



Energizing Life In Our Communities

Strategic Plan Quarterly Update

February 20, 2024

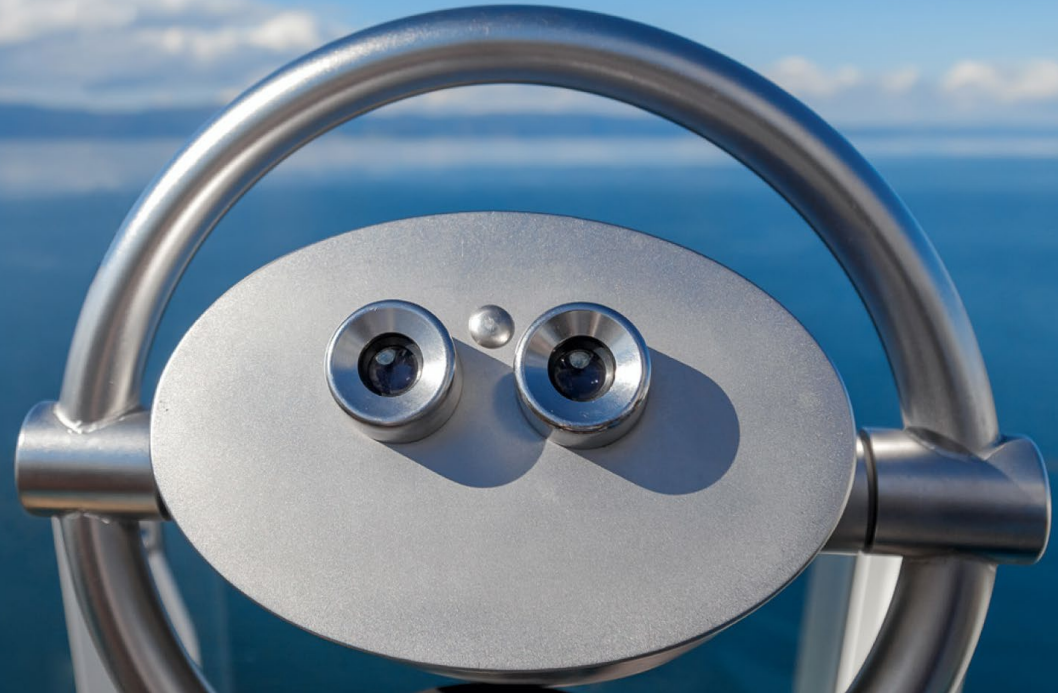
Laura Lemke
Senior Program Manager

Prior Presentation: December 5, 2023



FOCUS ON THE FUTURE

2023-2027 STRATEGIC PLAN



Prior Presentations & Conversations

Dec 5, 2023

2023-2027 Strategic Plan Update


Feb 7, 2023

Approval of the 2023-2027 Strategic Plan

Jan 24, 2023

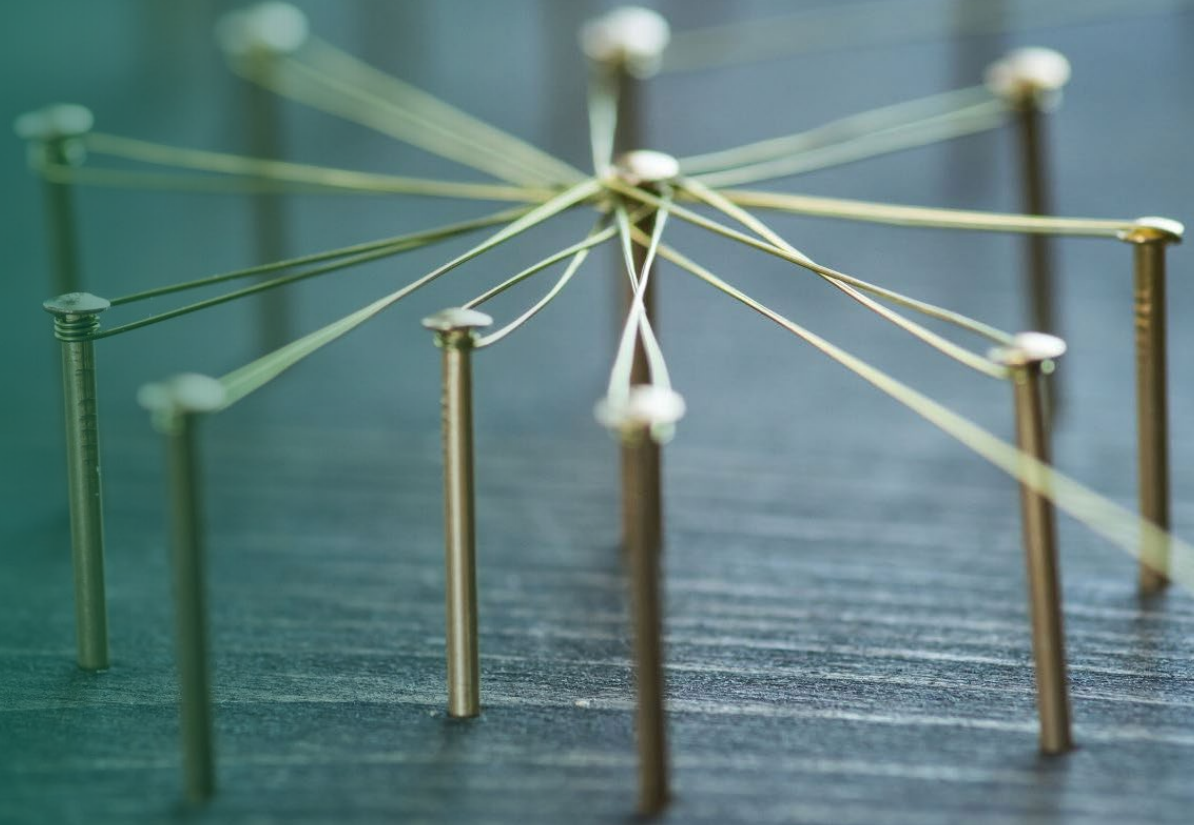
Draft 2023-2027 Strategic Plan

Approved 2023-2027 Strategic Plan: [Strategic Priorities - Snohomish County PUD \(snopud.com\)](https://snopud.com/strategic-priorities)



Today's Purpose:
Update on the
2023-2027 Strategic Plan
implementation.

Request of the Commission:
This presentation is
informational,
no action is requested.



Briefly: District Strategic Plan Elements

OUR PURPOSE (what guides us)

We deliver essential utility services to help our communities thrive

OUR VALUES (how we behave)

Every day we **SAFEGUARD** what matters, putting employee and community safety first.

We have **INTEGRITY**. We are a **TEAM**. We **SERVE** with pride, and **RISE** to challenges. We choose to **INCLUDE** all, **SEEK** growth, and be **BOLD**.

OUR COMMITMENT (the tenets that anchor us)

To fulfill our role in the community, we:

- Are a **powerful partner**
- Provide **exceptional value**
- Deliver **excellent experiences**
- Are the **best version of TeamPUD**

The enduring fundamentals that inform everything we do and are the filters we use to make decisions

OUR VISION (where we're going)

Be the utility that delights our customers and energizes life in our communities

The goal that the strategic plan is driving toward.

 **Strategic Priority**

A key area of focus required to achieve our vision and hold true to our Purpose and Commitment. We have five Strategic Priorities.

 **Objective**

The specific outcomes we are driving toward under a priority. There are 2 or more under each priority.

 **Initiative**

The specific work actions and work intended to help us achieve the objective. There are 3 or more under each objective.

[Click to view approved 2023-2027 Strategic Plan](#)



2023-2027 Strategic Plan

Establishing Our Key Performance Metrics

District Strategic Plan KPIs

- Relate to our values, anchors, and priorities
- Meaningful to us and our customers
- Provide holistic view of our position or progress
- Best available measures, may be replaced when new measures are available
- Cascade into strategic objective KPIs and operational metrics for insight into what is driving performance and changes



7 categories:

- Safety
- Electric System Reliability
- Water System Reliability
- Financial Stability
- Customer Experience
- Community Engagement
- Employee Experience

Strategic Performance Metrics

Safeguard What Matters

Recordable Incident Rate

Last 12 Months
4.81 Prior 12M 3.77 ↑

Incident Severity Rating

Last 12 Months
9.2 Prior 12M 8.7 ↑

Preventable Vehicle Accidents

Last 12 Months
33 Prior 12M 37 ↓

Employee Experience

Voluntary Employee Turnover

Last 12 Months Prior 12M 4.4% ↓
2.5% 2 Years Ago 3.6% ↓

Electric System Reliability

SAIDI *average minutes a customer was without power*

Last 12 Months Target 105.0 ↑
108.6 Prior 12M 137.7 ↓

ASAI *% time power was available to average customer*

Last 12 Months Target 99.980% ↓
99.979% Prior 12M 99.974% ↑

SAIFI *average # times a customer was without power*

Last 12 Months Target 1.00 ↑
1.02 Prior 12M 1.14 ↓

CEMI-5 *% customers experiencing >5 outages*

Last 12 Months Prior 12M 3.9% ↓
1.3% 5 Yr Avg 2.2% ↓

Water System Reliability

Unplanned Outages per 1,000 Customers

Last 12 Months Prior 12M 0.80 ↓
0.75

Customer Experience

Overall Customer Satisfaction Index

2023 Overall 2022 Score 751 ↓
738 Leader Score 789 ↓

Net Promoter Score

2023 Overall 2022 Score 14 ↓
4 Leader Score 29 ↓

JD Power Residential Customer Satisfaction Survey

Community Engagement

Involvement in Community

2023 Overall 2022 6.72 ↑
6.78 Leader 7.40 ↓

JD Power Residential Customer Satisfaction Survey

Financial Stability

Current Ratio

Electric Requirement 1.00 ↑
2.37 Same Q Last Yr 1.92 ↑

Water Requirement 1.00 ↑
4.80 Same Q Last Yr 3.74 ↑

Debt Service Coverage Ratio

Electric Board Requirement 1.75 ↑
3.94 Same Q Last Yr 4.55 ↓

Water - Parity Board Requirement 1.75 ↑
6.08 Same Q Last Yr 5.64 ↑

Operating Ratio

Electric Budget YTD 83.8% ↑
83.9% Last Yr YTD 82.3% ↑

Water Budget YTD 81.3% ↓
71.7% Last Yr YTD 66.6% ↑

Preliminary 2023 Q4 results, unaudited

Safeguard What Matters

Recordable Incident Rate (RIR)

(# recordable incidents * 200,000) / total working hours

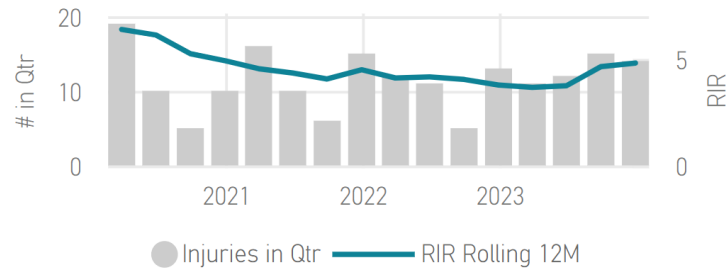
Last 12 Months

4.81

Prior 12M 3.77 | +27% | +1.03 ↑

52 recordable injuries, ▲ from 41 in the prior 12 months

Rolling 12 Month Recordable Incident Rate



Severity Rating

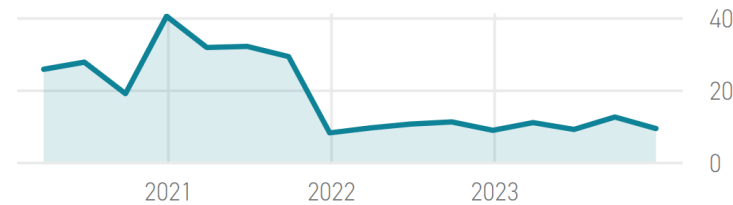
lost days / # recordable injuries

Last 12 Months

9.2

Prior 12M 8.7 | +6% | +0.5 ↑

Rolling 12 Month Severity Rating



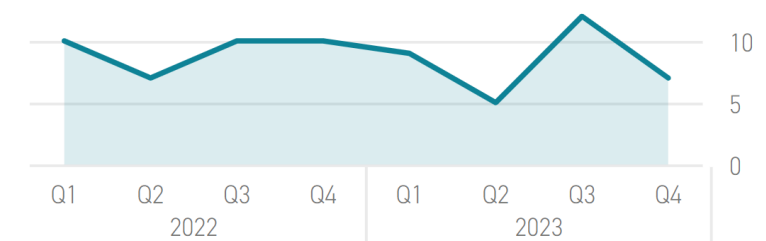
Preventable Vehicle Accidents

Last 12 Months

33

Prior 12M 37 | -11% | -4 ↓

Accidents by Quarter



Recordable Incident Rate (RIR) provides a standardized measure of safety performance, allowing the District to track workplace injuries and illnesses over time, compare our safety record with industry benchmarks, and identify areas for improvement.

This rolling 12-month calculation is not our official OSHA recordable incident rate. The OSHA metric is calculated by calendar year.

Severity Rating provides a common language for discussing and understanding the impact of safety incidents.

The PUD's Driving Committee meets the first Tuesday of each month to review accidents and determine which were preventable.

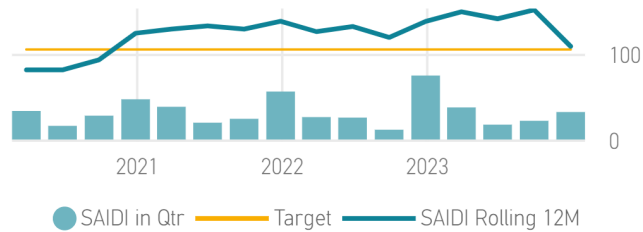
Note: Historical RIR may change as incidents may be reported up to one year after they occur and their classification of reportable or not may change. Severity rating may change as the count of recordable incidents shifts and as lost days continue to accrue to past injuries. The metrics will update each quarter to reflect the most recent data.

System Reliability

Electric System Reliability

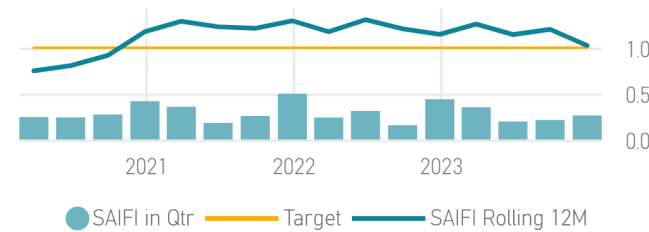
SAIDI (System Avg Interruption Duration Index)
average minutes a customer was without power

Last 12 Months **108.6** Target **105.0** +3.6 ↑
Prior 12M **137.7** -29.1 ↓



SAIFI (System Avg Interruption Frequency Index)
average # times a customer was without power

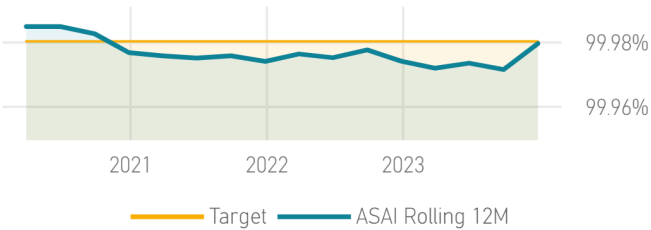
Last 12 Months **1.02** Target **1.00** +0.02 ↑
Prior 12M **1.14** -0.12 ↓



ASAI (Avg System Availability Index)

% time power was available to the average customer

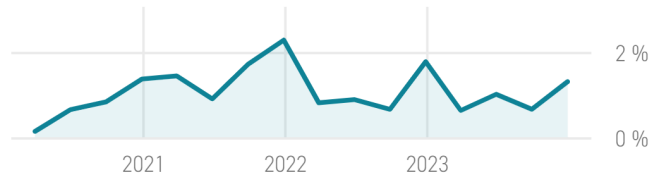
Last 12 Months **99.979%** Target **99.980%** ↓
Prior 12M **99.974%** ↑



CEMI-5 (Customers Experiencing Multiple Interruptions)

% customers experiencing more than 5 outages

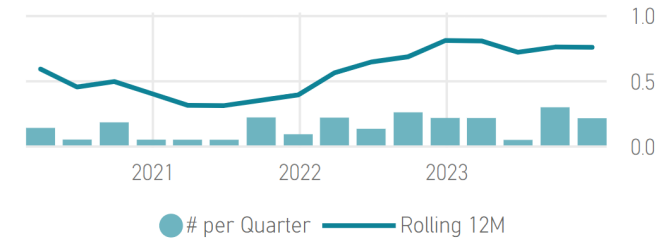
Last 12 Months **1.3%** Target **3.9%** -67% -3pp ↓
Prior 12M **3.9%**



Water System Reliability

Water Outages per 1,000 Customers
Unplanned outages only

Last 12 Months **0.75** Target **0.80** -6% -0.05 ↓
Prior 12 **0.80**



A lower **SAIDI** value indicates fewer or shorter interruptions.

ASAI translate SAIDI into a metric that describes the percentage of time that power was available to customers.

The calculation is:

$$\frac{\text{total minutes in period} - \text{SAIDI minutes}}{\text{total minutes in period}}$$

A lower **SAIFI** value indicates fewer power interruptions.

CEMI-5 includes outages of >1 minute. A lower score indicates that fewer customers are experiencing multiple outages.

Note: Electric system reliability metrics exclude planned outages and Major Event Days (MEDs). MED's are days in which the daily system SAIDI exceeds a calculated threshold that is evaluated and established for each calendar year. MEDs are identified to allow study of the system's daily operation without being influenced by a few large events.

Financial Stability (preliminary Q4 2023 results, unaudited)

Electric Utility

Current Ratio

Current & Accrued Assets / Current & Accrued Liabilities

Qtr End	Requirement	1.00	+1.37	↑
2.37	Last Qtr	2.43	-0.06	↓
	Same Q Last Yr	1.92	+0.44	↑

Debt Service Coverage Ratio

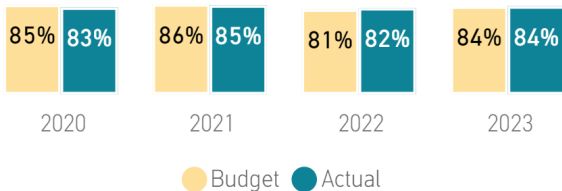
Operating Cash Flow / Total Debt

Qtr End	Board Requirement	1.75	+2.19	↑
3.94	Last Qtr	3.78	+0.17	↑
	Same Q Last Yr	4.55	-0.60	↓

Operating Ratio

Operating Expense / Operating Revenue

YTD	Budget YTD	83.8%	+0%	↑
83.9%	Last Yr YTD	82.3%	+2%	↑



Water Utility

Current Ratio

Current & Accrued Assets / Current & Accrued Liabilities

Qtr End	Requirement	1.00	+3.80	↑
4.80	Last Qtr	4.26	+0.54	↑
	Same Q Last Yr	3.74	+1.07	↑

Debt Service Coverage Ratio

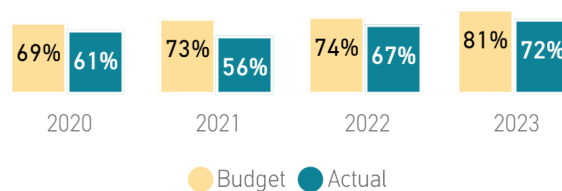
Operating Cash Flow / Total Debt

Qtr End	Board Requirement	1.75	+4.33	↑
6.08	Last Qtr	5.76	+0.32	↑
	Same Q Last Yr	5.64	+0.44	↑

Operating Ratio

Operating Expense / Operating Revenue

YTD	Budget YTD	81.3%	-12%	↓
71.7%	Last Yr YTD	66.6%	+8%	↑



Current Ratio measures an organization's ability to pay its short-term obligations or those due within one year. A current ratio of 1 indicates that the company has exactly enough short-term assets to cover its short-term obligations.

Debt-Service Coverage Ratio is used to assess whether an organization has sufficient net operating income to service its debt obligations. The ratio can influence credit ratings, borrowing costs, and overall financial stability. A ratio of 1 indicates that an organization has exactly enough operating income to pay its debt service costs.

Operating Ratio is an indicator of operational effectiveness. It is also a useful benchmark for both comparing organizational performance over time and comparing our performance to that of similar organizations.

Operating Expense includes O&M, Transmission, and Purchased Power / Water costs. For better comparison, Operating Expense actuals exclude an annual year-end non-cash adjustment related to an accounting standard requirement.

Operating Revenue excludes the Unbilled Revenue Adjustment.

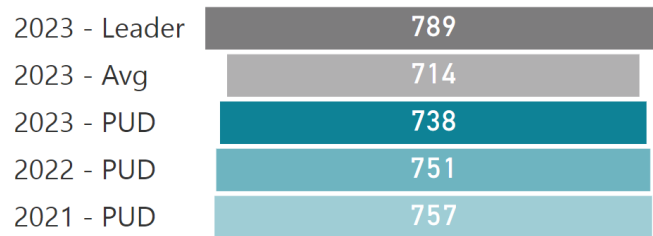
Customer Experience and Community Engagement

JD Power Residential Customer Satisfaction Survey

Overall Customer Satisfaction Index

2023 Year-End Score	2022	751	-13	↓
738	2021	757	-19	↓
	Leader	789	-51	↓

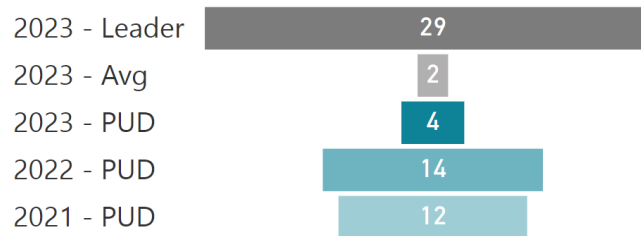
Segment Rank = 4 of 17, ▲ from 5 last yr



Net Promoter Score

2023 Year-End Score	2022	14	-10	↓
4	2021	12	-8	↓
	Leader	29	-25	↓

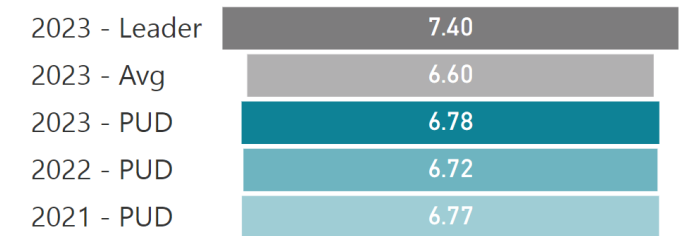
Segment Rank = 8 of 17, ▼ from 5 last yr



Involvement in Community

2023 Year-End Score	2022	6.72	+0.06	↑
6.78	2021	6.77	+0.01	↑
	Leader	7.40	-0.62	↓

Segment Rank = 5 of 17, ▲ from 8 last yr



JD Power surveys evaluate the quality of customer service provided by an organization, based on factors such as the customer's experience with the company's representatives, resolution of issues, and overall satisfaction. This is the top-level aggregated score. Our target is 800.

The JD Power Net Promoter Score (NPS) starts by classifying respondents into promoter, detractor, and passive segments. Then, the % of customers that are detractors is subtracted from the % that are promoters to determine the NPS.

This JD Power Score is in response to the question "On a scale of 1-10, where 1 is unacceptable and 10 is Outstanding, how would you rate Snohomish PUD on Involvement in the Community (e.g. local charities, civic organizations, etc.)?"

Note: Snohomish PUD is in the West Mid-Size Utility segment, which includes a total of 17 utilities.

The Leader score shown above = the top score in that category for 2023. The Avg score = the West Mid-Size Utility segment average score for 2023.

Employee Experience

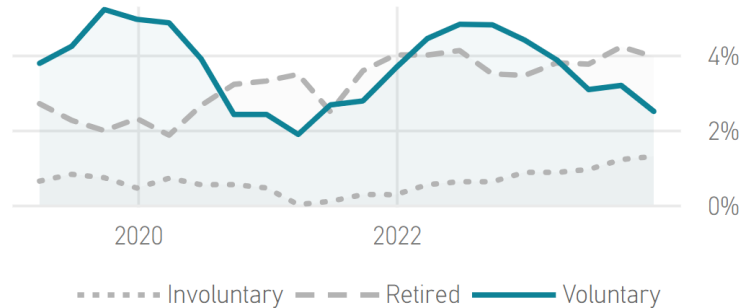
Voluntary Employee Turnover

excludes retirements and involuntary separations

Last 12 Months
2.5%

Prior 12M 4.4% | -43% ↓
2 Years Ago 3.6% | -32% ↓

Rolling 12-month Turnover, by Separation Reason



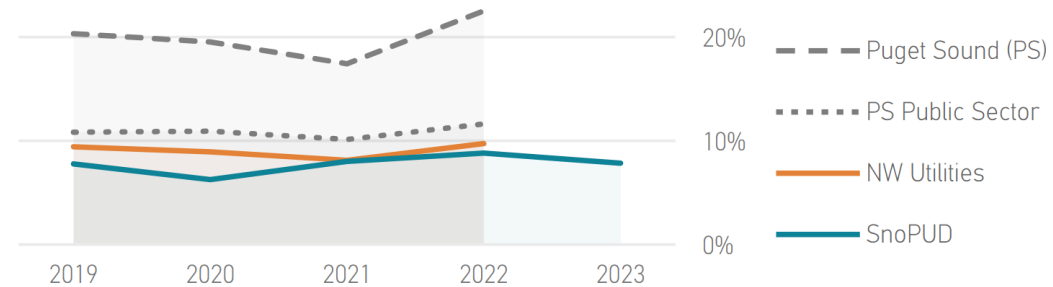
Overall Employee Turnover

includes all separation reasons

Last 12 Months
7.7%

Prior 12M 8.7% | -11% ↓
2 Years Ago 7.9% | -2% ↓

Annual Overall Turnover, with Milliman Benchmarks



Voluntary Employee Turnover measures the rate at which employees willingly leave SnoPUD. This can reflect job satisfaction levels, career development opportunities, and overall employee engagement. Voluntary turnover also includes people satisfied with their work at SnoPUD that leave due to new opportunities, relocation, and personal reasons.

This is a best available metric. We anticipate supplementing or replacing it with a new employee engagement metric later this year.

Overall Employee Turnover with a comparison to regional benchmarks helps put SnoPUD's voluntary turnover into context. Benchmarks are provided by Milliman and available annually. 2023 benchmark data is not yet available.

Strategic Performance Metrics

(intentionally duplicated)

Safeguard What Matters

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Last 12 Months
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Incident Severity Rating

Last 12 Months
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1.3% 5 Yr Avg **2.2%** ↓

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Unplanned Outages per 1,000 Customers

Last 12 Months Prior 12M **0.80** ↓
0.75

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Involvement in Community

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83.9% Last Yr YTD **82.3%** ↑

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71.7% Last Yr YTD **66.6%** ↑

Preliminary 2023 Q4 results, unaudited

2023 – 2027 Strategic Plan

2023 Key Achievements

(year in summary)



2023 Strategic Plan Key Achievements

- \$50 million GRIP grant to fund SnoSMART program for ADMS upgrade and distribution automation.
- 2023 Integrated Resource Plan (IRP) Update adopted by Commission.
- 2021 Water System Plan and updated Water Use Efficiency Goals adopted by Commission.
- Implemented Opt-in Outage Alert service.
- Launched new customer bill design.
- ConnectUp system cutover complete and first meters installed.
- Usage interval data available to customers in MySnoPUD.
- First annual Energy Block Party.
- Finalized and implemented new compensation structure and philosophy.
- Established Enterprise Project Governance Board (EPGB).
- Developed and implemented strategic plan management system and performance monitoring framework.



BOLSTER OPERATIONAL RELIABILITY AND RESILIENCY

STRATEGIC OBJECTIVES

2023 KEY ACHIEVEMENTS AND ACTIVITIES

RELATED 2023 COMMISSION PRESENTATIONS

1.1 Develop the capabilities for an increasingly complex energy future

Jason Zyskowski | Assistant General Manager,
Facilities, Generation, Power, Rates &
Transmission Management

- Established Data Management Council. Team developing requirements and RFP for selection of new data management tool for the District.
- Developed draft of electrification position statement for ELT review.
- Work underway to develop comprehensive understanding of electrification impacts.

1.2 Build the distribution grid of our future

Guy Payne | Assistant General Manager,
Distribution & Engineering Services

- Awarded \$50 million GRIP grant to fund SnoSMART program for ADMS upgrade and distribution automation.
- 20 distribution automation radios assigned and installed in control cabinets. 5 distribution automation devices communicating in the field.
- System Planning & Protection completed documentation of distribution substation equipment ratings.
- Transmission Plant Maintenance Program in place.

- SnoSMART Grant | Mar 7
- SnoPUD Reliability 2022 | Sep 19

1.3 Ensure resource adequacy by expanding and protecting resources

Jason Zyskowski | Assistant General Manager,
Facilities, Generation, Power, Rates &
Transmission Management

- 2023 Integrated Resource Plan (IRP) Update adopted by Commission.
- 25 MW battery in contract negotiations.
- 30 MW of additional wind generation acquired for 2024.
- 2021 Water System Plan and updated Water Use Efficiency Goals adopted by Commission.
- Design and permitting of Kayak and Burn Road reservoirs.

- IRP | Jan 24, Jul 25, Oct 2, Nov 21
- Organized Markets | Mar 7, Sep 5
- Bonneville Post-2028 | Apr 4
- Water Supply Update | Apr 28, Oct 17
- Tulalip Microgrid Projects | Aug 8
- Residential New Construction | Oct 2
- Energy Storage | Nov 7

1.4 Preserve exceptional customer value

Scott Jones | Chief Financial Officer

- Bonneville Power Administration Passthrough implemented and effective Nov 1, 2023.
- Issued RFP to identify consultant for Enterprise Risk Development program development.
- Developed job description and recruited for Manager, Enterprise Risk Management.
- Established Rates Strategy Working Group in October 2023.

- Energy Risk Management | Apr 28, Oct 17
- Monthly and Quarterly financial reports to the Commission

EVOLVE AND ENHANCE CUSTOMER EXPERIENCES

STRATEGIC OBJECTIVES

2023 KEY ACHIEVEMENTS AND ACTIVITIES

RELATED 2023 COMMISSION PRESENTATIONS

2.1 Center our work around customer desires, challenges, and expectations

Open | Assistant General Manager,
Customer & Energy Services

- Customer experience training module for all new hires.
- Ongoing customer experience workshops with department specific focus to establish areas of focus and action plans.
- Launched Customer 360 data and analytics project.
- Fielded 2023 Annual Customer Insights survey.

2.2 Deliver creative, personal, and convenient solutions

Open | Assistant General Manager,
Customer & Energy Services

- Implemented Opt-in Outage Alert service.
- Launched new customer bill design.
- Self Service Customer Moves development work complete, planned go-live in Q1 2024

- Outage Notifications | Feb 21

2.3 Give customers increased flexibility and control over their usage and costs

Kristi Sterling | Chief Information Officer

- Connect Up System Cutover complete
- Usage interval data is being presented to customers in MySnoPUD.
- Significant planning for the ConnectUp Solution Upgrade completed.
- Developed roadmap to coordinate rate updates & backlogs prior to planned AMI Tech Upgrade in Q2 2024.
- Established cross functional team to plan enablement of AMI and customer solutions.

- C&I Time of Day Pilot | Apr 28
- Flex Energy Pilot | Jul 11
- Time of Day Rate Implementation AMI Customer Enablement | Aug 22
- Pilot Small Distributed Generation Rate Schedule Extension | Nov 21
- ConnectUp Quarterly Updates

PRIORITY 3 ACTIVELY HELP OUR COMMUNITIES THRIVE

STRATEGIC OBJECTIVES

3.1 Strengthen our community connections

Lisa Hunnewell | *Director, Communications, Marketing & Business Readiness*

3.2 Support the economic vitality of our communities

Scott Jones | *Chief Financial Officer*

3.3 Align our practices with our communities' diverse needs

Colin Willenbrock | *General Counsel*

2023 KEY ACHIEVEMENTS AND ACTIVITIES

- A cross-functional team has drafted a philosophy and framework for engaging with our communities
- First annual Energy Block Party
- Second annual Run for Warmth Sponsorship
- Successful recruitment of nine (9) new line apprentices.
- Improving easement process with developers and builders is in process.

RELATED 2023 COMMISSION PRESENTATIONS

- Regular Communications and Community Engagement briefings



BUILD A SUSTAINABLE FUTURE WITH OUR COMMUNITIES

STRATEGIC OBJECTIVES

4.1 Responsibly minimize and mitigate our environmental impacts

Guy Payne | Assistant General Manager,
Distribution & Engineering Services

4.2 Help our customers and communities achieve their goals

Colin Willenbrock | General Counsel

2023 KEY ACHIEVEMENTS AND ACTIVITIES

- Began formation of Environmental Sustainability Action Plan (ESAP) Core Team.
 - Created draft Materiality Assessment which will help prioritize work in the ESAP.
 - Planned Woods Creek Sustainability Center shelter development in 2024, identifying point person and presenting to commission.
 - Ongoing Environmental Action Team and Sustainability Team meetings.
-
- Collaborative discussions and input to identify community and customer groups; sustainability goals and drivers within those groups; what it means to partner and support; and identify current programs as well as material gaps and opportunities for improvement.
 - Developed work plan and began assembling Core Team

RELATED 2023 COMMISSION PRESENTATIONS

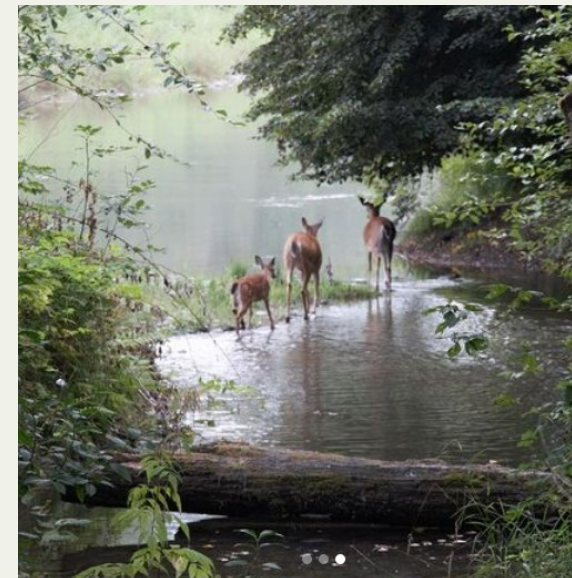
- Fish Habitat Purchase | Nov 7
- Woods Creek Sustainability Center | Nov 21



sнопud Last Saturday, #TeamPUD volunteers and their families harvested produce at the PUD's Woods Creek Sustainability Center and Food Forest. 7 lbs of radishes, 19 lbs of carrots, 23 lbs of plums, and 45 lbs of Asian pears and apples were gathered!

All produce was donated to a local food bank to aid in feeding food-insecure community members (over 10% of Snohomish County is food insecure).

Afterward, everyone got a chance to tour the nearby Woods Creek Hydro Project and learned how it supplies clean energy to 200+ homes annually. #PublicPower



sнопud Go fish go! 🐟 Work has been completed to recontour a side channel on the #SultanRiver after a major flood event in 2020 deposited gravel into the channel reducing flows.

The project also included re-engineering a log jam to prevent future damage to a bridge on the side channel.

With the work completed, the area will be an exceptional habitat for young salmon and steelhead this spring!

CREATE THE CULTURE AND CAPABILITIES NEEDED FOR THE FUTURE

STRATEGIC OBJECTIVES

2023 KEY ACHIEVEMENTS AND ACTIVITIES

RELATED 2023 COMMISSION PRESENTATIONS

5.1 Be an employer of choice

Kristi Sterling | *Chief Information Officer*

- Finalized compensation structure and philosophy and received Commission approval.
- Completed compensation structure changes.
- Established SnoPUD Inclusion Committee.
- Issued RFP to identify a vendor for employee experience survey tools and support.

- Job Description & Market Pay Review Project | Feb 7, Aug 22
- Juneteenth Holiday | Mar 21
- DEI Update | Jun 13

5.2 Evolve workforce skills and capabilities

Colin Willenbrock | *General Counsel*

- Developed strategic workforce plan framework. Scoped workforce development interview questions.
- Content and logistics confirmed for Refresh and Recommit leadership development course, course launching April 2024.
- Increased engagement with community workforce development organizations to promote SnoPUD and recruit for open positions.
- Improved External Leadership Development Programs selection application and selection process.
- Developed and implement new internal workforce management dashboard.

- Safety - Looking Back and Looking Ahead | Mar 21

5.3 Increase organizational alignment & effectiveness

Kristi Sterling | *Chief Information Officer*

- Established Enterprise Project Governance Board (EPGB). Ongoing revision of processes. Began pilot of new project management and prioritization tool.
- Developed and implement strategic plan management system including initiative action plans, key performance metrics, and framework for quarterly review and reporting process.
- Developed and implemented Monday Metrics report to management team.
- Rolled out operating plan templates and process to ELT.
- Generative AI (GenAI) Advisory Team developed Interim GenAI Policy and supporting processes and education.

- Draft 2023-2027 Strategic Plan | Jan 24
- Strategic Plan Update | Dec 5

A wooden puzzle piece with a notch and a bump, resting on a grid of blue lines on a light blue background. The puzzle piece is positioned in the lower-left quadrant of the image. The grid lines are thin and light blue, creating a pattern of squares and rectangles. The background is a solid light blue color.

Looking Forward

Upcoming and Ongoing Work

Collaborative Implementation & Management

- Division and Department Operating Plan Development
- Continued integration of strategic plan, operating plan, budget / financial planning, and project governance processes
- Development and integration of enterprise risk management program

Strategic Plan Specific

- Continued performance metric and dashboard development
- Expansion and integration of metrics for ELT and PUD leadership
- Monitoring of District operations and operating environment to determine where, if any, changes or adjustments are warranted

Planned Commission Reports

May 21, 2024	Written report
Aug 20, 2024	Year-to-Date Presentation
Nov 19, 2024	Written report
Feb 2025	2024 Key Achievements Presentation

Questions & Discussion

