

**Representative Policy Board
Consumer Affairs Committee
South Central Connecticut Regional Water District
Via Remote Access****

AGENDA

Regular Meeting of Monday, May 17, 2021 at 5:30 pm

1. Safety Moment
2. Approval of Minutes – April 19, 2021 meeting
3. Customer Care Realignment: P. Singh, D. Bochan and L. Gonzalez
4. Consumer Affairs Committee report of OCA – J. Donofrio
5. Approval of OCA invoice for April 2021 for \$3,305.00
6. Volunteers to attend Authority meetings on June 17, July 15, August 19 and September 16
7. Next meeting of Consumer Affairs Committee – June 21, 2021 at 5:30 p.m.
8. Adjourn

****In accordance with the Governor Lamont's, Executive Order No. 7B for the Protection of Public Health and Safety during COVID-19 Pandemic and Response, the public meeting will be held remotely. Members of the public may attend the meeting via conference call, videoconference or other technology. For information on attending the meeting via remote access, and to view meeting documents, please visit <https://www.rwater.com/about-us/our-boards/board-meetings-minutes?year=2021&category=1435&meettype=&page=>. For questions, contact the board office at 203-401-2515.**

Topic: RPB CAC Meeting

Time: May 17, 2021 05:30 PM Eastern Time (US and Canada)

Join Zoom Meeting (*via conference call*)

Dial by your location

+1 312 626 6799 US (Chicago)

+1 646 876 9923 US (New York)

+1 301 715 8592 US (Washington DC)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 408 638 0968 US (San Jose)

+1 669 900 6833 US (San Jose)

Meeting ID: 889 6681 4816

Passcode: 338239

Find your local number: <https://us02web.zoom.us/j/kcjkw9Ceqy>

SAFETY MOMENT

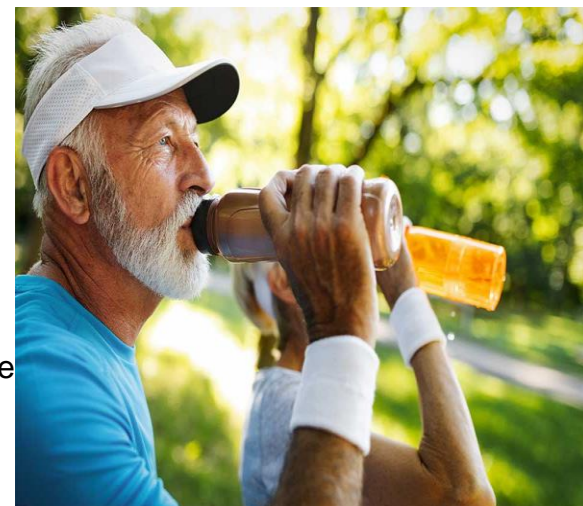
HEAT SAFETY TIPS

Summer is the season for working and playing outdoors. It's also the time to emphasize the importance of preventing and treating heat-related illness.

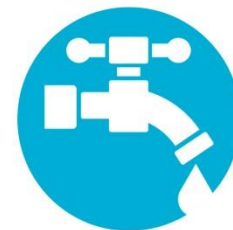
The common denominator of heat illness prevention is: **Water, Rest, Shade**. Getting plenty of all three when outdoors is the best way to beat the heat and stay out of trouble.

Heat Safety Tips:

- Stay hydrated throughout the day by drinking water steadily; don't wait until you're thirsty.
- Avoid caffeine and alcohol which cause us to lose water more rapidly.
- Take frequent breaks in the shade or indoors in an air conditioned space.
- Wear loose fitting, lightly colored and lightweight clothes.
- Check on friends and neighbors.
- Minimize use of heat-generating appliances like stoves or ovens.
- Do not exercise outdoors. If you must exercise outdoors, only exercise in the early morning hours, before 8 a.m.
- Take cool showers or baths to cool down.
- Check the local news and other outlets for important safety information.



Tap Into
Safety



Regional Water Authority

Service – Teamwork – Accountability – Respect – Safety

 Regional Water Authority

**Representative Policy Board
South Central Connecticut Regional Water District
Joint Meeting
Consumer Affairs Committee
and
Land Use Committee**

Minutes of the April 19, 2021 Joint Meeting

A joint meeting of the Consumer Affairs Committee (“CAC”) and the Land Use Committee (“LUC”) of the Representative Policy Board of the South Central Connecticut Regional Water District (“RPB”) took place on Monday, April 19, 2021, via remote access. Committee members present were: P. Betkoski, N. Campbell, P. DeSantis, B. Eitzer, M. Horbal, M. Levine, S. Mongillo, J. Oslander, F. Pepe, T. Rescigno, and Jamie Mowat Young.

RPB members present were: C. Havrda and M. Ricozzi.

RWA members present were: L. Bingaman, R. Kowalski, B. Nesteriak, T. Norris, J. Reckdenwald, and P. Singh.

D. Borowy and K. Curseaden attended from the Authority, and Jeff Donofrio, Esq., from the Office of Consumer Affairs (“OCA”).

RPB staff present: J. Slubowski.

Chairman Stephen Mongillo of the CAC, called the meeting to order at 5:30 p.m. He reviewed the Safety Moment distributed to members.

He stated that the meeting is a joint meeting with the Land Use Committee to review the RWA’s proposed FY 2022 capital and operating budgets. The business of the regular CAC Committee will take place after managements presentation of the FY 2022 proposed budgets.

Mr. Bingaman, RWA’s President and Chief Executive Officer, reviewed the FY 2022 capital budget outline and summarized the key points of the capital budget history. He reviewed assumptions used to develop the proposed budget. He noted that the FY 2022 capital budget includes funding of 84 projects and programs in four categories: Natural Resources, Treatment, Transmission and Pumping, and General Plant. He reported that the total budget for capital projects would be approximately \$42.9 million and is within the recommended range of GHP’s expenditure forecast audit.

Mr. Norris, RWA’s Vice President of Asset Management, Ms. Nesteriak, RWA’s Vice President and Chief Operating Officer, and Mr. Singh, RWA’s Chief Information Digital Officer and VP of Customer Care, provided information, breakdown of costs, and cost highlights for the following:

- Prioritization methodology
- Natural resources
- Treatment
- General Plant
- 5-year Plan of Capital Improvements

Mr. Bingaman discussed 5 new budget categories for FY 2023, which will include:

- Growth
- Long-Term Planning
- Regulatory Compliance
- Capital Renewal
- Technology

Mr. Bingaman summarized the FY 2022 proposed capital budget and stated that the organization would continue to pursue lower cost financing alternatives such as federal and state grants.

Discussion took place regarding levelized spending, materials, capital budget increase, infrastructure funding, and grant funding.

The Authority then reviewed the proposed FY 2022 operating budget. Mr. Bingaman provided an introduction of RWA's budget by reviewing its mitigating strategies due to COVID-19 uncertainties, reserve fund balances and FY 2021 capital sources.

Ms. Kowalski, RWA's Vice President of Financial Reporting & Analysis, provided the Authority with the FY 2022 Operating Budget financial summary. She stated that the proposed operating budget is \$59.7 million. Ms. Kowalski also reviewed trends and revenue and expense assumptions, which included:

- Highlights
- Declining consumption trends
- Revenue and expense trends and assumptions
- Maintenance Test
- Opportunities and vulnerabilities

Discussion took place regarding debt leverage decrease, Moody's assessment, invasive species and educational program budgets, wholesale services.

Attorney Donofrio, Office of Consumer Affairs, reported that he has reviewed the FY 2022 proposed capital and operating budgets and will be preparing his letter for the RWA. He commented on the RWA's challenges and adaptability for its FY 2021 budgets and deferment of the rate application due to the pandemic. The OCA's perspective of the FY 2022 budgets is that there is balance between the impact on customers while taking into consideration capital needs and deferred projects from FY 2021. His position is that he is satisfied with the proposed budgets.

At 7:00 p.m., Messrs. Bingaman, Eitzer, Harvey, Norris, Oslander and Singh and Mss. Kowalski, Reckdenwald, and Young withdrew from the meeting.

On motion made by Ms. Campbell, seconded by Mr. Pepe, and unanimously carried, the committee voted to approve the minutes of its March 22, 2021 meeting.

Attorney Donofrio reported on an ongoing consumer complaint from an owner of a rental in Milford. The owner is claiming relief for unpaid bills from a prior tenant in 2017. He anticipates the matter to be resolved by next month. He will report back to the committee at its next meeting.

On motion made by Mr. Pepe, seconded by Ms. Campbell, and unanimously carried, the Committee approved the OCA's March 2021 billing (\$1,962.50).

The Committee's next meeting is scheduled for Monday, May 17, 2021 at 5:30 p.m.

At 7:15 p.m., the meeting adjourned.

Stephen Mongillo
Consumer Affairs Committee Chairman

Peter Betkoski
Land Use Committee Chairman

Customer Care Realignment & Transformation

**Consumer Affairs Committee
May 2021**

Table of Contents

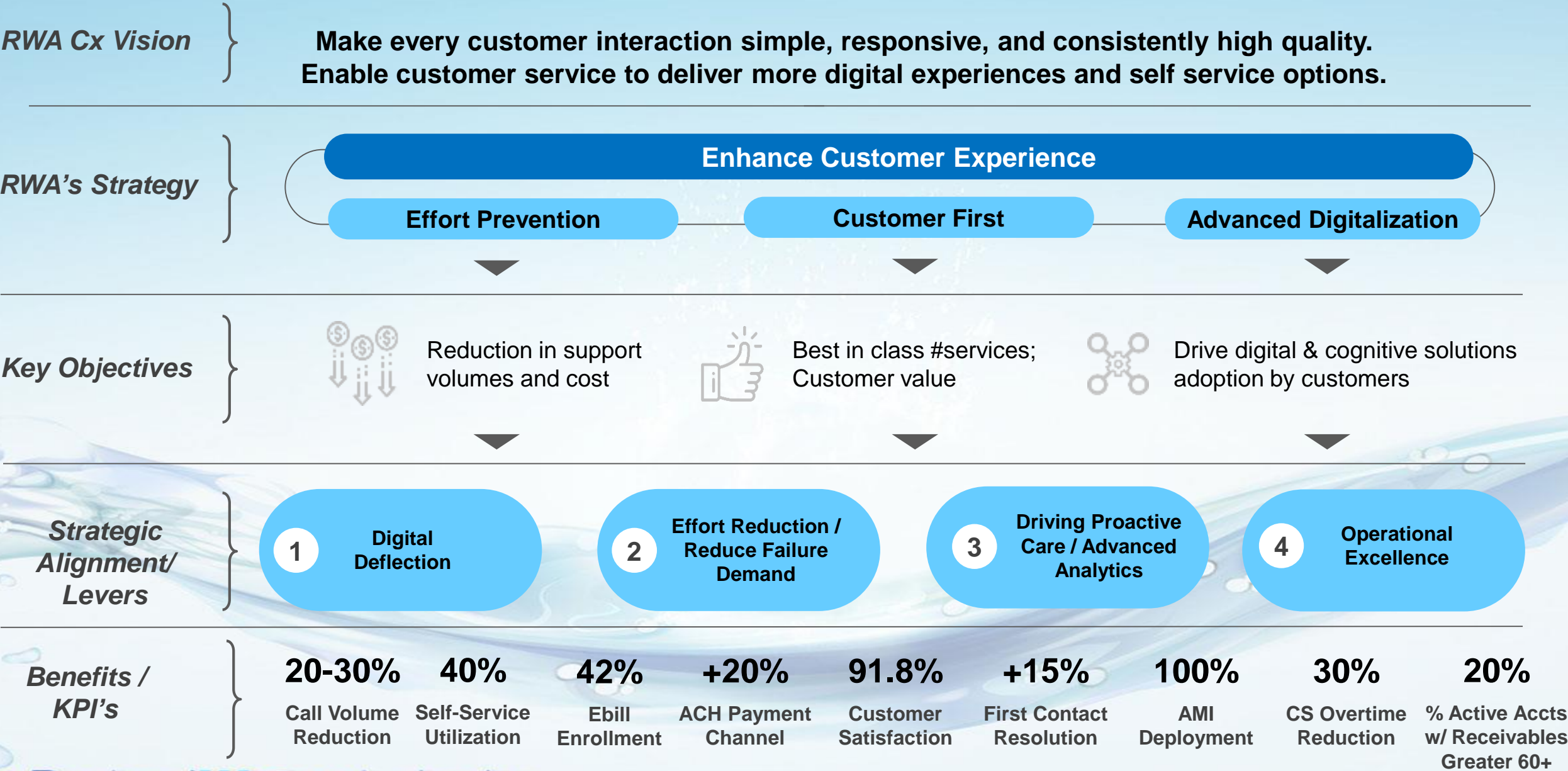


01 RWA Customer Care Vision

**Make every customer interaction simple, responsive, and consistently high quality.
Enable customer service to deliver more digital experiences and self service options.**

- Best **Value** for environmental services and a brand *customers can Trust*
- Making it **Easier** for customers to contact RWA as and when they want to
- Improving **Speed** and **Quality** of response resulting in improved customer service levels
- Innovative **Customer Engagement** on key product/services to reflect what matter to them
- Enhance customer **Self-Service** functionality to enable customer choice with multi-channel options
- **Monitor, Measure** and Digitize most important **Customer Journeys**
- Better use of Social Media data & transactional surveys to *respond to customers Effectively*
- Deliver **Proactive** customer-focused service through robust processes and increased revenue
- Build a **Resilient** resource model allowing the organization to deliver in an **Efficient & Cost Effective** manner

RWA Customer Experience (Cx) Strategy



~150k
transactions

Voice, Mail
Email, Fax, Web

High Manual Effort, Little Automation/AI or Technology

■ **Recently Reorganized to focus on Operational Efficiency and Customer Experience**

- 8 in-house contact center personnel (plus 2 vacancies)
- 8 back office customer service operations personnel (plus 1.5 vacancies)
- Customer Experience Manager role newly created

■ **Front Office & Back Office Functions**

- Hours of Operation 8 a.m. to 5 p.m. (Mon-Fri)
- Language support services for non-English speaking customers
- Supporting over 100k inbound calls per year
 - Average Speed of Answer <70 seconds
 - Abandonment Rate < 5%
 - First Call Resolution Metric in development

■ **Collections and Billing**

- High bill resolution, billing exception processing, payment processing
- Collections Master Plan in place
- Lien process was streamlined and resulted in the placement of 237 liens with a value of \$955k
- Top 100 Delinquent AR review process resulted \$950k of recoveries since October 2020

■ **Services Provided to 225K+ Customers**

- Water Services (116K+); Market Offerings (105K+); Recreation (~5K), Lab Services (~150), Fleet (~1K)
- Processing over 6,000 property closings per year
- Field Service Appointment scheduling: Meter Exchanges; AMI installations, Seasonal meters, Leaks
- CBYD; ask.info; Social media
- E-billing 28% adoption rate with a best in class 42% goal by 2025; 400 customers targeted in March e-billing promotion

Contact Center System Landscape

Current Technologies

- SAP CIS, Avaya, Nuance, Nice, Redbox, Smartsheet, IVR
- SAP uPerform knowledge management system

Opportunities

- Lack of Omni channel capability, Remote agent
- Lack of modern technologies such as ChatBots etc.
- Low self serve penetration levels

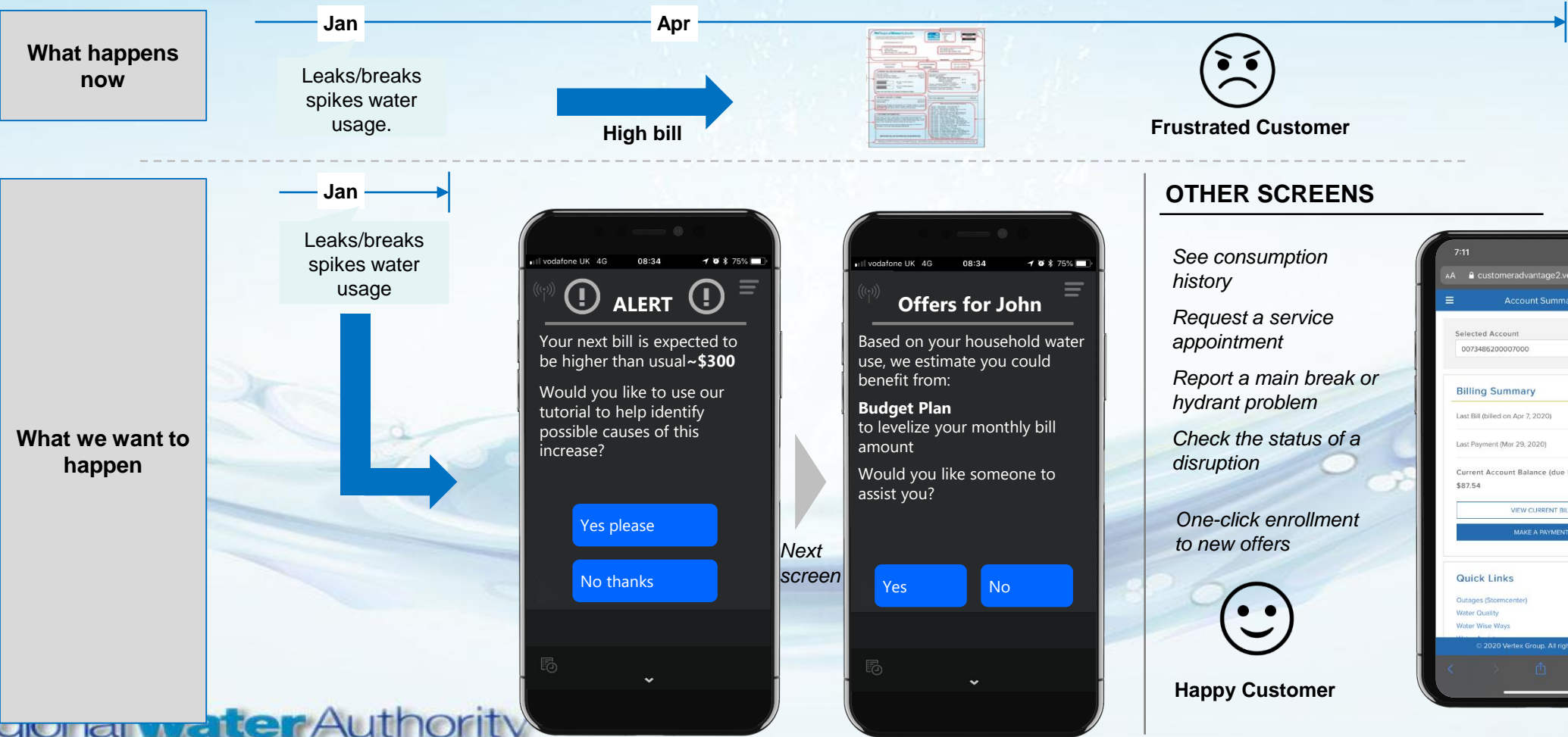
Customer Journey & Roadmap

What do our customers want today? What will they value (pay for) in the future?
(Value proposition by customer segment)

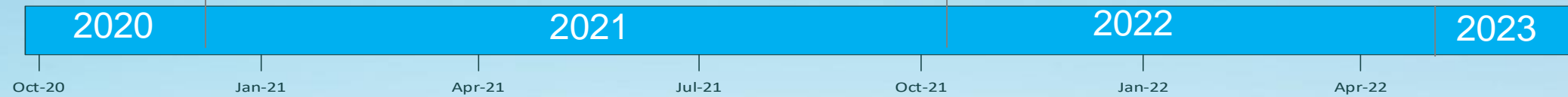
An example customer circumstance & journey

Residential customer in New Haven, cold January spikes water usage, 3 months from today in April this customer will receive a bill that is an order of magnitude higher than before to a degree that may even put pressure on ability to pay bills.

RWA customer experience with High Bill...



Customer Care Roadmap – Key Activities & Milestones



Bill Presentment/Print

Launch Redesigned Bill
Print/Mail
Outsourcing

Oct '20 – Apr '21



Go-Live (April)

Customer Portal & Non-Core Solution

Release 1: Customer Portal

Customer Portal
Link with RWater.com

Oct '20 – Jan '21

Jan '21 – May '21



Release 1: Portal Go-Live (May)

Release 2A: SAP Non-Core Solution

New Product Structure
Price Promo/Bundling
New Product Offerings

Oct '20 – Mar '21

Mar '21 – Aug '21



Release 2A: Non-Core Go-Live (September)

Release 2B: SAP Non-Core Solution / Mobile App

Enhanced Customer Portal
Mobile App
Communication Advantage
Document Advantage
Product Advantage

Oct '20 – May '21

June '21 – Dec '21



Release 2B: Enhanced Portal Go Live (December)

Monthly Billing Conversion

Portion/Route Design
Billing and Dunning Process Changes
Conversion Execution

Oct '20 – May '21

June '21 - Nov '21

~2 mo.
Buffer



Go-live Jan '22

CIS Roadmap

RFP
RPB Application*
Project Execution

Jun '21 – March '22

RPB Application
~Fall 2021*

May '22 - Jun '23



Go-live
(Jul '23)

*Tentative

Legend

Planning

Implementation




Go-live


Opportunities for RWA & Customers



Reduce Cost to Serve




Enhance Customer Experience



Increase Revenue Generation

Contact Channels




Phone




Web Chat




Email



Website



Social Media



Mobile App

Self Service



Conversational IVR



Visual IVR



Online Chatbot



Smart FAQ



Online Ticketing



Voice User Interfaces

Agent Assist



Phone Agent



Chat Agent




Email Agent




Social Media Monitoring & Engagement Agent


Agent System Enablers




CRM




Core Systems




RPA/ RDA




CIM




Decision Tree



Knowledge Management




Callback Manager




Visual Assist


Agent Training & Quality Management




Quality Monitoring




Interaction Analytics



CSAT Survey



Online Testing



VR Training

Agent Performance Management



Workforce Management



Gamification & R&R

Insight Enablers



Customer Journey Mapping



Online Sentiment Analysis



Operations Insights





Visual Dashboards



Recommendation Engine

Prioritizing the right digital interventions for RWA customers

 CURRENT OFFERINGS
 OPPORTUNITIES

Mobile Application for Self-Service



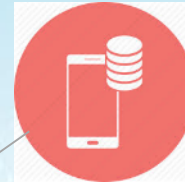
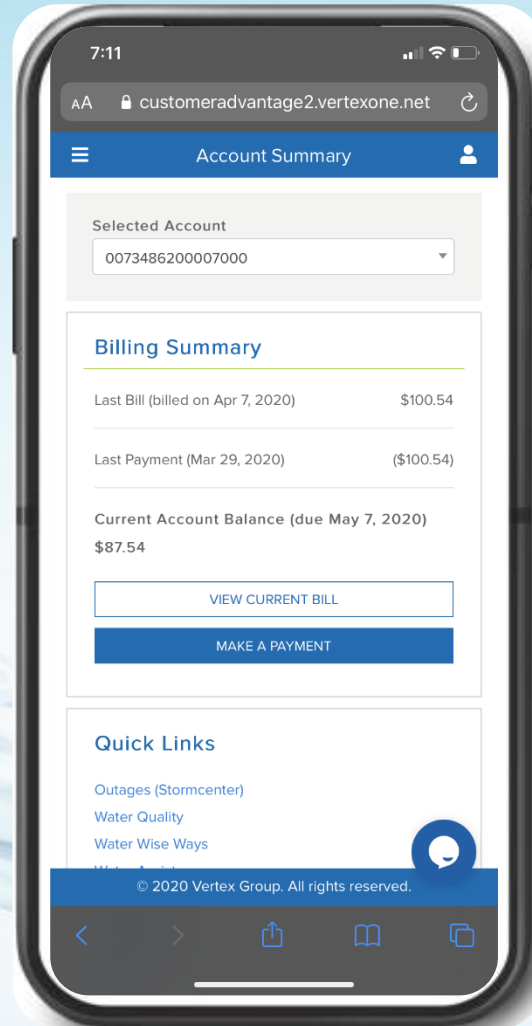
Billing



Usage Analytics



Self-service options



Payments



Chat & Email Support



Market Offerings & Services

- Device Agnostic
- Account Maintenance
- Communication Preferences
- Access Billing Statements
- Make and Schedule Payments
- Payment Allocation and Reconciliation
- Integration with Targeted Campaign / Marketing tools
- Upload, View, and Archive Documents
- Shop for Market Offering Products & Services
- WaterWatch Single-Sign (Consumption Analytics)
- Market Offering Ad Space
- Native or Pseudo (robotized) Integration with SAP for profile changes, plan changes / upgrades, payments etc.
- FAQs
- Email Support
- Raise a service request
- Organizational Content (Rate Schedule Board Agendas/Minutes)

Appendix



Strategic Goal 1: Meet or exceed customers' expectations in all we do to provide access to clean safe water and pristine environments.

PUT THE CUSTOMER FIRST			
Strategic Goal 1: Meet or exceed customers' expectations in all we do to provide access to clean safe water and pristine environments.			
	Prioritize positive customer outcomes; ensure processes and decisions start and end with the customer in mind and are aligned with our higher purpose to make life better for people by delivering water for life.	<ul style="list-style-type: none"> Establish a First Contact Resolution metric and determine a baseline for this metric by 2022; drive a 15% improvement in that customer experience by 2025. 	
	Pursue new processes, technologies and solutions to improve how we operate and better serve our customers and community in today's digital age.	<ul style="list-style-type: none"> 40% of the customer base is using self-service options to meet their billing and water use needs by 2025. 	
	Bolster our customers' understanding and confidence in our high-quality product and services, stewardship of resources and overall brand image.	<ul style="list-style-type: none"> Maintain RWA best-in-class 91.8% Customer Satisfaction Index; introduce transaction surveys and establish a baseline for improvement by 2025. 	

Rise of Technology

Forced Agility

Telecommuting as a Norm

Greater Government Involvement

Financial Integrity Threats

Generational Changes for Customers

Generational Changes for Employees

Greater Focus on Clean, Safe Water for All

Key Transformation Themes & Potential Benefits

Four key digital transformation themes that can drive significant YOY benefits for RWA



1. Digital Deflection

- Omni channel enablement
- Conversational/Intelligent IVR
- Digital self service channels
- Voice enabled enterprise solutions



2. Effort Reduction

- Workflow automation
- Process Reengineering using RPA
- Unified Desktop
- Augmented Troubleshooting



3. Driving Proactive Care/Advanced Analytics

- Process/Data Mining
- Real-time operation analytics
- Customer behavior analytics
- Predictive analytics



4. Customer Operational Excellence

- Training Management System
- Quality Management System
- Intuitive – Intelligent Knowledge Management

Process improvement initiatives using Process & Task Mining

Potential Benefits

20-30%

Call Volume Reduction

40%

Self-Service Utilization

42%

Ebill Enrollment

+20%

ACH Payment Channel

91.8%

Customer Satisfaction

+15%

First Contact Resolution

100%

AMI Deployment

30%

CS Overtime Reduction

20%

% Active Accts w/ Receivables Greater 60+

Customer Led Digital Enablement in Alignment to RWA Vision

Digital First Approach

Mobile, web and social media connectivity and Omnichannel platform will digitally transform how RWA and its customers will interact and engage in a Digital CX led operating model

Channel Services	Email/SMS	Online Account & Website	IVR	Contact Center	Smart Phone App	Social Media	Conventional Post
Billing and Payments	HIGH	HIGH	HIGH	MEDIUM	HIGH	LOW	MEDIUM
Account Management	MEDIUM	HIGH	HIGH	MEDIUM	HIGH	LOW	LOW
AMI Transactions	HIGH	HIGH	HIGH	MEDIUM	HIGH	MEDIUM	LOW
Rates/Promotion	MEDIUM	HIGH	MEDIUM	HIGH	HIGH	HIGH	LOW
Quality of Supply/Assets	HIGH	MEDIUM	HIGH	HIGH	HIGH	HIGH	LOW

Relevance: Channel to Services

 HIGH  MEDIUM  LOW

“Striking a balance between the needs of the business operation and that of the customer experience to deliver value for both”

What Customer Wants?

Speed & Efficiency, Personalization, Proactive, Meaningful Interaction

What Business Wants?

Positive CSAT, Reduced Cost to Serve, Improved Profitability, Greater Loyalty

Digital First Approach prioritizes the right channel for the right customer query resulting in significant Digital deflections and self serve

Experience Journey



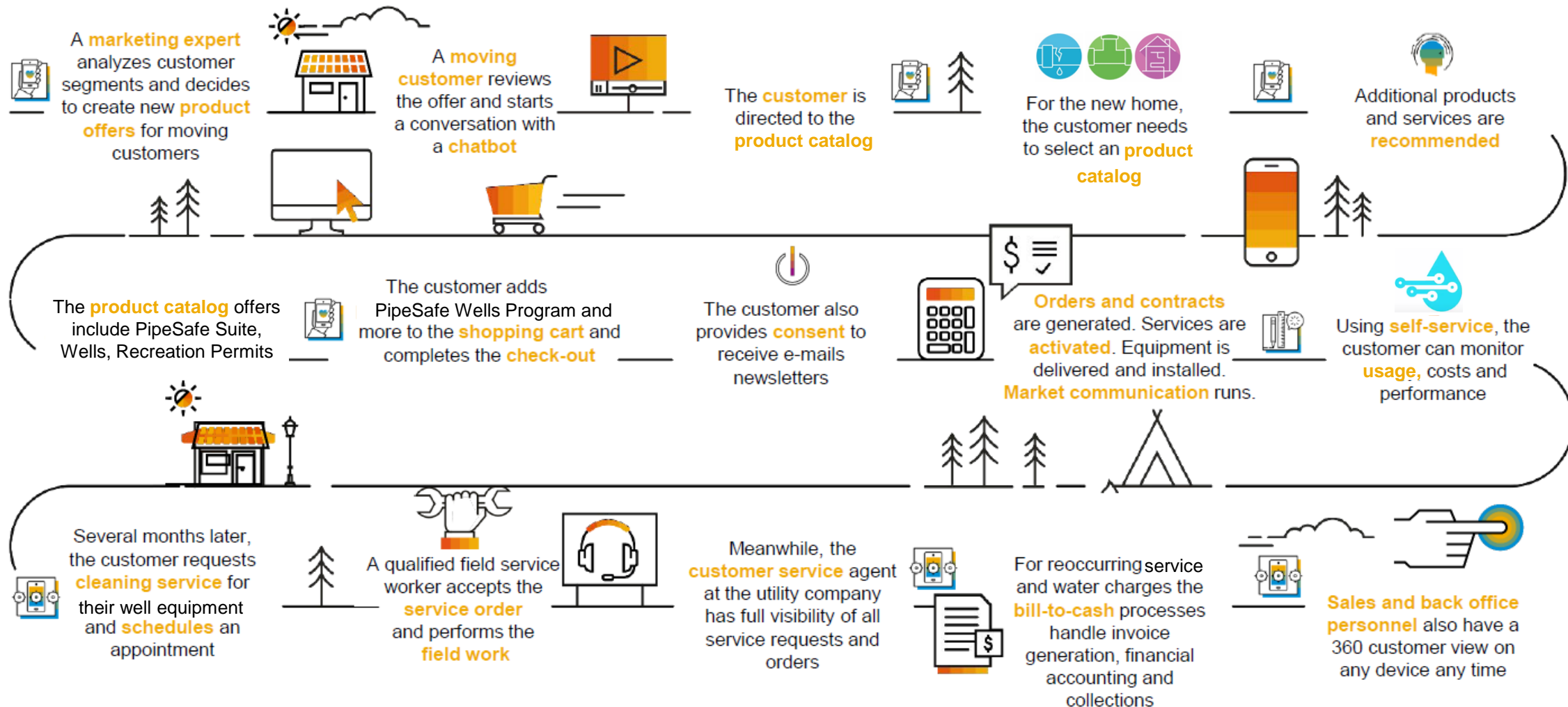
Winning the Digital Prosumer



Activation of Services and Equipment



Operations and Service



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A.I. Driven Virtual Assistants

DIGITAL-FIRST SERVICE

Omnichannel Virtual Assistants offers 24x7 self-service that both enhances CX and lowers Cost to Serve

Enhance the existing IVR with a **Voicebot** to serve common service needs for customers who have chosen the phone channel



Provide 24x7 online ChatBot on the **website**, with seamless handover to Live Chat or Messaging for issues that cannot be resolved by the ChatBot

In-app ChatBot operating as the first port of call for customers; resolving issues, directing customers to self-serve or connecting to agents as required



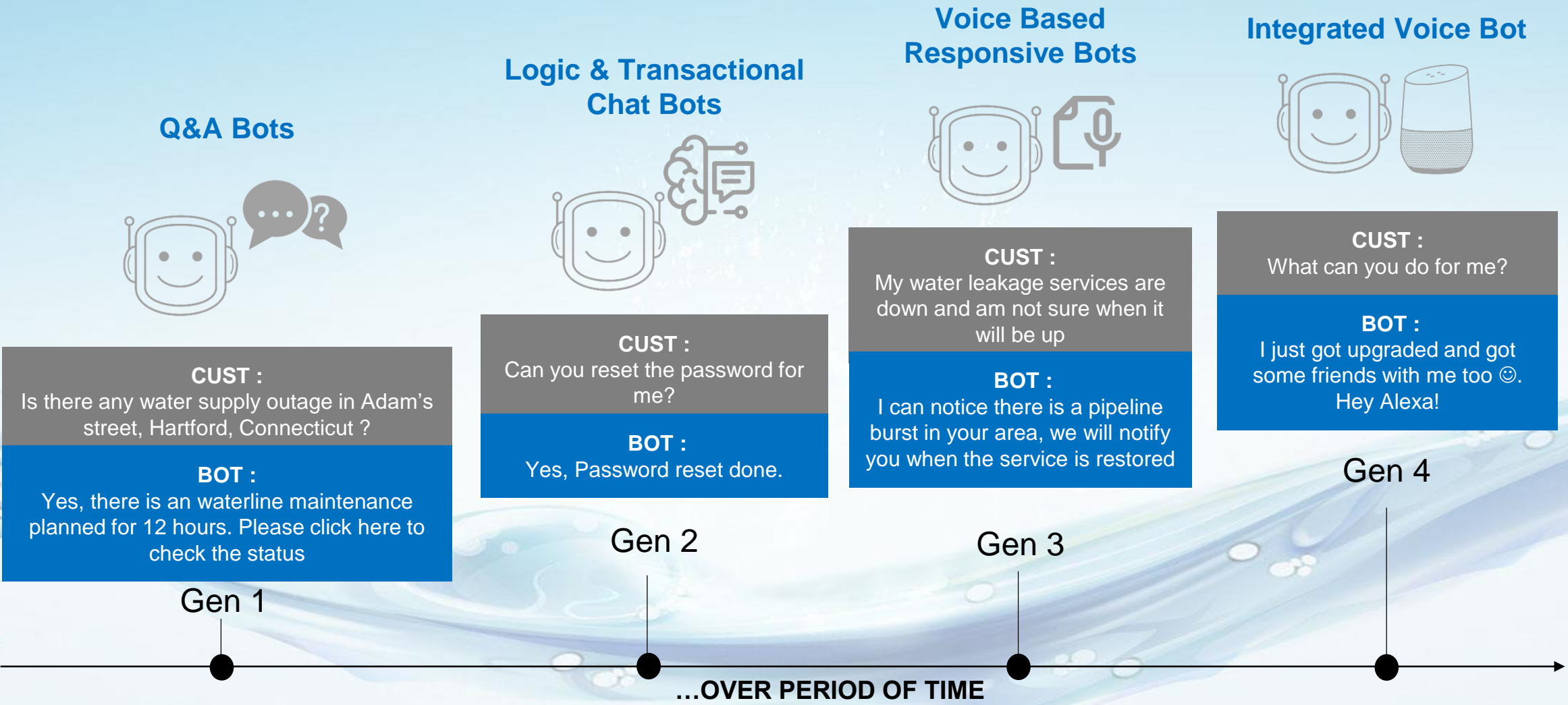
Provide 24x7 online support on **Social Media** via Chatbot, with seamless handover to Social Messaging for issues that cannot be resolved by the ChatBot



Offer integrated Voice User Interfaces (**VUI**) to provide **"Always-On"** service leveraging Smart Speakers such as the Amazon Echo, Google Home etc.

AI driven Virtual Assistant's driving deflection across the entire omnichannel contact center ecosystem

Shift Left - Moving from Simple to Conversational Virtual Assistant's



Conversational Virtual Assistant's providing proactive and personalized digital care services

Customer Portal/Mobile Application

Customer Advantage

Customer Advantage web and responsive mobile self-service site:

- **Self-service user access** and user profile management features
- Site branding, marketing and messaging features
- ADA compliant
- Account maintenance features
- **Account balance summary, consumption information**
- **Bill view and payment processing** features (integration with KUBRA)
- Un-authenticated payments
- Service request features
- **Hybrid App**
- Customer care proxy login
- Management Portal

Communication Advantage

Communication Advantage advanced self service communication preference engine

- Store **customers** preferred communication method and opt-in/opt-out **preferences**
- System Admins to **manage content** of communication template
- **Generate communications:** triggered by a file, processing a communication list via Management Portal or manually send communications to selected group of customers

Document Advantage

- Ability to **upload and archive documents** linked to a BP, contract, premise or unrelated CIS object
- Ability to access and review archived documents
- Ability for system admins to search for documents
- Ability for end users to **view their stored documents** in Communication Advantage

Non-Core Billing & Servicing

- **Non-Core billing and servicing** will complete the sales and warranty maintenance process upon completion of the **online non-core sales** processing.
- Processes will include the one-time and scheduled postings to allow for payments on the products sold via web and call center, as well as contractual information regarding initiation, completion, and maintenance of products sold within SAP.

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OF COUNSEL

May 5, 2021

Jennifer Slubowski, Executive Administrator
South Central Connecticut Regional Water District
Representative Policy Board
90 Sargent Drive
New Haven, CT 06511-5966

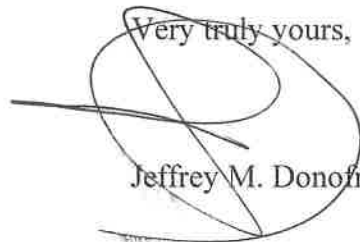
Re: Consumer Affairs Officer / Office of Consumer Affairs

Dear Ms. Slubowski:

Enclosed herewith is our invoice for services rendered through and including April 30, 2021.

Please contact me with any questions. Thank you.

Very truly yours,



Jeffrey M. Donofrio

JMD:st

Enclosure

cc: Mario Ricozzi, RPB Chair
Mark Levine
Anthony P. Rescigno
Stephen A. Mongillo
Naomi Campbell
Richard Smith
Frank Pepe

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FEDERAL TAX I.D. 06-1465137

Invoice submitted to:
South Central Connecticut Regional Water Authority
90 Sargent Drive
New Haven, CT 06511

May 4, 2021

In Reference To: Office of Consumer Affairs

Invoice #22848

Professional Services

		<u>Hrs/Rate</u>	<u>Amount</u>
4/5/2021	LJD Draft email to customer regarding Willow Street (West Haven)	0.17 250.00/hr	42.50
4/8/2021	JMD Review and reply to correspondence from Ted Norris	0.27 250.00/hr	67.50
4/12/2021	JMD RPB Finance Committee meeting	0.83 250.00/hr	207.50
4/14/2021	LJD Exchange emails with RWA regarding Willow Street (West Haven)	0.17 250.00/hr	42.50
	LJD Draft email to RWA regarding Willow Street (West Haven); review documents in connection with same	0.25 250.00/hr	62.50
4/15/2021	JMD Review SCCRWA Application for Disposition of 0.92 acres at 95 Ives Street in Hamden; review FY'22 Capital and O&M budgets proposed by SCCRWA; attend remote meeting of RPB	3.25 250.00/hr	812.50
4/19/2021	JMD Review RWA presentation documents re proposed FY'22 capital and O&M budgets; Attend remote meeting of CAC/LUC re proposed FY'22 capital and O&M budgets	2.50 250.00/hr	625.00
	LJD Review communications relating to Willow Street matter (West Haven)	0.17 250.00/hr	42.50
4/20/2021	JMD Attend remote meeting of RPB Finance Committee (Authority FY'22 budget presentations)	1.83 250.00/hr	457.50

			<u>Hrs/Rate</u>	<u>Amount</u>
4/20/2021	LJD	Exchange emails with RWA regarding Willow Street (West Haven)	0.17 250.00/hr	42.50
4/21/2021	JMD	Draft OCA's budget letter to Chairman Borowy re proposed FY'22 capital and O&M budgets	2.27 250.00/hr	567.50
4/22/2021	LJD	Draft email to customer regarding Willow Street (West Haven)	0.17 250.00/hr	42.50
4/23/2021	JMD	Revise/finalize OCA's letter to Chairman Borowy re Authority's proposed FY'22 budgets	0.50 250.00/hr	125.00
	LJD	Teleconference with customer in regards to Willow Street (West Haven); draft email to RWA regarding resolution	0.25 250.00/hr	62.50
4/28/2021	JMD	RPB Nominating Committee meeting (remote)	0.25 250.00/hr	62.50
	LJD	Draft email to customer regarding Willow Street (West Haven) in regards to final bill and resolution	0.17 250.00/hr	42.50
		For professional services rendered	13.22	3,305.00
		Previous balance		1,962.50
4/26/2021		Payment - thank you		(1,962.50)
		Total payments and adjustments		(1,962.50)
		Balance due		3,305.00