



# The 2014 OPALCO Member Survey

# EXECUTIVE SUMMARY

The survey results show that the large majority of our membership (91%) are satisfied with their electric co-op, and 81% trust OPALCO to run efficiently.

The most frequently cited areas for improvement included how the co-op communicates, increasing member participation in energy savings programs and addressing Internet services in San Juan County. Member participation in the survey reflected the islands population: San Juan Island – 40%; Orcas Island – 36%; Lopez Island – 19%; and other islands 5%.

### **Key findings for targeted areas of Communication, Energy Savings and Internet Services:**

**Communication** – Most (80%) rated OPALCO’s communication efforts highly. The most commonly used communication method was bill inserts (53%), followed by newspapers (51%) and OPALCO’s website (37%). The top three topics of interest to members are: Internet services (72%), Energy Efficiency and Conservation (54%), Power Supply and Rates (53%).

**Energy Savings** – The most interesting finding in Energy Savings is the potential for greater participation in energy efficiency and conservation. A large majority of respondents (84%) perceive that there are not a lot of potential energy savings to be achieved in their homes. However, our 2013 Conservation Potential Assessment shows that there is much to gain through weatherization measures in San Juan County and 39% reported a winter bill size of more than \$150.

**Internet Services** – Member satisfaction with current Internet services varies by island with Orcas leading with the greatest dissatisfaction and Lopez being the most satisfied. Overall, 35% are dissatisfied with their current Internet service and 32% are satisfied. Most (68%) would like OPALCO to make its infrastructure available for Internet services through a variety of Internet Service Providers; of that group, a majority (57%) would prefer that OPALCO be their ISP.

OPALCO management is very grateful to our membership for their participation in this survey. It is often the case that the majority voice remains silent—until asked. It is our goal to improve service to the entire membership. OPALCO’s leadership will be using these findings to inform policy and decision making going forward and we will regularly report on concrete progress made in addressing this member feedback.

**WHY?**

## THE 2014 OPALCO MEMBER SURVEY

The 2014 member satisfaction survey was developed to help OPALCO build a culture of listening to better serve its membership. This survey provides a foundation to inform board policy and decision making and will be supplemented by smaller, focused surveys on important issues. We will regularly report on concrete progress made in addressing this member feedback.

## SURVEY DETAILS

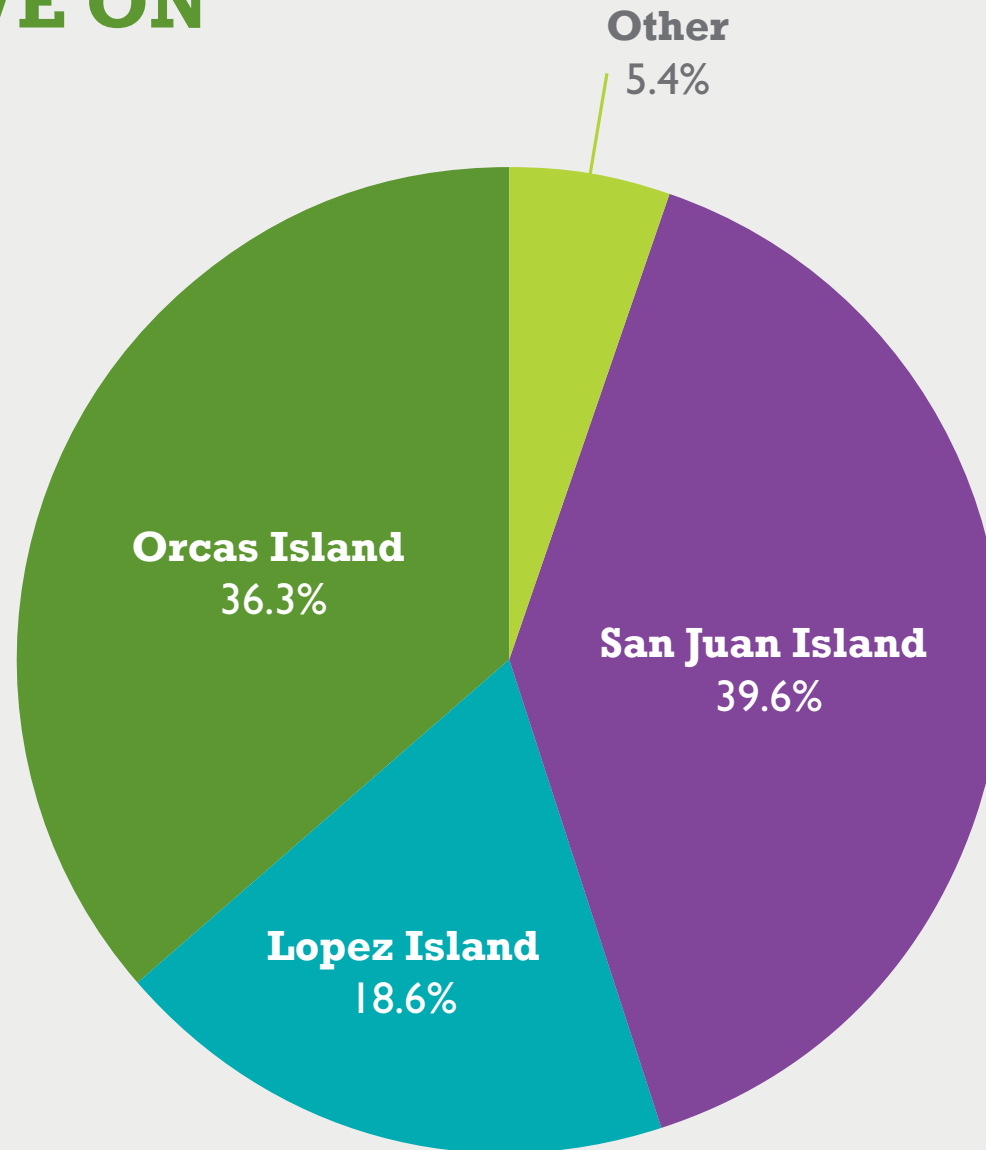
A 35-question online survey was released to the OPALCO membership on May 3, 2014 and closed on June 20, 2014. Members were offered a \$5 bill credit in exchange for their participation. Some members took the survey by phone or in person.

The final sample size was 2,172 respondents, nearly 20% of the OPALCO member base.

Statistical analysis was conducted using advanced modeling techniques, and all open-ended responses were read through individually (several thousand).

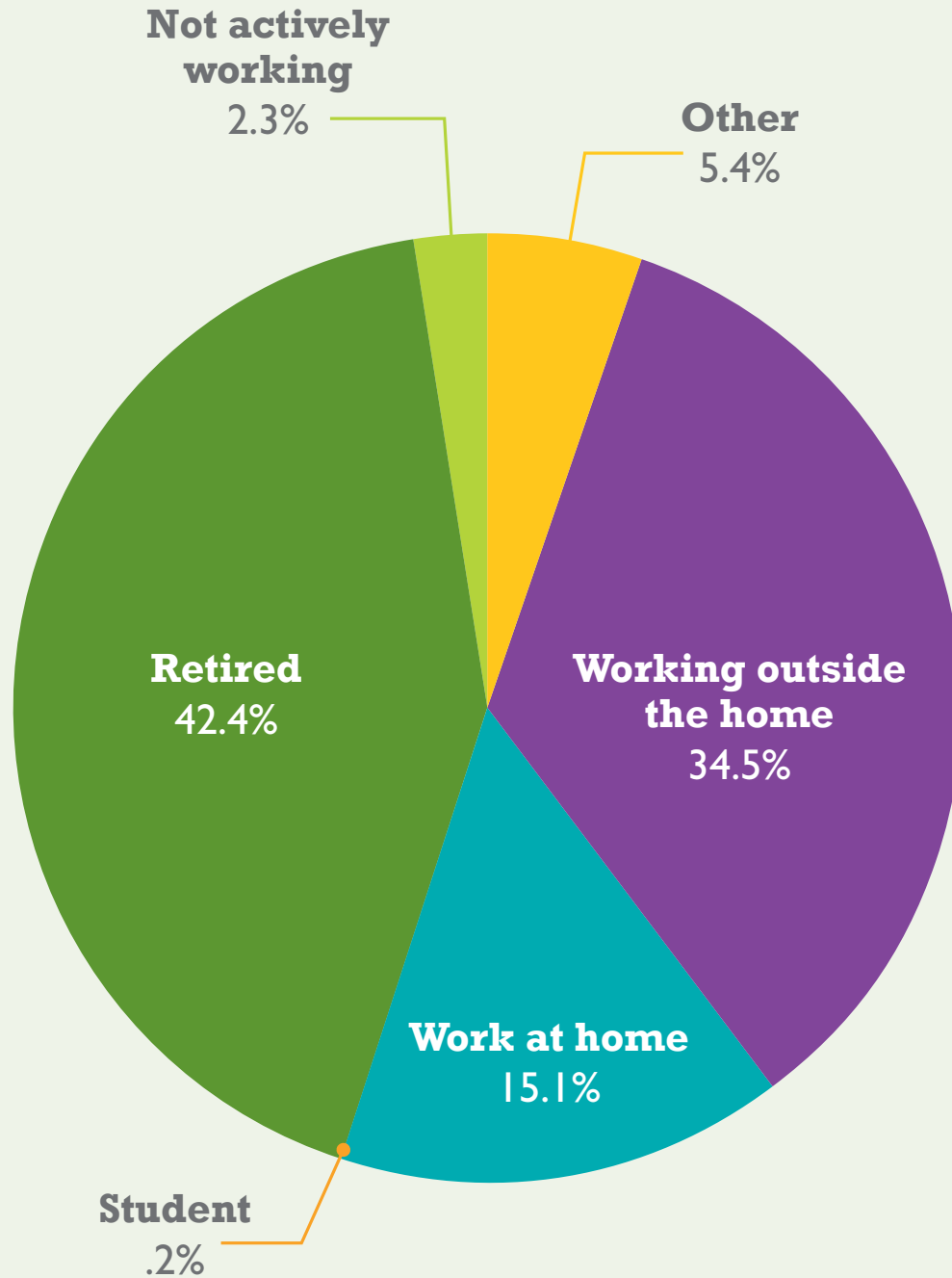
# DEMOGRAPHICS

## ISLAND YOU LIVE ON

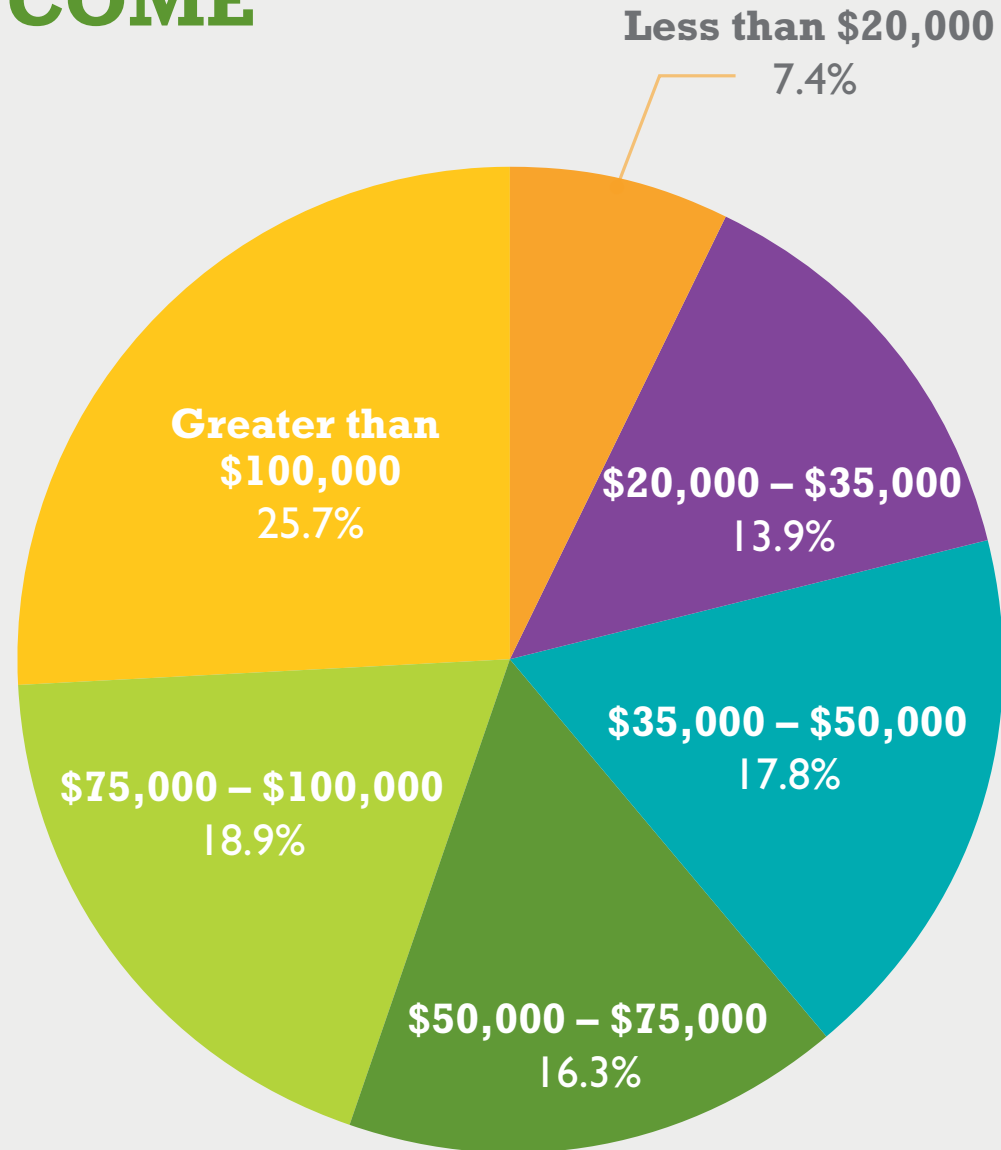




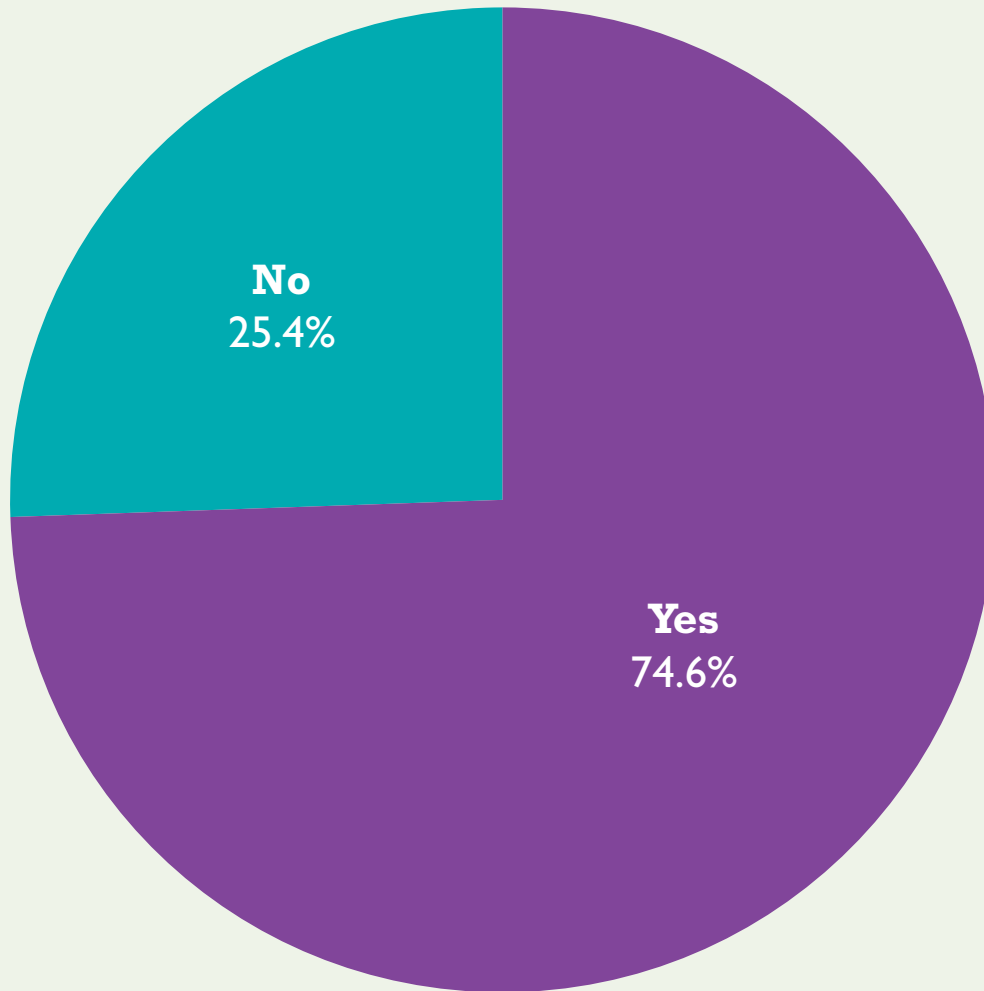
# WORK STATUS



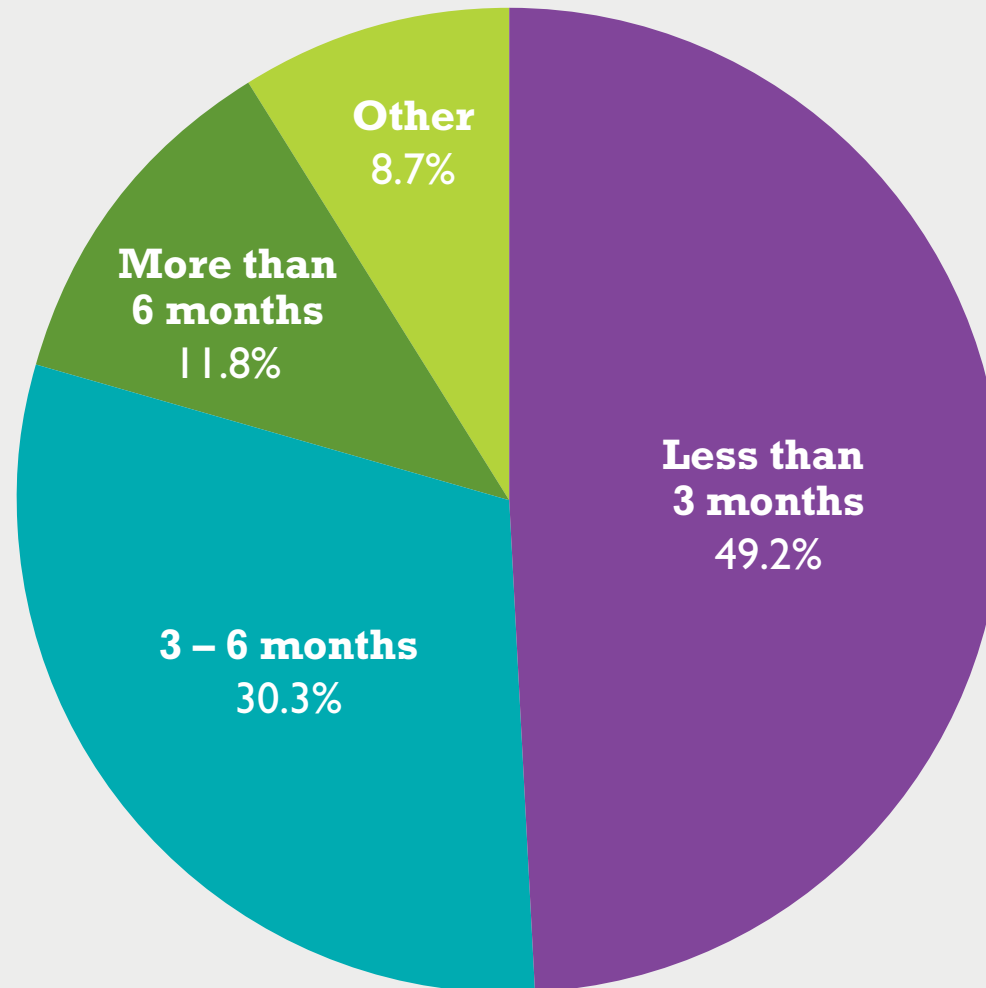
# HOUSEHOLD INCOME



# FULL TIME RESIDENT



## PART-TIME RESIDENTS – AMOUNT OF YEAR ON ISLAND



## WHAT THE SURVEY MEASURED

The member satisfaction survey measured satisfaction and trust in general, and also in three targeted areas:

- Communication
- Energy Savings
- Internet Services

## NARRATIVE COMMENTS

Of the 2,172 respondents, 657 (30%) included a narrative comment. The topics of these comments were as follows:

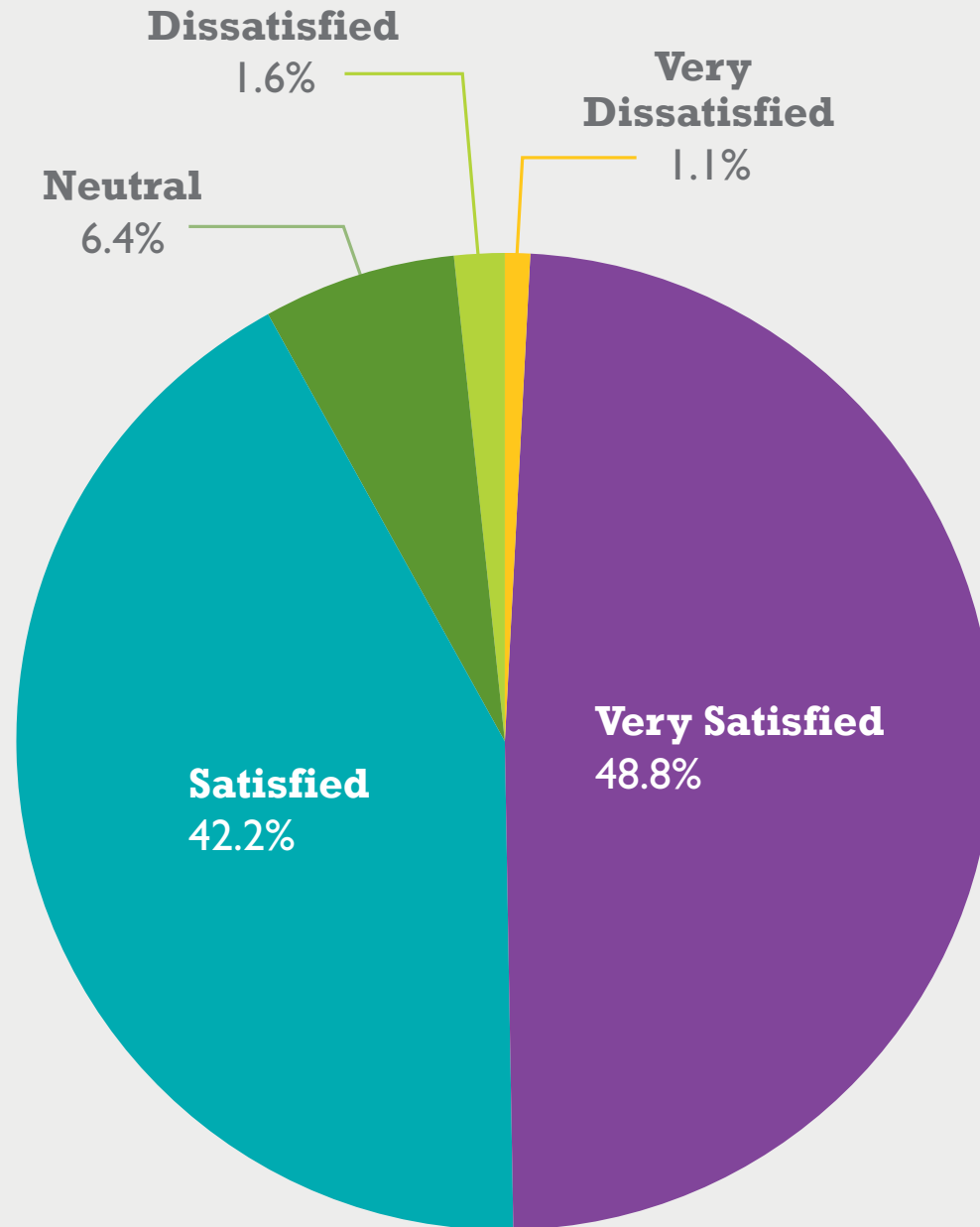
- 48% – Internet Services
- 23% – General Comments
- 11% – Energy Savings
- 9% – Power
- 5% – Transparency
- 4% – Communication

A sampling of comments are included in each section of these findings. A complete list of narrative comments is available upon request.

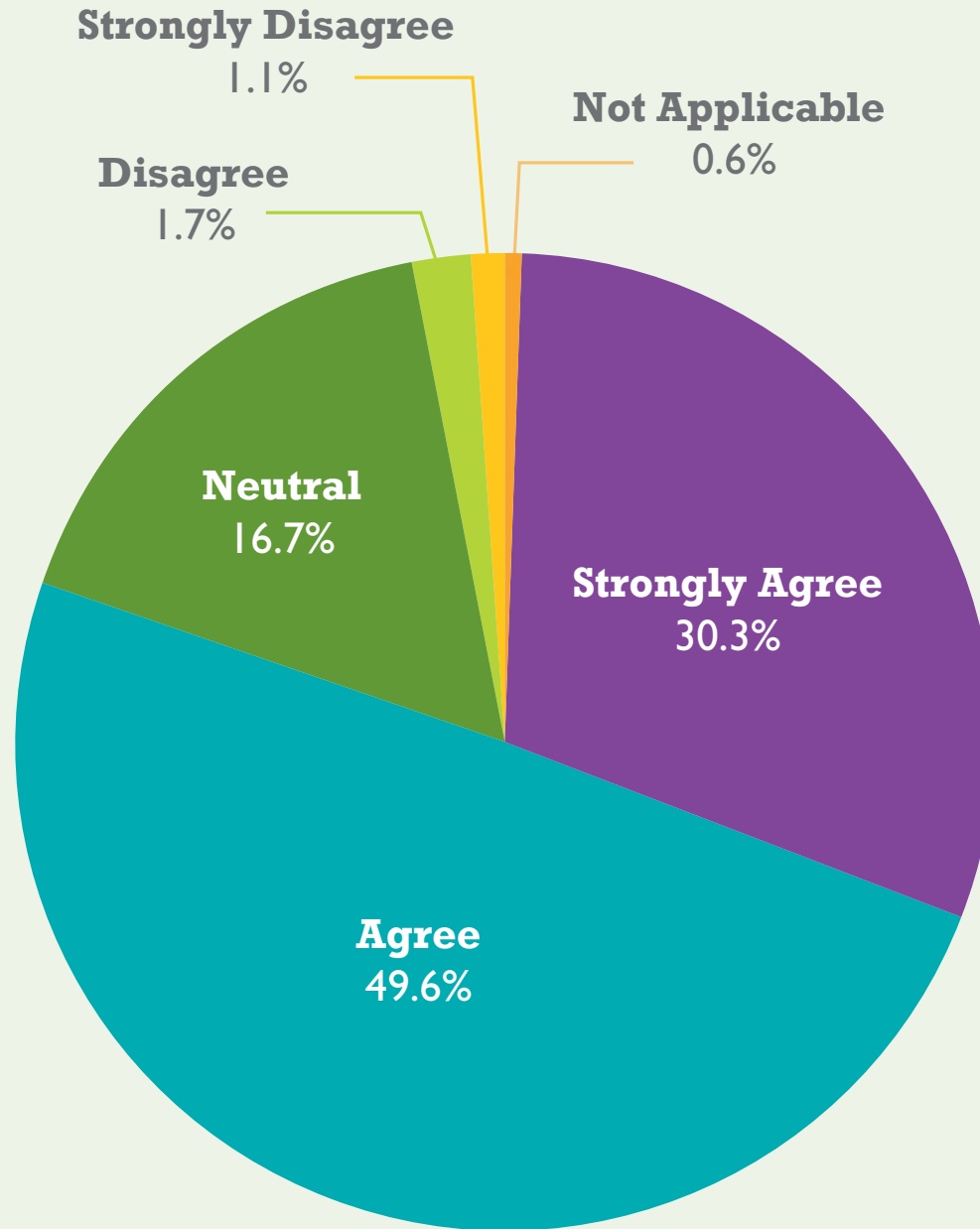
# GENERAL SATISFACTION AND TRUST

# OVERALL SATISFACTION

91% are satisfied





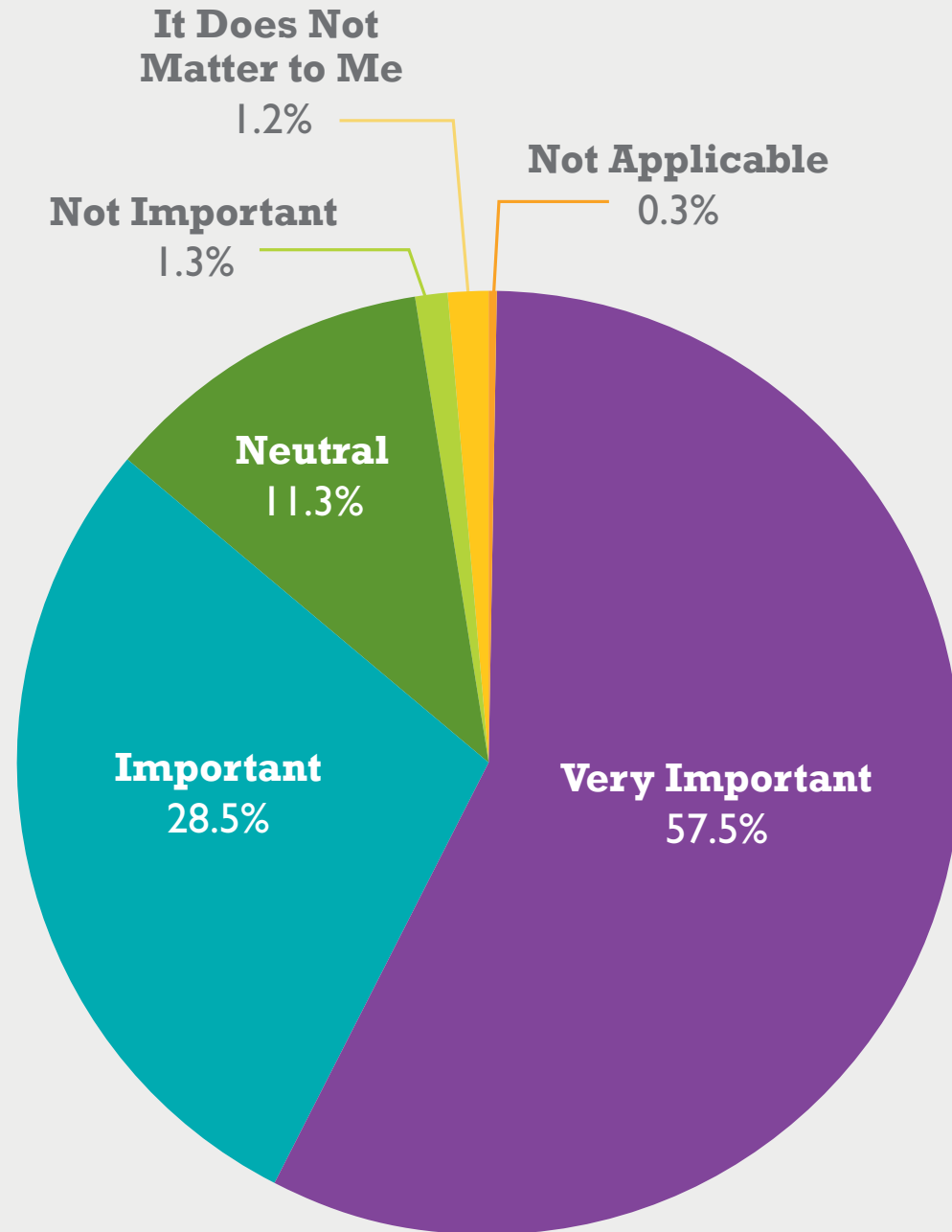


# HIGH INTEGRITY

80% rate OPALCO high on integrity

# IMPORTANCE OF CO-OP CLASSIFICATION

86% rate Co-op Classification as important



## PERFORMANCE RATINGS

	<b>SATISFIED</b>	<b>NEUTRAL</b>	<b>DISSATISFIED</b>
Overall member service	93.70%	4.70%	1.10%
Reliability of electric service	91.10%	7.20%	1.30%
Courtesy and helplessness of employees	90.30%	5.00%	0.50%
Restoration of power after an outage	88.00%	8.30%	1.30%
Highly trained, professional employees	84.70%	9.00%	0.50%
Communicating, keeping members informed	83.90%	10.40%	4.40%
Speed and efficiency of responding to members	81.00%	9.90%	1.70%
Resolving issues/problems	77.40%	9.50%	1.90%
Environmental concern	76.20%	17.40%	1.80%

## NARRATIVE COMMENTS

### GENERAL SATISFACTION (151 COMMENTS/23%)

#### Positive (48%):

- Appreciate the pro-active stance of clearing around power lines the past few years; seems to have helped lessen power outages during wind storms.
- I greatly appreciate OPALCO's commitment to the islands & the community.
- We appreciate the dedication of the outdoor staff that work in all climate conditions, especially when there's an outage.

#### Neutral (37%):

- I'm most interested in things I can do for the health of the environment. Keep me posted please!
- I would like OPALCO to take American Express for bill pay.
- It would be nice if PAL donations were tax deductible.

#### Negative (27%):

- Cut the thrills and keep the costs down.
- Speed up recovery from outages.
- Set term limits for members of the Board.

## NARRATIVE COMMENTS

### POWER (61 COMMENTS/9%)

Comments about power were evenly divided between issues of 1) rates and 2) system and reliability:

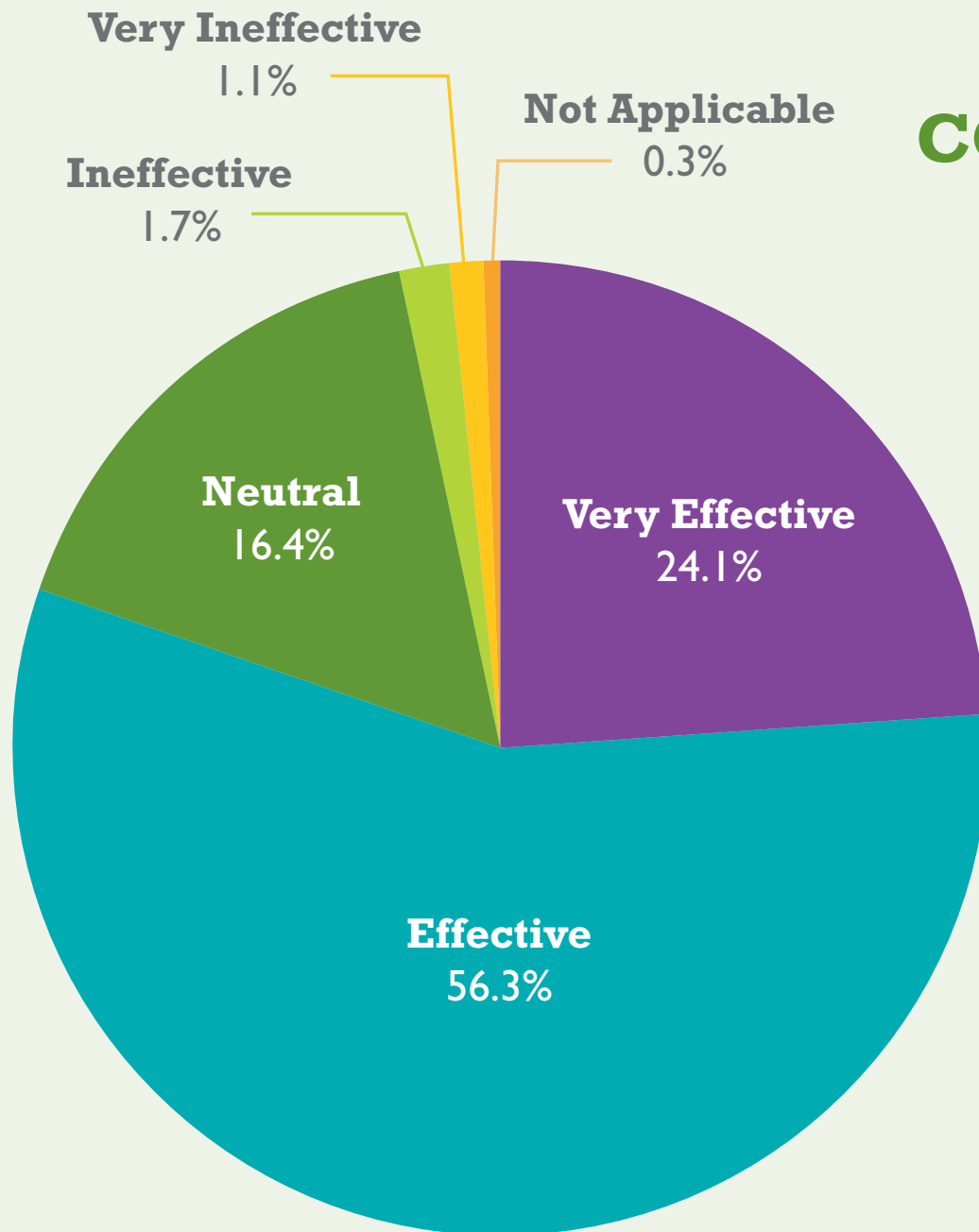
#### Rates:

- Appreciate anything you can do to keep our costs down.
- I think there should be a more economical way to keep electric hooked up when not in use for vacation homes.
- I would like a smart meter so I can use more electricity on non peak hours to save money if lower rates were offered.

#### System and Reliability:

- I would like to see more power lines be moved to underground.
- End planned power outages earlier, i.e., no later than 5 AM.
- We are full time residents and appreciate the short time to resolve outage issue.

# COMMUNICATION



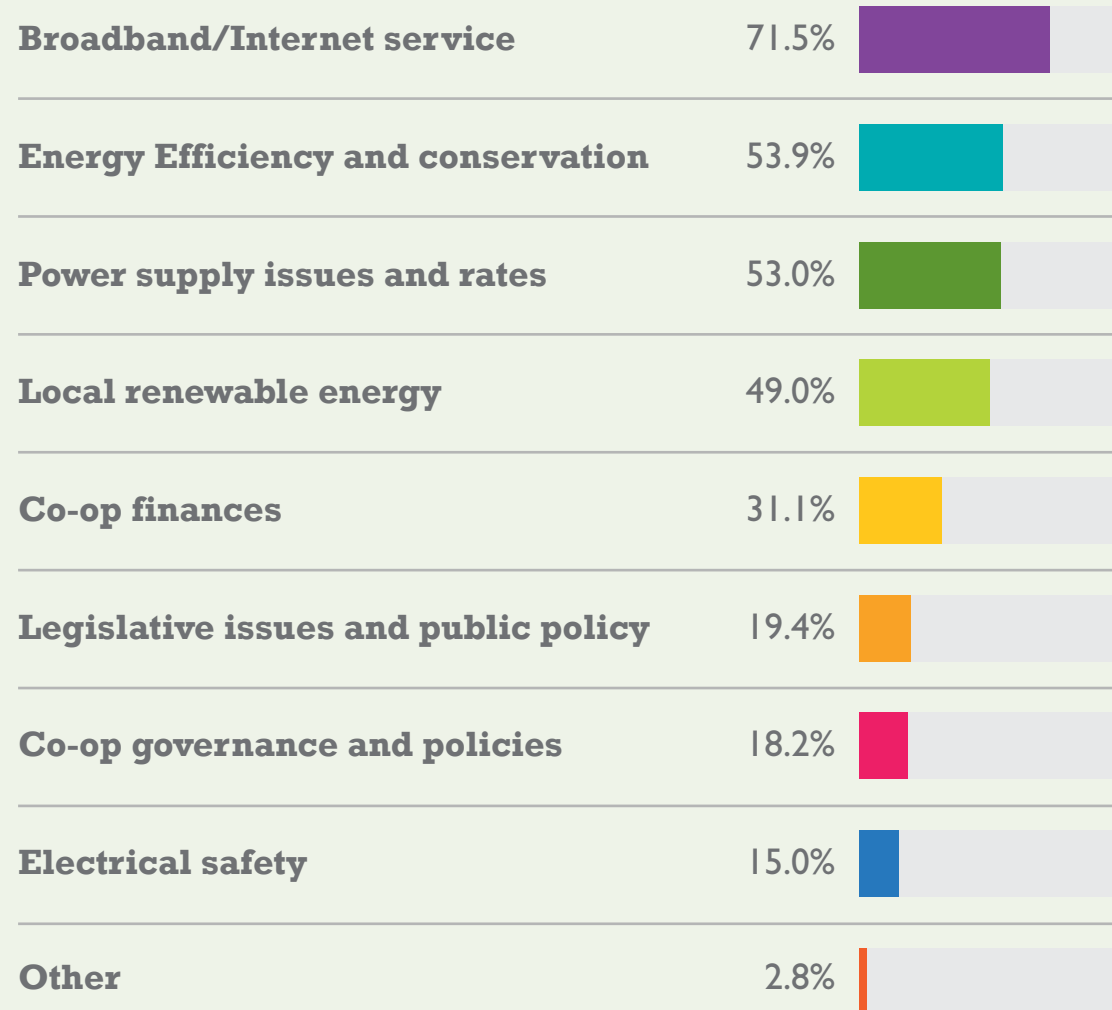
# COMMUNICATION EFFECTIVENESS

84% find OPALCO is effective in keeping them informed

## HOW DO YOU STAY CONNECTED?







## TOPICS OF GREATEST INTEREST

## NARRATIVE COMMENTS COMMUNICATION (27 COMMENTS/4%)

### Positive (11%):

- Keep doing the good work to keep us informed! Keep power on for us!
- Thanks for informing us of planned power outages for maintenance!
- Keep the e-mail communication.

### Neutral (41%):

- Tell us your work. There must be a lot to it.
- Provide owners an online opportunity for comments, meeting invitations, and exchange of information and opinion.
- I live on Decatur and would appreciate a possible OPALCO meeting here at our school for our community.

### Negative (48%):

- Improve communication in the event of outages.
- Better telephone service after-hours.
- Explanations on the web site and on SmartHub are too “scholarly”. Too many acronyms.

## NARRATIVE COMMENTS TRANSPARENCY (35 COMMENTS/5%)

Comments about transparency were divided between issues of board governance (71%) and broadband (29%):

### Board Governance:

- Let's get some more TRANSPARENCY with the BOARD's activities.
- Keep a balance between board and administration.
- Be open to the members at the board meetings. Only have executive sessions to discuss employee performance, contracts, and the purchase of land.

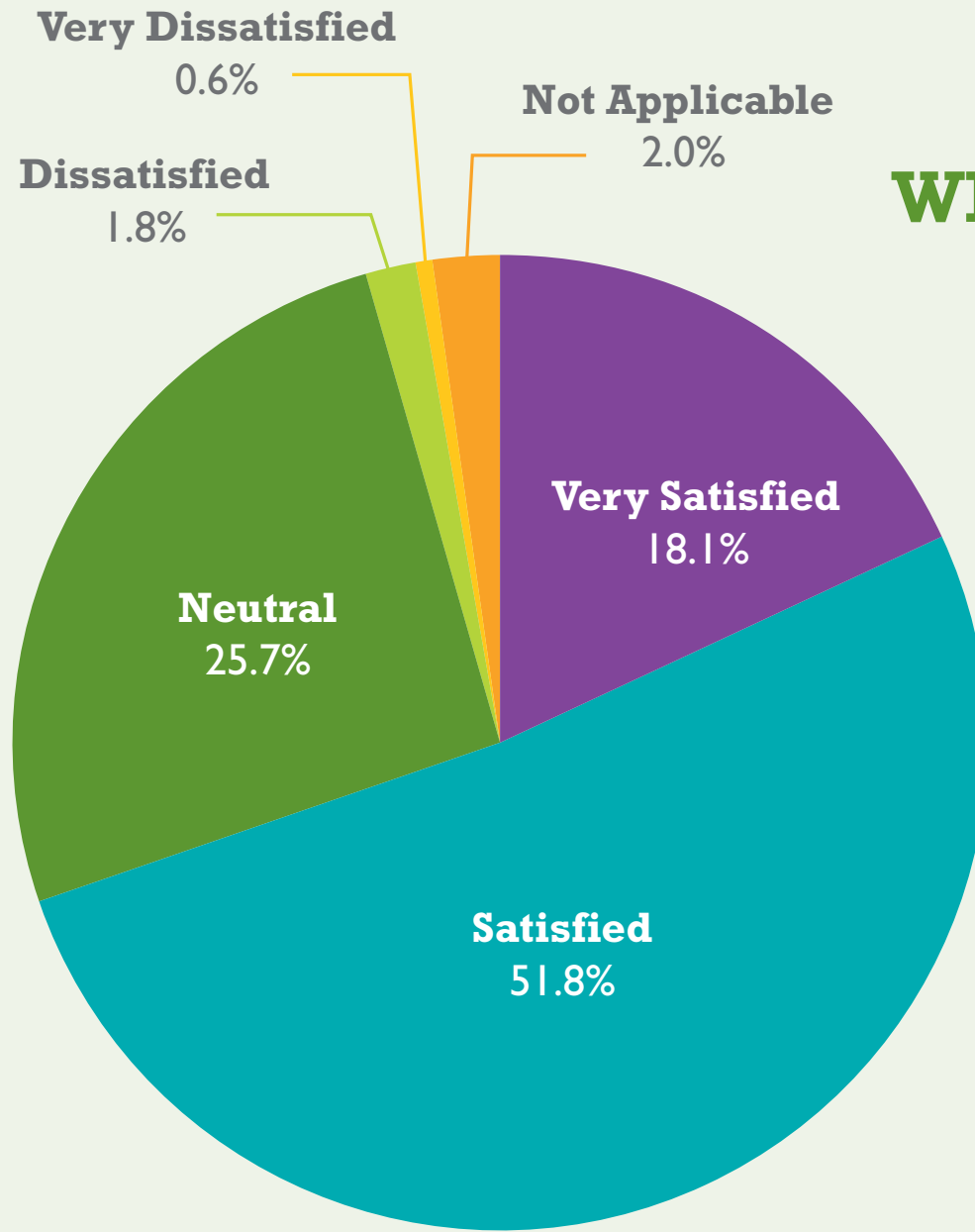
### Broadband:

- I am very concerned with the lack of transparency with the broadband initiative.
- I think OPALCO has been very secretive about its plan to install internet service
- I would like to see business case analyses of service/investment alternatives. I would like to see a long range strategic business plan.

# ENERGY SAVINGS

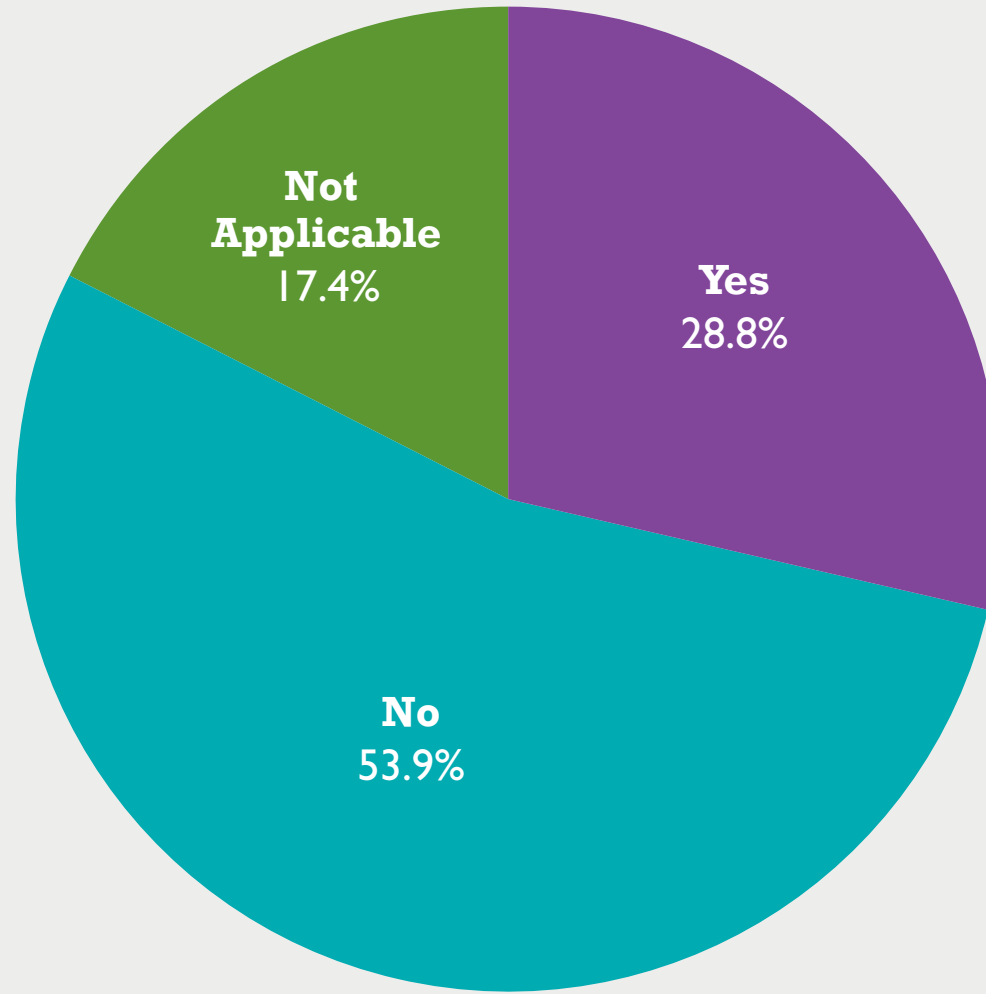
# SATISFACTION WITH EFFICIENCY PROGRAMS

70% are satisfied with Efficiency Programs



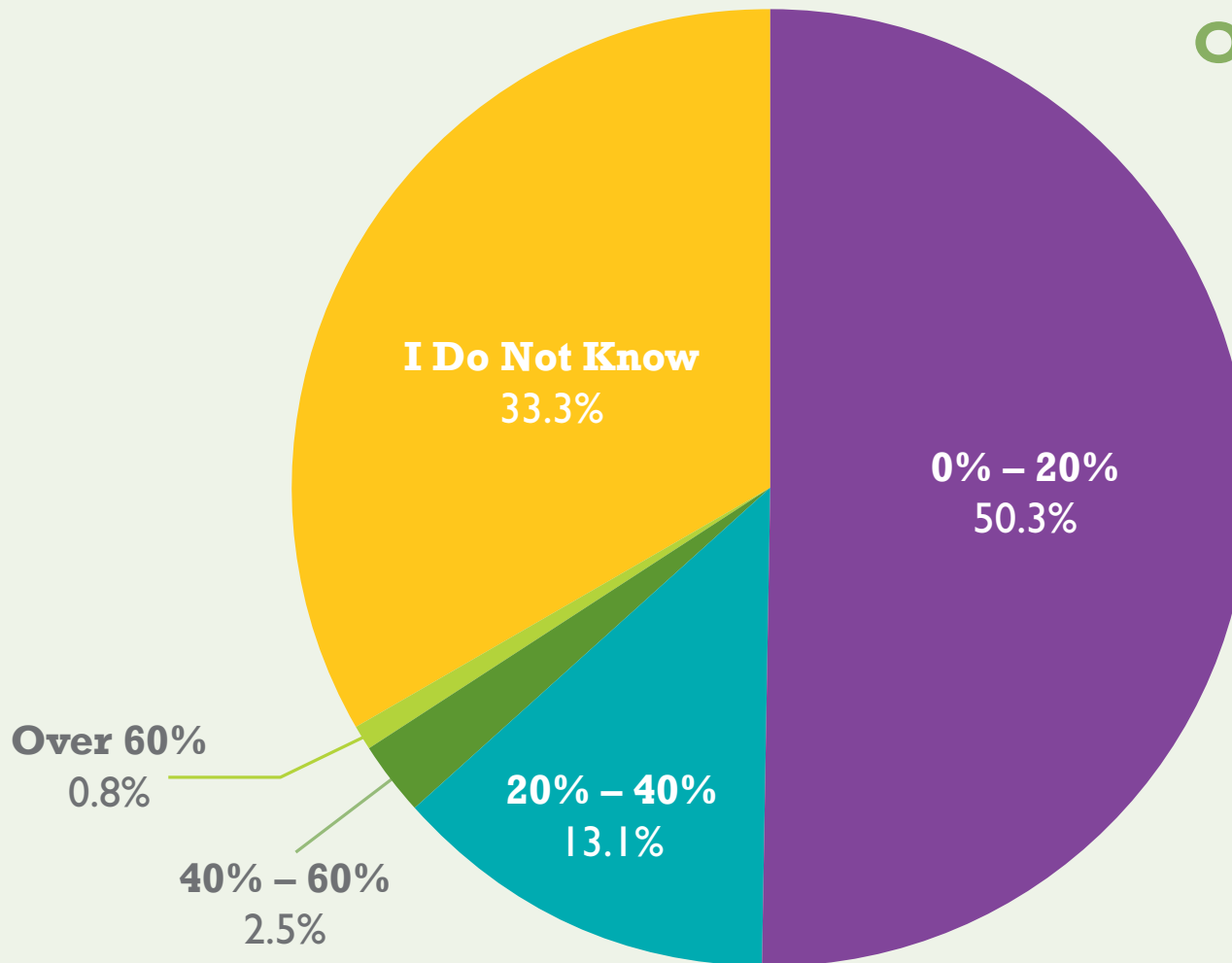
## ENERGY REBATES USAGE

54% have not used  
OPALCO rebates



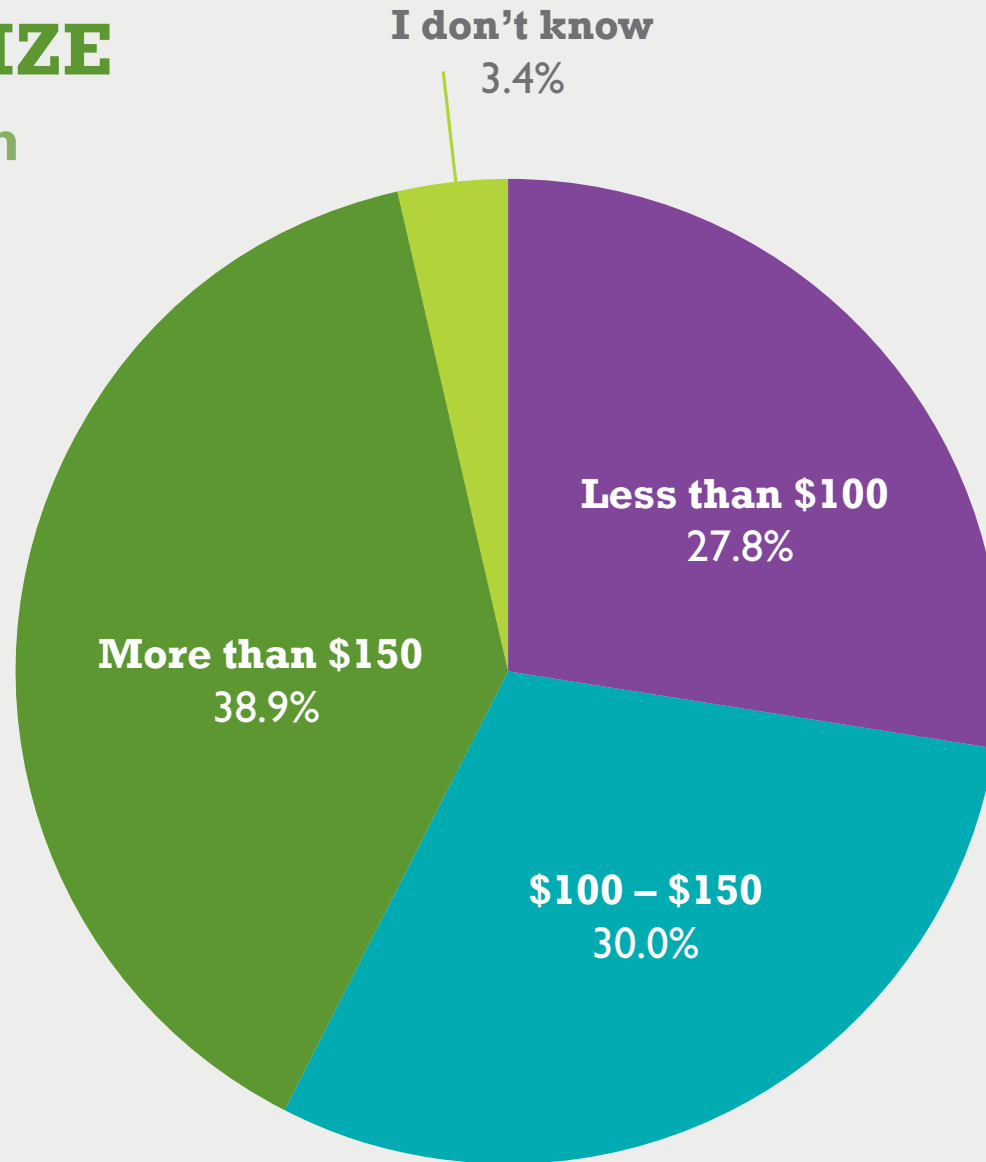
## PERCEIVED ENERGY EFFICIENCY SAVINGS

Only 16% perceive good potential for energy savings in their homes



## WINTER BILL SIZE

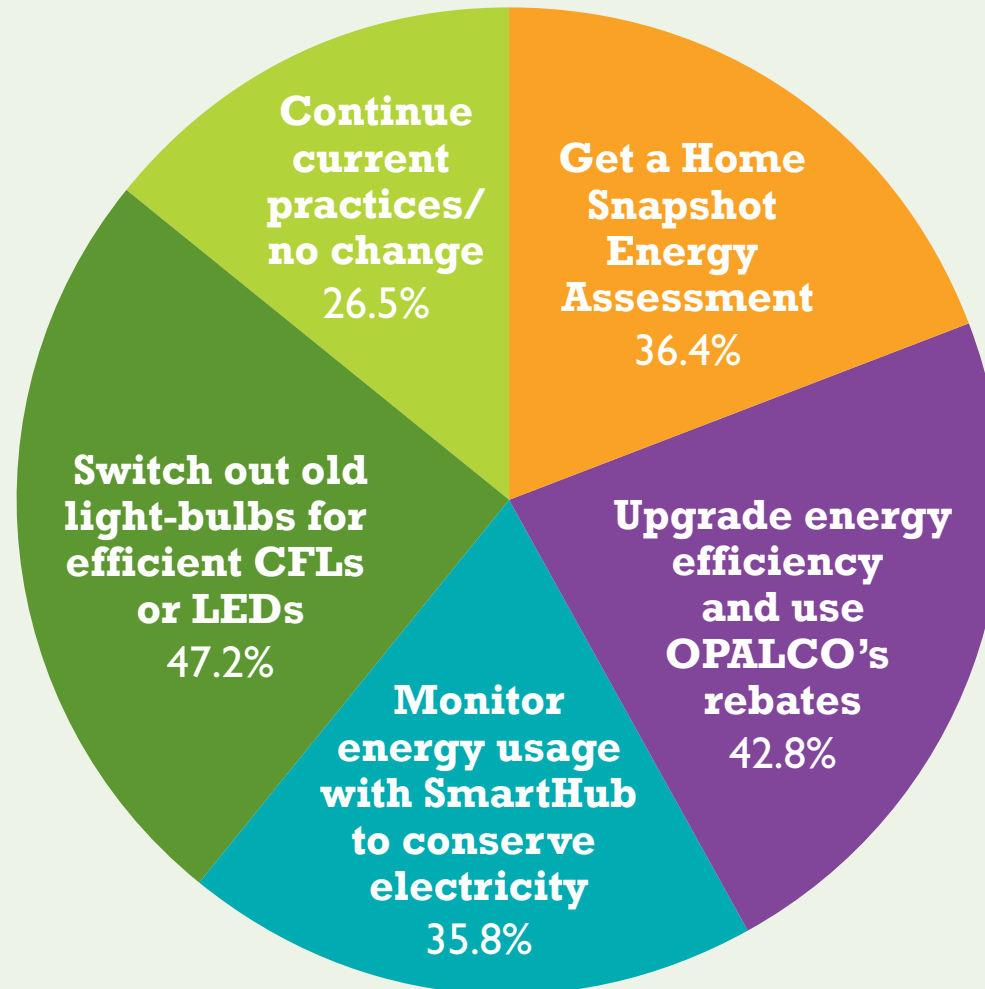
39% spend more than \$150 on winter bills





## LIKELY TO TAKE STEPS

An average of 41% are 'likely' to take energy savings measures



## NARRATIVE COMMENTS

### ENERGY SAVINGS (71 COMMENTS/11%)

#### Positive (13%):

- Keep on the current path. Help leverage local renewable power installations.
- I have installed solar panels and appreciate the rebates.
- Continue to reduce carbon foot-print.

#### Neutral (76%):

- I would also like to see a much more aggressive participation in smart energy services and direct funding to encourage energy efficiency and local energy production.
- Hourly SmartHub data so I can see my usage better.
- Let's be as green as we can and look far into the future for sustainable energy options.

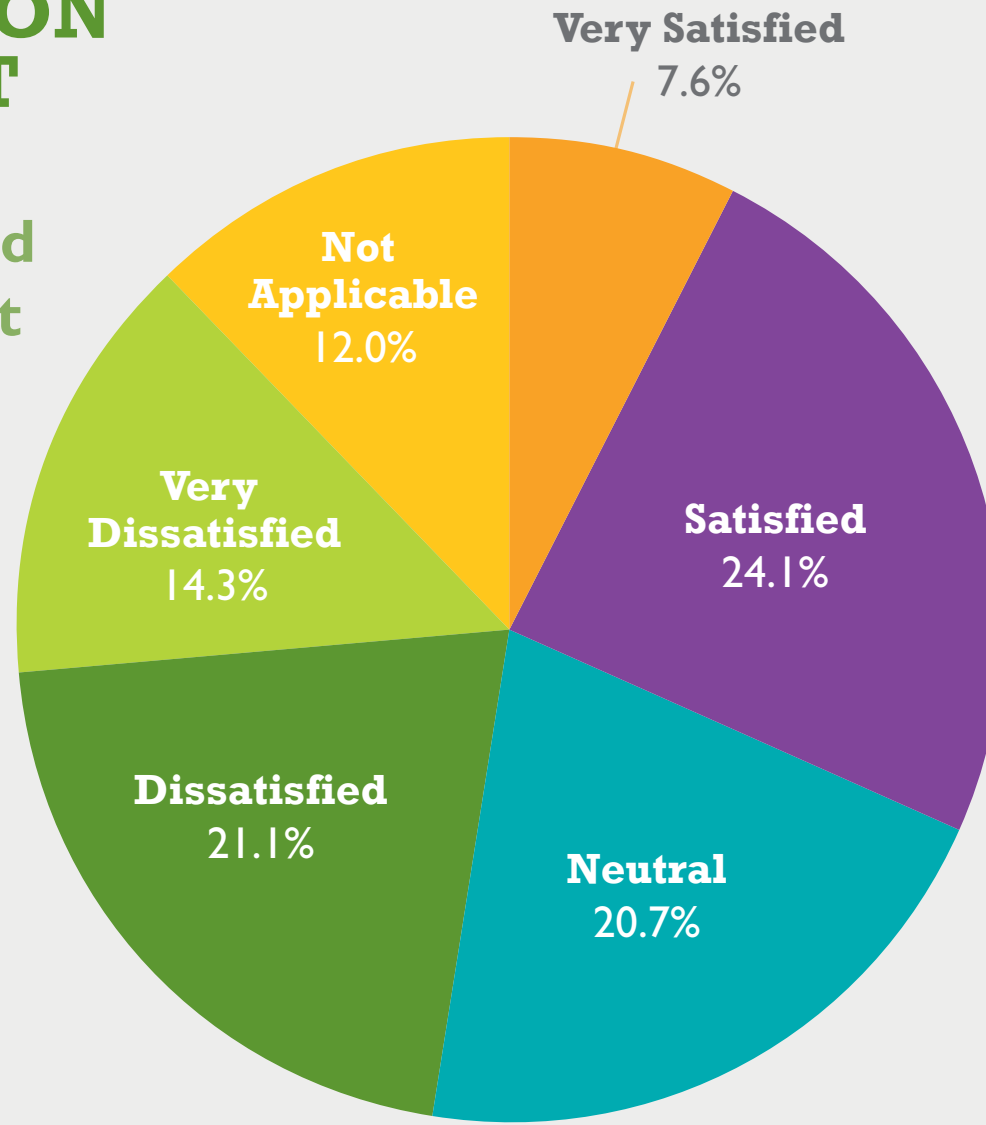
#### Negative (11%):

- Don't waste member money on renewable energy programs, they are subsidies to the wealthy who can afford solar.
- I miss that you no longer have sales of energy efficient items in the lobby.
- The method to recycle CFLs in office is too difficult when I have many bulbs.

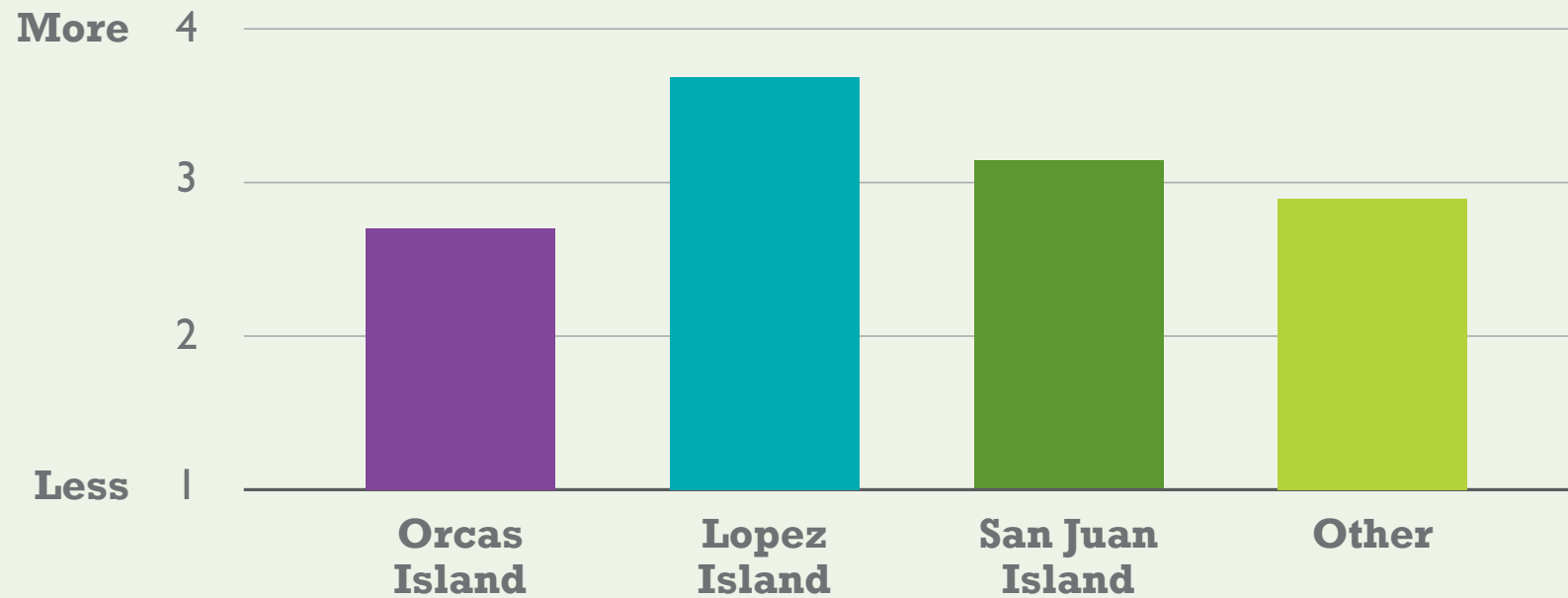
# INTERNET SERVICES

## DISSATISFACTION WITH CURRENT INTERNET

Only 32% are satisfied with current Internet services

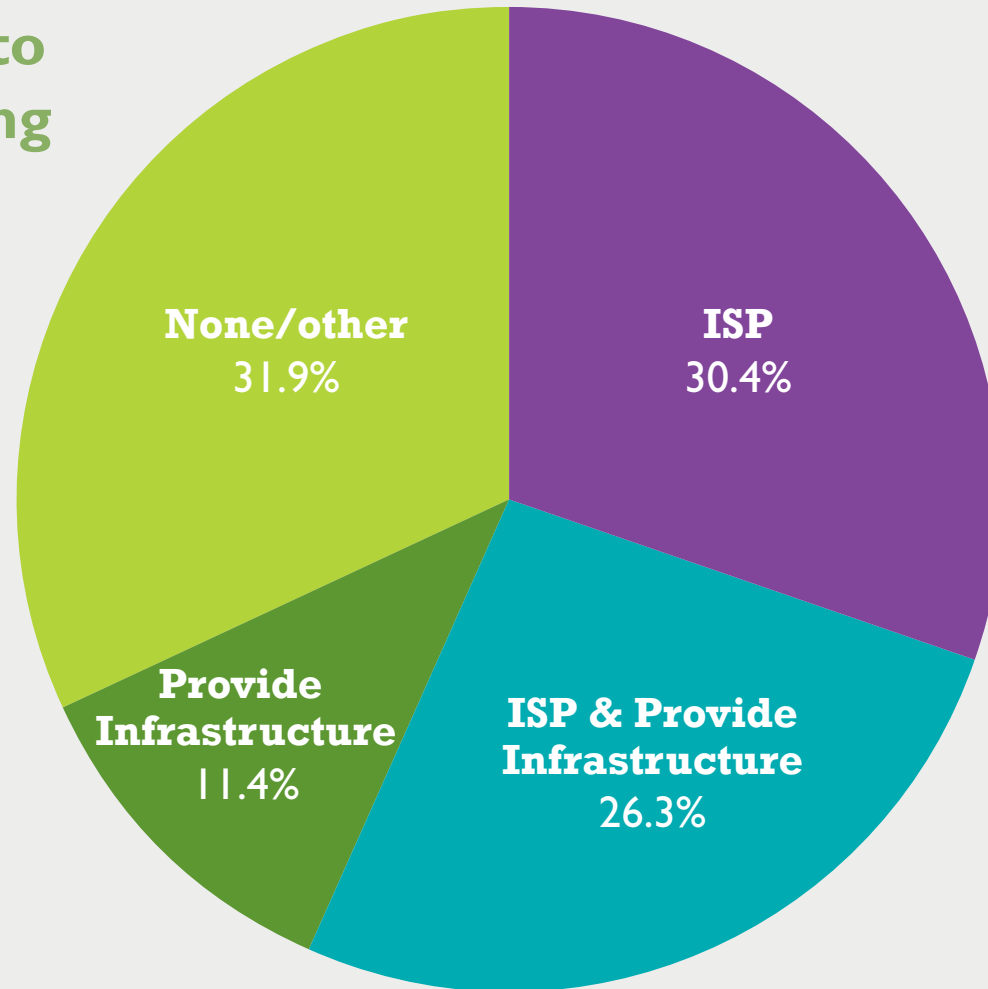


# SATISFACTION WITH INTERNET BY ISLAND



## DESIRED OPALCO INTERNET ROLE

68% want OPALCO to  
play a role in providing  
Internet services



# NARRATIVE COMMENTS

## INTERNET SERVICES (381 COMMENTS/48%)

### In favor (59%):

- Reliable high speed broadband internet is the most important thing to me right now. I work from home. Without internet, I lose my job.
- Please please please go forward with internet and voice services. CenturyLink is in dire need of a competitor.
- Reliable internet is essential to building an islands economy, please don't let a small number of poorly informed, fearful individuals derail you from providing this important service to your customers.

### Undecided (22%):

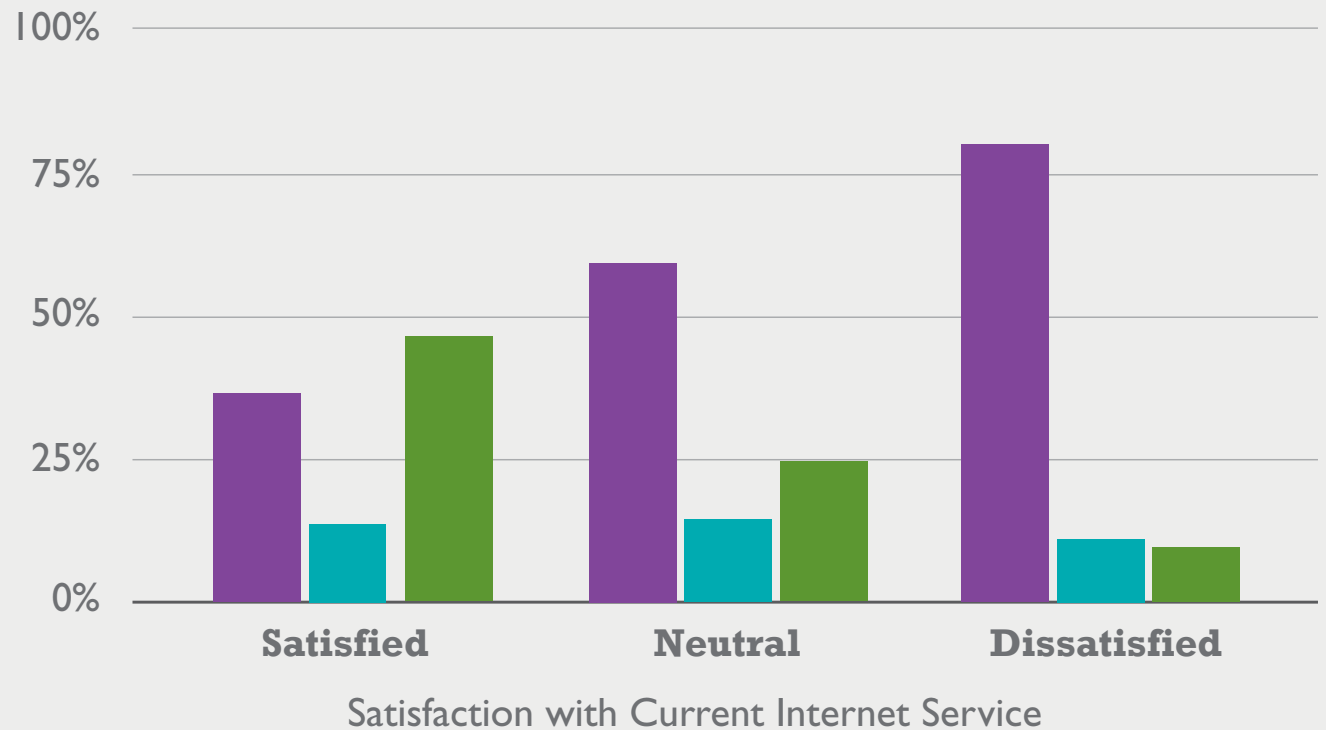
- I guess I would be interested to learn about any options for cost saving with my internet, long distance and other services I get from another provider if these services were available to me. I would switch if it would cost me less with my bundle deal I have now.

- I know the ISP question is complex. I just want service that's as reliable and cheap as possible and I don't know what the best solution is.
- I am confused as to what I think OPALCO's role should be regarding internet service. I probably would pay for higher service, but do not think the non-using members should be forced to pay.

### Against (19%):

- I am not happy that OPALCO is attempting to get into business that it knows little about.
- Most people do not want to pay for the rich to be able to have their supreme internet service. That is being handled by others now, and that is how it should be.
- OPALCO should not be in the internet business. Technology changes far too rapidly. OPALCO is for POWER.

## WHY SO MANY STRONG OPINIONS?



### Desired OPALCO Internet Role

 OPALCO should be an ISP

 OPALCO should provide infrastructure

 None



# THANK YOU!

The Co-op leadership team is very grateful for your participation in this survey. It is often the case that the majority voice remains silent—until asked. It is our goal is to improve service to the entire membership.