



# ANNUAL REPORT

## 2021 SERVICE LEADERS



We're all citizens.

Left to right: Orlando Chamberlain, Debi Bardhan-Akala, Jeffrey Harrison, Daphne Chiu, and Don Callahan

## A LETTER FROM JEFFREY HARRISON

PRESIDENT & CEO, CITIZENS ENERGY GROUP

### DEAR CITIZENS CUSTOMER:

Over the past two years as the COVID-19 pandemic has presented significant difficulties for many of our customers and the local economy, the commitment of Citizens Energy Group employees to being service leaders has never been stronger.

While remaining focused on safety, our employees strengthened their commitment to delivering quality customer service, implementing effective system and infrastructure improvements, and working to improve quality of life in the communities we serve.

### DECADE OF EXCELLENCE

Our commitment to teamwork is evident in our collective performance over the past decade following the acquisition of the community's water and wastewater utilities in August 2011. As we took on this responsibility, we promised the community we would enhance customer service, invest in infrastructure to improve reliability and protect the environment, and control escalating costs by enhancing efficiency and applying sound financial management. I am very pleased to say we are meeting all these objectives.

Our well-trained employees have delivered safe, reliable and efficient utility service while making it easier for our customers to do business with us. We have expanded efforts to help customers in need through our Warm Heart Warm Home Foundation, Universal Service Program and Low-Income Customer Assistance Program. Our system investments are restoring area waterways, reducing water main breaks, and expanding use of clean and efficient natural gas and thermal energy. Finally, we have established firm financial foundations for our utilities through a cost-conscious culture driven by process improvements.

### ADVANCING OUR GOALS

We are expanding the goals we established 10 years ago, with cross-functional teams of employees coming together to enhance customer service, leverage innovation to execute system improvement projects, and find new ways to deepen our engagement with the communities we serve.

Recognizing the ongoing economic disruption caused by the pandemic, we continue expanding our efforts to help customers in need. As the number of customers facing disconnection tripled over the past year, our Customer Operations team has been maximizing use of our assistance programs, while establishing more than 50,000 flexible payment arrangements with customers since last September, when the utility disconnection moratorium ended. These efforts are helping customers keep their utilities connected as they work to stabilize their finances.

Our employees' focus on being service leaders was on full display in February 2021 when extremely cold weather gripped the nation. While the energy supply chain across the southwestern U.S. came to a halt, Citizens employees, working in difficult conditions, ensured reliable and affordable utility service to our customers thanks to teamwork, advanced planning and ongoing system investments.

Implementing plans that included use of our underground natural gas storage assets, hedging contracts with suppliers, and long-term gas purchases with discounts, our gas supply team is working to shielding our customers from big spikes in natural gas prices. With another winter season upon us, Citizens natural gas customers have the lowest average annual gas bill in the state, according to data from the Indiana Utility Regulatory Commission.

Our commitment to service leadership has ensured effective execution of system improvement projects. While the pandemic has delayed many infrastructure projects across the world over the past two years, teamwork is keeping our projects on schedule and within budget.



As we approach the 11th year of our long-term control program to prevent sewer overflows to area waterways, we are mining the last segment of our 28-mile DigIndy Tunnel System along Pleasant Run Creek. The first 10 miles of the tunnel system has already prevented more than 2 billion gallons of sewage from reaching the White River and Eagle Creek. When complete in 2025, DigIndy will prevent up to 99 percent of sewer overflows now occurring. At the same time, we recently planted the 5,000th tree in our 10 Thousand Trees program, which is further reducing sewer overflows while beautifying neighborhoods and providing area youth jobs through Keep Indianapolis Beautiful.

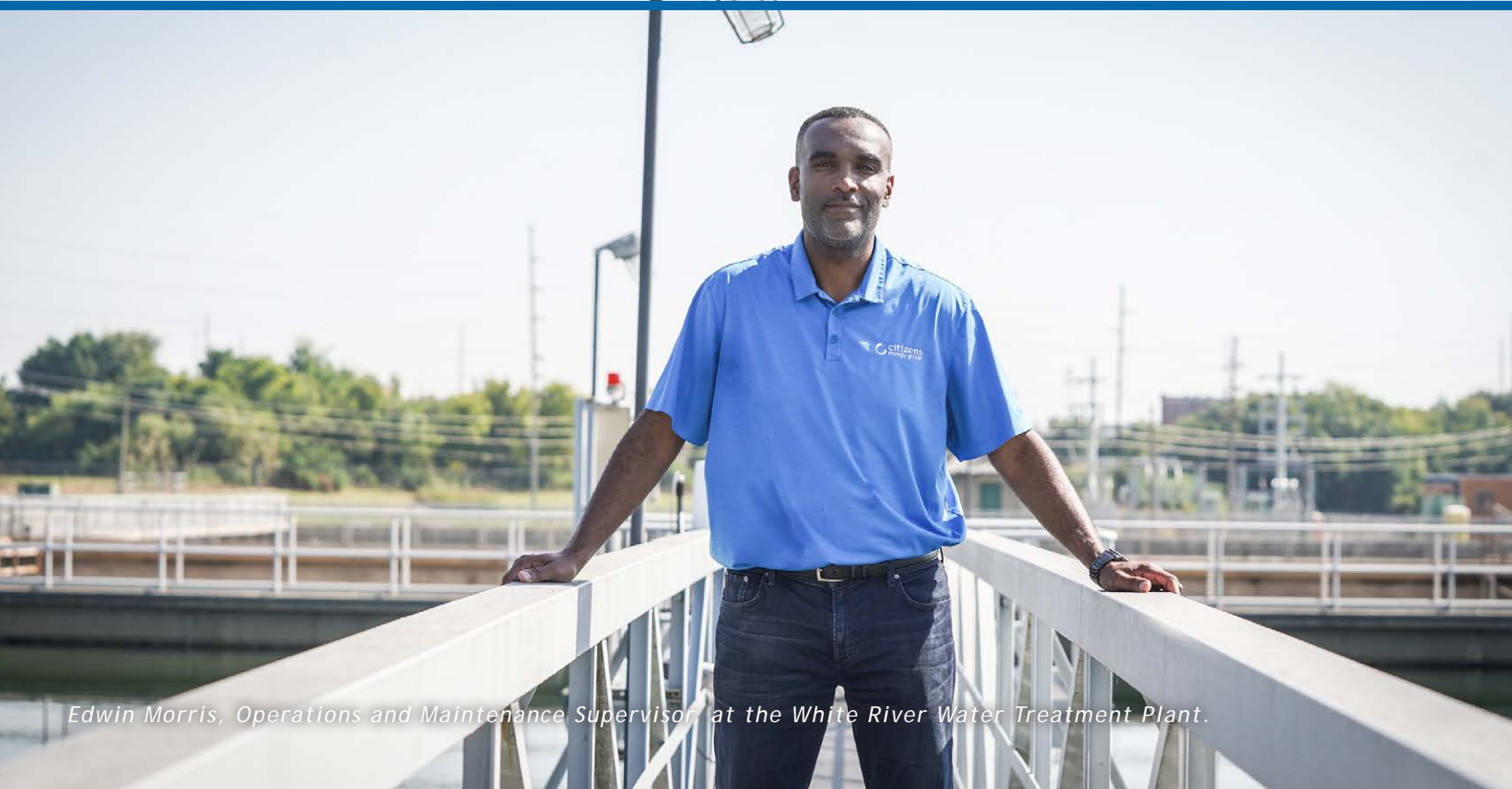
We also are committed to ensuring water supply to sustain growth. To this end, this past spring we opened Citizens Reservoir, the first new reservoir in Central Indiana in more than 50 years. By converting a retired 90-acre, 230-foot-deep stone quarry in Hamilton County to a reservoir, we have secured a supply of water to meet needs during a drought while supporting regional population growth and economic development. Citizens Reservoir will save our customers more than \$500 million compared with constructing a conventional reservoir. This fall we further secured our water supply by constructing a rock ramp on the White River in Riverside Park that creates a pool of water necessary for our White River in-take just north of 30th Street. Unlike a conventional dam that completely blocks the river, the rock ramp allows fish and other aquatic wildlife to move through the structure.

Citizens also continues to invest in our natural gas and thermal energy systems to keep them among the safest and best maintained urban utility systems in the nation.

ENGAGING OUR COMMUNITY

Our employees are continuing their deep commitment to community engagement and service. You will find Citizens employees across Central Indiana volunteering their time to organizations working to enhance quality of life in the communities we serve. For example, through our annual Sharing the Dream initiative our employees and business partners continue improving Indy Parks facilities with more than \$4 million in improvements provided over the past 13 years.

To further deepen community engagement, we recently created a Neighborhood Ambassador Program. Focusing on the King Commons, Martindale-Brightwood and SolIndy neighborhoods that are being impacted by our ongoing infrastructure projects, our Neighborhood Ambassador team is increasing personal engagement in these areas while maximizing use of our existing community development and philanthropic programs.



Edwin Morris, Operations and Maintenance Supervisor at the White River Water Treatment Plant.



Terri Williams, Contact Center Supervisor, answering calls from Citizens Energy Group customers.

DIVERSITY DRIVES BETTER SERVICE

At Citizens, we have become a service leader by leveraging the talents of diverse, cross-functional teams working in an inclusive environment, thus producing better results for our customers and communities.

Last year, Citizens joined with other businesses across Central Indiana to participate in the Indy Racial Equity Pledge and Business Equity for Indy (BEI) initiatives. As part of the Indy Racial Equity Pledge, Citizens pledged to be a leader in the business community for facilitating diversity and inclusion in our workforce, with our business partners and in the communities we serve. I am pleased to report we are making significant progress toward fulfilling each of these goals.

I personally have the privilege of being the chairperson for BEI, a joint venture of the Central Indiana Corporate Partnership and the Indy Chamber, in collaboration with the Indianapolis Urban League. Through five task forces, BEI is advancing racial equity in hiring and promotion; procurement and participation; learning and talent; impediments to health; and public policy through collaboration, creation, and investment. During the first year of the Indy Racial Equity and BEI efforts, over 150 companies have invested more than \$250 million and 50,000 hours toward our equity goals.

As a foundational partner in the Central Indiana economy, Citizens will continue playing a key role in seeking solutions to help make Indianapolis a more equitable and inclusive community.

SERVICE LEADERS

Whether our employees are enhancing customer service, completing system improvement projects, changing a process to reduce costs or volunteering for a local non-profit organization, they are always striving to be service leaders.

SINCERELY,

A handwritten signature in black ink that reads "Jeffrey A. Harrison".

Jeffrey A. Harrison  
President & CEO, Citizens Energy Group





# SERVICE LEADERS

## CITIZENS EMPLOYEES MAKING A DIFFERENCE FOR THE PEOPLE OF CENTRAL INDIANA

Many of Citizens' employees volunteer in the local community. Here, Terri Williams, Contact Center Supervisor, is at Indy Urban Acres, a project that empowers and educates people by providing equitable access to free, high-quality produce.

“WE ALL HAVE ONE GOAL AND THAT IS TO PROVIDE THE SAFEST AND BEST UTILITY SERVICE TO THE COMMUNITY, AND WE CAN'T DO IT WITHOUT EACH OTHER.”

Susan Mikels, Contact Center Supervisor, in the Citizens Energy Group call center.

### CITIZENS ENERGY GROUP EMPLOYEES ARE MOTIVATED TO BE SERVICE LEADERS TO ENHANCE OUR SHARED QUALITY OF LIFE.

As supervisors with responsibility for coaching and developing Contact Center associates, **Terri Williams** and **Susan Mikels** are driven by a passion for helping others.

“I treat each customer as an individual. I find joy in knowing I’m able to help customers in need; that’s what is most important to me,” said Terri, who volunteers with various community organizations and events including the IBE Summer Celebration and the Fire, Police & Deputy Sheriff’s Awards event.

Susan explained that providing excellent customer service in the Contact Center comes down to teamwork. “We all have one goal and that is to provide the safest and best utility service to the community, and we can’t do it without each other,” Susan said. “My main motivation when working with customers is to ensure I represent Citizens with the same personal care that I would exhibit representing my family.”

Each day Terri and Susan see the financial hardships many Citizens customers face in a community plagued by persistent poverty and the added impacts of the COVID-19 pandemic.

“The pandemic has affected our customers in many different ways. In addition to the devastating health impacts, the pandemic has meant loss of income for some and caused additional stress in their daily lives. That’s why it’s important to consider the individual circumstances of each customer who reaches out for assistance. Our customers are individuals with diverse needs, and there is no one-size-fits-all answer to providing help,” said Susan, who has been an active volunteer with community development corporations.



**420,000**  
bills generated and delivered to customers per month



**54,136**  
phone calls answered by the Contact Center per month



**41,500**  
outbound alerts and notifications sent to customers per month



**2,700**  
online chats answered per month

Billing and Customer Service by the numbers for 2020



**// IN REGULATORY AFFAIRS, WE ARE CONTINUALLY LOOKING FOR CREATIVE WAYS TO CONTINUE OUR INVESTMENTS WHILE CREATING NEW WAYS TO HELP CUSTOMERS IN NEED... //**



*Debi Bardhan-Akala, Director Regulatory Affairs, leading a meeting.*

While she doesn't directly serve external customers, **Debi Bardhan-Akala**, Director of Regulatory Affairs, is inspired by the concept of service leadership. "I believe in investing in our internal resources, our employees. They are a repository of knowledge, work experience and wisdom and when they flourish, their internal satisfaction is manifested in their interaction with external customers," she said. "A long time ago, a senior executive at Citizens told me happy employees equals happy customers. That is the mantra I try to follow each day."

Working in Regulatory Affairs gives Debi the opportunity to help Citizens invest in critical infrastructure while ensuring reasonable rates. "In Regulatory Affairs, we are continually looking for creative ways to continue our investments while creating new ways to help customers in need, such as our Low-Income Customer Assistance Program, which helps water and wastewater customers better manage their bill and reduce their water consumption," said Debi, who spends her spare time advocating for individuals impacted by domestic violence as a board member at The Julian Center.

The vital work of maintaining critical water operations facilities, such as the Fall Creek Treatment Plant and Central Canal, keeps **Edwin Morris** focused on being a service leader. Edwin, Operations and Maintenance Supervisor in Water Operations, also is motivated by the immense gratitude he feels for his position at Citizens.

"Working at Citizens has created financial stability for my family, a plan for retirement and a platform to create partnerships that allow me to give back to the community. I'm proud to provide safe and reliable services to the community. I am obliged to give 100% to Citizens Energy Group and our customers," said Edwin, who is a board member at Groundwork Indy, an organization that provides mentorship and employment to young adults on the northwest side of Indianapolis.

As a meter reader, **Don Callahan** knows his work is the first step to providing accurate bills to customers, which is a critical part of customer satisfaction. For the past two years, Don has been able to get accurate reads despite the challenges related to the COVID-19 pandemic. "As a meter reader during the pandemic, I have needed to be even more aware of my surroundings and wear personal protective equipment to ensure my safety and the safety of our customers. I'm motivated to get accurate meter reads each day because customers are precious like the water we deliver," said Don, who has enjoyed volunteering as a soccer coach for the past 49 years.



**// I'M PROUD TO PROVIDE SAFE AND RELIABLE SERVICES TO THE COMMUNITY. //**

*Edwin Morris, Operations and Maintenance Supervisor, volunteers his time to serve on the Groundwork Indy board. This organization engages teens in advocacy and service-learning efforts aimed at waterways, parks, and open spaces.*



**// I'M MOTIVATED TO GET ACCURATE METER READS EACH DAY BECAUSE CUSTOMERS ARE PRECIOUS LIKE THE WATER WE DELIVER. //**

*Don Callahan, Meter Reader, reading a customer's water meter.*





“ I AM MOTIVATED TO VOLUNTEER FOR COMMUNITY ORGANIZATIONS BECAUSE I KNOW I CAN IMPACT THE LIVES OF PEOPLE WHO ARE HAVING A LIFE JOURNEY THAT IS MUCH MORE DIFFICULT THAN MINE.”

*Daphne Chiu, Resource Recovery Manager, reviewing plans for a capital project.*

A passion for nature drives **Daphne Chiu**, Manager, Resource Recovery, to serve our customers, the community and the environment. “Ever since I started working in the wastewater utility industry, I have had the opportunity to help protect the environment in many ways including working on sanitary sewer projects, combined sewer overflow prevention, and wastewater treatment plant upgrades,” said Daphne. “I enjoy collaborating with other departments as we move our capital projects forward. I also enjoy the opportunity to mentor young employees coming into our industry as they work to positively impact our environment.”

Daphne believes giving back to the community is a key part of being a service leader. “Each year I volunteer with members of my church to bring gifts and food to Coburn Place, a shelter for parents and families impacted by interpersonal abuse. I am motivated to volunteer for community organizations because I know I can impact the lives of people who are having a life journey that is much more difficult than mine,” said Daphne.

As a Technical Specialist for Citizens thermal energy utility, **Orlando Chamberlain** gets fulfillment from knowing his daily attention to detail helps ensure safe and reliable steam service to more than 300 buildings in the downtown area, ranging from Lucas Oil Stadium to the IUPUI campus.

“My personal development is realized through serving our customers and volunteering in the community,” said Orlando, who volunteered this past summer at a community garden. “Being able to volunteer at the garden and mentor young men working there was very fulfilling. Being thankful for all the opportunities I have had here at Citizens, motivates me to serve customers and volunteer to make our community better.”



“ MY PERSONAL DEVELOPMENT IS REALIZED THROUGH SERVING OUR CUSTOMERS AND VOLUNTEERING IN THE COMMUNITY.”

*Orlando Chamberlain, Technical Specialist, working in a Citizens Thermal Energy plant.*



#### TRUSTEES

Dennis Bland  
Daniel Evans  
John Krauss  
Jackie Nytes  
Brian Williams

#### DIRECTORS

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Sherry D. Davis  
Jeffrey Good  
Christia Hicks  
J.A. Lacy  
Maria Quintana  
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#### OPERATING MANAGEMENT

**Jeffrey Harrison**  
President & Chief Executive Officer  
**J.P. Ghio**  
Vice President, Energy Operations  
**Mark Jacob**  
Vice President, Capital Programs & Engineering / Quality  
**Jeff Willman**  
Vice President, Water Operations  
**John Brehm**  
Sr. Vice President and Chief Financial Officer  
**Sabine Karner**  
Vice President and Controller  
**Jennett Hill**  
Sr. Vice President and General Counsel  
**LaTona Prentice**  
Vice President, Regulatory Affairs  
**Jodi Whitney**  
Vice President, Human Resources & Chief Diversity Officer  
**Mike Strohl**  
Sr. Vice President, Chief Customer Officer  
**John Lucas**  
Vice President, Information Technology  
**Curtis Popp**  
Vice President, Customer Operations  
**Craig Jackson**  
Sr. Vice President, Special Projects

#### COMPANY VISION:

We will fulfill the promise of the Trust to serve our customers and communities with unparalleled excellence and integrity.

#### COMPANY MISSION:

We provide safe, reliable services to our customers, while being good stewards of the environment. We maintain the lowest possible rates with sound financial management. We build and renew our businesses to remain competitive, add value, and create the greatest long-term benefit for our customers and communities.

# CONNECT WITH US

## SOCIAL MEDIA:

FACEBOOK: @CITIZENSENERGYGROUP

INSTAGRAM: @CITIZENSENERGYGROUP

TWITTER: @CITIZENSENERGY

YOUTUBE: @CITIZENSENERGYGROUP

WEBSITE: CITIZENSENERGYGROUP.COM

*Don Callahan, Meter Reader, on the banks of the White River. Citizens is proud to support the annual White River Cleanup in the downtown Indianapolis area.*