



Dennis Swanson
Director, Regulatory Affairs

FortisBC Inc.
Suite 100 – 1975 Springfield Road
Kelowna, BC V1Y 7V7
Tel: (250) 717-0890
Fax: 1-866-335-6295
www.fortisbc.com

Regulatory Affairs Correspondence
Email: electricity.regulatory.affairs@fortisbc.com

September 27, 2013

Via Email
Original via Mail

Canadian Office and Professional Employees Union Local 378
c/o Jim Quail, Barrister & Solicitor
2nd Floor, 4595 Canada Way
Burnaby, B.C. V5G 1J9

Attention: Mr. Jim Quail

Dear Mr. Quail

Re: FortisBC Inc. (FBC)

**Application for Approval of a Multi-Year Performance Based Ratemaking Plan
for 2014 through 2018 (the Application)**

**Response to the Canadian Office and Professional Employees Union Local 378
(COPE) Supplemental Information Request (IR) No. 1**

On July 5, 2013, FBC filed the Application as referenced above. In accordance with Commission Order G-139-13, FBC respectfully submits the attached response to COPE Supplementary IR No. 1.

If further information is required, please contact the undersigned.

Sincerely,

FORTISBC INC.

Original signed:

Dennis Swanson

Attachments

cc: Commission Secretary
Registered Parties (e-mail only)

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 1

9 SUPPLEMENTARY QUESTIONS RE SERVICE QUALITY INDICATORS

9.1 For the period 2004 through 2012 and 2013 to date, provide an electronic spreadsheet in Excel format showing the monthly and annual average results for each of the service quality indicators that were included in the most recent PBR plan.

Response:

Please refer to Attachment 9.1 containing an electronic spreadsheet. Table D6-2 in Appendix D6 of the Application sets out the history of each SQI that was included in FBC's most recent PBR Plan. Certain SQIs were not tracked prior to 2007 and therefore historical results back to 2007 have been provided in those cases. Please also refer to the responses to BCUC IR 1.70.1 and ICG IR 1.12.2.

9.2 Provide an electronic spreadsheet in Excel format showing the monthly and annual average results for each of the service quality indicators listed in Table **B6-8** (and not otherwise reflected in your response to #1) for 2009-2012 and 2013 to date. This is a continuing data request during the pendency of this proceeding.

Response:

Please refer to the responses to COPE Supplementary IR 1.9.1 and ICG IR 1.12.2. With respect to the request for continuing data during the pendency of this proceeding, FBC notes that it will present the results of its SQIs at each Annual Review. Since SQI performance is based on the annual results, FBC does not believe that its monthly performance is necessary for the review of this Application, and therefore declines to provide continuing data during the pendency of this proceeding.

9.3 Identify the specific data source within the Company's books and records, as well as any associated formulas, used to calculate each of the service quality indicators listed in Table **B6-8**.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 2

1 **Response:**

Performance Measure	Data Source	Formula
Emergency Response Time	Secure Network Drive and Dispatch Software	Refer to Appendix D6, section 3.1.1
Telephone Service Factor	Secure Network Drive and Secure Phone Infrastructure	Refer to Appendix D6, section 3.2.1
First Contact Resolution	Third Party Survey Company	Refer to Appendix D6, section 3.2.2
Billing Index	Secure Network Drive and Customer Service/Billing Software	Refer to Appendix D6, section 3.2.3
Meter Reading Accuracy	Secure Network Drive and Customer Service/Billing Software	Refer to Appendix D6, section 3.2.4
SAIDI	Secure Network Drive	Refer to Appendix D6, section 3.3.1.1
SAIFI	Secure Network Drive	Refer to Appendix D6, section 3.3.1.2
AIFR	Utility Risk Management Software and Secure Network Drive	Refer to Appendix D6, section 3.3.2
Customer Satisfaction Index	Third Party Survey Company and Secure Network Drive	Refer to Appendix D6, section 3.3.3

2

3

4

5 9.4 Describe the internal auditing process to ensure the accuracy of the data
6 reported for the service quality indicators listed in Table **B6-8** for the prior PBR
7 plan and changes or improvements to this auditing process or plan, if any,
8 proposed for the 2014 PBR plan.

9

10 **Response:**

11 To ensure the accuracy of the data reported for the SQIs, the Company assigns owners to be
12 accountable for each of the SQIs. These owners represent departments in the Company that
13 would be most knowledgeable of the indicators' results and are in the best position to ensure
14 the accuracy of the data reported. Additionally, further validation is performed from an overall
15 perspective when the data for all the service quality indicators are collected, tracked and
16 reported centrally. This is currently done by the Regulatory group for reporting purposes.
17 Before the actual results are published, the owners of the service quality indicators are asked to
18 review and confirm the results.

19 Further validation of the data accuracy will also be completed under the Company's proposed
20 Annual Review process. As part of the proposed Annual Review process, the Company will be

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 3

discussing its current year service quality results. At that time, stakeholders will have an opportunity to discuss any of the reported SQI results.

FBC believes the described process is appropriate to ensure the accuracy of the data reported for the SQI results.

9.5 Provide a copy of the annual review provided to the Commission for each year of the previous PBR with respect to the service quality indicators.

Response:

Please refer to Attachment 9.5.

9.6 Provide the monthly number of customer complaints by customer class and category of complaint received by the Company and any internal analysis of these complaints for the period January 2009 to date.

Response:

FortisBC tracks customer complaints by category monthly, however does not track them by customer class. Note: Some of the categories are also used for general inquiries; therefore the true number of complaints is slightly lower than these figures. Please see the table below.

<p>FortisBC Inc. (FBC or the Company)</p> <p>Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)</p>	<p>Submission Date:</p> <p>September 27, 2013</p>
<p>Response to Canadian Office and Professional Employees' Union, Local 378 (COPE)</p> <p>Supplementary Information Request (IR) No. 1</p>	<p>Page 4</p>

Note: These numbers represent the count of complaints/inquiries in the General Tracking System. If still active, it represents the Department it is currently assigned to, and if closed, it represents the Department that it was assigned to at time the of closing.

Count of INQUIRY_ID
Year

Month	Aboriginal Relations	Account Maintenance BC	Billing BC	Brushing BC	Capital Projects	Contact Centre BC	Corporate Communications BC	Escalations BC	Fleet	Generation	Land BC	Meter Readers BC	Metering Inquiries BC	New Connects BC	Operations BC	Payments BC	Power Sense	Privacy BC	Substations	System Control Centre	Totals
2009	1				3	10		1	2		1	2		2	17						38
	2					6			1	1			1		1	16	1				27
	3			3	1	14		1	1	2	1				1	26				3	53
	4			1	2	13			2	1		1	2		3	49	1				76
	5				5		13			1		2			3	39				1	65
	6			1		1	7		2				1		1	33		2			48
	7				8	15					1	1			1	26					52
	8				9	7			1	1		1			2	20			1		43
	9				6	6			1	2			1		1	22					39
	10				5	11				2			3		3	19		1			46
	11				3	1	6		1	1		1	2		2	13					30
	12		1		4	1	9		1		2	1		1	1	6		1			28
2010	1				6		6		1		4	2			3	9					31
	2			1	5		10	1		2		4	1		2	9		1			36
	3				9	2	5		2		5	1			4	19			1		49
	4			1	12	1	8		1			2		1	2	13					41
	5				10		8		1			2			3	10	1				36
	6				7	2	12				1	1			2	21					46
	7			1	10		4				1	4			3	29					52
	8				7		9		4			1			1	21				1	48
	9			1	2		8		2		1	1			1	28					44
	10				5	7	6		1	1		1			2	12				1	37
	11			3	10	2	5	1		1		2			1	15					41
	12				3		8		2		1	1			1	13					30
2011	1			3	5		6		2		1	2			1	9					28
	2				8	2	6		3	1			1		3	19					43
	3		1		9	3	4			1			3		2	20					43
	4				11	3	8		2		1	1			1	14					41
	5			1	15	3	12	1		2		1			4	10		1			50
	6				6	1	8	1		1		5			2	8	1				34
	7			3	7		2		1	2		2			4	10			1		33
	8				6	1	4				1		7		2	10		2	1		33
	9				6	3	5			1			1		3	15		1			35
	10			1	5	5	4	2		1	1		1		5	12					38
	11				5		10		1	2			3		2	8		1			32
	12			1	4	1	5						3		1	8					25
2012	1				2		10			2			2		2	10			1		29
	2			1	7	1	8					1			1	10					30
	3				7		3	1	1	1					1	6		1			21
	4				7	2	1					1			2	12					25
	5	1		1	11		6		2			3			4	16					44
	6			1	9	1	15		1		1	3			3	15					49
	7				10	1	13			1			1		2	20		1			49
	8				9	1	7	1	1	1	1		2		4	11		1			39
	9				1		1		2			2			2	10				1	20
	10			1	4		8		1	1					2	24					39
	11					1	5		2		1	2			2	10					23
	12				1	1	1								1	4		3		1	14
2013	1				2		5		6	2						4					19
	2		1		4		2		2	1	1	1			2	4		1		1	20
	3			1	1		2	1		2			2		1	10					22
	4			2	5	1	4		2	1			2		1	18			1		38
	5				9		5		2			1			3	10					33
	6			1	6		6		1	1		2			1	4					22
	7			1	3	11	5		1		1	4			1	33					60
	8				1	4	9		3			1			3	44					66
	9					1	2								1	22		1			27
Totals																					2160

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 5

1
2 9.7 Provide the monthly number of the Company's customer complaints by customer
3 class and by category of complaint filed with the Commission for the period
4 January 2009 to date.

5
6 **Response:**

7 Please refer to the following table which sets out the monthly number of customer complaints to
8 the Commission by customer class and category of complaint. Note that only customer
9 complaints to BCUC where a response from FBC was required have been captured in the table
10 below.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 6

	Category	Rate Class	January	February	March	April	May	June	July	August	September	October	November	December	Total
2009	Extensions/Operations/SRW	Res	1		1			1			1				
	Extensions/Operations/SRW	Other	1							1					
	Rates/Bills/Standard Charges	Res		1		3								1	
	Rates/Bills/Standard Charges	Comm	1												
	Capital Projects	Res						1							
	Outages	Res										2	1		
Total			3	1	1	3	0	2	0	1	1	2	1	1	16
2010	Rates/Bills/Standard Charges	Res	1	2				1		1					
	Extensions/Operations/SRW	Res									1	1			
	Capital Projects	Res											9	3	
	Capital Projects	Wholesale											1		
	Outages	Comm			1	1									
Total			1	2	1	1	0	1	0	1	1	1	10	3	22
2011	Rates/Bills/Standard Charges	Res		2		2		1	1			1		1	
	Rates/Bills/Standard Charges	Comm				1									
	Extensions/Operations/SRW	Res										1	1		
	Extensions/Operations/SRW	Irrigation									1				
	Capital Projects	Res						1							
Total			0	2	0	3	0	2	1	0	1	2	1	1	13
2012	Rates/Bills/Standard Charges	Res			1		1			1			2	2	
	Extensions/Operations/SRW	Res					1	1			2				
Total			0	0	1	0	2	1	0	1	2	0	2	2	11
2013	Extensions/Operations/SRW	Comm	1												
	Extensions/Operations/SRW	Res	1	1		1									
	Rates/Bills/Standard Charges	Res	2	1		3	2	2							
	Rates/Bills/Standard Charges	Other								1					
Total			4	2	0	4	2	2	0	1	N/A	N/A	N/A	N/A	15

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 7

9.8 Describe in detail how any of the service quality indicators listed on Table **B6-8** impacted the incentive or bonus payments to employees for each year of the prior PBR.

In your response, identify the dollar amount of incentive payments available, paid, and withheld as a result of the performance of any of these service quality indicators. In your response, differentiate by type of employee (i.e., executives, managers, supervisors, other, etc.)

Response:

FBC clarifies that the primary purpose of the service quality indicators listed on Table B6-8 is for use within the context of the proposed PBR Plan to ensure that the utility is encouraged to pursue efficiencies that do not sacrifice service quality. The SQIs have a different intended use than the measures used for the Company's balanced scorecard. It is only those measures included on the balanced scorecard that affect incentive payments for eligible employees.

For the period of the prior PBR plan from 2007 – 2011, of the measures included as service quality indicators and the measures on the balanced scorecard, three of them (AIFR, SAIDI, CSI) are common to both. These three measures were appropriate for both uses, scorecard (corporate performance) and service quality monitoring (PBR Plan), as they are important indicators of safety, reliability and customer service and essential elements to the Company's business. The CSI and SAIDI measures are focused on ensuring the Company is able to deliver a safe and reliable service while maintaining a customer service focus. The AIFR measure helps to ensure focus on achieving employee safety. Creating a safe working environment for employees will support the delivery of a safe and reliable service to customers.

In their use as SQIs, the three measures complement the other service quality indicators (i.e. emergency response time, telephone service factor, etc.) in forming an overall group of measures to ensure there is not a sustained serious degradation of service quality during the term of the PBR Plan.

In their use as scorecard measures, as described in section A5 Organizational Performance and Monitoring, FBC currently and in the past has used these three measures as part of its balanced scorecard approach to deliver on a number of key success measures critical to the business. As outlined in the responses to BCSEA IR 1.34.1 and BCUC IR 1.4.1, FBC's current balanced scorecard is comprised of four categories of measures (Financial, Safety, Customer and Regulatory) which are standardized between the electric and gas businesses. In total, six measures describe and guide the Company's overall performance in meeting the targets, which are set annually. In each target category, three performance levels are used: Threshold (50 per

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 8

cent), Target (100 per cent) and Maximum (150 per cent). FBC employees receive annual incentive pay, based on the achievement of the corporate scorecard targets during a year. Performance targets guide employees to execute results in key areas and are weighted to balance the interests of our various stakeholders. A minimum or threshold level of earnings must be met before any incentive payout occurs.

During the previous PBR plan from 2007 – 2011, for management and exempt (M&E) staff, corporate performance as measured by the balanced scorecard impacted compensation under the short-term incentive (STI) pay program. The STI program recognized and rewarded the achievement of corporate objectives by putting compensation at risk. The value of short-term incentive pay assigned to each broad band of pay ranged from 15-20% of regular earnings, with the maximum payout set at 100% of target.

For executives, corporate performance as measured by the balanced scorecard impacted their compensation under the short-term incentive (STI) pay program. This variable pay component was dependent upon both corporate and individual performance and was based on a percentage of salary. For executives, 50% of short-term incentive was based on attainment of individual objectives, and 50% was based on attainment of corporate objectives.

There were no unionized employees eligible for short term incentive pay during the previous PBR plan. Please refer to the response to BCUC IR 1.223.1.2 for a description of the current short term incentive pay for the eligible COPE Customer Service group of employees. Only those COPE Customer Service employees hired after March 2012 are eligible for short term incentive pay.

For the dollar amount of incentive payments paid to management and exempt staff and unionized staff, please refer to the response to Gabana IR 1.14 for the short-term incentive pay FBC paid to its management and exempt employees, excluding executives, from 2008 to 2012. For the dollar amount of incentive payments paid to executives, please refer to the response to BCUC IR 1.103.1 which provides the total and average costs relating to FBC, FEI and FHI executives for base pay, short-term incentive pay, long-term incentive pay and benefits for 2008 to 2014.

To see how the performance of the three scorecard measures CSI, SAIDI and AIFR have affected the incentive payments to eligible employees from 2007 – 2011, please refer to the following table.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 9

Scorecard Measure Weightings

Category	Measure	2007		2008		2009		2010		2011	
		Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target
Customer Satisfaction	CSI	18.8%	25.0%	17.5%	20.0%	17.5%	20.0%	15.0%	15.0%	15.0%	15.0%
Reliability	SAIDI	20.0%	20.0%	20.0%	20.0%	15.0%	15.0%	0.0%	20.0%	20.0%	20.0%
Safety	AIFR	12.5%	25.0%	0.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%
Other		25.4%	30.0%	35.0%	35.0%	38.2%	40.0%	39.1%	40.0%	39.9%	40.0%
Total		76.7%	100.0%	72.5%	100.0%	95.7%	100.0%	79.1%	100.0%	99.9%	100.0%

To be able to compare the measures and their relative contribution to the overall incentive payments in each year as described earlier, FBC provides the requested information in percentages. The "Target" percentages (i.e. weightings) as shown represent the measures' available incentive payments, expressed as a percentage of the overall scorecard total. The "Actual" percentages represent the actual performance during the year for the measures times their assigned weightings. The difference between "Actual" and "Target" represents the incentive payment withheld as a result of the performance of the measures.

9.9 If different from your response to #8, identify other service quality indicators not otherwise listed in Table **B6-8** that had an impact on incentives or bonuses paid to employees for the same time period.

Response:

As noted in the response to COPE Supplemental IR 1.9.8, FBC clarifies that the primary purpose of the service quality indicators (SQI) listed on Table B6-8 are for use within the context of the proposed PBR Plan to ensure that the utility is encouraged to pursue efficiencies that do not sacrifice service quality. The SQIs have a different intended use than the six measures used for the Company's balanced scorecard. It is only those measures included on the balanced scorecard that affect incentive payments for eligible employees.

In addition to the measures included on the balanced scorecard, incentives paid to employees are also impacted by achievement of individual objectives. In the case of COPE Customer Service employees, incentives are impacted by achievement of individual and departmental objectives.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 10

9.10 With regard to the Telephone Service Factor metrics in Table **B6-8**, define the term “answered” in your proposed indicator. Specifically, does this term reflect the answer of the telephone call by a customer service representative? If not, provide the historical performance for calls answered by a live customer service representative when the customer selects that option on the voice response menu.

Response:

The Telephone Service Factor metric measures the percentage of calls answered by a customer service representative within a defined window of time.

9.11 With regard to Emergency Response Time in Table **B6-8**, define the term “responded to.”

Response:

The Emergency Response Time measures the time elapsed from the initial identification of a loss of electrical power (via a customer call or internal notification) to the arrival of FBC personnel on site at the trouble location.

9.12 Provide a copy of the survey instrument used for the Customer Satisfaction Index in Table **B6-8** and identify what results from the survey are used to calculate the “index.”

Response:

The Customer Satisfaction Index survey instrument is included as Attachment 9.12. Section F of the survey has been omitted as this section’s questions change from quarter to quarter and associated results are not used in the index calculation.

The index is calculated by pro-rating the mean scores of five service-attributes, as determined by customer responses to eight questions. The weighting applied to each question is shown in Table 1 below.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 11

1

Table 1: CSI weighting by question

Service	Measure	Sample	Weight	Question
Overall Satisfaction	Mean	All Respondents	30%	B1
Accuracy of Meter Reading	Mean	All Respondents	10%	B3.2
Energy Conservation Information	Mean	All Respondents	10%	B3.8
Contact Center	Mean	All Respondents	25%	C5
Field Services (includes four questions to evaluate meter reader, linesman, technician, and PowerSense representative service quality)	Mean	All Respondents	25%	Sum(D3, D8, D13, D22)

2

3

4

5

6

7

8

9

10

11

Response:

12

13

14

15

16

17

18

19

20

21

22

Response:

23

24

25

26

27

No, FortisBC does not offer any such payments. As stated in Section B6.7.2.2 of the Application (Exhibit B-1), FBC is proposing a number of non-financial Service Quality Indicators to assist with the review and analysis of annual performance. These SQIs are not tied to any financial provision but rather the sustained and serious degradation of SQI performance may warrant the off-ramp provision of the PBR mechanism. Failure to meet one (or more) SQI

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 12

benchmarks does not necessarily constitute unacceptable performance as there are many random events or events that are beyond the full control of FBC that could impact SQI performance.

9.15 Has the Company made any investments in the last five years that were intended to improve service quality performance compared to historical performance? If so, describe such investments (e.g., infrastructure to improve reliability of service, customer call center operations, advanced metering to improve billing and customer service, etc.) and the impact they have had on service quality performance.

Response:

Since 2005, and including in the last five years, FBC has made considerable capital investments to increase reliability, capacity and customer service throughout the Company's service territory. FBC does not use its performance standards to plan what capital investments are required, however, in general FBC's capital projects and investments will have an impact on one or more of its SQIs either directly or indirectly.

9.16 If the Company's actual historical performance is better than the proposed baseline for service quality indicators as described in Appendix **D-6**, define how the Company has determined that the lower or lesser baseline performance recommendation was determined to be "acceptable."

Response:

Please refer to the response to BCPSO IR 1.3.1.

9.17 Provide the survey instrument the Company currently uses to measure First Contact Resolution.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 13

1 **Response:**

2 As described in Exhibit B-1-1, Appendix D-7 Service Quality Indicators, Section 3.2.2 First
3 Contact Resolution, FBC believes that the simplest and most effective way to evaluate FCR is
4 to ask the customer their opinion as to whether or not their issue was resolved on the first
5 contact. In order to gain customer feedback on this topic, FBC uses the same methodology as
6 that currently used at the gas contact centers. This involves using Service Quality Measurement
7 (SQM), a call centre industry research expert to contact customers who have recently had an
8 interaction with the Company. On average, 90 customers per month are contacted by SQM and
9 asked the following questions:

10 SQM's First Call Resolution (FCR)

11 Definition: Customer's call is resolved on the first call without having to call back to resolve their
12 inquiry or problem.

13 There is one question in the IVR Survey that is used to determine the FCR percentage.
14 Question 6 receives a score of 100% if 1 is pressed. All other responses receive a score of 0%.
15 The question reads as follows:

16 6. In total, how many calls did you have to make to resolve your initial inquiry?

- 17 • Press 1 for... 1 call
- 18 • 2 for... 2 calls
- 19 • 3 for... 3 calls
- 20 • 4 for... 4 or more calls

21
22

23

24 9.18 Describe the events or factors that have led or might lead to a failure to meet any
25 of the sub-measures included in the Billing Index proposed in Appendix **D-6**. In
26 your response, describe the impact of the AMI system on these billing indicators.

27
28 **Response:**

29 The three sub-measures included in the Billing Index are the percentage of bills accurate based
30 on input data, percentage of bills delivered to Canada Post within two days of creation and
31 percentage of customers billed within two business days of the scheduled billing date. Any one
32 of those could be affected by an error in the creation of the bill – wrong input data, system

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 14

change etc. Numerous quality checks are in place to reduce the frequency of such an event taking place.

Please refer to the response to BCUC IR 1.64.1 for the impact of the AMI system on these billing indicators.

The accuracy component of the Billing Index can be impacted by a production issue, like a system change or rate change not showing the correct rate or the correct tax amount on a group or subset of bills. For example, this could occur if a testing scenario was missed or not comprehensive enough after a system change was implemented.

The completion component of the Billing Index can be affected when there is an influx of invoice amounts or meter reads outside normal thresholds, which results in an increase in billing outsorts.

An example where the timeliness component of the Billing Index could be impacted is when there has been a printing issue, or a billing file technical issue that negatively affects the invoices in the billing file getting to Canada Post within 2 business days.

9.19 With regard to Meter Reading Accuracy, does the Company agree with the AMI system will automatically read each meter remotely? What is the Company's experience in obtaining accurate meter readings with the AMI system to date?

Response:

The AMI system will be configured to automatically collect meter reads on a daily basis. The accuracy of the data collected is validated in the Meter Data Management System (MDMS) that acts as the repository for all meter data. No portion of the AMI system has been implemented by FortisBC to date, however, the project implementation includes a plan for a test zone installation in order to prove the AMI system's accuracy prior to full deployment.

Additionally, the AMI project recognizes that there will be a small number of meters that will continue to be read manually. The manual read process will be similar to what is done today.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 15

1 9.20 Describe in detail why each of the service quality indicators listed as
2 "informational" are categorized in that manner and fail to reflect a baseline
3 performance measure.
4

5 **Response:**

6 Please refer to the responses to BCUC IRs 1.60.1.1, 1.60.1.2 and 1.68.9.
7
8
9

10 9.21 Does the Company track whether it keeps appointments for field work that
11 require a premise visit to the customer? If so, provide any performance data for
12 this metric for 2009 through 2012 and 2013 to date. [In your response, identify
13 those appointments not kept due to customer reasons and Company reasons.]
14

15 **Response:**

16 No, given the multitude of factors that can impact the timing of customer site visits, FBC does
17 not track whether it keeps appointments for such field work. Despite this, FBC does endeavour
18 to keep all appointments as committed to customers, and to reschedule such appointments
19 when they may be unavoidably delayed.
20
21

22
23 9.22 With regard to the proposed benchmark for the First Contact Resolution
24 indicator, does the Company intend to or seek to improve performance over time
25 since the proposed benchmark is a reflection of the first year's performance?
26

27 **Response:**

28 As indicated in Exhibit B-1-1, Appendix D-7 Service Quality Indicators, Section 3.2.2 First
29 Contact Resolution, the proposed benchmark of 78 percent is also the same target for FEI's gas
30 call centers. FEI set its benchmark based on its first year operations for the gas call centers
31 and recognizing that the 78 percent benchmark positions the company above the industry
32 average of 71 percent for an Energy Call Center. By using the same benchmark, FBC will
33 position its performance target to be above the industry average also.

34 At this time, FBC expects to be able to maintain the First Contact Resolution results at the
35 proposed benchmark of 78 percent.

FortisBC Inc. (FBC or the Company) Application for Approval of a Multi-Year Performance Based Ratemaking Plan for 2014 through 2018 (the Application)	Submission Date: September 27, 2013
Response to Canadian Office and Professional Employees' Union, Local 378 (COPE) Supplementary Information Request (IR) No. 1	Page 16

9.24 With regard to the evaluation by Black and Veatch of other Canadian PBRs, provide a copy of the portion of each PBR studied that includes the service quality performance index and associated penalty mechanism.

Response:

Please refer to the table below detailing the titles, links of the references and related SQL sections used for each of the five PBR plans:

Utility/ Jurisdiction	Title	Section	Link
Alberta Electricity and Natural Gas	Decision 2012-237 - Rate Regulation Initiative, Distribution Performance-Based Regulation	Section 14	http://www.auc.ab.ca/applications/decisions/Decisions/2012/2012-237.pdf
Enbridge Gas and Union Gas	PEG's report -Assessment of Union Gas Ltd. And Enbridge Gas Distribution Inc. Incentive Regulation Plans, September 2011	Section 7	http://www.ontarioenergyboard.ca/OEB/_Documents/EB-2011-0052/PEG_Final%20Report_20110930.pdf
OEB's Power Distributors	Report of the Board - Renewed Regulatory Framework for Electricity Distributors: A Performance-Based Approach, October 2012	Section 4	http://www.ontarioenergyboard.ca/OEB/_Documents/Documents/Report_Renewed_Regulatory_Framework_RRFE_20121018.pdf
OEB's Power Distributors	Report of the Board - on 3rd Generation Incentive Regulation for Ontario's Electricity Distributors, July 2008	Section 2.9	http://www.ontarioenergyboard.ca/OEB/_Documents/EB-2007-0673/Report_of_the_Board_3rd_Generation_20080715.pdf
Gaz Metro (English version)	Performance incentive mechanism, Agreed in NSP R- 3599-2006 (Translation – Not approved by Participants)	Section 3.2.5	http://www.corporatif.gazmetro.com/data/media/gazmetro%20performance%20incentive%20mechanism.pdf?culture=en-ca

Attachment 9.1

REFER TO LIVE SPREADSHEET MODELS

Provided in electronic format only

(accessible by opening the Attachments Tab in Adobe)



2006 Annual Review and 2007 Revenue Requirements Workshop

David Bennett
General Counsel

November 9, 2006
Kelowna, BC



2006 Annual Review and 2007 Revenue Requirements

AGENDA

Morning

- | | |
|--|--|
| <p>9:30</p> <p>Welcome and Introductions
BCUC Staff</p> <p>Introductory Comments
David Bennett</p> <p>9:45</p> <p>Community Initiatives
Natika Sunstrum</p> <p>10:00</p> <p>DSM Committee Report
Russ Leslie, IMEU</p> <p>10:15</p> <p>Capital Projects - 2006
Mark Warren</p> <p>10:35</p> <p>Break</p> <p>10:50</p> <p>Capital Projects - 2007
Edgar Frank</p> <p>11:15</p> <p>2006 Financial Results
<i>Variance & Incentive Review</i>
Ian Lorimer</p> <p>12:00</p> <p>LUNCH (provided)</p> | <p>12:45</p> <p>Performance Standards
2006 Results and 2007 Targets
Dawn Mehrer / Marko Aaltomaa</p> <p>Overview of 2007 Revenue Requirements</p> <p>1:25</p> <p>Load Forecast
Dennis Swanson</p> <p>1:45</p> <p>Power Purchase Expense & Strategy
Dan Egolf</p> <p>2:05</p> <p>Revenue Protection
Mark Warren</p> <p>2:25</p> <p>Break</p> <p>2:40</p> <p>Revenue Requirements Summary
Ian Lorimer</p> <p>3:10</p> <p>PLP Integration - Chuck Lee</p> <p>3:30</p> <p>Wrap up - BCUC Staff</p> <p>3:45</p> <p>AFUDC Supplemental Review
Dennis Swanson</p> |
|--|--|

Afternoon

2006 Annual Review

Performance Standards

Dawn Mehrer, Supervisor Customer Service
Marko Aaltomaa, Kootenay Regional Engineer

November 9, 2006
Kelowna, BC

Performance Standards:

- Primarily focused on Safety, Reliability and Customer Service
- Agreed to as part of the 2006 Negotiated Settlement Agreement (2006 NSA)
- Overall assessment of Company performance
- Agreement about actions if targets not met

Objectives:

- Review 2006 performance – Results October 2005 to September 2006
- Set targets for 2007

Performance Standard	2006 Target	Actual Results	Result
All Injury Frequency Rate	4.83	2.09	✓
Injury Severity Rate	24.62	20.94	✓
Recordable Vehicle Incidents	4.72	2.63	✓
System Average Interruption Duration Index	2.87	2.62	✓
System Average Interruption Frequency Index	2.76	3.53	
Generator Forced Outage Rate	0.35%	2.68%	
Billing Accuracy	0.072%	0.034%	✓
Meters Read as Scheduled	97%	97%	✓
Contact Center - Telephone Service Factor	70%	72%	✓
Emergency Response Time	85%	93%	✓
Residential Service Connections – percentage connected within 6 working days	85%	86%	✓
Residential Extensions – percentage quoted within 35 working days	75%	82%	✓
Residential Extensions – percentage connected within 30 working days	75%	74%	
Customer Satisfaction Survey	N/A	8.4	N/A

69

Safety Indicator - All Injury Frequency Rate

The total number of work related Lost Time Injuries or illness plus Medical Aid Injuries (per 100 workers).

2006 Target = 4.83

2006 Result = 2.09

Status: Target Met ✓

2007 Target = 3.29

2007 Target based on 3 year rolling average.

70



Safety Indicator - Injury Severity Rate

The total number of lost work days due to work related injuries or illness (per 100 workers).

2006 Target = 24.62

2006 Result = 20.94

Status: Target Met ✓

2007 Target = 17.53

2007 Target based on 3 year rolling average.

71



Safety Indicator - Recordable Vehicle Incident Rate

The number of licensed fleet motor vehicle incidents that result in injury and/or property damage > \$1,000 per 1,000,000 kms

2006 Target = 4.72

2006 Result = 2.63

Status: Target Met ✓

2007 Target = 3.46

2007 Target based on 3 year rolling average.

72



T&D System Reliability Indicator - SAIDI

SAIDI is the amount of time the average customer's power is off per year

2006 Target = 2.87

2006 Result = 2.62

Status: Target Met ✓

2007 Target = 2.57

2007 Target based on 3 year normalized average using 2004 results + 10%, 2005 results +10% and 2006 results.

73



T&D System Reliability Indicator - SAIFI

SAIFI is the average number of interruptions per customer served per year

2006 Target = 2.76

2006 Result = 3.53

Status: Target Not Met

2007 Target = 3.15

2007 Target based on 3 year normalized average using 2004 results + 10%, 2005 results +10% and 2006 results.

74

SAIFI Results Summary

The SAIFI result has been substantially affected by the following transmission system related events:

- Total Loss of Supply from BCTC caused an outage in Kelowna on March 3, 2006. This outage contributed 0.47 to the SAIFI result.
- Two outages at the recently upgraded DG Bell Terminal station in June due to protection mis-operation added 0.43 to the SAIFI result.

75

Generation Reliability Indicator - FOR%

The Generator Forced Outage Rate (FOR%) is the ratio of the total forced outage time to forced outage time plus total operating time multiplied by 100.

2006 Target = 0.35%

2006 Result = 2.68%

Status: Target Not Met

2007 Target = 0.35%

Target is fixed for the term of the PBR.

76

Generator FOR% Results Summary

The Generator FOR% result has been substantially affected by the following two significant events:

- A seven week outage at the Corra Linn generating station due to water in the generator winding as a result of the operation of the fire protection system.
- A transformer outage due to a developing fault in the winding at the Lower Bonnington generating station that has resulted in a unit outage since August of this year and a return to service date forecasted for January 2007.
- With these two outages removed the Generator FOR% would have met the target.
- The 2007 target of 0.35% will not be met due to the Lower Bonnington outage.

77

Emergency Response Time

This performance target measures the percentage of time that our personnel arrive on site after the initial identification of a loss of electrical power within 2 hours

2006 Target = 85%

2006 Result = 93%

Status: Target Met ✓

2007 Target = 85%

Target is fixed for the term of the PBR.

78



Residential Service Connections

This performance target measures the percentage of new customer connections that do not require design or permitting are connected within 6 business days

2006 Target = 85%

2006 Result = 86%

Status: Target Met ✓

2007 Target = 85%

Target is fixed for the term of the PBR

79



Residential Extension Quoting Time

This performance target measures the percentage of customers that have an initial design and customer quotation provided within 35 working days of the initial request

2006 Target = 75%

2006 Result = 82%

Status: Target Met ✓

2007 Target = 75%

2007 Target based on 3 year rolling average is 72%

80



Residential Extension Completion Time

This performance target measures the percentage of customer extensions that are completed within 30 working days after acceptance of the quote

2006 Target = 75%

2006 Result = 74%

Status: Target Not Met

2007 Target = 75%

2007 Target based on 3 year rolling average is 73%

81



Billing Accuracy

% of bills delayed beyond the regular billing cycle

2006 Target = 0.072%

2006 Result = 0.034%

Status: Target Met ✓

2007 Target = 0.072%

Fixed target for term of PBR



82



Commitment to Read Meters

Actual meters read as percentage of those scheduled to be read.

2006 Target = 97%

2006 Result = 97%

Status: Target Met ✓

2007 Target = 97%

Fixed target for term of PBR.



83



Contact Center Performance

Telephone Service Factor: % of incoming calls answered in 30 seconds or less

2006 Target = 70%

2006 Result = 72%

Status: Target Met ✓

2007 Target = 70%

Fixed target for term of PBR.



84

First Contact Resolution (FCR)

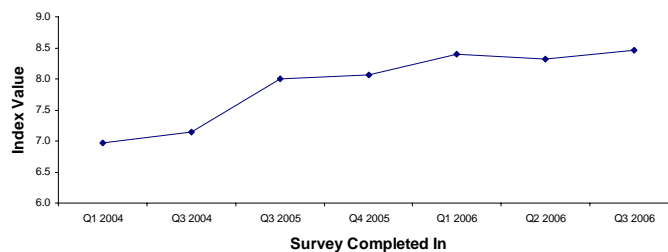
- Agreed to research possible measures for FCR
- In August 2006 the Company began 'subjective' FCR tracking:
- Allows FortisBC to:
 - Better understand current levels of FCR
 - Measure FCR trends
 - Identify areas of improvement
 - Provide a means to ensure areas of improvement are addressed and resolved.
- Propose to use FCR tracking going forward for process and performance improvements

85

Customer Satisfaction Survey

Directional Metric – Average satisfaction score out of ten.

Customer Satisfaction Index



Average Score 2006 = 8.4

86



2006 Performance Standards – Summary

- Targets were met in 10 out of 13 categories.
- Overall, results show that performance this year has been positive and qualifies the Company for financial incentives.

87



2007 Performance Standard Targets

Performance Standard	2007 Target
All Injury Frequency Rate	3.29
Injury Severity Rate	17.53
Recordable Vehicle Incidents	3.46
System Average Interruption Duration Index	2.57
System Average Interruption Frequency Index	3.15
Generator Forced Outage Rate	0.35%
Billing Accuracy – percentage of bills delayed beyond the regular bill schedule	0.072%
Meters Read as Scheduled	97%
Contact Center – percentage of calls answered within 30 seconds	70%
Emergency Response Time – percentage of calls responded to within 2 hours	85%
Residential Service Connections – percentage connected within 6 working days	85%
Residential Extensions – percentage quoted within 35 working days	75%*
Residential Extensions – percentage connected within 30 working days	75%*

88



2007 Annual Review and 2008 Revenue Requirements Workshop

Agenda


David Bennett
VP, Regulatory Affairs and General Counsel

November 8, 2007
Kelowna, BC



2007 Annual Review and 2008 Revenue Requirements Workshop

Morning		Afternoon	
Time		Time	
9:00	Welcome and Introductions BCUC Staff Introductory Comments David Bennett <u>2007 Annual Review</u>	1:00	Performance Standards 2007 Results and 2008 Targets Dawn Mehrer <u>2008 Revenue Requirements</u>
9:15	Community Initiatives Mark Warren	1:40	Load Forecast Sandra Gault
9:35	DSM Committee Report Buryl Goodman	2:00	Power Purchase Expense & Strategy Dan Egolf
10:00	Capital Projects- 2007/08 Curtis Klashinsky	2:30	Break
10:45	Break	2:50	Other Cost Accounts/Summary Dennis Swanson
11:00	2007 Financial Results Variance & Incentive Review Dennis Swanson	3:50	Wrap up - David Bennett
11:45	LUNCH (provided)		



2007 Annual Review

Performance Standards

Dawn Mehrer
Manager Customer Service

November 8, 2007
Kelowna, BC



Performance Standards:

- Focused on:
 - Safety; Reliability; Customer Service
- Set as part of the 2006 NSA
- Provide an overall assessment of performance

Today's Objectives:

- Review 2007 performance (October 06 to September 07)
- Set targets for 2008

2



2007 Performance Standards Overview

- **Targets were met or exceeded in 12 out of 13 categories.**
- **Injury severity rate less than target.**
- **Most notable improvements:**
 - Residential service connection and quoting metrics

3



All Injury Frequency Rate

The total # of Lost Time Injuries or illness plus Medical Aid Injuries (per 100 workers).

2007 Target = 3.29

2007 Result = 1.58

Status: Target Met ✓

2008 Target = 2.09

4

FORTISBC	Injury Severity Rate
<p>The total # of lost work days due to injuries or illness (per 100 workers).</p>	
<p>2007 Target = 17.53</p>	
<p>2007 Result = 41.54</p>	
<p>Status: Target Not Met</p>	
<p>2008 Target = 21.62</p>	
<p>5</p>	

FORTISBC	Recordable Vehicle Incident Rate
<p>The # of motor vehicle incidents resulting in injury and/or property damage > \$1,000 (per 1,000,000 km's driven).</p>	
<p>2007 Target = 3.46</p>	
<p>2007 Result = 1.55</p>	
<p>Status: Target Met ✓</p>	
<p>2008 Target = 2.07</p>	
<p>6</p>	



SAIDI

SAIDI is the amount of time the average customer's power is off per year (hours)

2007 Target = 2.57

2007 Result = 2.38

Status: Target Met ✓

2008 Target = 2.43



7



SAIFI

SAIFI is the average number of interruptions per customer served per year

2007 Target = 3.15

2007 Result = 2.41

Status: Target Met ✓

2008 Target = 3.11



8



The Generator Forced Outage Rate

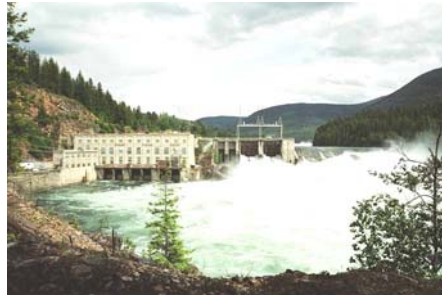
FOR% is the ratio of the total forced outage time to forced outage time plus total operating time multiplied by 100.

2007 Target = 0.35%

2007 Result = 0.08%

Status: Target Met ✓

2008 Target = 0.35%



9



Emergency Response Time

% of time that FortisBC arrives on site after the initial identification of a loss of electrical power within 2 hours

2007 Target = 85%

2007 Result = 91%

Status: Target Met ✓

2008 Target = 85%



10



Residential Service Connections

The % of new customer connections (no design or permitting) that are connected within 6 business days

2007 Target = 85%

2007 Result = 88%

Status: Target Met ✓

2008 Target = 85%



11



Residential Extension Quoting Time

% of customers that have received a design and quotation within 35 working days

2007 Target = 75%

2007 Result = 91%

Status: Target Met ✓

2008 Target = 80%



12



Residential Extension Completion Time

The % of customer extensions that are completed within 30 working days after acceptance of the quote

2007 Target = 75%

2007 Result = 86%

Status: Target Met ✓

2008 Target = 77%



13



Billing Accuracy

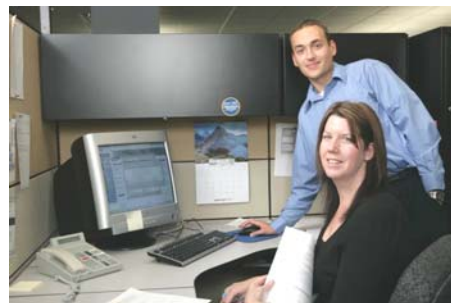
% of bills delayed beyond the regular billing cycle

2007 Target = 0.072%

2007 Result = 0.047%

Status: Target Met ✓

2008 Target = 0.072%



14



Commitment to Read Meters

Actual meters read as percentage of those scheduled to be read.

2007 Target = 97%

2007 Result = 97%

Status: Target Met ✓

2008 Target = 97%



15



Contact Center Performance

Telephone Service Factor: % of incoming calls answered in 30 seconds or less

2007 Target = 70%

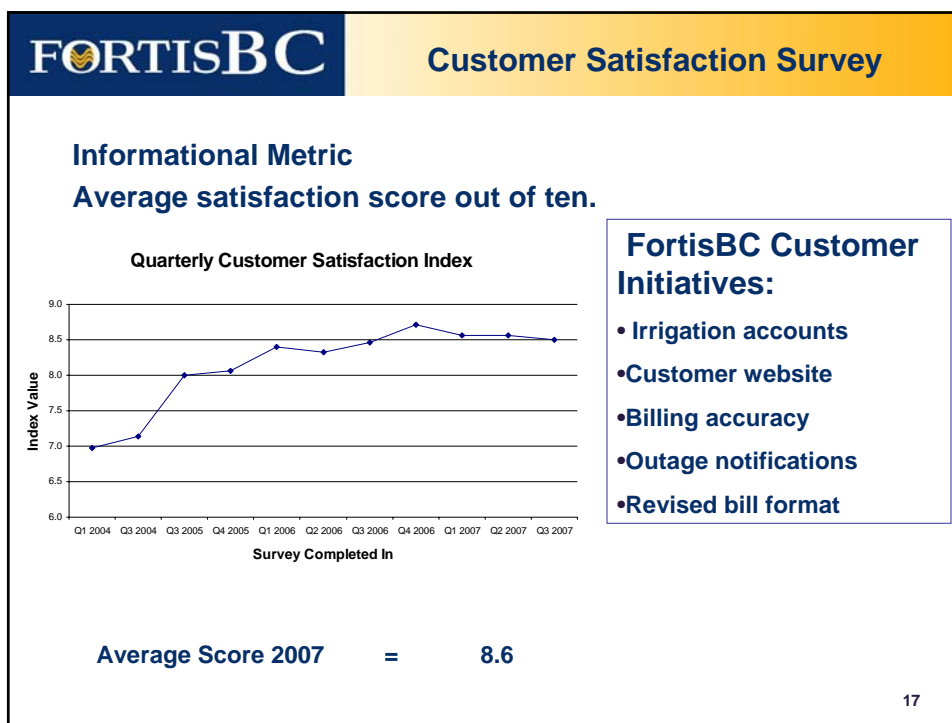
2007 Result = 70%


Status: Target Met ✓

2008 Target = 70%



16






Revised Bill Format

Dear Fortis,

"I want to tell you how much I appreciate your new billing and the side panel that gives all the info. It makes the statement so much clearer and I know exactly where I stand."



Customer Suggestion:

"...give notification the days that the meter reader will arrive in the area."

Meter Reading Information

Meter Number: 165030

Oct 27 2007	02910
Oct 19 2007	02819
8 days	91 kWh
Average current kWh/Day	
Average previous year kWh/Day	
Next reading on or about Dec 20 2007	

To improve service, please call us to report a power outage or abnormal power line, call us at 1-800-470-7878 (1-800-438-7847).

Please use your account number on your check or money order payable to FortisBC Inc. Your payment is accepted at most financial institutions.

FORTISBC

DUE DATE: December 09, 2007

AMOUNT DUE: 245.62

4006 072324649362 000000000000 00000264936

00005949000



2007 Performance Standards – Summary

- **Targets were met in 12 out of 13 categories.**
- **Results show that performance this year has been positive and qualifies the Company for financial incentives.**



19



Performance Standards

Questions/Comments



2008 Annual Review and 2009 Revenue Requirements Workshop

<u>Morning</u>		<u>Afternoon</u>	
<u>Time</u>		<u>Time</u>	
9:00	Welcome and Introductions David Bennett/BCUC Staff	1:15	Performance Standards 2008 Results and 2009 Targets Doyle Sam
9:15	Opening Remarks John Walker		<u>2009 Revenue Requirements</u>
	<u>2008 Annual Review</u>	2:00	Load Forecast Sandra Gault
9:30	Key Issues Michael Mulcahy	2:30	Power Purchase Expense Wheeling & Water Fees Dan Egolf
10:00	DSM Committee Report Michael Mulcahy/Richard Tarnoff	3:00	Break
10:30	Capital Projects Doyle Sam	3:30	2009 Revenue Requirement Overview Michele Leeners
11:15	Break	4:00	Summary & Closing - David Bennett
11:30	2008 Financial Results Variance & Incentive Review Michele Leeners		
12:15	LUNCH (provided)		

2008 Annual Review

Safety, Environment, Revenue Protection

Michael Mulcahy
VP, Customer & Corporate Services

November 13, 2008
Kelowna, BC

2008 Annual Review

Performance Standards

Doyle Sam
Vice President Engineering & Operations

November 13, 2008
Kelowna, BC

Performance Standards:

- Safety, Reliability, Customer Service
- Set as part of the 2006 NSA
- Provide an overall assessment of performance

Today's Objectives:

- Review 2008 performance (Oct '07 to Sept '08)
- Confirm Incentive sharing
- Propose targets for 2009

Targets were met or exceeded in 10 out of 13 categories

Targets not met:

- All Injury Frequency Rate ("AIFR")
- Injury Severity Rate ("ISR")
- System Average Interruption Duration Index ("SAIDI")

Notable improvements:

- Customer Residential service connection and quoting metrics

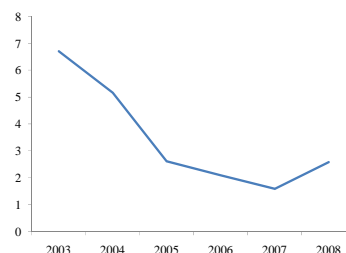
The total # of Lost Time Injuries or illness plus Medical Aid Injuries (per 100 workers).

2008 Target = 2.09

2008 Result = 2.57

Status: Target Not Met

2009 Target = 2.08



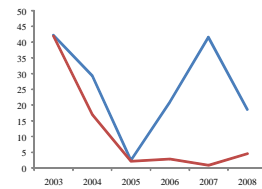
The total # of work days lost due to injuries or illness
(per 100 workers).

2008 Target = 17.53

2008 Result = 18.52

Status: Target Not Met

2009 Target = 27.00



75

- **“Joe”**
 - 30 yr practicing PLT journeyman
 - Extensive knowledge of this device
- **Detailed switching/work plan**
- **Causal factors**
 - Out of Scope
 - Procedure violations
 - Lock to Lock
 - Standard Work Procedure (SWP)
 - Personal Protective Equipment (PPE)
 - Limits of Approach



76

The # of vehicle incidents resulting in injury and/or property damage > \$1,000 (per 1,000,000 kms driven).

2008 Target = 2.07

2008 Result = 1.12

Status: Target Met ✓

2009 Target = 1.77



77

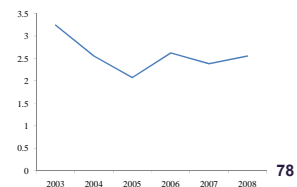
The amount of time the average customer's power is off per year (hours).

2008 Target = 2.45

2008 Result = 2.55

Status: Target Not Met

2009 Target = 2.54



78

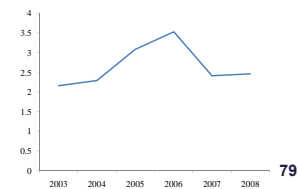
The average number of interruptions per customer served per year.

2008 Target = 3.11

2008 Result = 2.46

Status: Target Met ✓

2009 Target = 2.80



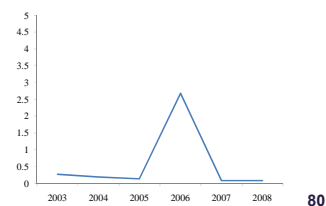
The ratio of the total forced outage time to forced outage time plus total operating time multiplied by 100.

2008 Target = 0.35%

2008 Result = 0.08%

Status: Target Met ✓

2009 Target = 0.35%



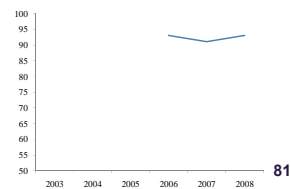
The % of response time to site within 2 hours of initial outage notification.

2008 Target = 85%

2008 Result = 93%

Status: Target Met ✓

2009 Target = 85%



81

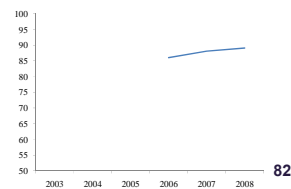
The % of new customer connections completed within 6 business days.

2008 Target = 85%

2008 Result = 89%

Status: Target Met ✓

2009 Target = 85%



82

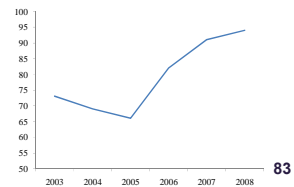
The % of customers that have received a design and quotation within 35 working days.

2008 Target = 80%

2008 Result = 94%

Status: Target Met ✓

2009 Target = 89%



83

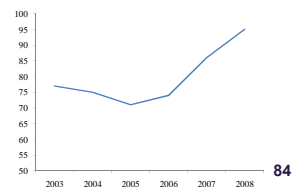
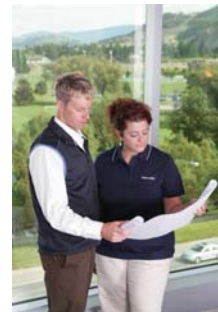
The % of customer extensions completed within 30 working days after quote acceptance.

2008 Target = 77%

2008 Result = 95%

Status: Target Met ✓

2009 Target = 85%



84

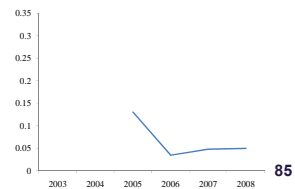
The % of bills delayed beyond the regular billing cycle.

2008 Target = 0.072%

2008 Result = 0.049%

Status: Target Met ✓

2009 Target = 0.072%



85

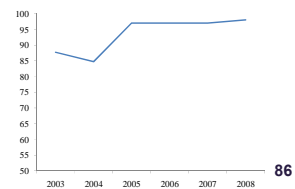
The actual meters read as a percentage of those scheduled to be read.

2008 Target = 97%

2008 Result = 98%

Status: Target Met ✓

2009 Target = 97%



86

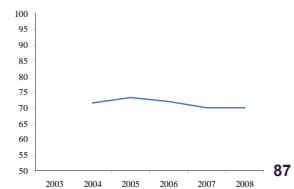
The % of incoming calls answered within 30 seconds.

2008 Target = 70%

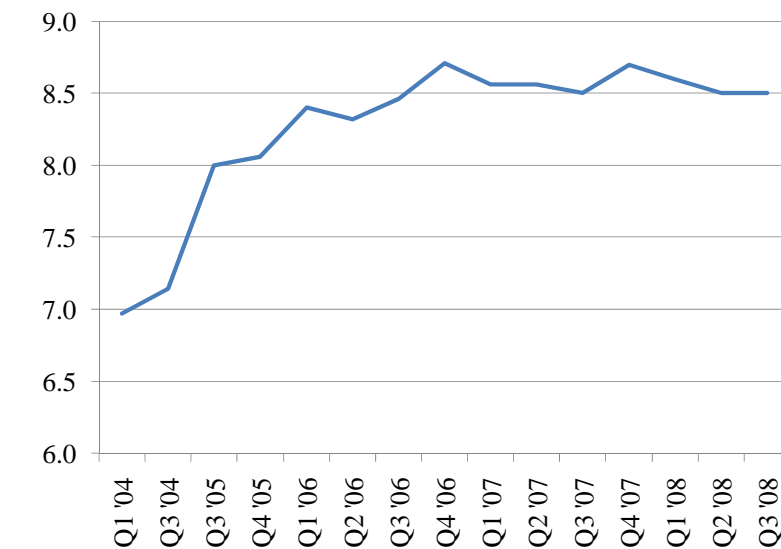
2008 Result = 70%

Status: Target Met ✓

2009 Target = 70%



87



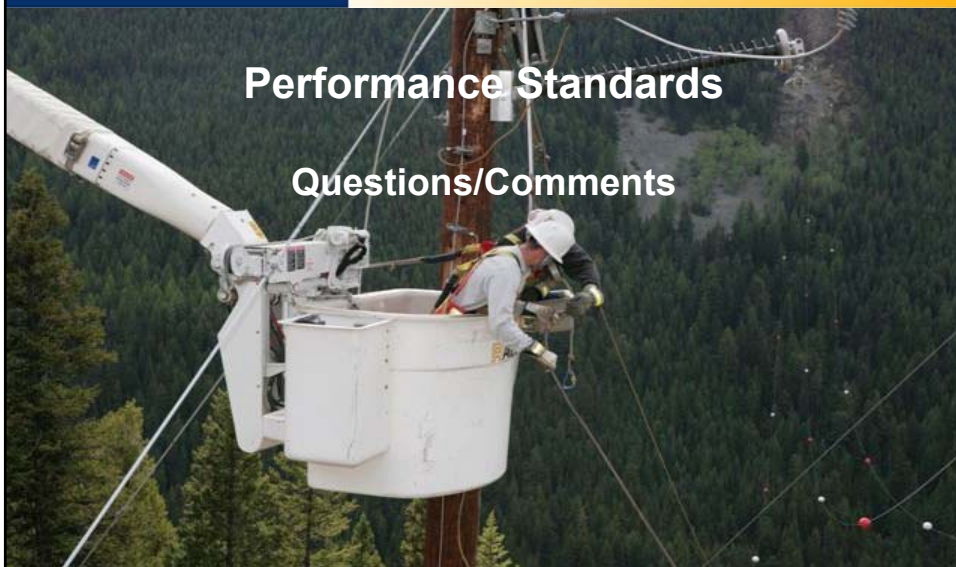
Average Score 2008 = 8.6

88

- Targets were met or exceeded in 10 out of 13 categories
 - Continued focus on safety
 - Response time to outages has improved
- Test for Incentive Sharing
 - Incentive was not earned at the expense of performance
 - The Company did not allow or cause performance to deteriorate in a material way
- The Company has met the test for incentive sharing

Performance Standards

Questions/Comments





2009 Annual Review and 2010 Revenue Requirements

November 17, 2009
Kelowna, BC



2009 Annual Review and 2010 Revenue Requirements Workshop

<u>Morning</u>		<u>Afternoon</u>	
<u>Time</u>		<u>Time</u>	
9:00	Welcome and Introductions Dennis Swanson/ Philip Nakoneshny		<u>2010 Revenue Requirements</u>
9:05	Opening Remarks Dennis Swanson	1:00	Load Forecast Sandra Gault
	2009 Annual Review	1:30	Power Purchase Expense Wheeling & Water Fees Dan Egolf
9:15	DSM Committee Report Keith Veerman/ David Mayes	2:00	2010 Revenue Requirements Overview and Accounting Issues Brett Henderson
9:45	Capital Projects Gary Williams	2:45	Break
10:30	2009 Financial Results Variance & Incentive Review Brett Henderson	3:00	Overview of System Development Doyle Sam
11:00	Break	3:45	Summary & Closing Dennis Swanson
11:15	Performance Standards 2009 Results and 2010 Targets Marko Aaltomaa		
11:45	LUNCH (provided)		

2009 Annual Review

Performance Standards

Marko Aaltomaa
Superintendent System Operations

November 17, 2009
Kelowna, BC

Performance Standards:

- **Safety, Reliability, Customer Service**
- **Set as part of the 2006 NSA**
- **Provide an overall assessment of performance**

Today's Objectives:

- **Review 2009 performance (Oct '08 to Sept '09)**
- **Confirm Incentive sharing**
- **Propose targets for 2010**

Targets were met or exceeded in 12 out of 13 categories

Targets not met:

- **FOR%**

Notable improvements:

- **Safety**
- **SAIFI**

The total # of Lost Time Injuries or illness plus Medical Aid Injuries (per 100 workers).

2009 Target = 2.08

2009 Result = 1.61

Status: Target Met ✓

2010 Target = 1.92



The total # of work days lost due to injuries or illness
(per 100 workers).

2009 Target = 17.53

2009 Result = 16.57

Status: Target Met ✓

2010 Target = 25.54



5

The # of vehicle incidents resulting
in injury and/or property damage >
\$1,000 (per 1,000,000 kms driven).

2009 Target = 1.77

2009 Result = 1.65

Status: Target Met ✓

2010 Target = 1.44



6

The amount of time the average customer's power is off per year (hours).

2009 Target = 2.54

2009 Result = 2.14

Status: Target Met ✓

2010 Target = 2.50



The average number of interruptions per customer served per year.

2009 Target = 2.80

2009 Result = 1.53

Status: Target Met ✓

2010 Target = 2.18



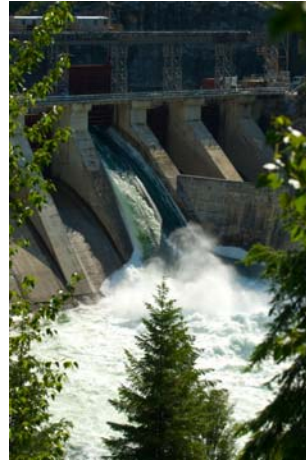
The ratio of the total forced outage time to forced outage time plus total operating time multiplied by 100.

2009 Target = 0.35%

2009 Result = 0.79%

Status: Target Not Met

2010 Target = 0.35%



9

- **Failed transformer in service since 1907**
 - Due to a rupture of a cooling pipe
 - 26 day outage to repair and place back into service
 - Replacement of the transformer will be proposed in a CPCN related to UBO Repowering to be submitted in 2010



10

The % of response time to site within 2 hours of initial outage notification.

2009 Target = 85%

2009 Result = 90%

Status: Target Met ✓

2010 Target = 85%



11

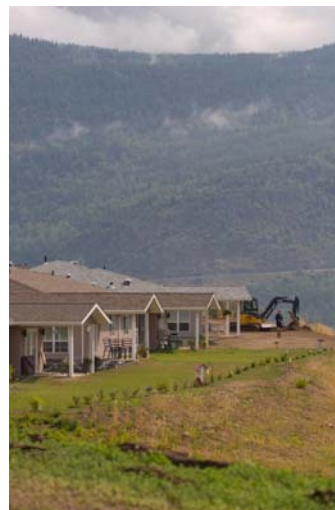
The % of new customer connections completed within 6 business days.

2009 Target = 85%

2009 Result = 90%

Status: Target Met ✓

2010 Target = 85%



12

The % of customers that have received a design and quotation within 35 working days.

2009 Target = 89%

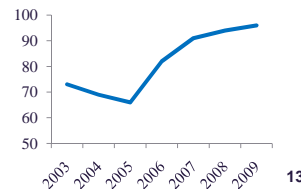
2009 Result = 96%

Status: Target Met ✓

2010 Target = 94%

Historical Performance Review:

- Positive trend since 2005, with consistent and acceptable performance in recent years
- Missing future targets “mathematically” more probable



13

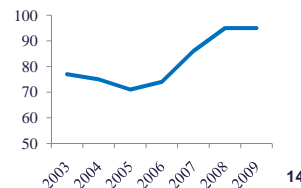
The % of customer extensions completed within 30 working days after quote acceptance.

2009 Target = 85%

2009 Result = 95%

Status: Target Met ✓

2010 Target = 92%



14

The % of bills delayed beyond the regular billing cycle.

2009 Target = 0.072%

2009 Result = 0.043%

Status: Target Met ✓

2010 Target = 0.072%



15

The actual meters read as a percentage of those scheduled to be read.

2009 Target = 97%

2009 Result = 98%

Status: Target Met ✓

2010 Target = 97%



16

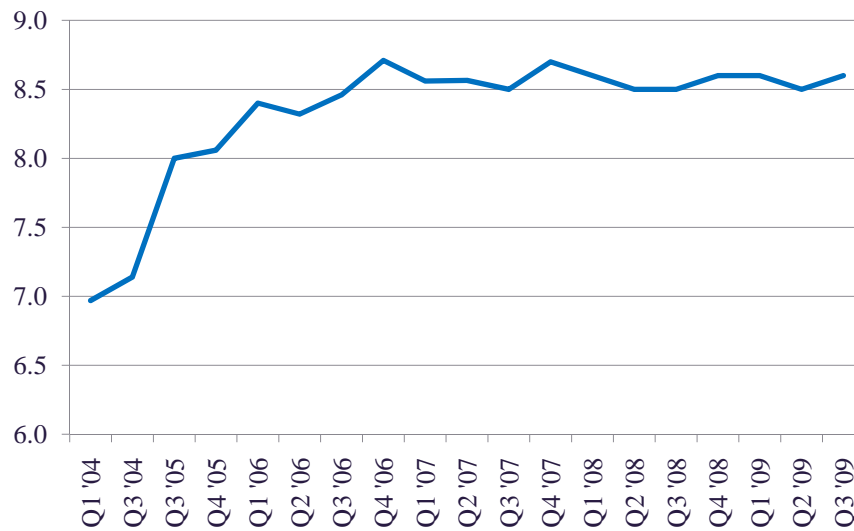
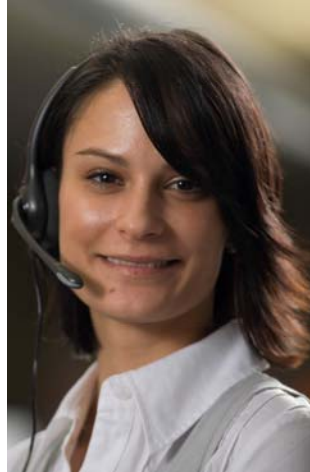
The % of incoming calls answered within 30 seconds.

2009 Target = 70%

2009 Result = 70%

Status: Target Met ✓

2010 Target = 70%



Average Score 2009 = 8.6

- **Targets were met in 12 out of 13 categories.**
- **The Company has met the incentive test for sharing.**



19

Performance Standards

Questions/Comments



2010 Annual Review and 2011 Revenue Requirements Workshop

<u>Morning</u>		<u>Afternoon</u>	
<u>Time</u>		<u>Time</u>	
9:00	Welcome and Introductions Dennis Swanson / Philip Nakoneshny	1:00	Performance Standards 2010 Results and 2011 Targets Marko Aaltomaa
9:15	Opening Remarks Dennis Swanson		<u>2011 Revenue Requirements</u>
9:45	<u>2010 Annual Review</u> 2010 DSM Report Mark Warren	2:00	Load Forecast Katie Rice
10:15	2010 Capital Projects Gary Williams	2:30	Power Purchase Expense, Wheeling & Water Fees Jamie King
11:00	Break	3:00	Break
11:15	2010 Financial Results Variance & Incentive Review Brett Henderson	3:15	2011 Revenue Requirements Overview and Accounting Issues Brett Henderson
12:00	LUNCH (provided)	4:00	Revenue Protection Charlotte Greenham
		4:15	Summary & Closing Dennis Swanson

1



FortisBC's 2010 Annual Review and 2011 Revenue Requirements Workshop

"We must adjust to changing times and still hold
to unchanging principles."

- 39th US President Jimmy Carter

2 November 16, 2010
Kelowna, BC



2010 Annual Review

Performance Standards

Marko Aaltomaa
Manager, Network Services



Performance Standards:

- Safety, Reliability, Customer Service
- Set as part of the 2006 NSA
- Provide an overall assessment of performance

Today's Objectives:

- Review 2010 performance (Oct '09 to Sept '10)
- Propose targets for 2011



2010 Performance Standards Overview

Targets were met or exceeded in 10 out of 13 categories

Targets met with best results during PBR:

- Injury Severity Rate
- Emergency Response Time
- Residential Service Connection Metrics

Targets not met:

- All Injury Frequency Rate (AIFR)
- Vehicle Incident Rate (VIR)
- SAIDI

3

FORTISBC

All Injury Frequency Rate (AIFR)

The total # of Lost Time Injuries or illness plus Medical Aid Injuries (per 100 workers).

2010 Target = 1.92

2010 Result = 1.98

Status: Target Not Met

2011 Target = 2.05



4

FORTISBC

Injury Severity Rate (ISR)

The total # of work days lost due to injuries or illness (per 100 workers).

2010 Target = 17.53

2010 Result = 12.78

Status: Target Met ✓

2011 Target = 15.96



5

FORTISBC

Vehicle Incident Rate (VIR)

The # of vehicle incidents resulting in injury and/or property damage > \$1,000 (per 1,000,000 km driven).

2010 Target = 1.44

November Update Result = 2.26

Revised Result = 2.03

Status: Target Not Met

2011 Target = 1.60



6

FORTISBC

System Average Interruption Duration Index (SAIDI)

The amount of time the average customer's power is off per year (hours)

2010 Target = 2.50

2010 Result = 2.94

Status: Target Not Met

2011 Target = 2.69



7

FORTISBC

SAIDI Overview

Capital Project Reliability Impacts during Oct 09 to Sept 10

Cause	SAIDI Impact	SAIFI Impact	Description
Planned outages on Transmission	0.27	0.06	Outages required to safely support the Capital Program
30L Conversion Project in the Kootenay's	0.1	0.07	Outages attributed to non normal transmission system configuration
Okanagan Transmission Reinforcement Project (OTR) in SOK	0.25	0.49	Outage attributed to legacy protection systems left in service due to OTR
Totals	0.62	0.62	

8

FORTISBC

System Average Interruption Frequency Index (SAIFI)

The average number of interruptions per customer served per year.

2010 Target = 2.18

2010 Result = 2.16

Status: Target Met ✓

2011 Target = 2.10



9

FORTISBC

Generator Forced Outage Rate (FOR)

The ratio of the total forced outage time to forced outage time plus total operating time multiplied by 100.

2010 Target = 0.35%

2010 Result = 0.09%

Status: Target Met ✓

2011 Target = 0.35%



10

FORTISBC

Emergency Response Time

The % of response time to site within 2 hours of initial outage notification.

2010 Target = 85%

2010 Result = 94%

Status: Target Met ✓

2011 Target = 85%



11

FORTISBC

Residential Service Connections

The % of new customer connections completed within 6 business days.

2010 Target = 85%

2010 Result = 95%

Status: Target Met ✓

2011 Target = 85%



12

FORTISBC

Residential Extension: Quoting

The % of customers that have received a design and quotation within 35 working days.

2010 Target = 94%

2010 Result = 98%

Status: Target Met ✓

2011 Target = 96%

Historical Performance Review:

- Positive trend since 2005, now nearing 100%
- Missing future targets “mathematically” more probable



13

FORTISBC

Residential Extension: Completion

The % of customer extensions completed within 30 working days after quote acceptance.

2010 Target = 92%

2010 Result = 98%

Status: Target Met ✓

2011 Target = 96%



14

FORTISBC

Billing Accuracy

The % of bills delayed beyond the regular billing cycle.

2010 Target = 0.072%

2010 Result = 0.049%

Status: Target Met ✓

2011 Target = 0.072%



15

FORTISBC

Commitment to Read Meters

The actual meters read as a percentage of those scheduled to be read.

2010 Target = 97%

2010 Result = 98%

Status: Target Met ✓

2011 Target = 97%



16

FORTISBC

Contact Center Performance (TSF)

The % of incoming calls answered within 30 seconds.

2010 Target = 70%

2010 Result = 70%

Status: Target Met ✓

2011 Target = 70%

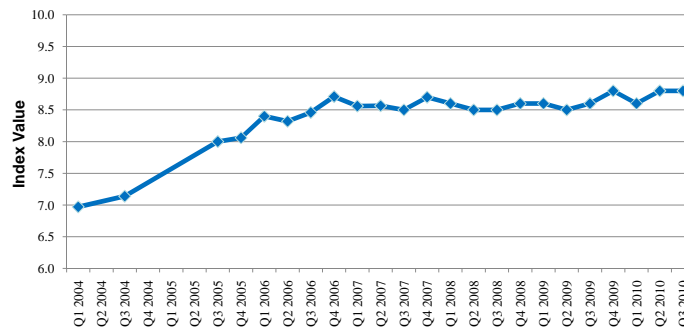


17

FORTISBC

Customer Satisfaction (Informational Metric)

Quarterly Customer Satisfaction Index



Average Score 2010 = 8.7

18

FORTISBC

2010 Performance Standards – Summary

- Targets were met in 10 out of 13 categories.
- The Company continues to show positive performance overall, with increasing customer satisfaction.



19

FORTISBC

2011 Performance Standards Targets

Performance Standard	2011 Target
All Injury Frequency Rate	2.05
Injury Severity Rate	15.96
Vehicle Incident Rate	1.60
SAIDI	2.69
SAIFI	2.10
Generator Forced Outage Rate	0.35%
Billing Accuracy	0.072%
Meters Read as Scheduled	97%
Contact Centre - calls within 30 seconds	70%
Emergency Response Time	85%
Residential Connections - within 6 days	85%
Residential Extensions - quoting time	96%
Residential Extensions - completion time	96%

20

FORTISBC

Discussion

Performance Standards

21



Top Ten Worst Performing Feeders

Feeder	Region	Length (km)	SAIDI Impact			SAIFI Impact		
			2009	2008	2007	2009	2008	2007
PRI4	Princeton	100.72	0.059	0.044	0.054	0.008	0.013	0.036
NOR1	Princeton	250.03	0.187	0.129	0.000	0.026	0.034	0.000
BLU2	Castlegar	40.16	0.056	0.040	0.001	0.017	0.013	0.001
HED4	Keremeos	26.10	0.000	0.061	0.095	0.000	0.007	0.014
PLA2	South Slocan	92.09	0.075	0.004	0.022	0.018	0.002	0.012
CAS1	Castlegar	23.15	0.059	0.001	0.020	0.011	0.001	0.010
PLA1	South Slocan	56.97	0.053	0.008	0.011	0.022	0.003	0.005
OOT1	Castlegar	79.60	0.047	0.019	0.000	0.029	0.006	0.000
OSO3	Oliver	95.59	0.046	0.007	0.000	0.020	0.004	0.001
OSO1	Oliver	25.93	0.045	0.000	0.003	0.016	0.000	0.001

22



FortisBC 2011 Annual Review

Dennis Swanson
Director, Regulatory Affairs
November 22, 2011



Accomplishments During the Term of PBR

- PBR has provided the flexibility to successfully adapt to changing
 - » Government Policy
 - » Customer Expectations
 - » First Nations Expectations
 - » Economic Climate
 - » Electrical Infrastructure
- PBR sharing mechanism = 6.5% rate mitigation
- Productivity gains (PIFs) = 10.4%
- Customer Satisfaction = 87% compared to 70% in 2004 when Fortis acquired the Company
- PBR flexibility has mitigated customer rate increases
- Avoided use of significant deferral mechanisms
- Reduced embedded Cost of Debt by 1.4% saving \$9 million of annual interest expense



2011 Annual Review

2011 Performance Standards

Sarah Wagner
Regulatory Analyst
November 22, 2011



2011 Performance Standards Overview

- Targets focus on Safety, Reliability and Customer Service
- Targets set as part of the 2006 Negotiated Settlement Agreement
- Targets were met or exceeded for all 13 standards



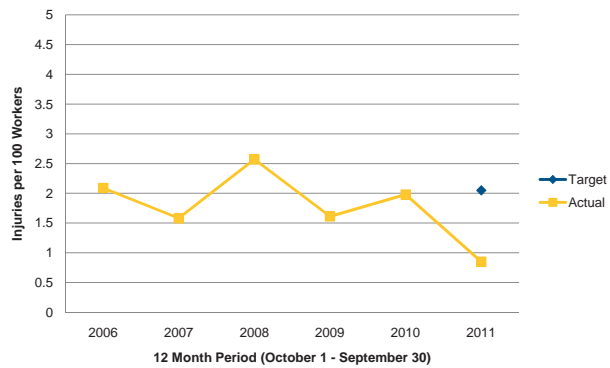
Safety

All Injury Frequency Rate

$$\frac{(\# \text{ of LTI + MA}) \times 200,000 \text{ hours}}{\text{Exposure Hours}}$$

2011 Target = 2.05

2011 Actual = 0.85



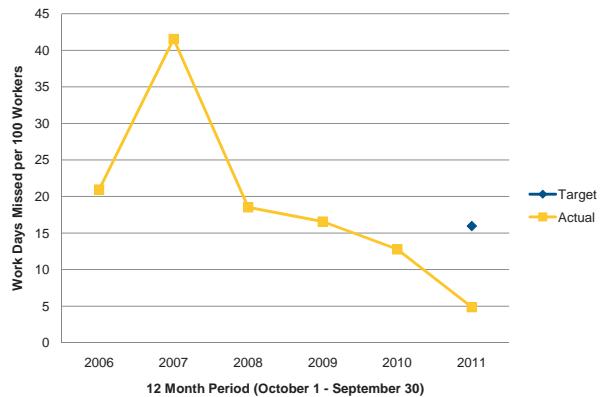
Safety

Injury Severity Rate

$$\frac{(\# \text{ of Work Days Missed}) \times 200,000 \text{ hours}}{\text{Exposure Hours}}$$

2011 Target = 15.96

2011 Actual = 4.86



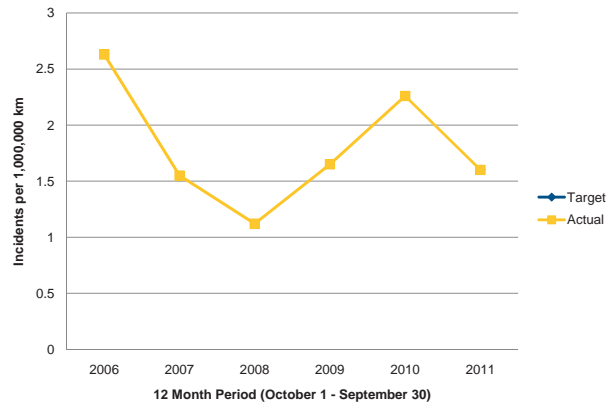
Safety

Vehicle Incident Rate

$$\frac{(\# \text{ of Vehicle Incidents}) \times 1,000,000 \text{ Kilometres}}{\text{Total Kilometres Driven}}$$

2011 Target = 1.60

2011 Actual = 1.60



45



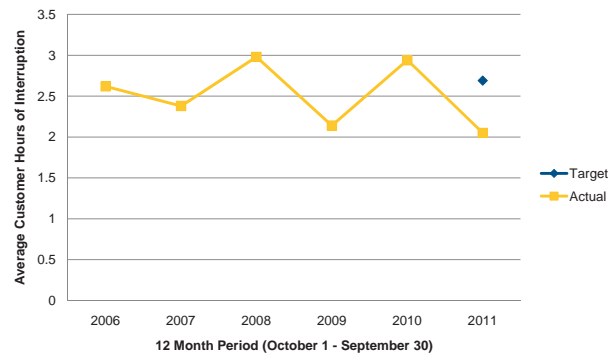
Reliability

System Average Interruption Duration Index (SAIDI)

$$\frac{\text{Total Customer Hours of Interruption}}{\text{Total \# of Customers Served}}$$

2011 Target = 2.69

2011 Actual = 2.05



46



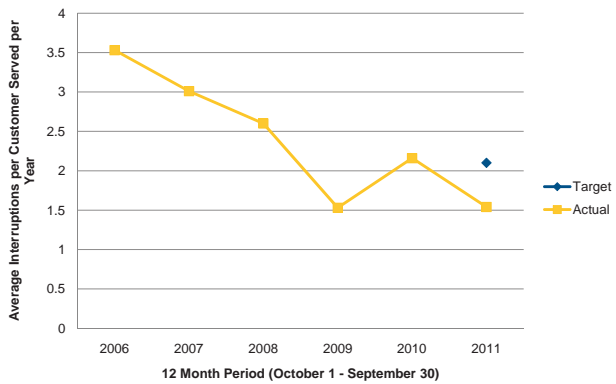
Reliability

System Average Interruption Frequency Index (SAIFI)

$$\frac{\text{Total \# of Customer Interruptions}}{\text{Total \# of Customers Served}}$$

2011 Target = 2.10

2011 Actual = 1.54



Reliability

SAIDI and SAIFI Performance in 2011

- No weather related major events
- Improved transmission system performance

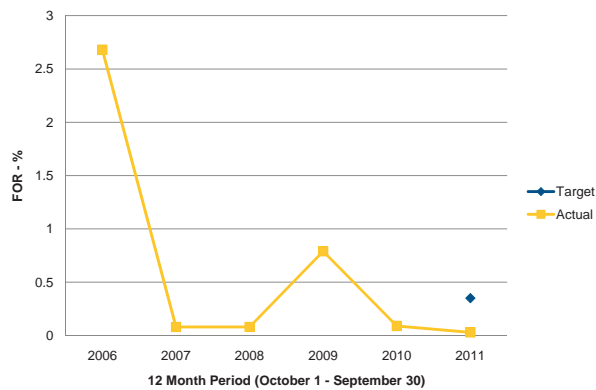
Reliability

Generator Forced Outage Rate

$$\frac{\text{Total Forced Outage Time}}{\text{Forced Outage Time} + \text{Total Operating Time}}$$

2011 Target = 0.35%

2011 Actual = 0.03%

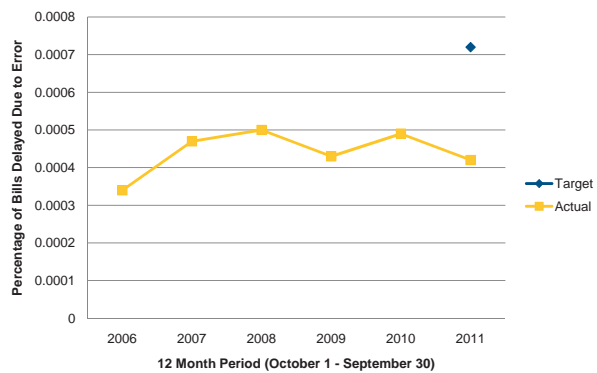


Customer Service

Billing Accuracy

2011 Target = 0.072%

2011 Actual = 0.042%

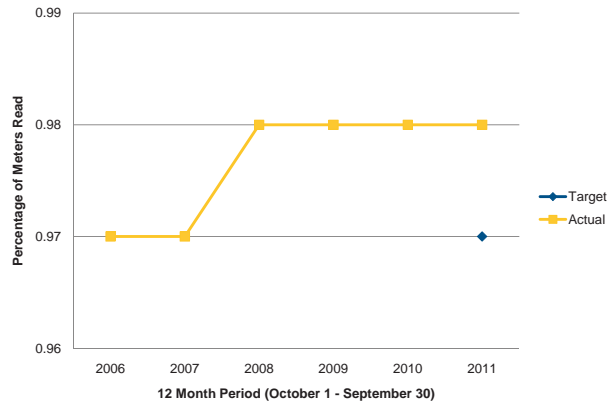


Customer Service

Meters Read as Scheduled

2011 Target = 97%

2011 Actual = 98%



51

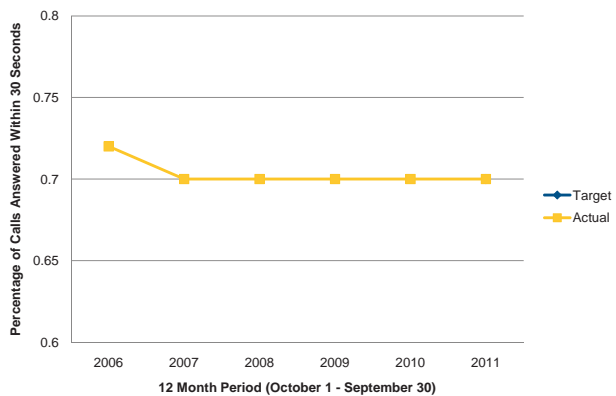


Customer Service

Contact Centre Performance

2011 Target = 70%

2011 Actual = 70%



52

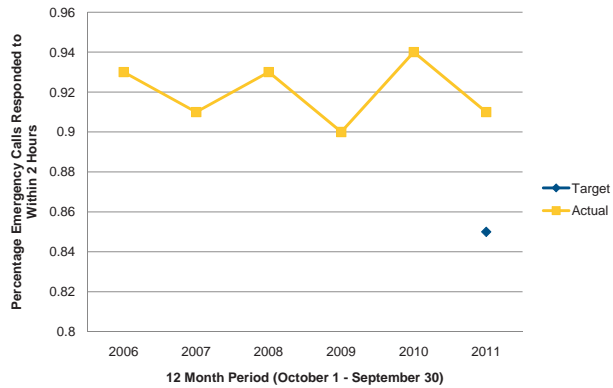


Customer Service

Emergency Response Time

2011 Target = 85%

2011 Actual = 91%



53

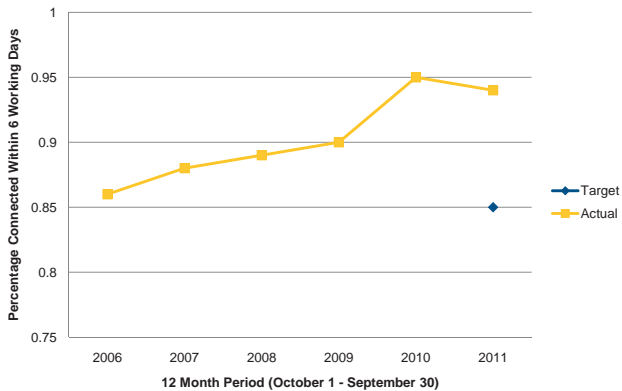


Customer Service

Residential Service Connections

2011 Target = 85%

2011 Actual = 94%



54

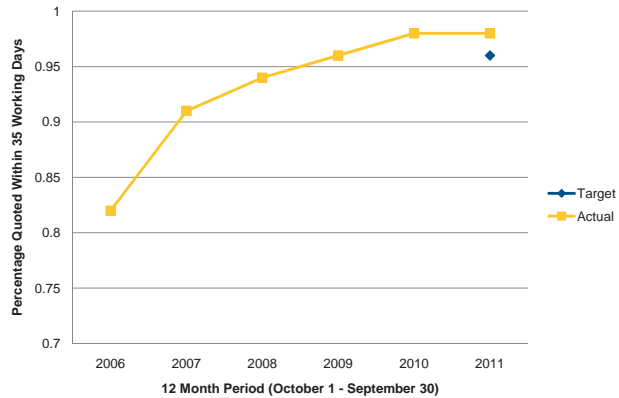


Customer Service

Residential Extensions – Quoting Time

2011 Target = 96%

2011 Actual = 98%

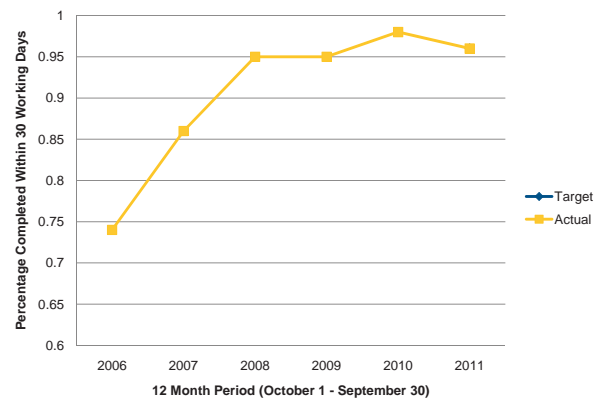


Customer Service

Residential Extensions – Completion Time

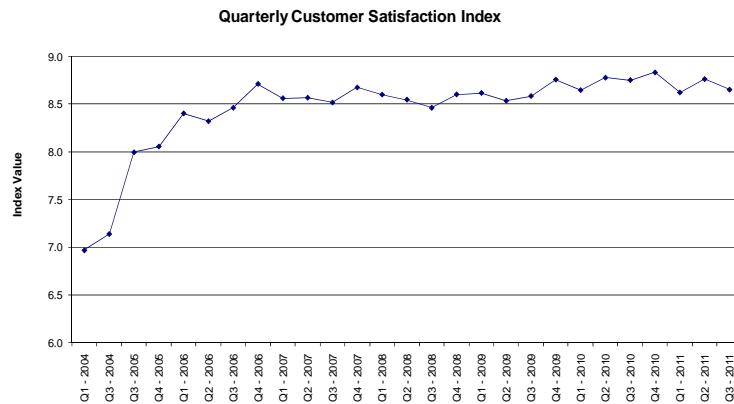
2011 Target = 96%

2011 Actual = 96%



Customer Service

Customer Satisfaction Survey



57



2011 Performance Standard Summary	2011 Target	2011 Result	Met - ✓ Missed - x
All Injury Frequency Rate	2.05	0.85	✓
Injury Severity Rate	15.96	4.86	✓
Vehicle Incident Rate	1.60	1.60	✓
System Average Interruption Duration Index	2.69	2.05	✓
System Average Interruption Frequency Index	2.10	1.54	✓
Generator Forced Outage Rate	0.35%	0.03%	✓
Billing Accuracy – percentage of bills rejected by system	0.072%	0.042%	✓
Meters Read as Scheduled	97%	98%	✓
Contact – percentage of calls answered within 30 seconds	70%	70%	✓
Emergency Response Time – calls responded to within 2 hours	85%	91%	✓
Residential Service Connections –connected within 6 working days	85%	94%	✓
Residential Extensions – quoted within 35 working days	96%	98%	✓
Residential Extensions – connected within 30 working days	96%	96%	✓

58



2011 Performance Standards

Questions?

Attachment 9.12

**Customer Satisfaction Index Survey
FortisBC Electric Division
2013 (Q3)**

QUOTAS

COMMERCIAL: 50

RESIDENTIAL: 300

Hello, my name is _____. I'm calling from TNS Canadian Facts on behalf of FortisBC about the electricity service you receive and I would like to ask you a few questions, if I may, please? Please be assured, we are not trying to sell anything.

INTERVIEWER NOTE: IF RESPONDENT ASKS, THE SURVEY TAKES ABOUT 13.5 MINUTES.

Comment [r1]: Electric Residential: 13.5 minutes
Electric Commercial: 12.5 minutes

SECTION A: QUALIFYING RESPONDENT

A1. Are you the person or one of the people responsible for paying your electricity bill?

- | | | |
|---|--------------------------|------------------|
| 1 | Yes | [SKIP TO A3] |
| 2 | Yes, help make decisions | [SKIP TO A3] |
| 3 | No, don't make decisions | [CONTINUE at A2] |
| 8 | Don't know | [TERMINATE] |
| 9 | Refused | [TERMINATE] |

A2. May I speak to that person?

- | | | |
|---|-----------------------|-----------------------|
| 1 | Yes | [Repeat Introduction] |
| 2 | No, not available now | [Tag as CALLBACK] |
| 3 | No | [TERMINATE] |
| 8 | Don't know | [TERMINATE] |
| 9 | Refused | [TERMINATE] |

SKIP TO SECTION B FOR COMMERCIAL CUSTOMERS

A3. Are you or any member of your immediate family or household employed in the following sectors: (READ LIST)

- | | | |
|---|---------------------------------|--------------------------|
| 1 | Utility company | [TERMINATE] |
| 2 | Natural gas company | [TERMINATE] |
| 3 | Electricity company | [TERMINATE] |
| 4 | Market research company | [TERMINATE] |
| 5 | Newspaper, radio, or TV network | [TERMINATE] |
| 6 | Utility regulatory body | [TERMINATE] |
| 7 | No/none | [BRING UP QUESTIONNAIRE] |

SECTION B: GENERAL SERVICE

B1. First, I would like to get your opinion of the overall service provided by FortisBC. On a 10 point scale where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how satisfied are you with the overall service provided by FortisBC?

(Code: 98 = NA, 99 = DK)

1 2 3 4 5 6 7 8 9 10 98 99

IF RESPONSE IS 6 OR LESS GO TO QUESTION B2, ELSE GO TO QUESTION B3.

B2. Can you tell me the main reason why you gave a rating of ____? (Bring answer from B1)

B3. Taking into consideration your personal experience and general impressions, how satisfied are you with the following aspects of your electricity service? Please use a scale of 1 to 10 where 1 is “Not at all satisfied” and 10 is “Extremely satisfied”. The first one is

(Code: 98 = NA, 99 = DK)

B3.1	Reliability of electrical supply that is the number of power outages.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.2	Accuracy of meter reading.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.3	The price you pay for electricity.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.4	FortisBC staff being friendly and knowledgeable.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.5	FortisBC operating in an environmentally responsible manner.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.6	FortisBC showing concern for public safety.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.7	FortisBC providing a bill that is accurate.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.8	FortisBC’s Power Sense providing information to help you conserve energy.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.9	FortisBC resolving your issue the first time you call.											
	1	2	3	4	5	6	7	8	9	10	98	99
B3.10	FortisBC providing a bill that is easy to understand.											
	1	2	3	4	5	6	7	8	9	10	98	99

Validation rules

INSTRUCTIONS: ASK QB4 OF ALL COMMERCIAL CUSTOMERS. ASK QB4 OF OF EVERY SECOND RESIDENTIAL RESPONDENT ONLY.

B4. When thinking about FortisBC service, please rate the following according to their relative importance. Please use a scale of 1 to 10 where 1 is “Not at all important” and 10 is “Extremely important.” The first one is....

[CODE 98 = NA]

[CODE 99 = DK]

[MATCH ROTATION IN B3]

Comment [r2]: This question is to be asked of all commercial respondents and only of every other residential respondent.

B4.1	Reliability of electrical supply that is the number of power outages.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.2	Accuracy of meter reading.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.3	The price you pay for electricity.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.4	FortisBC staff being friendly and knowledgeable.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.5	FortisBC operating in an environmentally responsible manner.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.6	FortisBC showing concern for public safety.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.7	FortisBC providing a bill that is accurate.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.8	FortisBC’s Power Sense providing information to help you conserve energy.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.9	FortisBC resolving your issue the first time you call.											
	1	2	3	4	5	6	7	8	9	10	98	99
B4.10	FortisBC providing a bill that is easy to understand.											
	1	2	3	4	5	6	7	8	9	10	98	99

Validation rules

B5. Now I would like to read you 8 items and I would like you to tell me which is most important to you and then next most important to you and so on....The 8 items are...

Get ranking on first four only!

[RANDOMIZE]

B5.1 Reliability and dependability of power with few outages.

B5.2 The price you pay for electricity.

B5.3 That the staff is friendly and knowledgeable.

B5.4 That FortisBC operates in an environmentally responsible manner.

B5.5 That FortisBC shows concern for public safety.

B5.6 That FortisBC provides a bill that is accurate and easy to understand.

B5.7 That FortisBC provides information to help you conserve energy.

B5.8 That FortisBC resolves your issue the first time you call.

No validation rules

SECTION C: CONTACT CENTRE SERVICE

C1. Now I would like to ask you a few questions about contacting FortisBC by phone. Have you called FortisBC within the past six months?

- 1. Yes (Continue at C2)
- 2. No (Skip to Section D)
- 3. Don't know (Skip to Section D)

C2. What was the main reason for your recent call to FortisBC?

DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

- 1. Connect a new service, name change, final read
- 2. Equal Payment Plan/ Pre-authorized Payment Plan/ electronic billing
- 3. Balance owing on account/ payment arrangements
- 4. Inquire about a meter reading or an estimated reading
- 5. Inquire on energy consumption (high bill)
- 6. To report a power interruption or electrical service problem
- 7. To ask about tree-trimming
- 8. To inquire about energy efficiency programs and information
- 9. Electrician/contractor/new service installation
- 10. Pole removal/ replacement
- 11. To report a problem with street lights
- 12. Inquiries related to receipt of payment
- 13. Other

Validation rule if item 12 is checked

IF ONLY ITEM 6 WAS CHECKED, SKIP TO QUESTION C5, ELSE CONTINUE AT QUESTION C3

C3. Did the FortisBC representative complete your request or resolve your issue the first time you called the Contact Centre?

- 1. Yes (Skip to C5)
- 2. No (Continue at C4)

C4. Can you tell me why you had to call more than once to have this issue resolved?

Validation rule.

C5. Overall, on a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how satisfied are you in general with the service you receive from FortisBC customer service representatives over the phone?

(Code: 98 = NA, 99 = DK)

1 2 3 4 5 6 7 8 9 10 98 99

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION C6, ELSE SKIP TO C7

C6. Can you tell me the main reason why you gave a rating of ____? (Bring in answer to C5)

Validation rule.

C7. On a scale of one to five, where one means “very low effort and five means “very high effort”, how much effort did you personally have to put forth with FortisBC to handle your request?

[CODE 98 = NA]
[CODE 99 = DK]

1 2 3 4 5 98 99

C8. Do you have any suggestions that will help FortisBC improve customer service by phone?

DO NOT READ LIST. ACCEPT ALL RESPONSES. PROBE (Check boxes for multiple responses)

- 1. Friendlier staff
- 2. Answer right away
- 3. Fewer busy signals
- 4. More automated options on the phone system
- 5. Get your questions answered on the first call
- 6. Customer Service Representative more knowledgeable re products and services
- 7. Leave a message for an agent to call back
- 8. More people answering phones/on staff
- 9. Don't know no opinion
- 10. Other

Validation rule if item 10 was selected

SECTION D: FIELD SERVICE

D1. Has a **Meter Reader** visited your home /business [for commercial customers] in the past six months?

1. Yes

(Continue at Question D2)
2. No

(Skip to Question D6)
3. Not sure

(Skip to Question D6)
- (Radio buttons)

D2. What was the nature of the visit?

DO NOT READ LIST. ACCEPT ALL RESPONSES. (Check boxes for multiple responses)

- 1

Read the meter
- 2

Electrical service location
- 3

Wire or poles relocation
- 4

Wire clearances
- 5

Underground service installation
- 6

Street light installation
- 7

Damage claim
- 8

Dimming lights/voltage problems
- 9

Temporary disconnection
- 10

Transformer leak
- 11

Emergency repairs
- 12

Commercial demand calculations
- 13

Electrical service extension
- 14

Energy consumption/high bill
- 15

Energy efficiency programs
- 16

Other

Validation rule if item 16 was selected

FortisBC Electric Division– Customer Satisfaction Index Survey

D3. Overall, on a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how would you rate the quality of service provided by the **Meter Reader**?

(Code: 98 = NA, 99 = DK)

1 2 3 4 5 6 7 8 9 10 98 99

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION D4, ELSE GO TO QUESTION D5

D4. Can you tell me the main reason why you gave a rating of ____? (Bring in answer to D3)

Validation rule.

D5. Do you have any suggestions that will help FortisBC improve their field service by the **Meter Reader**?

ACCEPT ALL RESPONSES. PROBE! (Check boxes for multiple responses)

1. Be more friendly
2. Get questions answered right away
3. Knowledgeable about products and services
4. Solve the problem or schedule a follow-up
5. More people on staff
6. Better explain issue and solution
7. Show an interest in wanting to help
8. Be more thorough in their work
9. Clean up after job complete
10. More prompt / come when expected
11. Don't know/no opinion
12. Other

Validation rule if Item 12 is selected

D6. Has a **Linesman** visited your home /business [for commercial customers]in the past six months?

1. Yes (Continue at Question D7)
2. No (Skip to Question D11)
3. Not sure (Skip to Question D11)

(Radio buttons)

D7. What was the nature of the visit?

DO NOT READ LIST. ACCEPT ALL RESPONSES. (Check boxes for multiple responses)

- 1 Read the meter
- 2 Electrical service location
- 3 Wire or poles relocation
- 4 Wire clearances
- 5 Underground service installation
- 6 Street light installation
- 7 Damage claim
- 8 Dimming lights/voltage problems
- 9 Temporary disconnection
- 10 Transformer leak
- 11 Emergency repairs
- 12 Commercial demand calculations
- 13 Electrical service extension
- 14 Energy consumption/high bill
- 15 Energy efficiency programs
- 16 Other

Validation rule if item 16 was selected

D8. Overall, on a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how would you rate the quality of service provided by the **Linesman**?

(Code: 98 = NA, 99 = DK)

1 2 3 4 5 6 7 8 9 10 98 99

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION D9, ELSE GO TO QUESTION D10

D9. Can you tell me the main reason why you gave a rating of ____? (Bring in answer to D8)

Validation rule.

D10. Do you have any suggestions that will help FortisBC improve their field service by the **Linesman**?

ACCEPT ALL RESPONSES. PROBE! (Check boxes for multiple responses)

- 1. Be more friendly
- 2. Get questions answered right away
- 3. Knowledgeable about products and services
- 4. Solve the problem or schedule a follow-up
- 5. More people on staff
- 6. Better explain issue and solution
- 7. Show an interest in wanting to help
- 8. Be more thorough in their work
- 9. Clean up after job complete
- 10. More prompt / come when expected
- 11. Don’t know/no opinion
- 12. Other

Validation rule if Item 12 is selected

D11. Has a **Technician** visited your home /business [for commercial customers] in the past six months?

- 1. Yes (Continue at Question D12)
- 2. No (Skip to Question D16)
- 3. Not sure (Skip to Question D16)

D12. What was the nature of the visit?

DO NOT READ LIST. ACCEPT ALL RESPONSES. (Check boxes for multiple responses)

- 1 Read the meter
- 2 Electrical service location
- 3 Wire or poles relocation
- 4 Wire clearances
- 5 Underground service installation
- 6 Street light installation
- 7 Damage claim
- 8 Dimming lights/voltage problems
- 9 Temporary disconnection
- 10 Transformer leak
- 11 Emergency repairs
- 12 Commercial demand calculations
- 13 Electrical service extension
- 14 Energy consumption/high bill
- 15 Energy efficiency programs
- 16 Other

Validation rule if item 16 was selected

D13. Overall, on a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how would you rate the quality of service provided by the **Technician**?

(Code: 98 = NA, 99 = DK)

1 2 3 4 5 6 7 8 9 10 98 99

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION D14, ELSE GO TO QUESTION D15

D14. Can you tell me the main reason why you gave a rating of ____? (Bring in answer to D13)

Validation rule.

D15. Do you have any suggestions that will help FortisBC improve their field service by the **Technician**?

ACCEPT ALL RESPONSES. PROBE! (Check boxes for multiple responses)

- 1. Be more friendly
- 2. Get questions answered right away
- 3. Knowledgeable about products and services
- 4. Solve the problem or schedule a follow-up
- 5. More people on staff
- 6. Better explain issue and solution
- 7. Show an interest in wanting to help
- 8. Be more thorough in their work
- 9. Clean up after job complete
- 10. More prompt / come when expected
- 11. Don’t know/no opinion
- 12. Other

Validation rule if Item 12 is selected

D16. Are you aware of any:
(a) Energy efficiency information or information about how to save energy and money on your energy bills offered by FortisBC PowerSense?
(b) Give-aways offered by FortisBC PowerSense?
(c) FortisBC PowerSense energy efficiency rebate programs?

- 1. Yes
- 2. No
- 98 NA
- 99 DK

D17 a. Have you participated in any FortisBC PowerSense energy efficiency rebate programs?

- 1 Yes
- 2 No
- 98 NA
- 99 DK

D17 b. Did you receive a free sample product, such as a free CFL, clothesline, shower nozzle, shower timer, or energy saving kit offered by FortisBC PowerSense?

- 1 Yes
- 2 No
- 98 NA
- 99 DK

Comment [r3]: Ask off of residential respondents only.

[IF RESPONSE IS “Yes” to Q16 a or c and 17 a, CONTINUE, Otherwise go to D20]

D18. On a scale of one to five, where one means “very low effort” and five means “very high effort”, how much effort did you personally have to put forth to receive your rebate or energy efficiency information?

(Code: 98 = NA, 99 = DK)

- 1 2 3 4 5 98 99

[need to let respondents know that if the question is not applicable, they can say so—there may be programs without rebates/incentives]

D19. Taking into consideration your personal experience, how satisfied are you with FortisBC's energy efficiency rebate programs and information about how to save energy? Please use a scale of 1 to 10 where 1 is “Not at all satisfied” and 10 is “Fully satisfied.”

(Code: 98 = NA, 99 = DK)

- 1 2 3 4 5 6 7 8 9 10 98 99

ASK ALL

D20. Has the **Power Sense Representative** (An employees who helps you with energy conservation) visited your home /business [for commercial customers]in the past six months?

1. Yes

(Continue)
2. No

(Skip to Section E)
3. Not sure

(Skip to Section E)

D21. What was the nature of the visit?

DO NOT READ LIST. ACCEPT ALL RESPONSES. (Check boxes for multiple responses)

- 1

Read the meter
- 2

Electrical service location
- 3

Wire or poles relocation
- 4

Wire clearances
- 5

Underground service installation
- 6

Street light installation
- 7

Damage claim
- 8

Dimming lights/voltage problems
- 9

Temporary disconnection
- 10

Transformer leak
- 11

Emergency repairs
- 12

Commercial demand calculations
- 13

Electrical service extension
- 14

Energy consumption/high bill
- 15

Energy efficiency programs
- 16

Other

Validation rule if item 16 was selected

D 22. Overall, on a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how would you rate the quality of service provided by the **Power Sense Representative**?

(Code: 98 = NA, 99 = DK)

1 2 3 4 5 6 7 8 9 10 98 99

IF RESPONSE IS 6 OR LESS, CONTINUE, ELSE GO TO QUESTION D24

D23. Can you tell me the main reason why you gave a rating of ____? (Bring in answer to D 22)

Validation rule.

D24. Do you have any suggestions that will help FortisBC improve their field service by the **Power Sense Representative**?

ACCEPT ALL RESPONSES. PROBE! (Check boxes for multiple responses)

- 1. Be more friendly
- 2. Get questions answered right away
- 3. Knowledgeable about products and services
- 4. Solve the problem or schedule a follow-up
- 5. More people on staff
- 6. Better explain issue and solution
- 7. Show an interest in wanting to help
- 8. Be more thorough in their work
- 9. Clean up after job complete
- 10. More prompt / come when expected
- 11. Don't know/no opinion
- 12. Other

Validation rule if Item 12 is selected

SECTION E: COMMUNITY INVOLVEMENT & PUBLIC SAFETY

E1. Now, on a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Extremely satisfied”, I would like you to rate your satisfaction with how FortisBC contributes back to the community through initiatives such as donations to local charities and sponsorship of community programs and events.

(Code: 98 = NA, 99 = DK)

1	2	3	4	5	6	7	8	9	10	98	99
---	---	---	---	---	---	---	---	---	----	----	----

E2. Can you recall any recent community events, activities or initiatives in which FortisBC has been involved? What were they?

Validation rule.

E3. Again, using a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Extremely satisfied”, how would you rate your satisfaction with FortisBC’s efforts towards promoting public safety?

(Code: 98 = NA, 99 = DK)

1	2	3	4	5	6	7	8	9	10	98	99
---	---	---	---	---	---	---	---	---	----	----	----

E4. Can you think of a particular way in which FortisBC has promoted public safety recently? Can you tell me how they promoted public safety?

Validation rule.

SECTION G (a): COMPANY EVALUATION

G(a)1. We're almost finished. I'd like to ask you a question about your general impressions of FortisBC. Firstly, on a 10-point scale where 0 is "Not at all likely" and 10 is "Extremely likely," how likely is that you would recommend FortisBC to family, friends or colleagues?

[CODE 98 = NA]

[CODE 99 = DK]

0 1 2 3 4 5 6 7 8 9 10 98 99

IF G(a)1 is less than 7, then ask G(a)2 and then skip to G(b)1

G(a)2. Can you tell me the main reason why you gave a rating of ____? [BRING IN ANSWER TO G(a)1]
[CAPTURE RESPONSE]

If G(a)1 is 9 or more, then ask G(a)3

G(a)3. Can you tell me the main reason why you gave a rating of ____? [BRING IN ANSWER TO G(a)1]
[CAPTURE RESPONSE]

G(b)1 [ENTER Gender] [DO NOT ASK]

- 1 Male
- 2 Female

FOR COMMERCIAL SAMPLE SKIP TO G(b)3; ELSE CONTINUE TO G(b)2

G(b)2 For classification purposes, could you please tell me in which of the following age groups you belong?

[READ LIST]

- 1 18-34
- 2 35-54
- 3 55-74
- 4 Over 75
- 5 Refused

G(b) 3. And finally, I have a few last questions. FortisBC is continually looking for ways to improve the level of service they provide their customers. May we have your permission for TNS Canadian Facts to share your specific answers with FortisBC Managers?

1 – Yes

2 – No, definitely not

INSTRUCTIONS: IF ANSWERED CODE 1 IN G(b)3 ASK G(b)4.

G(b)4. And if a FortisBC Manager needed to follow-up with you, would it be ok for them to call you back?

1 – Yes

2 – No, Don't call me back

CONFIRM NAME (ACCEPT FIRST OR LAST NAME).

THANK YOU VERY MUCH FOR YOUR HELP.

SUBMIT