the account number they are paying. Walmart will charge the Customer a \$2.00 convenience fee to make the payment, and the payment will be received in real-time by utilizing existing functionality offered by EWEB's current third-party payment processor. EWEB is also exploring additional cash payment options to provide more choices for customers who choose to pay in cash. This is in addition to payment options available via EWEB's Customer Portal.

### **Drop Box Services**

It is EWEB's intention to offer a drop box option at future in-person sites. We discourage customers from leaving cash payments in the drop box. Drop box is a popular service for property management companies who prefer to drop off checks. Customer Service and Billing Operations will continue to evaluate drop box utilization for all future customer facing locations

### **Site Selection for In-Person Customer Service**

There are several criteria to be considered when selecting a new interim location to serve customers. All of these criteria are focused on meeting the business need. Proposed selection criteria are as follows:

#### *Location*

Site should be in an area that is near our customers, well known, on or near a main thoroughfare, and easy to find. A survey of lobby patrons, conducted after the lobby was closed, found that 36% live in the 97402 zip code (West Eugene), 20% in 97401 (Central Eugene and Ferry Street Bridge), 18% in 97404 (River Road / Santa Clara), and 14% in 97405 (South Eugene). The remainder of lobby patrons live in 97408 (North Gilham), 97477 and 97478 (East Springfield and Upriver), and 97403 (University Area).

#### *Convenience*

Site should be easy to access from the roadway; be accessible by car, bus, bicycle, or on foot; have adequate parking near the entrance, including bicycle parking; and be near a bus stop. If the site is co-located in a mall or building with other businesses, it should be close to and easily accessible from a main first floor entrance. There should be spaces to locate a drop box and ATM-style kiosk that are available to customers 24/7.

#### *Safety and Security*

Site, including customer and employee parking, must be visible, well lit, and safe to approach. Site should be located in a populated area, fully ADA compliant, and be readily accessible to emergency vehicles.

#### *Cost*

Lease cost per square foot should be near or below average retail costs for the area. Value of utilities, janitorial service, and on-site security, if provided, will be considered in comparing costs.

### Adequate Space

There should be enough space for four to five workstations, a reception area or counter, a break area including sink and kitchenette, and employee restrooms en suite. A conference room for EWEB meetings with contractors or third parties is a plus. Minimum size is approximately 800 square feet.

### Readiness

Available properties vary widely in readiness from building shells with bare studs to nearly turn-key. The site should be vacant and available soon, with minimal startup and construction work required.

### Flexibility

Customer needs, programs, and available technologies evolve over time. Many retail leases are five years. EWEB would value flexibility for a shorter lease term and ability to modify the space as business needs change.

### Additional Features

There are many additional features that could add value, such as EV charging, customer restrooms en suite or in a common area, and restaurants and shops nearby - a location that customers might visit anyway and places for employees to eat lunch.

### Selection Process

EWEB Customer Service leadership, in partnership with Property, Facilities and IS, will investigate several locations currently available for lease and score the criteria for each location on a scale from zero to five. Any location that fails any criteria (scoring less than two), or scores lower than three for three or more criteria, will be eliminated. EWEB will then rank the sites and enter into lease negotiations with one or more of the top scorers.

Here is an example selection matrix:

Locations	Criteria								Scoring	
Site	Location	Convenience	Safety & Security	Cost	Adequate Space	Readiness	Flexibility	Additional Features	Average	Rank
Site A	5	5	4	4	5	5	5	2	4.4	2
Site B	4	5	5	4	5	5	5	4	4.6	1
Site C	2	5	4	3	2	2	2	2	2.8	Fail
Site D	5	5	5	3	1	2	2	2	3.1	Fail
Site E	4	1	4	3	4	2	4	2	3.0	Fail

In this example, two sites (D and E) would be eliminated because they scored lower than two in any of the criteria. Site C would be eliminated because it scored less than three in three or more criteria. In this example, EWEB staff would consider entering into negotiations with Site B or possibly Site A, as their scores are very similar.

Preliminary estimates of location setup and ongoing operational costs are \$230,000 total over 3 years, not including payment kiosk.

### Recommendation

EWEB staff would like the Board to provide feedback on the selection process. Once a tentative lease agreement is reached, the agreement will be submitted to the Board for approval.