

ANNUAL CHOICE GAS UPDATE

June 18, 2024



Annual Choice Gas Discussion Topics

1. Agricultural Choice Gas Program Update
 - Selection Results
 - Program Differences-AG vs Res/Com
2. Choice Gas Program Update
 - Selection Results
 - Supplier Annual Report
 - Program Changes
 - Choice Gas Tariff Changes
 - Choice Gas Survey
3. WY Workshop Status Update
 - Resolved Issues
 - Credit Requirements

2024 Agricultural Choice Gas Program

Selection Results



Approximately 7,779 customers participate in the AG program



3,748 multi-year balloted customers from 2023



3,982 eligible customers sent packets

2,501 of the eligible customers made selections

1,481 of the eligible customers defaulted



Approximately 1,648 delegation agreements submitted by Suppliers

AG Choice Gas Program Differences

Agricultural Program

- 2-week selection period
- Year-round marketing
- No restricted delegation agreement use
- Can choose up to 3-year term
- Program year runs April 1st through March 31st
- Approximately 7,800 customers
- Primarily seasonal usage-irrigation & grain drying

Res/Com Program

- 3-week selection period
- Marketing coincides w/selection period
- Delegation agreement commercial use only
 - 2 or more service addresses
- Residential can choose up to 2-year term
- Commercial can choose up to 3-year term
- Program year runs June 1st through May 31st
- Approximately 81,269 customers

2024 Residential/Commercial Choice Gas Program

Selection Results



Approximately 80,962 customers participate in the CG program



13,314 multi-year balloted customers from 2023



67,648 eligible customers sent packets

26,363 of the eligible customers made selections
41,285 of the eligible customers defaulted



Approximately 443 delegation agreements submitted by Suppliers

Choice Gas Program Annual Report

Filed by Suppliers to the NE Commission

First set of Balloted/Default files

Files are generated approximately 1 week after the end of the selection period

Purpose is to provide customer/Supplier information for the transportation service's team when requesting Tallgrass capacity



Second set of Balloted/Default files

Files are generated approximately 1 week before June 1st

Purpose is to provide customer activity in the interim from the generation of the first set of files together with any confirmation code changes for the final snapshot of anticipated billing activity starting June 1st

Program Changes

Added Cybersecurity Addendum to Supplier Agreements

Added IVR selection method-added information to the packet materials for the new selection method.

Choose a submission method and submit your selection. Submission of your supplier choice can be completed online at choicegas.com, by phone at 877-245-3506, through your chosen supplier, or by mail using the enclosed selection form.

IVR (PHONE)

- Call 877-245-3506 and follow the Choice Gas prompts to make your selection.
- You should only need to input the confirmation code provided to you from your chosen supplier.
- If you have more than one premise, you may be transferred to a call center representative for assistance.

Choice Gas Tariff Review

Choice Gas tariff language is actively being reviewed.

We are identifying areas where clarity and improvements could be made for the benefit of customers and to better reflect the current working status and structure of the program.

CHOICE GAS SURVEY

Survey sent August 11, 2023 w/reminder email on the 18th & closed 25th

Objectives:

- Obtain insight into program value proposition and perceived customer benefits and/or challenges
- Obtain insights for ongoing improvements to the program
- Determine customer understanding of the program
- Determine customer education needs

2023 Choice Gas Survey

Nebraska Results

Customer Insights



Survey Introduction



Purpose:

The survey aimed to understand the Choice Gas selection experience and gather feedback from those in the program



Response:

Out of all the Nebraska Choice Gas customers (~44k) who received the survey invitation on August 10, a total of 1,885 successfully completed the survey within the 14-day period, resulting in a 4.3% response rate



Demographics:

The majority of respondents were homeowners (83%), followed by renters (10%), business owner (3%), farmer or agricultural business, and landlords (1%)

Survey Overview

Survey Design:

Comprehensive Understanding:

The survey structure aimed for a comprehensive understanding of the entire Choice Gas selection process, from customer demographics to attitudes and behaviors

Customer-Centric Approach:

Questions were designed with a customer-centric approach, ensuring that respondents' experiences and opinions were at the forefront

Actionable Insights:

Each question was strategically chosen to yield actionable insights, enabling stakeholders to make informed decisions based on the survey outcomes

Flexibility for Analysis:

The survey structure allowed for flexibility in analysis, facilitating a deep dive into specific themes and areas of interest

Balanced Mix of Quantitative and Qualitative Data:

Included a mix of Quantitative and Qualitative questions, provided a view of both numerical trends and customer sentiment

Alignment with Survey Goals:

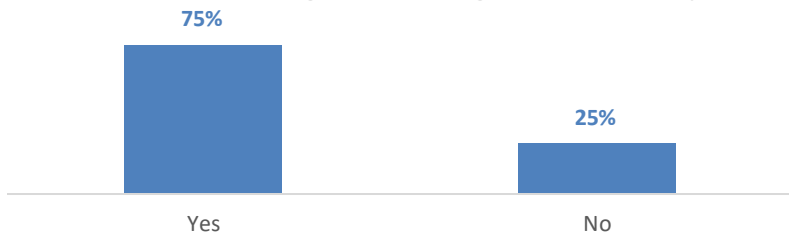
Every question was aligned with the overarching goals of understanding customer behaviors, preferences, and pain points in the gas supplier selection process

Structure and Questions:

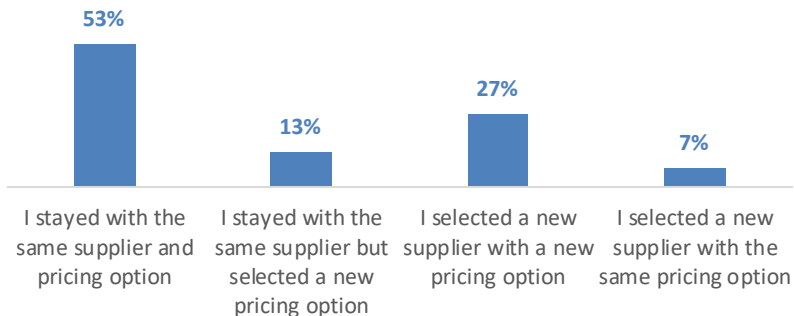
- Demographics
- Selection Behavior
- Factors Influencing Selection
- Attitudes Towards Selection
- Ease of Selection and Communication
- Selection Methods and Resources
- Overall Satisfaction and Feedback

Selection Behavior and Choices

Did you actively review pricing options before selecting a natural gas commodity?



Select the statement that best describes your selection this year:



Insight:

75% of Nebraska respondents actively reviewed pricing options before selecting.

Among the 25% who didn't review options, the most common reasons were satisfaction with their current supplier (56%), being unaware of the need to select (19%), or intentionally did nothing (10%). 15% selected "Other" with most notable reasons being too busy or forgot.

53% stayed with the same supplier and pricing options, with 47% selecting a new supplier or pricing option.

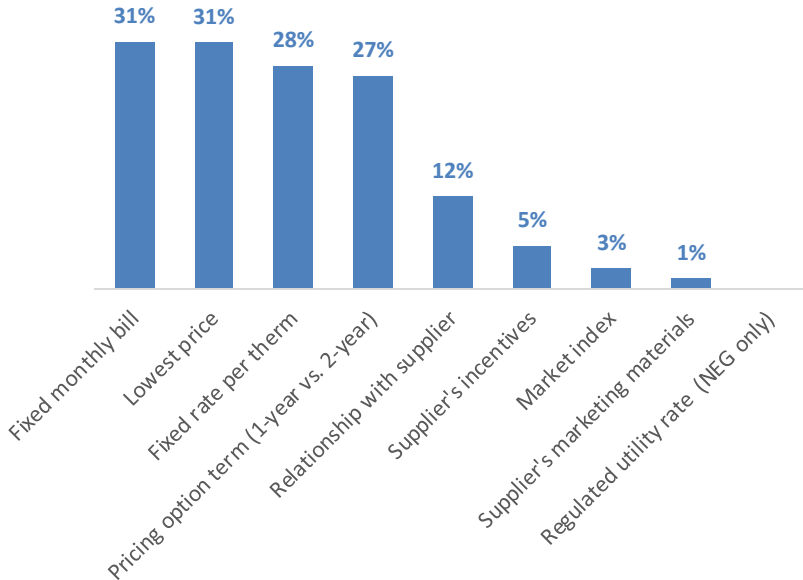
Key Takeaways:

Most respondents engaged in a deliberate selection process, highlighting the importance of program and pricing transparency.

Clear communication and awareness-building are crucial to engage all customers in the selection process.

Factors Influencing Selection

Select the factor(s) that influenced your natural gas commodity selection.
Please select all that apply.



Insight:

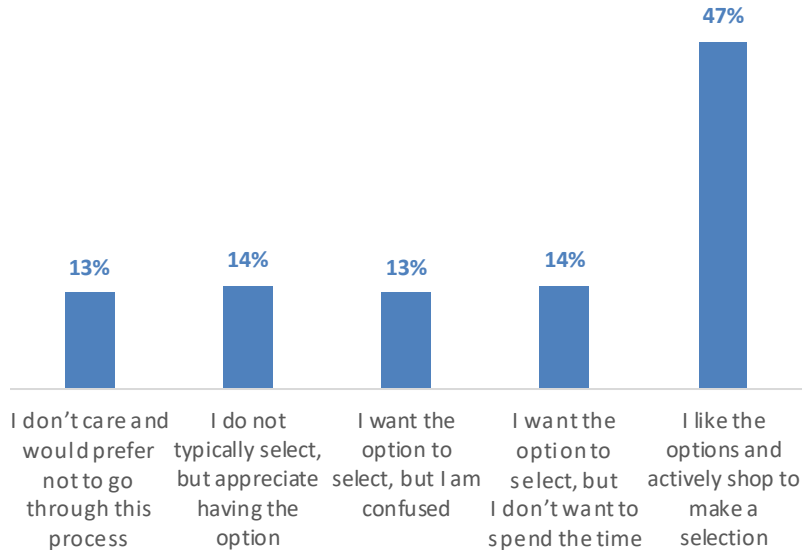
The top factors were fixed monthly bill (31%) lowest price (31%), fixed rate per therm (28%), and pricing option term (27%).

Key Takeaway:

Price related factors heavily influence customer decisions, highlighting the importance of pricing explanation and transparency.

Attitudes Towards Selection

Which statement best describes the level of importance you place on having the option to select your natural gas commodity supplier and pricing option?



Insight:

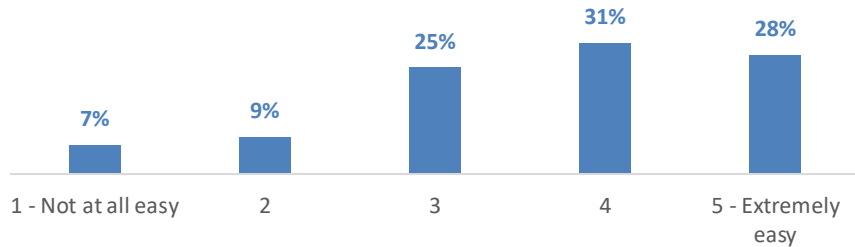
Attitudes varied, with 47% actively shopping to select, 27% wanting the option but finding process confusing or time-consuming, 14% appreciating the option but don't typically select, and 13% not wanting to go through the process.

Key Takeaway:

Simplifying the selection process by providing an easy way to compare options would improve the customer experience.

Ease of Selection and Communication

How easy was it for you to understand the Choice Gas Program?



Was the deadline for selecting your natural gas commodity supplier clearly communicated to you?



Insight:

59% rated the ease of selection at a 4 or 5 out of 5

88% of respondents acknowledged that the selection deadline was communicated to them.

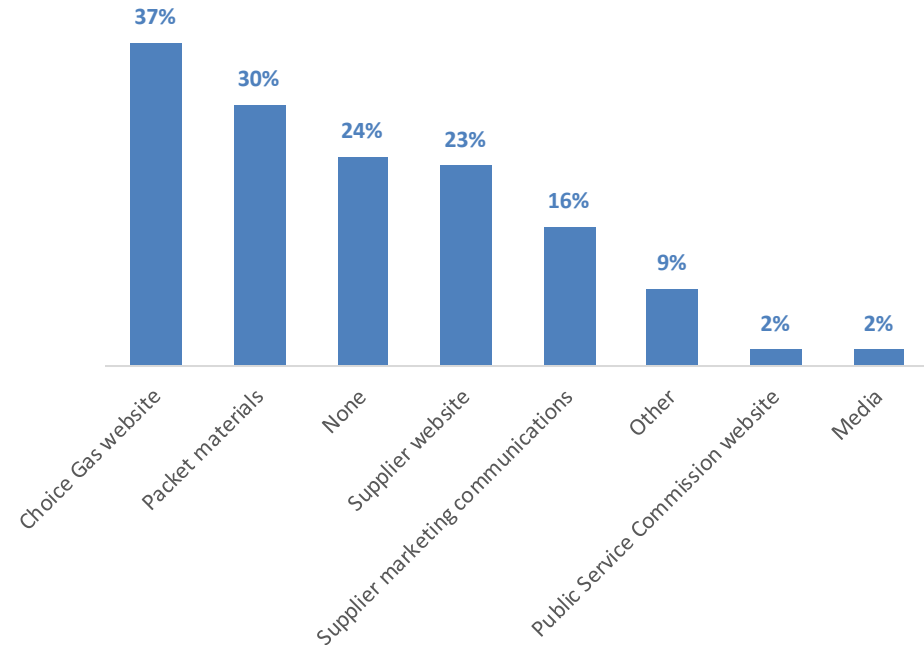
Key Takeaway:

Communication is effective, as shown by the number of respondents acknowledging communication on deadlines.

There is room for improvement in program understanding, focus on simplifying language, clarifying terminology, and streamlining communication processes.

Selection Resources

Which resource(s) did you use when selecting your natural gas commodity supplier and pricing option? Please select all that apply.



Insight:

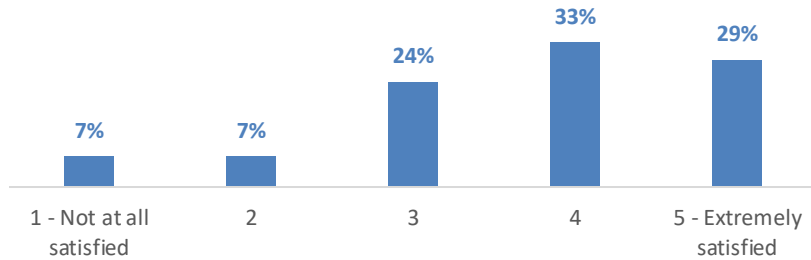
37% relied on the Choice Gas Website, 30% used packet materials, and 24% did not use any external resources. Notably, word of mouth emerged as a substantial resource for those selecting “Other.”

Key Takeaway:

While digital resources like the websites and packet materials are popular resources, it’s noteworthy that 24% of respondents do not use any of the available resources to assist in selection process.

Overall Satisfaction and Feedback

How would you rate your overall satisfaction with the Choice Gas Program?



Are you satisfied with the current three-week enrollment/selection period?



Insight:

62% rated satisfaction at a 4 or 5 on a 5-point scale, indicating above average satisfaction but not exceptional.

85% of respondents are satisfied with the three-week selection period.

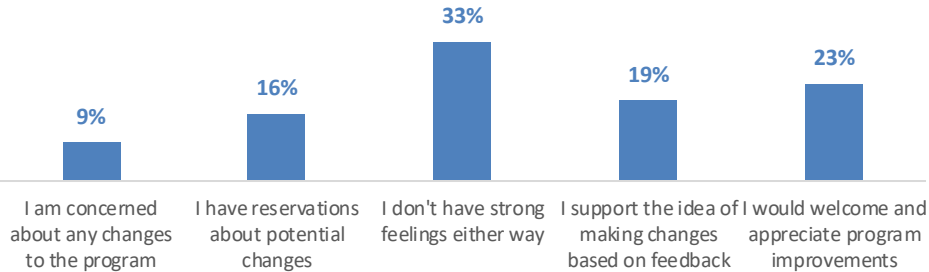
Feedback emphasized the need for a simplified process and improved pricing transparency.

Key Takeaway:

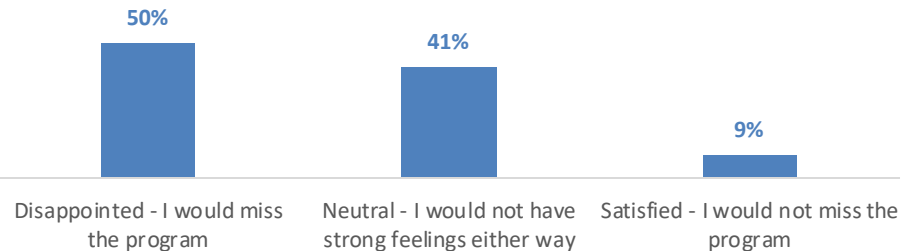
The average rating indicates that aspects of the program are meeting customer expectations. However, there is opportunity for improvement, as indicated by customer feedback, to improve overall customer satisfaction.

Attitudes Towards Program Changes

How would you feel about Black Hills Energy making changes to the Choice Gas Program based on feedback gathered from this survey and other customer research?



In the event that Black Hills Energy decides not to offer the Choice Gas Program anymore based on this survey and other data collected, how would you feel?



Insight:

When asked about their feelings towards making changes to the program, 42% would support or welcome changes, while 33% had no strong feeling either way.

50% would miss the program if no longer offered, while 41% would not have strong feelings either way.

Key Takeaway:

23% actively seek improvements and 19% support changes based on feedback, highlighting an opportunity for positive adjustments.

While 33% have no strong feelings, 9% expressed concern, and 16% have reservations, emphasizing the importance of careful consideration in program modifications.

Half (50%) would miss the program if it were no longer offered, indicating its perceived value among respondents.

Program Feedback – Additional Insights



Confusion with Selection Process

The selection process and resources were identified as confusing and difficult to understand, indicating the need for clearer language and explanation.



Desire For Simplification

Concerns include a complicated, time-consuming process that is difficult to compare cost options, signifying the need for a more streamlined experience.



New Customers' Understanding

New customers find the program challenging and desired more flexibility in selecting outside designated periods, highlighting the need for clear and concise guidance.



Annoyance with Excessive Offers

Excessive calls, emails and mailings from suppliers were highlighted as an annoyance, suggesting the need for more controlled communication channels.



Call for a One-Stop Shop

Customers want a convenient method to compare options, with transparent and all-inclusive pricing, emphasizing the need for a one-stop selection experience.

Key Takeaways

Addressing feedback on communication, streamlining processes, controlling supplier interactions, enhancing pricing transparency, and providing clear guidance for both new and existing customers can substantially improve overall satisfaction and program value.

Summary

Active Review of Pricing: A substantial 75% of respondents actively reviewed pricing options, emphasizing the importance of pricing transparency in the Choice Gas selection process.

Factors Influencing Selection: Fixed monthly bill and lowest price emerged as the primary factors influencing customer choices.

Selection Process: A substantial 87% like having the option to select, but 27% find it confusing or too time-consuming, highlighting the need for simplification.

Communication Effectiveness: While 88% acknowledged communicated deadlines, there is room for improvement in overall program communication as noted by the 41% of respondents that find the program hard to understand.

Resource Preference: The website and packet materials are popular but direct communication channels are also preferred by some customers.

Feedback Insights: Customers expressed confusion around the program, a desire for simplification, annoyance with excessive supplier offers, and a need for a one-stop shop for comparison.

Opportunities for Improvement: Streamlining processes, providing clarity for both new and returning customers, and creating a comprehensive comparison platform are key to enhancing the experience for customers.

Comprehensive survey results available in the appendix.

Driving Program Consistency

WYOMING

- ✓ Program materials should contain same information
- ✓ Firm date to suppliers for packet material data changes
- ✓ Immediate confirmation of selection
- ✓ Suppliers offering market index commodity price options should have an explanation on website
- ✓ Clearly describe supplier is providing gas & utility provides additional services
- ✓ Rights customers have related to marketing, reporting complaints, opting out
- ✓ Customer education-Supplier provides commodity only
- ✓ No Delegation Agreements for residential
- ✓ Four-week marketing and enrollment period
- ✓ Marketing period should remain eleven weeks & not coincide w/selection period
- ✓ Expanding selection period to 4 weeks
- ✓ Delegation Agreement use for commercial customers with more than one account

NEBRASKA

- ✓ Program materials should contain same information
- ✓ Firm date to suppliers for packet material data changes
- ✓ Immediate confirmation of selection- included default customers
- ✓ Suppliers offering market index commodity price options should have an explanation on website
- ✓ Clearly describe supplier is providing gas & utility provides additional services
- ✓ Rights customers have related to marketing, reporting complaints, opting out
- ✓ Customer education-Supplier provides commodity only

Already implemented in NE

- ✓ No Delegation Agreements for residential
- ✓ Expansion of selection period – unfavorable for suppliers – no customer feedback positive or negative
- ✓ Delegation Agreement use for commercial customers with more than one account

Driving Program Consistency Cont'd

WYOMING Issues Under Review

- ✓ Stronger Administration of the program
- ✓ Suppliers record all calls
- ✓ Prohibit suppliers from marketing safety & reliability
- ✓ More robust surveys
- ✓ Removal of supplier is too harsh of a term
- ✓ Proposal to eliminate balloted customer numbers from the Choice Gas website and replace with ratings instead

Stronger Administration of the Program

Concern raised related to Choice Gas Administration's role in managing the program specific to Supplier activities.

While nothing specific was brought for discussion, it is believed that as the workshops progressed the initial concern for stronger administration seemed to lessen.

Workshop discussions covered a variety of processes, related timing, Administrator's role together with expectations of Suppliers from Choice Gas Administration became more visible and understood.

Suppliers Record All Calls

Implementation of a requirement to record all outbound and incoming calls between Suppliers and customers was added to the Mailing List & Marketing Agreement.

The language that allowed for maintaining a log of all calls was removed from the Mailing List & Marketing Agreement in both of Wyoming and Nebraska.

Additional language was included for a governing regulatory agency to review calls in the event of disputes between Suppliers and customers.

- p) Suppliers must be able to provide, upon request to Choice Gas Administrator, all telephonic customer specific call recordings to include both inbound and outbound Customer calls with the natural gas commodity Supplier, or its contractor or agent, and can also include electronic (e-mail or text message) communications. Review of requested recording(s) by Choice Gas Administrator and/or a governing regulatory agency possessing competent jurisdiction over the subject matter related to the communication, will be performed as deemed necessary for customer or Supplier dispute resolution.

Prohibit Suppliers from Marketing Safety & Reliability

The driver for including this representation in the Mailing List & Marketing Agreement was the February Extreme Weather Event in Wyoming which impacted only those customers taking service from the Gas Cost Adjustment regulated rate during Storm Uri.

- m) Unless requested or required by the Choice Gas Program Administrator, Suppliers agree to not make any representation relating to the safety or reliability of their natural gas commodity supply with Customers or potential Customers. Suppliers acknowledge that safety and reliability are the responsibility of the regulated utility and agree to not present any information to the contrary or suggest otherwise to customers or potential customers in any type of communications. Suppliers are also restricted from making any representations regarding the safety or reliability of their natural gas commodity supply to any customer in relation to the February Extreme Weather event in particular those customers who are subject to the February Extreme Weather charge as a result of being served by Black Hills Wyoming Gas, LLC (the regulated Utility) under the gas cost adjustment (GCA) regulated rate during the February 2021 event.

Prohibit Suppliers from Marketing Safety & Reliability

Cont'd

Since the Nebraska Choice Gas Program does not offer a utility regulated rate, the language was revised.

- q) Unless requested or required by the Choice Gas Program Administrator, Suppliers agree to not make any representation relating to the safety or reliability of their natural gas commodity supply with Customers or potential Customers. Suppliers acknowledge that safety and reliability are the responsibility of the regulated utility and agree to not present any information to the contrary or suggest otherwise to customers or potential customers in any type of communications.

More Robust Surveys

Surveys have only been recently introduced to customers for the Choice Gas Program beginning with the first one sent in 2021. Choice Gas Administration has determined a survey to be sent every other year among many other surveys sent out to customers would ease survey fatigue.

The survey results discussed earlier in our presentation demonstrate our commitment to program improvement and customer satisfaction.

Surveys will be an ongoing part of the program and our survey experts are consistently working toward the best way to achieve valuable customer insight.

Supplier Participation Agreement Termination Language Concerns - Current

21. **Termination**: Black Hills Nebraska Gas may terminate this Agreement upon written notice to Supplier upon any of the following conditions: i) if Supplier substantially fails to deliver gas in accordance with this Agreement, or ii) if Supplier materially breaches to comply with any other provisions of this Agreement or the Tariff, including submitting false information to Black Hills Nebraska Gas regarding Customer subscription and lack of confirmation with Customer, and Supplier shall be barred from any further participation in the Choice Gas Program. If this Agreement is terminated due to non-performance by the Supplier, Supplier is obligated to reimburse Black Hills Nebraska Gas for the actual cost of replacement. Actual Cost of replacement gas includes, but is not limited to, commodity supply costs, transportation costs, imbalance penalties, penalties assessed by third parties for unauthorized receipts or deliveries in violation of an operational flow order, as well as any customer relighting costs which are incurred by Black Hills Nebraska Gas as a result of Supplier's failure to deliver gas to its Customers in accordance with this Agreement. Black Hills Nebraska Gas shall invoice Supplier for the reimbursement amount, if any, and payment shall be due to Black Hills Nebraska Gas thirty (30) days after the invoice date. Interest shall accrue on the reimbursement amount from the termination of this Agreement to the date payment is made by Supplier to Black Hills Nebraska Gas.

Supplier Participation Agreement Termination Language Concerns – Proposed

Proposed Choice Gas Program Supplier Participation Agreement Termination Language:

Termination: Black Hills Nebraska Gas may terminate this Agreement upon written notice to Supplier upon any of the following conditions: i) Supplier substantially fails to deliver gas in accordance with this Agreement, (ii) Supplier materially breaches this Agreement, (iii) Supplier substantially and repeatedly fails to comply with any other provision of this Agreement, the Choice Gas Program Tariff, and other related Choice Gas Program requirements, or (iv) Supplier fails to comply with applicable federal, state, or local laws. Termination of this Agreement may also occur if Supplier intentionally submits false information to Black Hills Nebraska Gas regarding a Customer subscription and lack of confirmation with Customer.

Supplier Participation Agreement Termination Language Concerns - Proposed

After notice, discussion, and reasonable dispute resolution, if this Agreement is terminated, then Supplier may be suspended or barred from any further participation in the Choice Gas Program. In addition to termination of this Agreement and Supplier's suspension or disqualification from the Choice Gas Program due to non-performance by the Supplier, then Supplier shall reimburse Black Hills Nebraska Gas for the Actual Cost of procuring and providing replacement of natural gas supply. Actual Cost of replacement gas includes, but is not limited to, commodity supply costs, transportation costs, imbalance penalties, penalties assessed by third parties for unauthorized receipts or deliveries in violation of an operational flow order, as well as any customer relighting costs which are incurred by Black Hills Nebraska Gas as a result of Supplier's failure to deliver gas to its Customers in accordance with this Agreement, the Tariff, or other governing terms of the Choice Gas Program. Black Hills Nebraska Gas shall invoice Supplier for the reimbursement amount, if any, and payment shall be due to Black Hills Nebraska Gas thirty (30) days after the invoice date. Interest shall accrue on the reimbursement amount from the termination of this Agreement to the date payment is made by Supplier to Black Hills Nebraska Gas.

Black Hills Nebraska Gas will provide gas service performing the terminated Supplier's price options and prices for impacted customer(s) throughout the remainder of the earlier of (a) a suspension period, (b) transfer of Supplier's customers to another Choice Gas Program Supplier or (c) if appropriate or necessary, the remaining program year.

Black Hills Nebraska Gas will notify the affected customers if the Supplier is no longer eligible to participate in the Choice Gas Program and as a result, all terminated Supplier's customer(s), including customer(s) with multi-year terms will be placed on the Gas Cost Adjustment regulated rate and required to remit a new ballot for the next program year.

Proposal to Eliminate Balloted Numbers from Website & Replace with Ratings

Questions around the purpose of posting the customer balloted numbers to the Choice Gas website were discussed

Pros/Cons: Balloted customer numbers

- **P:** The balloted customer numbers are posted daily during the annual selection period – existing process, working well
- **P:** It is believed various parties utilize this information (i.e., customers, existing Suppliers, BHE and potential parties interested in participating in the Choice Gas Program
- **P:** Balloted customer numbers have been posted for years with no reported negative impact

Pros/Cons: Replace with ratings

**It is believed that “ratings” refers to Customer Satisfaction (CSAT) ratings*

- **P:** CSAT ratings available from Suppliers
 - Suppliers include ratings on their websites
- **P:** Can be beneficial info for customers during selection process
- **C:** Ratings can include Supplier service territories not related to Choice Gas
- **C:** If “ratings” refers to online reviews:
 - Information is only valuable if Rating and # of Ratings are included
 - Ratings can be manipulated
- **C:** BH Wyoming Gas may incur costs / resources to manage.

Current BHE Credit Requirements

Credit and Performance Assurances: Supplier agrees to provide financial assurances of its ability to perform its obligations and meet its commitments under this Agreement. Such assurances shall be provided at least once annually and shall be in the form of a Letter of Credit that is in a form acceptable to Black Hills Energy, or Guaranty Agreement in a form acceptable to Black Hills Energy. Additionally, in order to qualify as a new Supplier under the Black Hills Energy Choice Gas Program, Supplier agrees to provide Black Hills Energy with three years of audited financial statements.

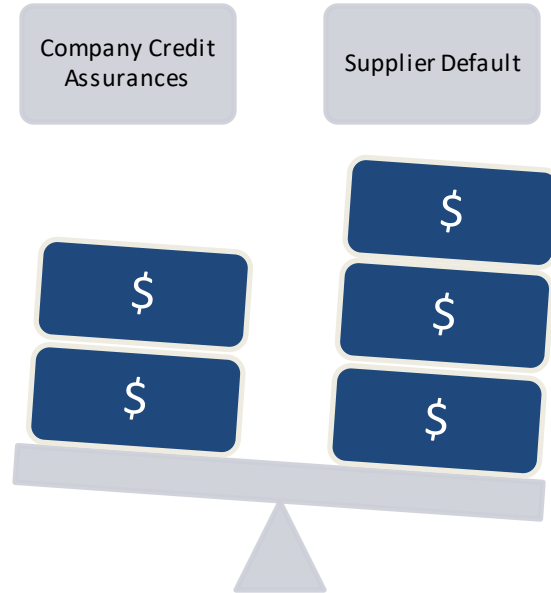
The Supplier agrees to notify Black Hills Energy within five days of any material changes in its financial conditions that could affect its ability to perform its obligations and meet its commitments pursuant to this Agreement, including, but not limited to, informing the Company of a downgrade in its credit ratings, or a downgrade to the credit rating of the entity providing a Parental Guaranty for Supplier, if applicable. Failure to provide such notice shall deem the Supplier to be in breach of this Agreement, and subject to, among other things, disqualification from participation in the Program.

The Gas Delivery Cost for the period shall be the cost of backup, emergency, or replacement gas supplies or other services directly attributable to the Company's Casper, Gillette and Torrington Divisions during the period. In the event the Company, at its sole discretion, needs to purchase: i) operational gas supplies or other services in order to ensure system integrity; or ii) replacement gas supplies or other services due to the failure of qualified supplier(s) to deliver sufficient gas volumes, and the Company does not recover sufficient dollars from the non-performing Supplier(s) to fully reimburse the Company for any costs related to such purchases, then the actual unrecovered cost to the Company for such purchasing, including but not limited to gathering, transporting, storing, treating, and processing of any backup, emergency or replacement gas supply, or any other services, fees and taxes related to such gas, shall be included in the Gas Delivery Cost for the period. If circumstances arise whereby the Company is required to implement emergency replacement gas supply, the Company will immediately provide notice of such emergency to the Commission. For any costs not recovered from Suppliers related to service described above, the Company shall request approval from the Commission to be reimbursed through the GDCA mechanism.

Credit Requirements Protect Customers

BHE Administration Position: The Company's Credit Assurance policy protects customers from bearing the cost burden in event of a Supplier Default.

If we loosen requirements, customer financial risk increases:



Credit Requirements Follow Up

Supplier Inquiries:

- Are Supplier receivables taken into consideration in the credit requirement process
- Can credit requirements be bifurcated into summer/winter amounts
- Suppliers could provide data of other industry standards around credit requirements

Black Hills has followed up on the above inquiries with its Finance department to determine if the Supplier inquiries are viable and fall within acceptable Black Hills business practices.

The Company is reviewing the impact of a change in its credit practices and requirements on the Choice Gas Program customers and Company business administration, operations, and risk profile in relationship to applicable non-discrimination and preferential treatment legal requirements.

Black Hills will continue to engage in further discussion and analysis on balancing the credit requirements with the potential financial risk involved with volatile pricing in gas markets



APPENDIX

Detailed Results

Survey Response

Surveys
Delivered

- NE = 44,115
- WY = 51,422
- **Total = 95,537**

Surveys
Completed

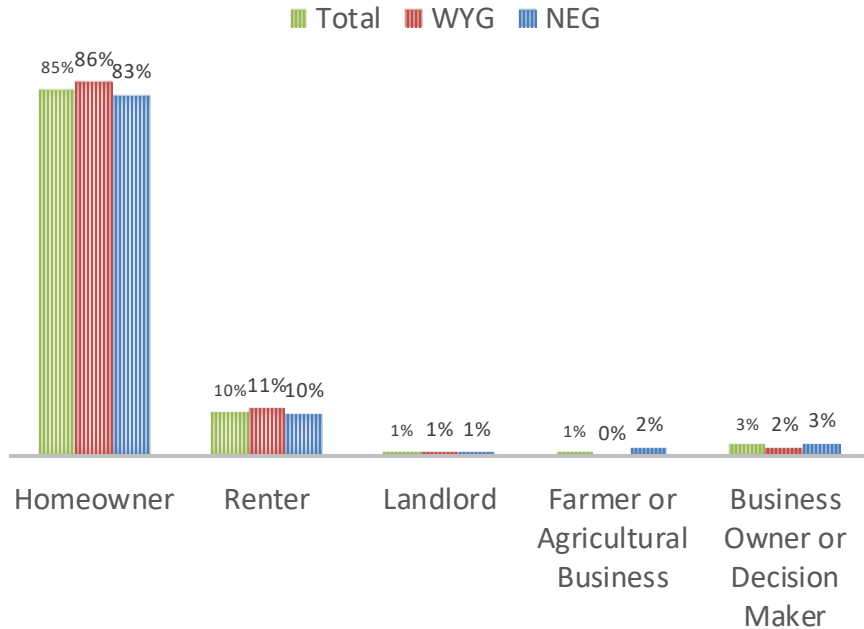
- NE = 1,885
- WY = 2,112
- **Total = 3,997**

Response
Rate

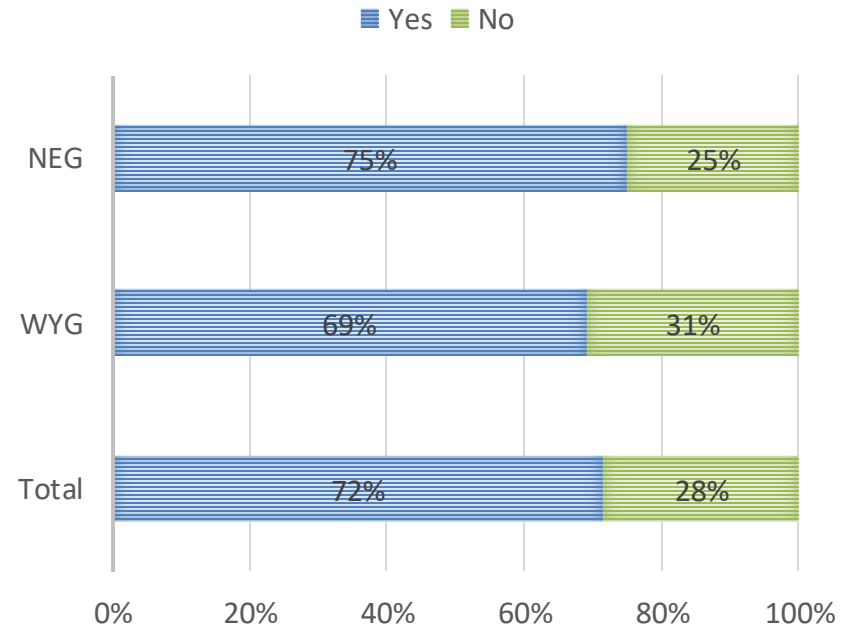
- NE = 4.3%
- WY = 4.1%
- **Total = 4.2%**

Questions and Results

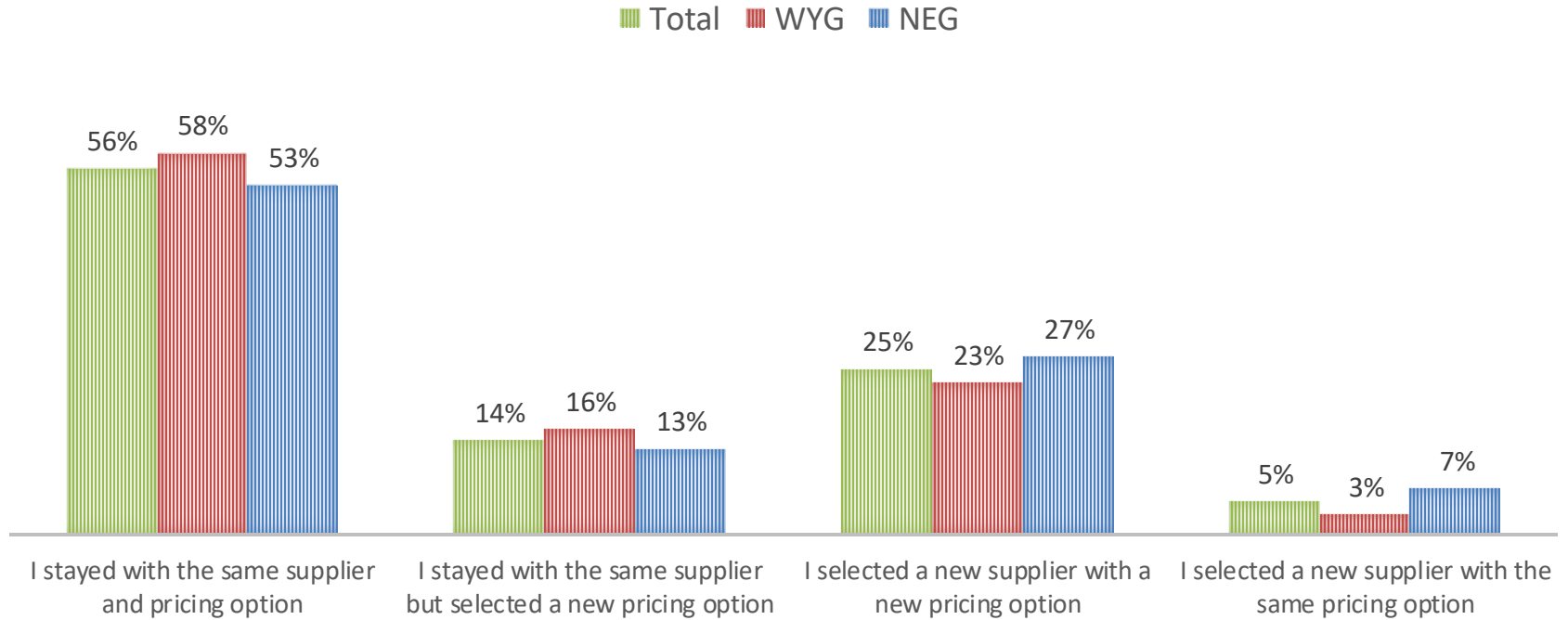
Q1: I am answering this survey as a:



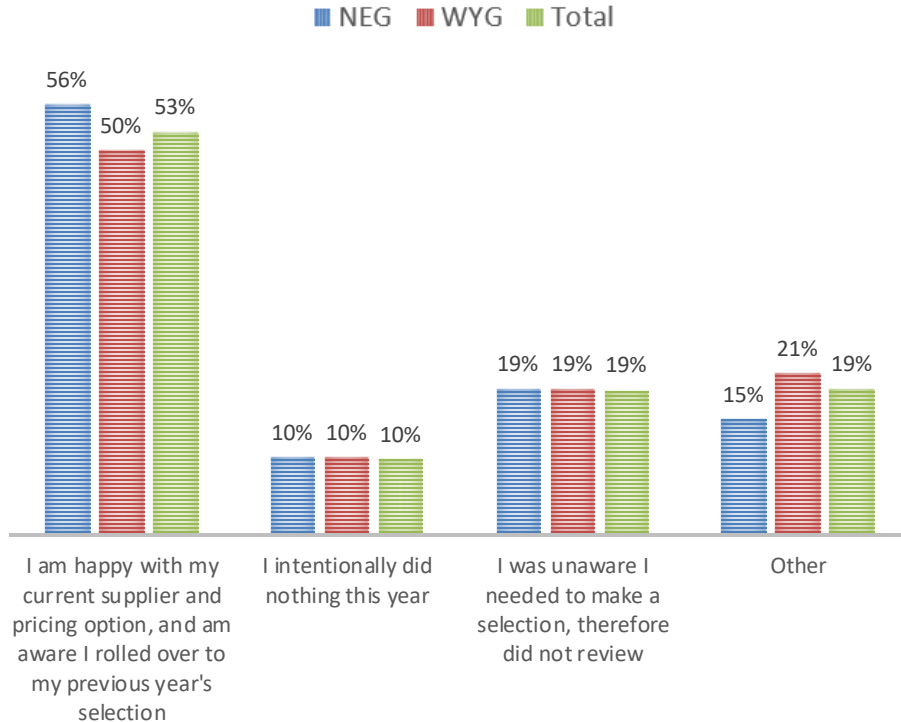
Q2: Did you actively review pricing options before selecting a natural gas commodity supplier?



Q3: Select the statement that best describes your selection this year:



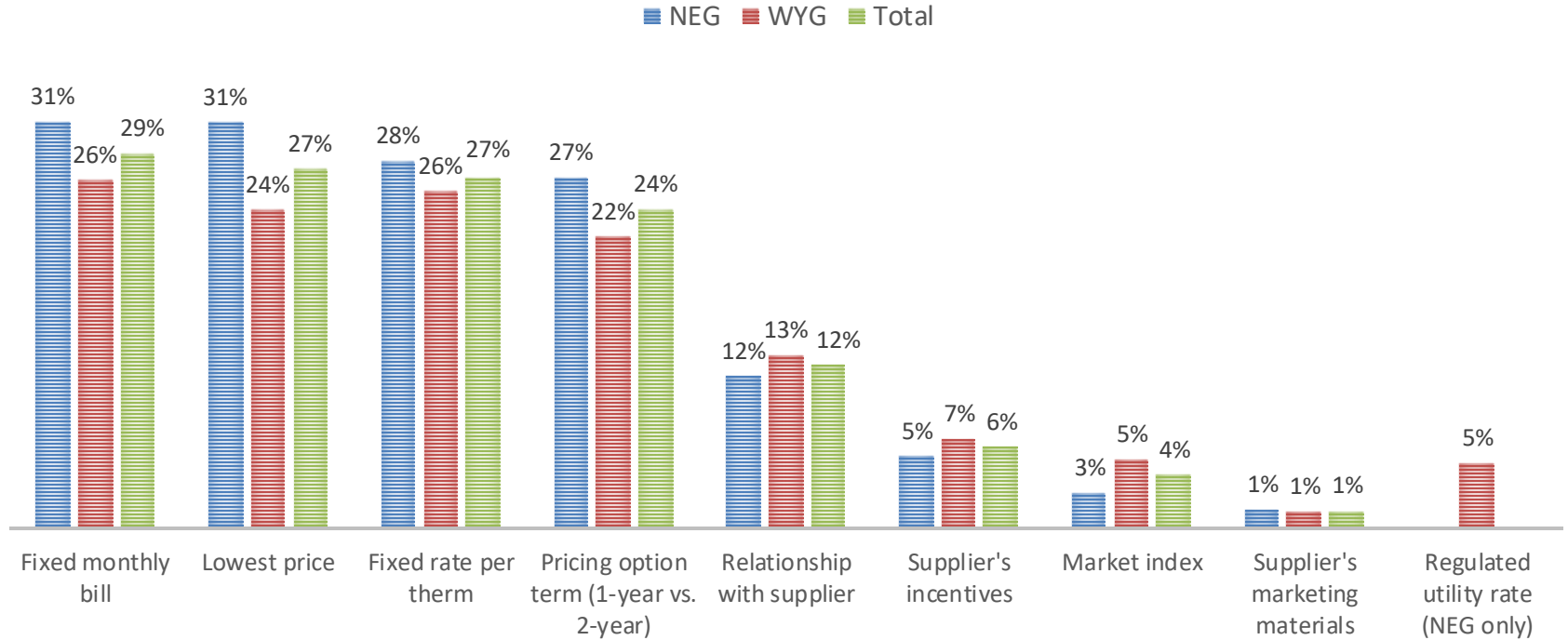
Q4: Select the reason you did not actively review supplier's options this year:



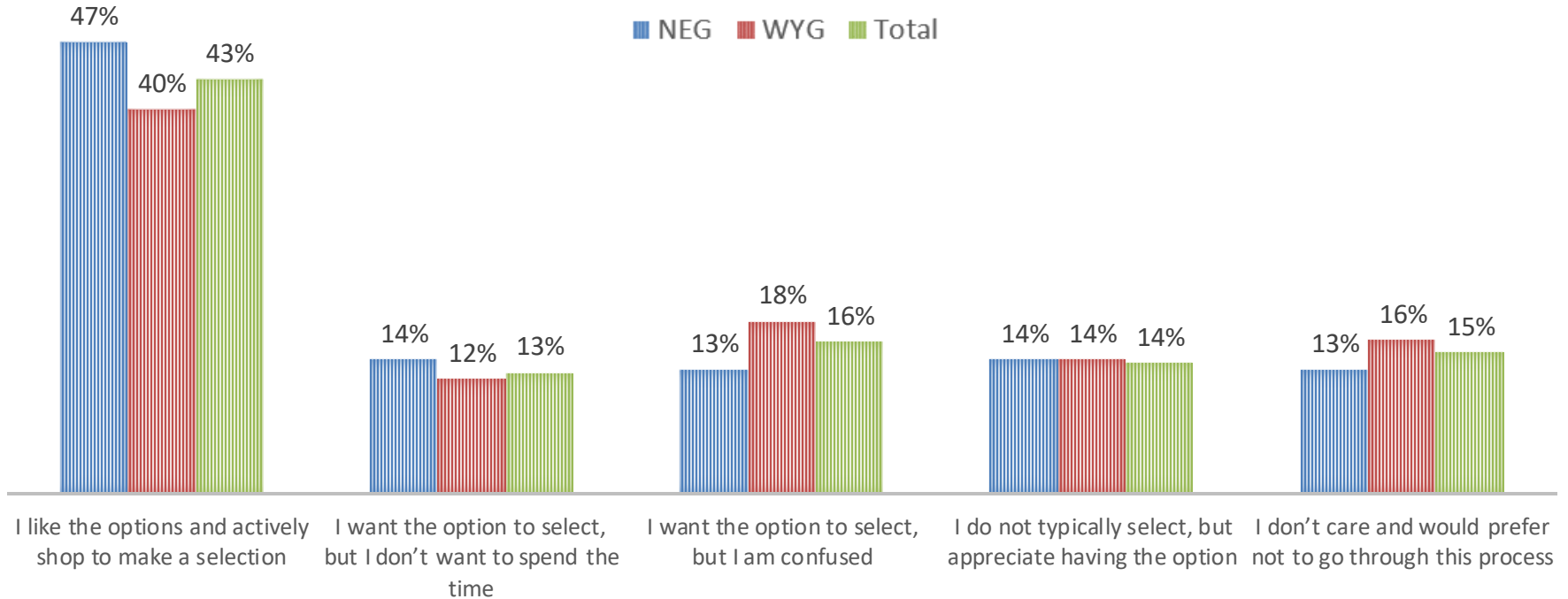
Q5: Please provide the reason you did not actively review supplier's options this year.

Other Reason	NEG	WYG	Total
Process complicated or confusing	18	32	50
Process was time consuming	14	29	43
Loyal/happy customer	4	13	17
New customer & didn't know	8	6	14
On 2-year plan	5	9	14
No option to select where I live	6	6	12
Didn't care	3	7	10
Did not know about selection process/did not receive information	7	2	9
Part of group selection	1	8	9
Landlord selected	2	5	7
Account balance due if switch	1	3	4
Moving		1	1

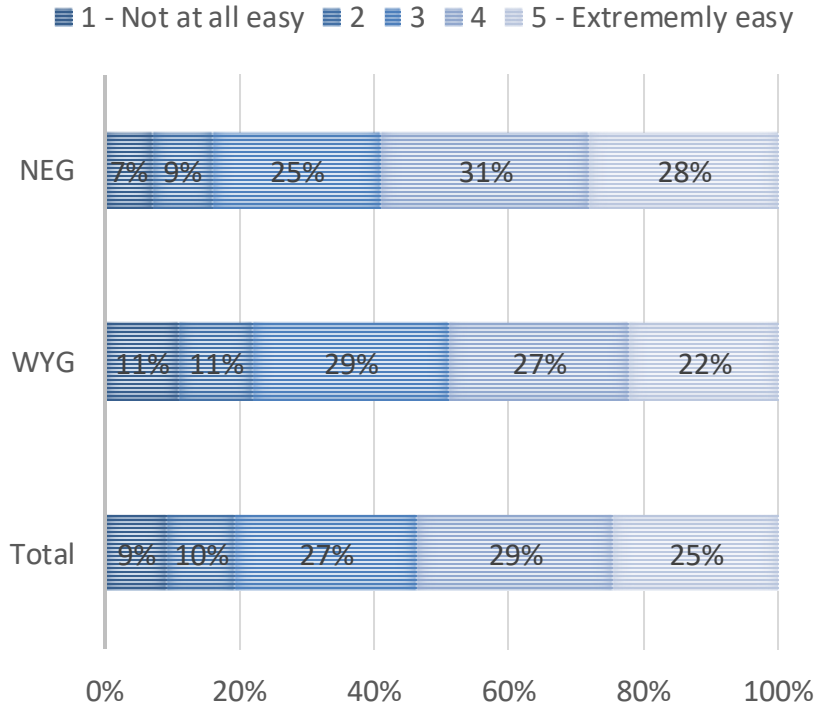
Q6: Select the factor(s) that influenced your natural gas commodity selection. Please select all that apply.



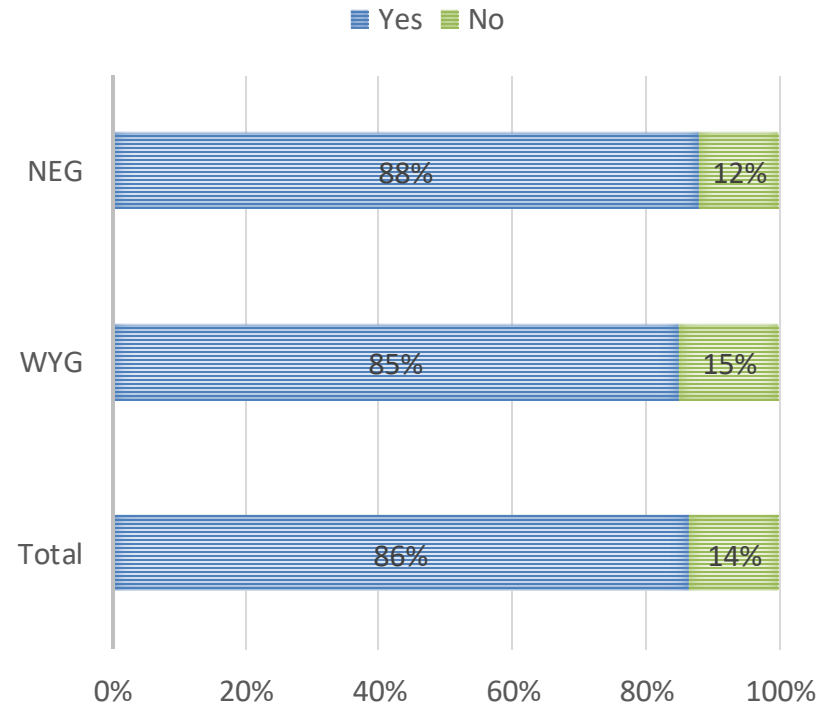
Q7: Which statement best describes the level of importance you place on having the option to select your natural gas commodity supplier and pricing option?



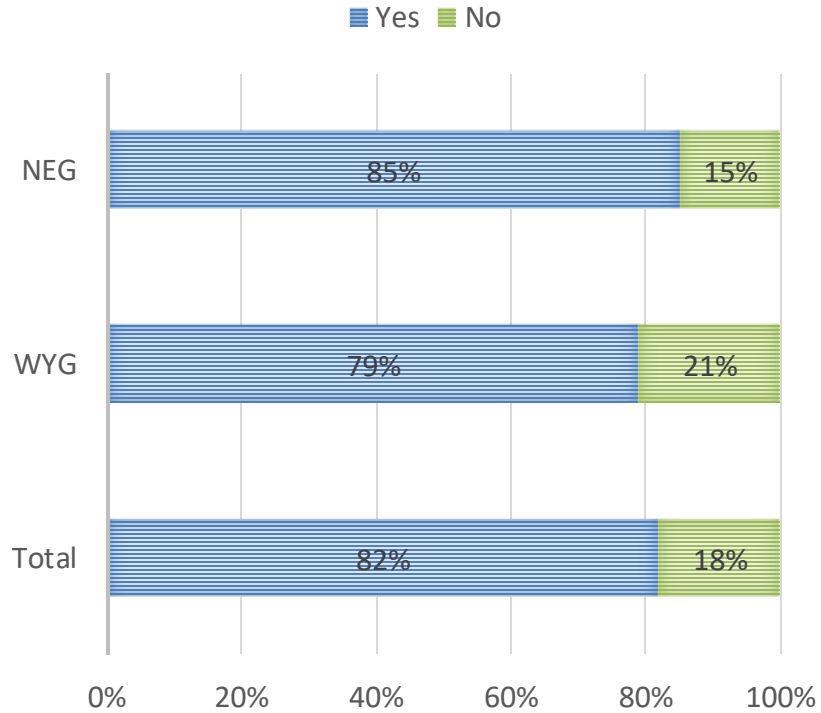
Q9: How easy was it for you to understand the Choice Gas Program?



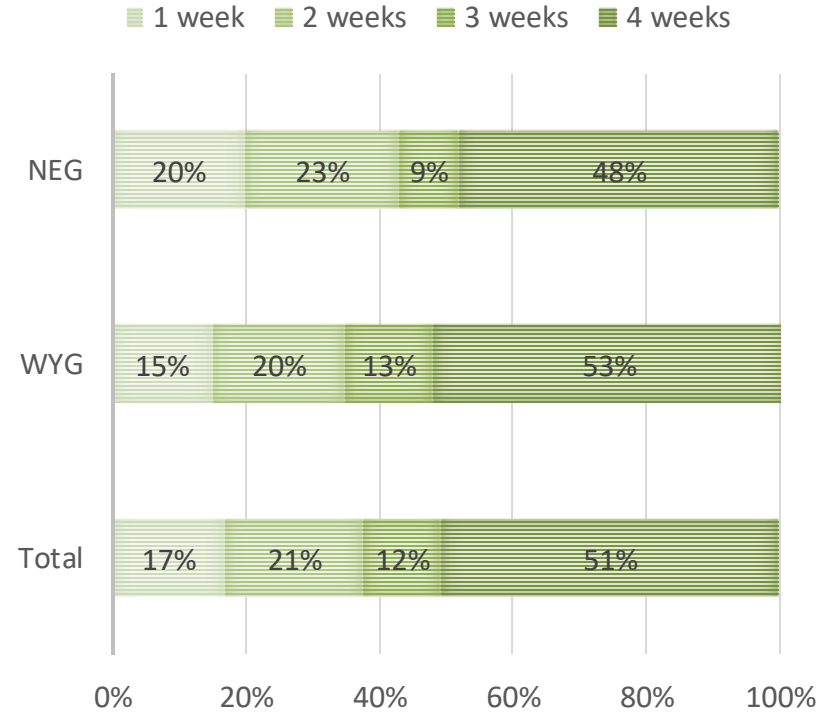
Q10: Was the deadline for selecting your natural gas commodity supplier clearly communicated to you?



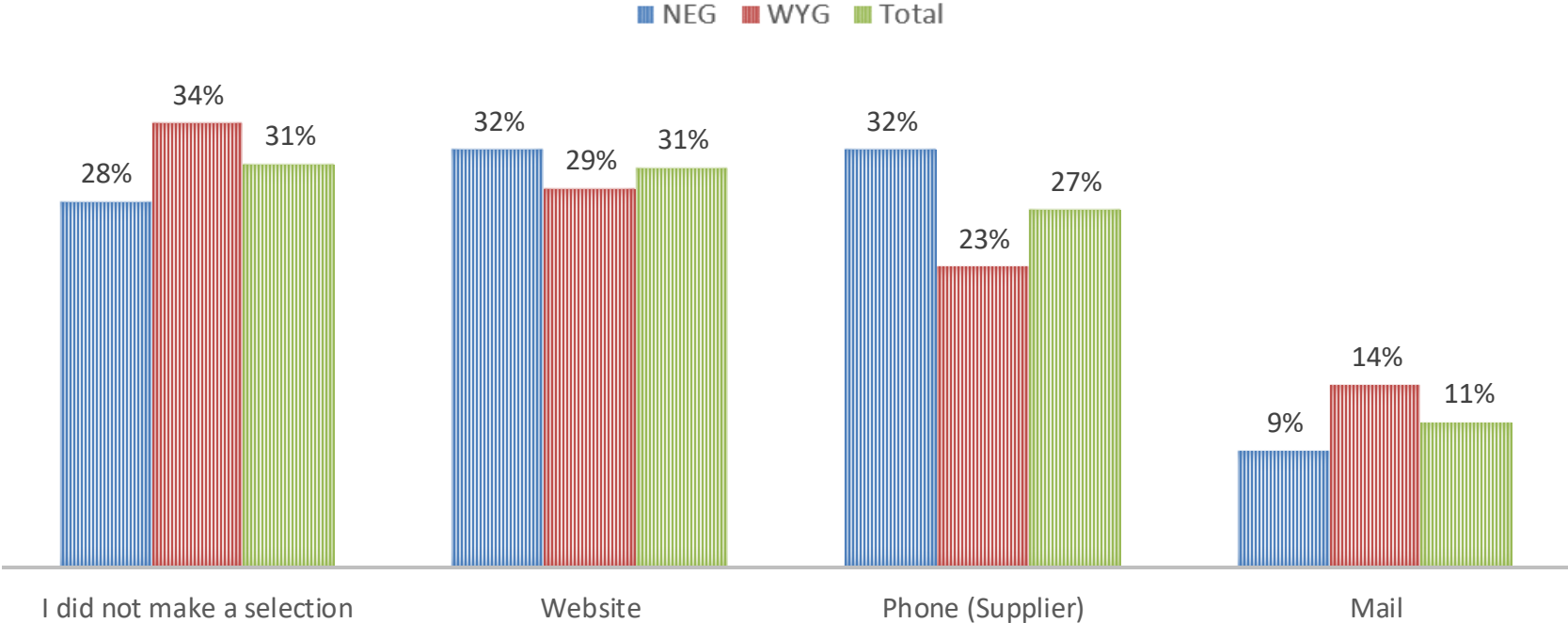
Q11: Are you satisfied with the current three-week enrollment/selection period?



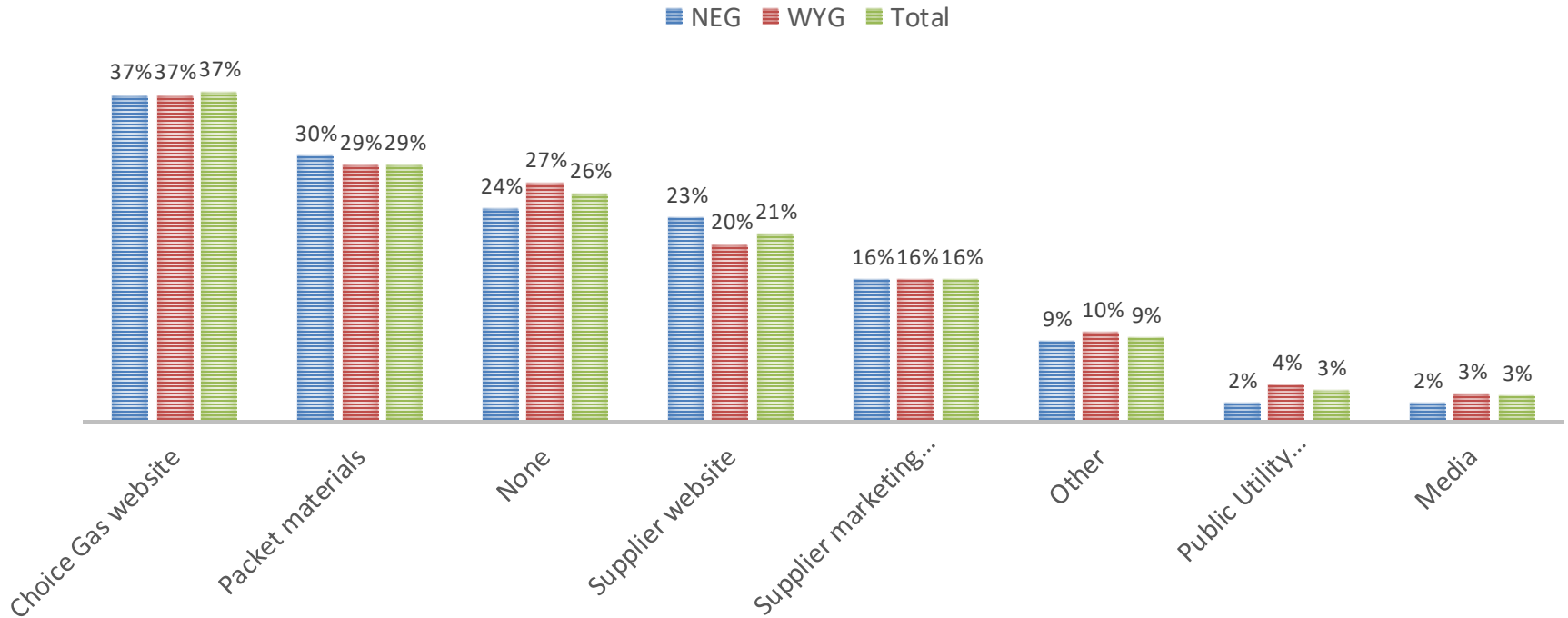
Q12: What additional amount of time was needed?



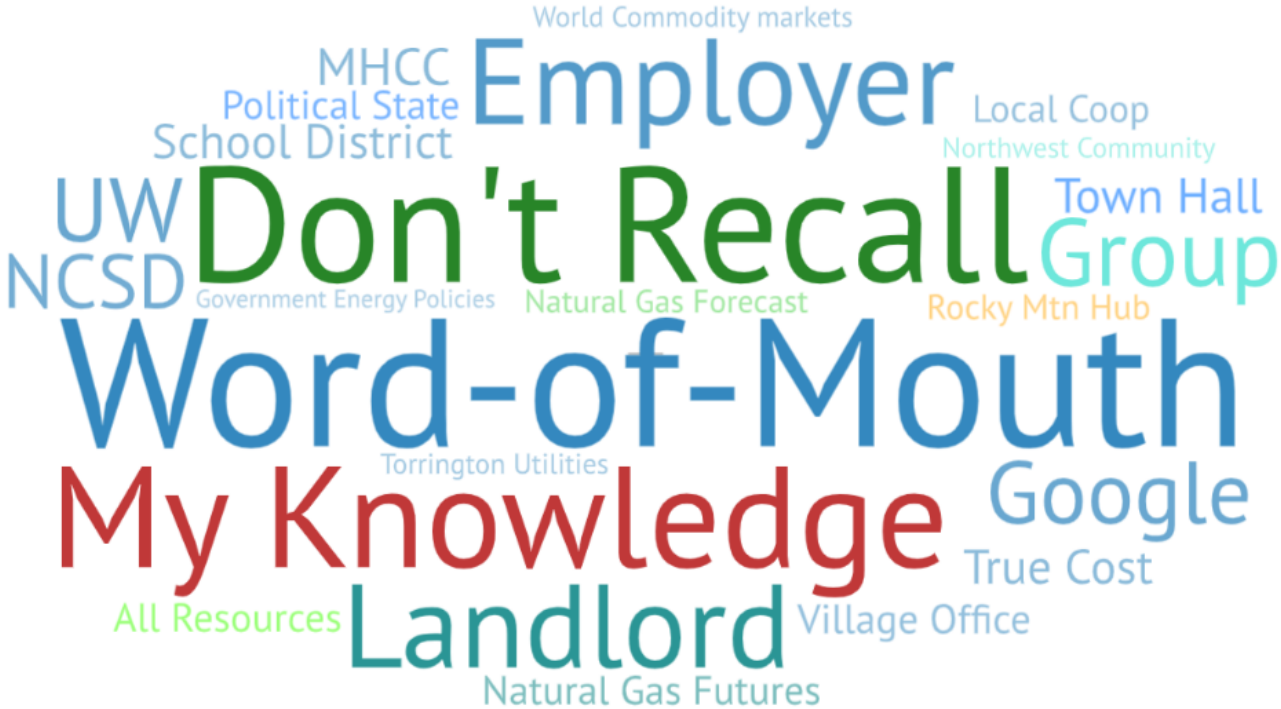
Q13: How did you make your natural gas commodity supplier selection this year?



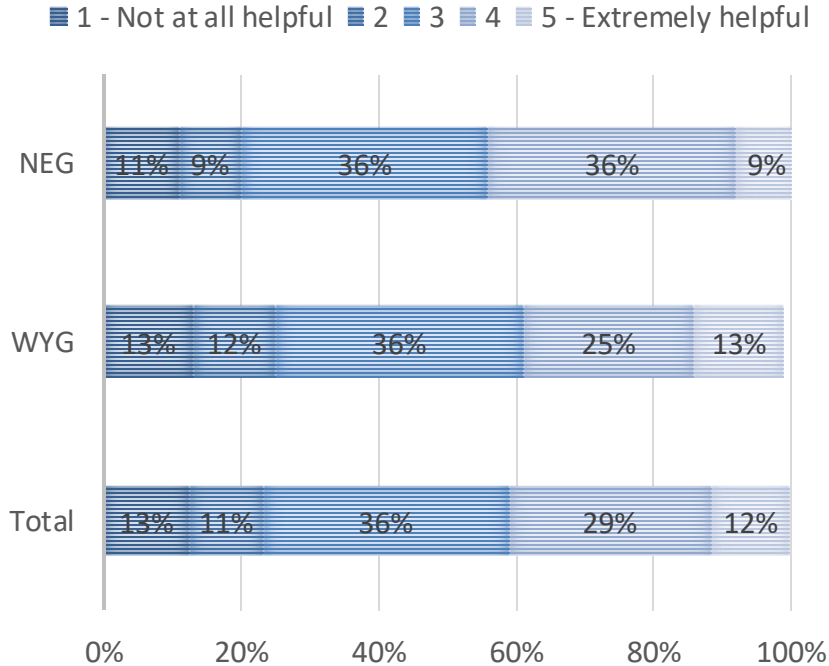
Q14.a: Which resource(s) did you use when selecting your natural gas commodity supplier and pricing option? (Select all that apply).



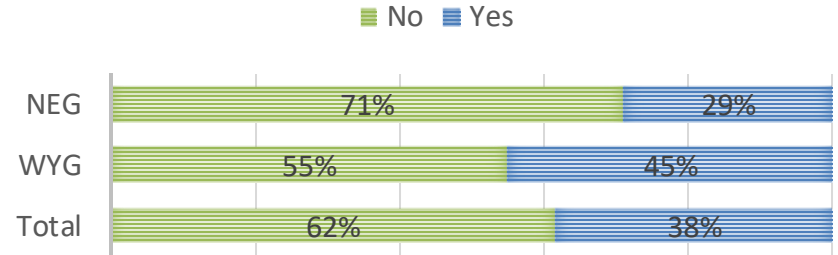
Q14.b: Please list the other resource(s) you used when selecting your natural gas commodity supplier this year.



Q15.a: How helpful was media when making a supplier selection?



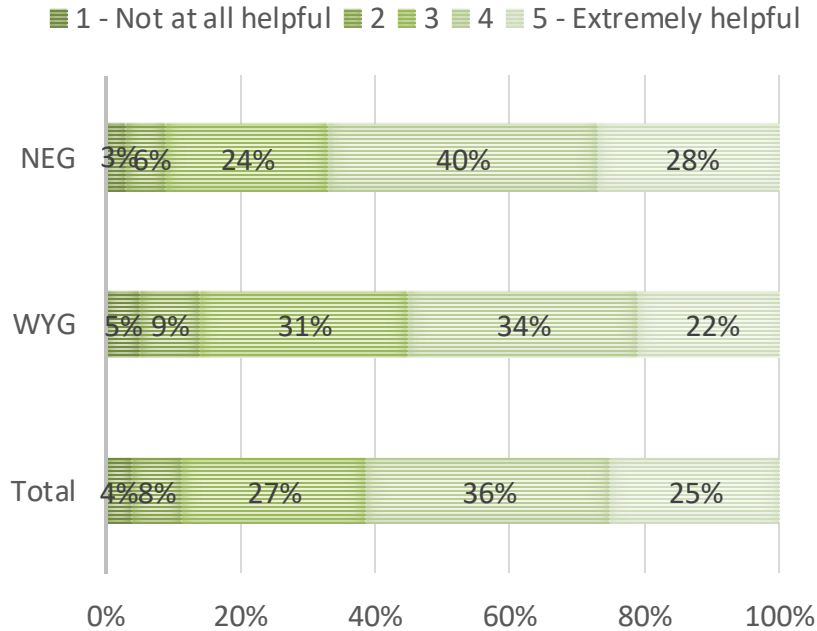
Q15.b: Were there any aspects of media that were confusing or difficult to understand?



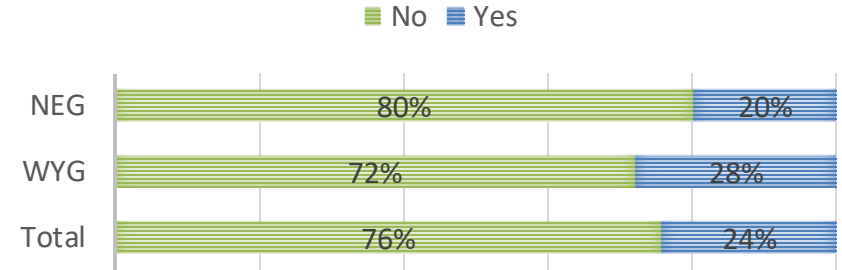
Q15.c: What was confusing or difficult to understand in regard to media?

Marketing Competition
Pricing
 Too Much Information
 Deceptive Wording

Q16.a: How helpful was the Choice Gas website when making a supplier selection?



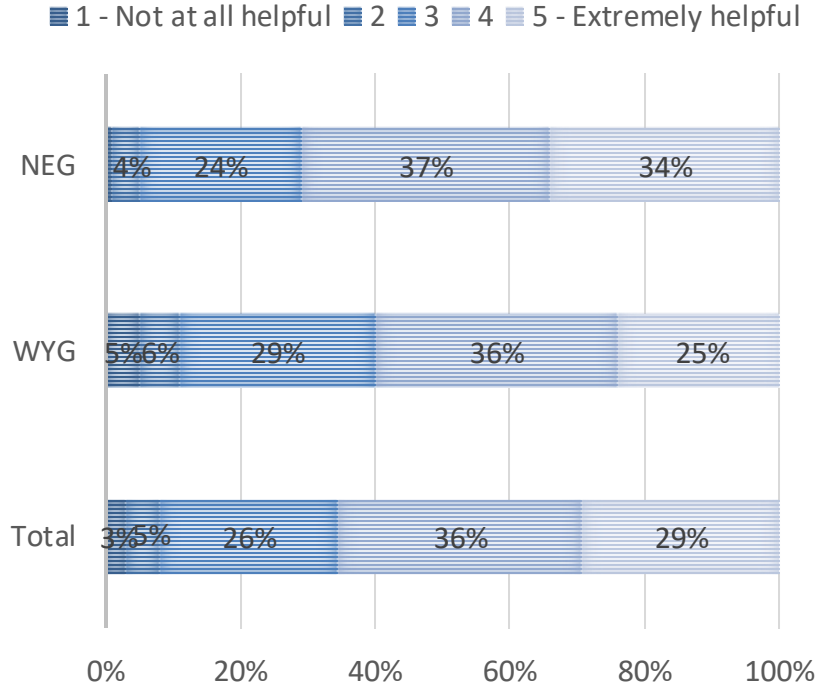
Q16.b: Were there any aspects of the Choice Gas website that were confusing or difficult to understand?



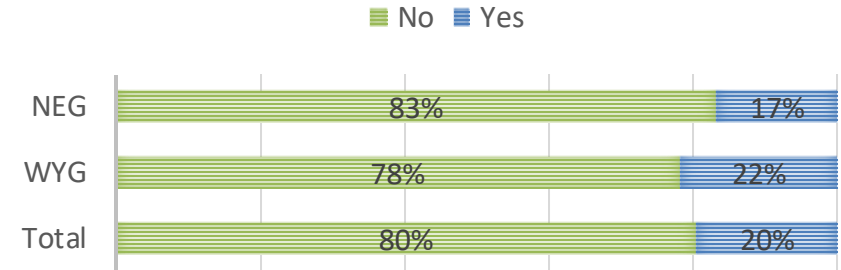
Q16.c: What was confusing or difficult to understand in regard to the Choice Gas website?



Q17.a: How helpful was the packet materials when making a supplier selection?



Q17.b: Were there any aspects of the packet materials that were confusing or difficult to understand?



Q17.c: What was confusing or difficult to understand in regard to the packet materials?

Terminology
 Pricing
 Time consuming
 Process not clear
 Comparing options
 Don't recall

Q18.a: How helpful was the Public Service Commission website when making a supplier selection?

■ 1 - Not at all helpful ■ 2 ■ 3 ■ 4 ■ 5 - Extermely helpful



Q18.b: Were there any aspects of the Public Service Commission website that were confusing or difficult to understand?

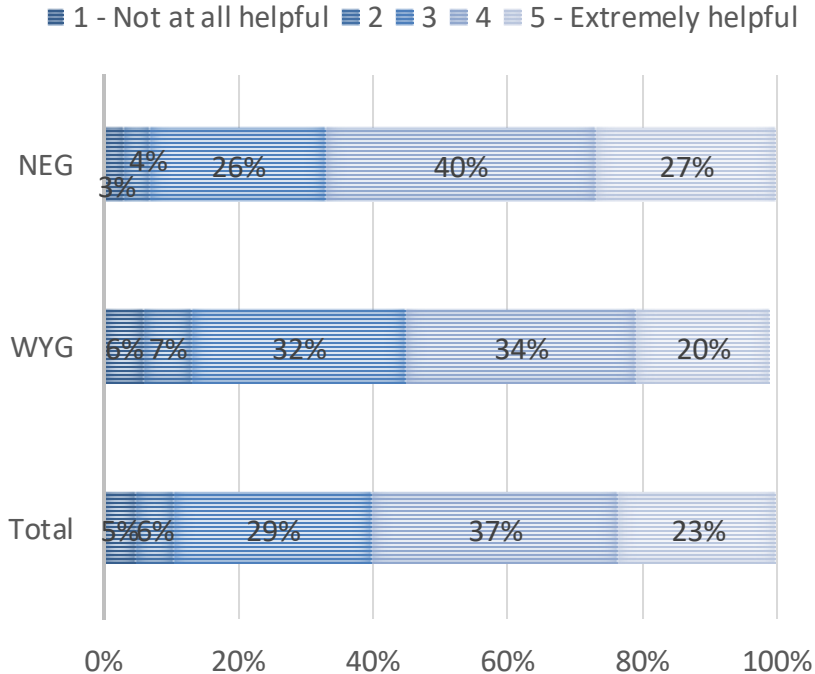
■ No ■ Yes



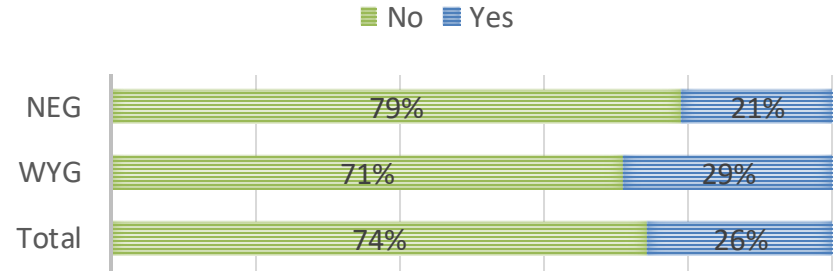
Q18.c: What was confusing or difficult to understand in regard to the Public Service Commission website?

Process not clear
Terminology
 Comparing options
 Pricing

Q19.a: How helpful was the supplier marketing communications when making a supplier selection?



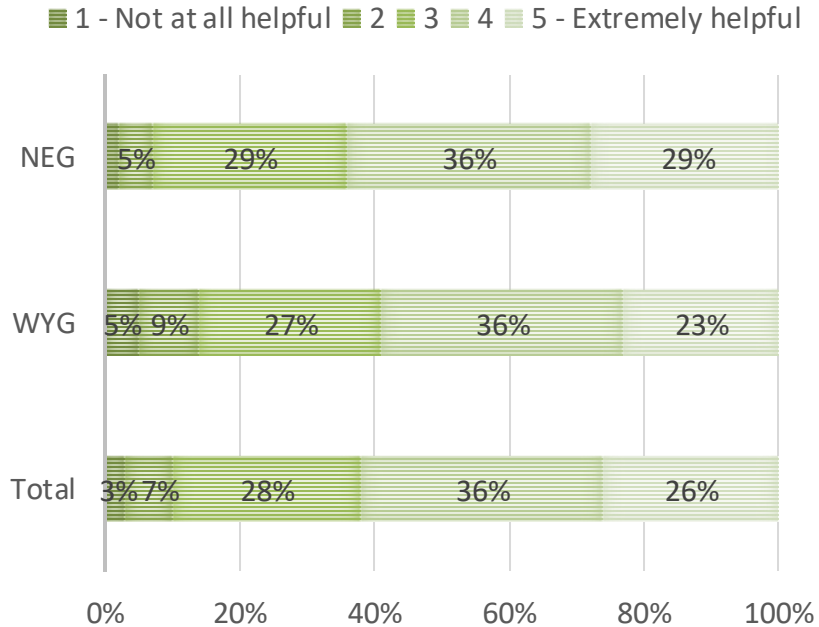
Q19.b: Were there any aspects of the supplier marketing communications that were confusing or difficult to understand?



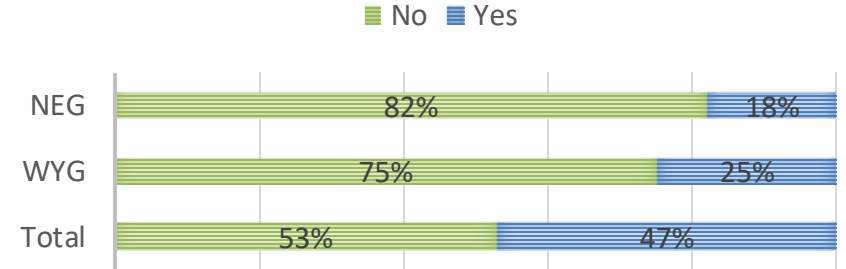
Q19.c: What was confusing or difficult to understand in regard to supplier marketing communications?

False advertising
 Comparing options
Pricing
 Process not clear
 Terminology

Q20.a: How helpful was the supplier website when making a supplier selection?



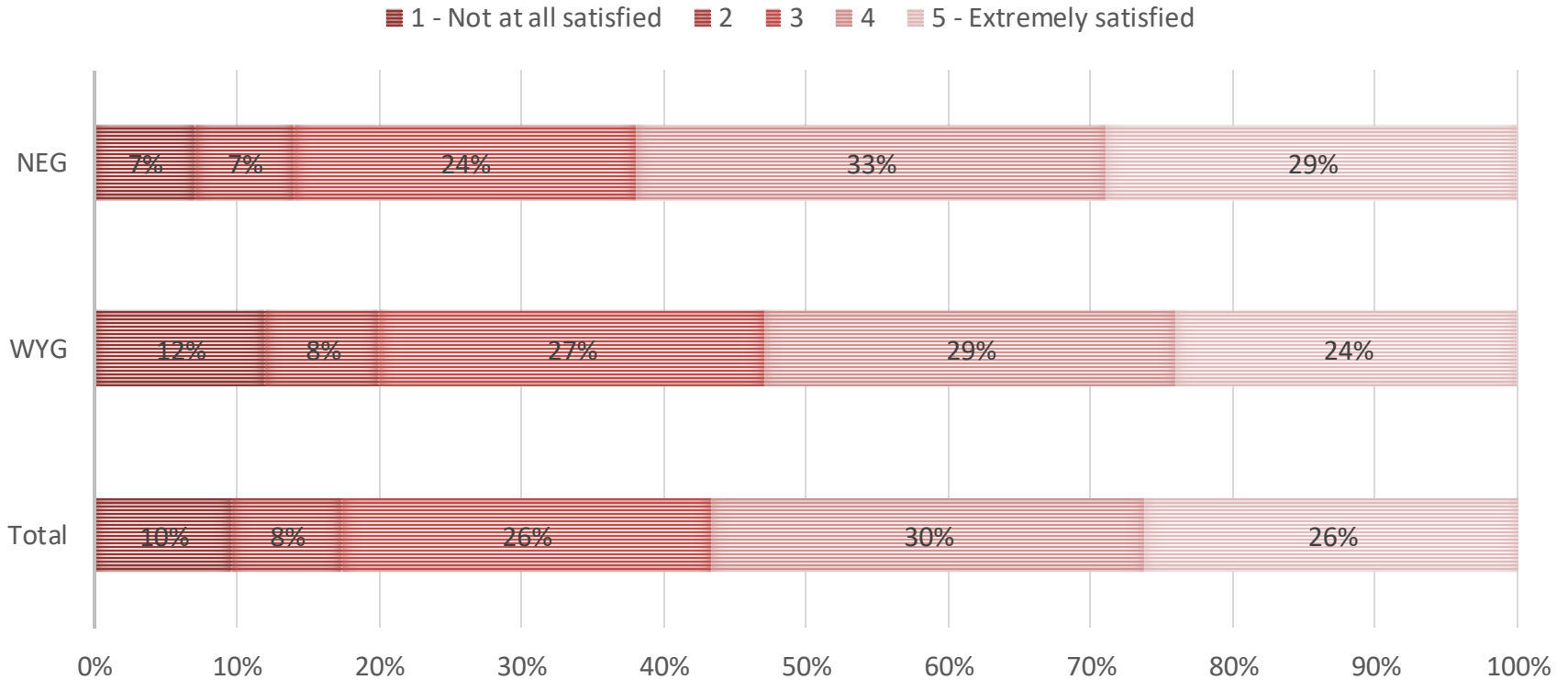
Q20.b: Were there any aspects of the supplier website that were confusing or difficult to understand?



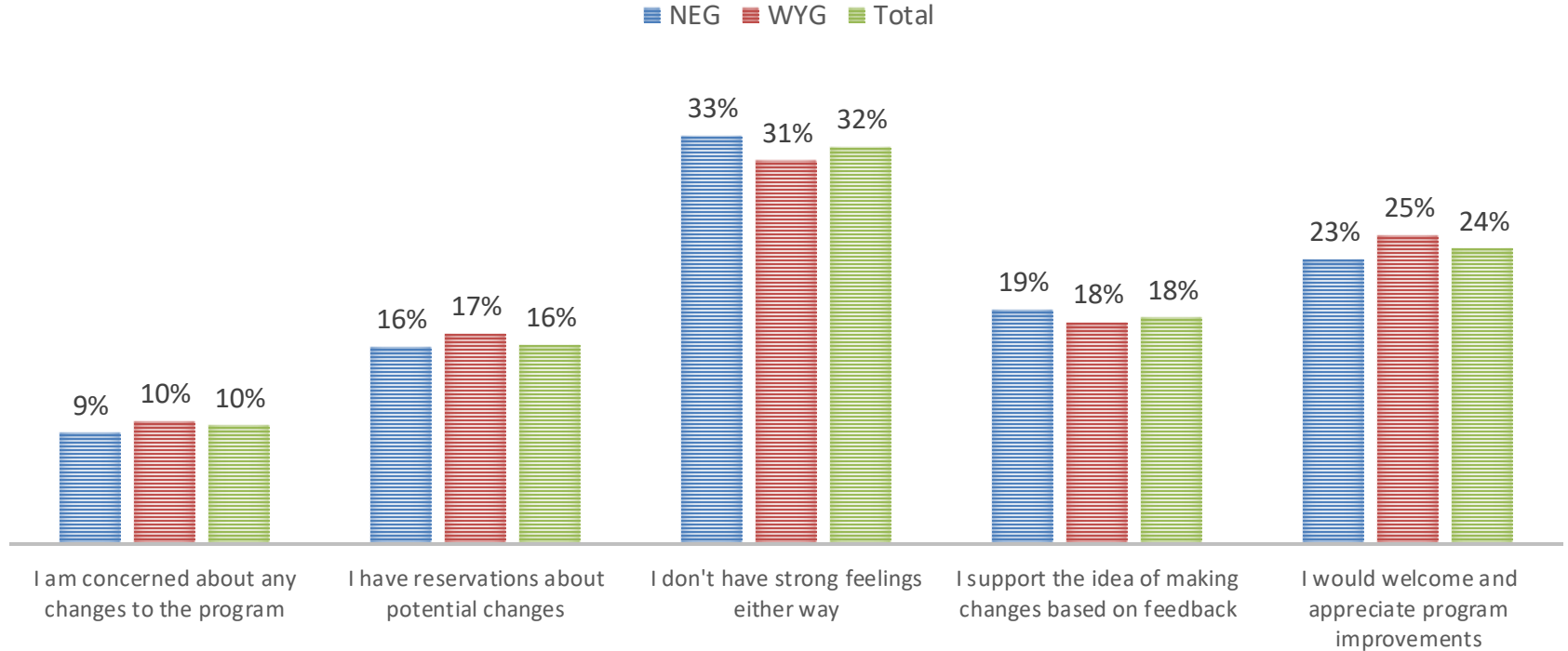
Q20.c: What was confusing or difficult to understand in regard to supplier website?

Comparing options
Pricing info
 Not all user-friendly
 Terminology

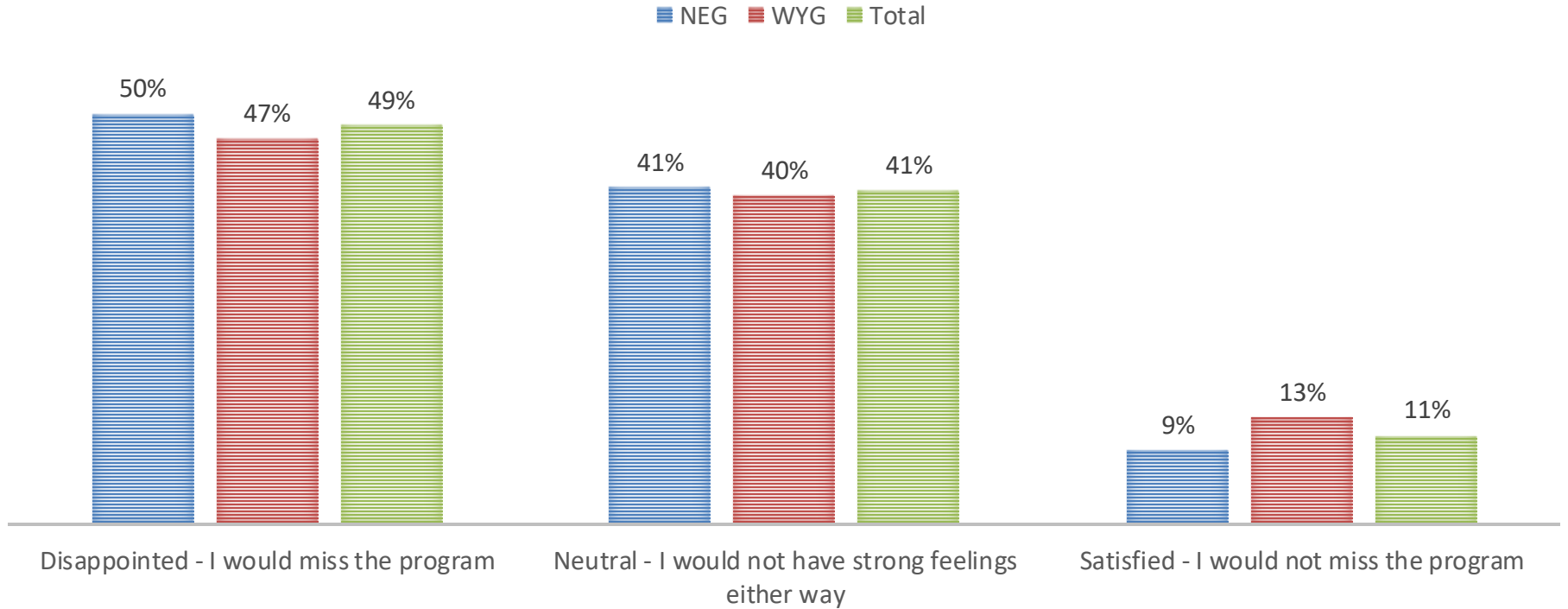
Q21. How would you rate your overall satisfaction with the Choice Gas Program?



Q22. How would you feel about Black Hills Energy making changes to the Choice Gas Program based on feedback gathered from this survey and other customer research?



Q22. In the event that Black Hills Energy decides not to offer the Choice Gas Program anymore based on this survey and other data collected, how would you feel?



Q23. We value your input! Please share the reasons behind your rating and any feedback you believe would be helpful to the program's improvement.



Comparison and Transparency

- Difficult to compare options
- Hard to find pricing
- Explain associated costs



Process and Communication

- Don't understand terminology
- Better explanation of process
- Provide information sooner



Time-Consuming

- Time consuming researching options
- Supplier websites not user-friendly
- Excessive supplier calls



New Customers

- Provide new customer option to select vs. roll-over
- Communicate and explain selection process



Streamline Process

- One stop shop to compare options and pricing
- Provide the lowest cost option



