

**SPU ‘Voice of the Customer’ Inventories
Updated: November 2019**

BACKGROUND:

To inform its 2021-2026 Strategic Business Plan (SBP), SPU has inventoried and reviewed pertinent market research and outreach conducted by the utility and others relevant to its customer base and utility services. This review is summarized in separate Voice of the Customer (VOC) inventories for residential customers, businesses and employees. The inventories only include high level informational surveys and outreach related to customer satisfaction or “are we doing the right things” input and do not capture research or outreach that is program or project specific.

This review reflects a commitment by SPU to start its work with what is known about customers and employees and demonstrate responsiveness and follow through before asking again. This allows SPU to be informed by and responsive to customer and employee values, while demonstrating respect for time and money.

The Voice of the Customer inventories will be available centrally for all staff to utilize and will be updated as key research is conducted to update information or fill informational gaps. See Appendix 1-3 for residential, business and employee Voice of the Customer inventories.

Appendix 1
Voice of the Customer Inventory - Residential
High-Level Summary of SPU relevant information

Residential Customer Research	Findings Relevant to SPU
2020 Utility Discount Program (UDP) Focus Groups (n=)	<ul style="list-style-type: none"> TBD
2020 DWW Vision Plan Outreach (n=)	<ul style="list-style-type: none"> TBD
2019 City-Wide Residential Satisfaction Survey (n=) Full data will be available in 2020	<ul style="list-style-type: none"> 82.8% are satisfied with quality of water provided by the City 86.9% satisfied by reliability of water provided by the City 81.7% satisfied with solid waste services such as garbage pickup 79.9% satisfied with drainage and wastewater services SPU ratings were higher than other City services except for Fire.
2019 SPU Community Org Discussions SW Plan (n= Ecross, Chinese Info Center, Horn of Africa)	<ul style="list-style-type: none"> SW education is important but does not address root cause of waste. Create more consistent communications program by fostering relationships with leaders and orgs Incentivize/pay community for time to participate in feedback sessions Language and cultural relevancy are crucial to education and outreach Outreach successful through trusted community-based organizations. SPU should utilize billing processes to connect with customers in their language and receive feedback.
2019 Yale Climate Opinion Maps King County, WA (n=>24,000)	<ul style="list-style-type: none"> 79% believe climate change is happening, 71% think it is affecting the weather 63% believe global warming is caused mostly by human activities 68% worried, 79% will harm plants and animals, 45% will harm me, 66% already harming people in US 76% environmental protection more important than economic growth 75% corporations should do more to address; 70% citizens should do more to 87% fund research into renewables; 76% regulate CO2 as pollutant 51% discuss global warming at least occasionally
2017 SPU Strategic Business Plan Update customer outreach findings summary (Online Survey n=453, 7 mtgs, neighborhood outreach sessions, hard-to-reach communities in different languages (Spanish, Tagalog, Somali, Amharic,	<ul style="list-style-type: none"> Prioritized public health and environment, want continued investment in high quality services and reliable infrastructure. Highlighted concerns about affordability and a desire see SPU be more efficient and cut costs. Most were ok with change in rate path. Affordability issues raised in open-ended questions (but n=100)

Mandarin, Cantonese, Vietnamese)	
2017 SCL SBP Online Survey (n=1377 res)	<ul style="list-style-type: none"> • Cost concerns and infrastructure improvements are among top concerns. • Finding technologies to improve service, costs and safety was most important. • Leading on environmental issues was important. • Opinion tended to be correlated with bill amounts. Those who paid more had lower opinion and those who paid less had higher opinion.
2017 SCL SBP Stakeholder Engagement (n=23)	<ul style="list-style-type: none"> • Low income customers would like greater equity in service delivery through process improvements • Improve communications with low income customers • Benchmark against nation’s leading utilities • Balance debt with plans for sustainability and consumption decline
2016 RSJI Community Survey (n=400 phone, 1,695 web survey)	<ul style="list-style-type: none"> • Nearly 96% said ending racial inequity is a responsibility of government and should be prioritized. • Strong belief that to achieve equity resources must be allocated based on need. • Economic prosperity is not felt by all and Seattle’s black community experiences a disproportionate lack of opportunity. • Environmental inequities persist by race and gender • Communities of color and other vulnerable groups struggle to remain in our high cost city. • City efforts to be inclusive are making some inroads but more work needs to be done. • Progress towards racial equity is not being felt by all. Urgency and action is necessary to make a difference in people’s lives.
2016 SPU Customer Focus Groups (3 residential)	<ul style="list-style-type: none"> • Value SPU, increasing distrust of government and cynicism, desire third-party verification of info. • Confidence in water quality decreased. • Strong concern about climate change and environment. • Sees affordability as an increasing problem. • Concern about increasing litter and illegal dumping. • Many unclear about how to recycle and compost.
2015 SPU Residential Customer Survey, Mailed (n=1163)	<ul style="list-style-type: none"> • Strong satisfaction with SPU services; stormwater and transfer stations somewhat lower, but still very positive. • No changes in neighborhood problem perceptions. • No significant difference on communications testing. • Lowest marks are on 'loyalty.'
2015 Pacific Northwest Values & Priorities Study (Forterra, PSRC, Amazon and	<ul style="list-style-type: none"> • PNW residents enjoy a high quality of life and positive outlook—well above national averages. Growth is seen as inevitable and most think we need to do a better job planning for it.

<p>King County-sponsored study) 4-county study area (n=638) Online survey</p>	<ul style="list-style-type: none"> • Environment/scenic beauty viewed as a highly important regional priority and as a strength. This is unique compared to the rest of the nation. • While not emphasized in the research, water systems were identified as an issue that is important to the future of the region and an area where the region is doing well. • Recommended connecting to people via core values of: peace of mind, happiness, low stress and well-being. • There's an opportunity to reach people by focusing on how we can work together to sustain this special place.
<p>2014 City of Seattle Utility Discount Program Survey (n= 171)</p>	<ul style="list-style-type: none"> • Most are familiar with the UDP program but only a third consider themselves very familiar • Most are satisfied with the program • Over half of those not re-enrolling did so because they were no longer eligible and one-in-four were eligible but did not reapply for other reasons. • Most commonly cited reason for not reapplying was lack of awareness. Applications missing info, forgotten and not finished in time was also common. • Most people were motivated to reapply because of financial help. • Top complaints center on reapplication process, poor communication and income qualification.
<p>2014 City of Seattle Utility Discount Program Focus Groups (3 groups, 25 participants total, Cambodian, Ethiopian, Spanish speakers)</p>	<ul style="list-style-type: none"> • Majority of participants who were aware of the UDP had tried to apply, most unsuccessfully. • Challenges due to language barriers are major and complex • Phone translation received poor rating. • Most participants uncomfortable applying through central office. • Many participants rely on local community based agencies and all recommended that outreach happen through networks they rely on and provide ways for applications to be completed in community settings.
<p>2014 RSJI Community Survey (n=400 phone plus 3100 web)</p>	<ul style="list-style-type: none"> • Overwhelming support for government to prioritize addressing racial equity gaps in jobs, health, housing and other areas. • Housing affordability is highest on a list of concerns • People of color, including youth of color rate economic opportunities lower than white counterparts. • City outreach efforts are highly valued and are not felt equally across communities. • Concern about growth and economic development is the most important issue facing community members. • Consensus that racial problems continue and we have more work to do.
<p>2012 SPU Residential Focus Groups (3 underserved in-language (Spanish, Chinese-Cantonese and Vietnamese)</p>	<ul style="list-style-type: none"> • Generally satisfied with SPU's services. • Language barriers correlated with dissatisfaction and distrust. • Fear of contacting SPU due to miscommunication. • Most don't drink tap water (prefer bottled or filtered water).

Appendix 2

Voice of the Customer Inventory - Business High-Level Summary of SPU relevant information

Business Customer Research	Findings Relevant to SPU
2019 SPU Business Influencer Interviews (n=25)	<ul style="list-style-type: none"> • Nov 2019
2019 SPU Community Org Discussions SW Plan (n= Ecos, Chinese Info Center, Horn of Africa)	<ul style="list-style-type: none"> • SW education is important but does not address root cause of waste. • Create more consistent communications program by fostering relationships with leaders and orgs • Incentivize/pay community for time to participate in feedback sessions • Language and cultural relevancy are crucial to education and outreach • Outreach successful through trusted community-based organizations. • SPU should utilize billing processes to connect with customers in their language and receive feedback.
2019 Envirostars Barriers and Motivators Research (n=26 interviews, n= 51 surveys)	<ul style="list-style-type: none"> • Many area businesses do what they can to be ecologically friendly and are proud of their efforts. • Businesses are challenged with limits of time and budget. • Looking for value proposition from EnviroStars – what benefits will it bring for the extra time spent and money spent (namely save money, bring more customers, educate me and my staff, create a community of businesses, quick and easy, support to apply?) • There must be tangible benefits to participate. Applications must be straightforward. • Currently business owners do not see value for time invested in EnviroStar process.
2017 SCL SBP Online Survey (n=58 key accts; n=230 general)	<ul style="list-style-type: none"> • Service reliability most important (esp for those relying on service for business.) • Invest in infrastructure and operations/maintenance to improve service reliability • Help customers conserve and save money. • Keeping costs down and rate predictability are important. • Planning for the future (climate) and environmental stewardship are important. • Customer service is important.
2017 SCL SBP Stakeholder Engagement (n=301)	<ul style="list-style-type: none"> • Service reliability is necessary for businesses relying on service. • Need transparency (what causes), predictability and gradualism in rates and accuracy in billing. • Set rates considering conservation and efficiency effort. • Concern about climate change, resiliency and preparedness. • Ensure equity in pricing for small business. • Provide education, conservation programs for small business. • Look at equitable allocation of costs for development. • Increase communication to low income providers.

<p>2016 ECOSS/OED Green Business Innovation Survey (n=60)</p>	<ul style="list-style-type: none"> • Industries know green actions can result in cost savings, risk reduction, better compliance and a competitive edge in marketing and customer service. • Key barriers are lack of time, information and finances. • Opportunities are as diverse and numerous as products and activities. Every step makes an important difference. • Extra help from trusted sources – helps • Direct on-on-one support makes a big difference in business interest and follow-through. ECOSS has a strong track record as a catalyst and partner. • Don't re-invent the wheel – just connect businesses to the green business tools, resources and contacts that make sense through OED and ECOSS. • Continued and expanded partnerships and methods can ensure even greater outreach success. • Green business assistance motivates industrial businesses to be a key part of Seattle's reputation as a clean and green city. Businesses appreciate being recognized for their interests and contributions.
<p>2016 SPU Focus Groups – Business and Developers (n=12 business, n= 5 developers)</p>	<p><u>Businesses</u></p> <ul style="list-style-type: none"> • Appreciate SPU's consistent, high-quality services but believe they pay a lot to get a lot (especially compared to the cost of utilities in other regions). • Placed great emphasis on finding efficiencies. • Reported contacting customer service more often than residential customers. Some felt very well taken care of while some other small-to-midsize businesses were frustrated. • Small businesses had no interest in increased communication with SPU. However, they were very interested once they learned about cost-saving programs SPU offers. <p><u>Developers</u></p> <ul style="list-style-type: none"> • Feel treated as second-class citizens and blamed for sprawl around growth. They want to feel more like partners and less like adversaries. • Having problems keeping up with rapid building code changes and confusing processes. • Positive experiences with the new DSO office and believe it's making SPU easier to work with. <p><u>General</u></p> <ul style="list-style-type: none"> • Climate change is one of the top concerns for all audiences and they have no knowledge of SPU's efforts in this area. • Strengthen partnerships with developers and businesses. Both groups are significant community contributors but they often don't feel like partners. • Position SPU as a problem solver instead of an enforcer. Policies around solid waste sorting, graffiti removal and water conservation are seen as punitive. Customers complain about being up-charged on garbage and being held to a different standard than the Utility on eliminating graffiti.
<p>2013 SPU Voice of Customer Developers Survey (n=41)</p>	<ul style="list-style-type: none"> • Requirements aren't clear. Repeat customers have likely figured things out. New customers will likely be discouraged.

	<ul style="list-style-type: none"> • Majority of customers don't know how requirements or decisions are made, who makes them and why. • Service comparison with other jurisdictions somewhat mixed however there is still a high level of dis-satisfaction with SPU service.
2011 SPU Commercial, Industrial Phone Survey (n=600)	<ul style="list-style-type: none"> • Most customers satisfied with SPU services. Reliability of water services rated highest followed by sewer and water quality. Satisfaction stable/consistent with previous research. Positive ratings of SPU customer service. • 1/3 of commercial customers unaware of their responsibilities re: stormwater pollution control. • Low awareness of Resource Venture conservation services through SPU. • Low reporting of neighborhood problems with drainage, litter or graffiti.

Appendix 3
Voice of the Customer Inventory - Employees
High-Level Summary of SPU relevant information

Employee Research	Findings Relevant to SPU
2019 City-Wide Employee survey	<ul style="list-style-type: none"> • Survey results anticipated by mid-2020
2019-2020 SPU Listening sessions	<ul style="list-style-type: none"> • TBD
2018 City Office of Civil Rights RSJI City wide Employee Survey	<ul style="list-style-type: none"> • Over 80% of employees understand why RSJI approaches equity and social justice through the lens of race and can identify examples of institutional racism. • Over half of employees feel there is support for resolving workplace issues involving institutional racism. • Over 2/3rds of employees feel their department encourages participation in RSJI trainings and activities. • SPU responses consistent with City wide responses
2018 City-wide values, anti-harassment survey (n= 4231)	<ul style="list-style-type: none"> • City wide summary documents reveal underreporting of discrimination and harassment due to mistrust of HR and management. • Fear of retaliation, lack of transparency, lack of awareness of reportable offenses, as well as racial and gender bias and ageism highlighted. • Women of color experience compounded forms of harassment. • Calls for an investment in funding, time and resources to effectively address change in institutional policies, practices and culture.
2017 SPU SBP Employee Survey and Open-Ended Verbatims Online (n=923)	<ul style="list-style-type: none"> • Prioritized operational excellence, concern about the environment and impacts of climate, concern about ongoing affordability, and concern about aging infrastructure. • Place a stronger value on workforce transformation than do customers.

	<ul style="list-style-type: none">• Place somewhat less priority on environment when compared to customers, but it's still a high priority.• Affordability is raised in open-ended responses (explanations and comments), but n=100. 'Cost' is the key term used.• There are also several open-ended responses related to conflicting priorities or trouble setting priorities.
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