

Washington County Service Authority Board of Commissioners
March 26, 2018 Regular Meeting Minutes

1. Call the Meeting to Order

The Regular Meeting of the Washington County Service Authority Board of Commissioners, held in the E. W. Potts, Jr. Board Room located at 25122 Regal Drive, Abingdon, Virginia, was called to order by the Vice Chairman at 5:58 pm.

2. Roll Call - Vice Chairman

Commissioners Present:

Mr. Jim McCall, Vice Chairman
Mr. Wayne Campbell
Mr. Dwain Miller
Mr. Tim Orfield
Mr. Kenneth Taylor

Commissioners Absent:

Mr. Mike White, Chairman
Mr. Vernon Smith

WCSA Officers Present:

Robbie Cornett; Secretary, General Manager
Melinda Jett; Treasurer, Controller
Carol Ann Shaffer; Assistant Secretary, Administrative Assistant

General Counsel Present:

Thomas Dene, Esq.; Dene & Dene, P.C.

Consultants Present:

Dennis Amos, PE; Hunt & Proffitt, Inc.
Bobby Lane, PE; The Lane Group, Inc.
Kevin Heath, PE; The Lane Group, Inc.

WCSA Staff Present:

Dave Cheek PE; Operations Manager
Ryan Kiser, PE; Engineering Manager
Holly Edwards; Customer Service
Don Cole; Water Production Manager
Johnny Lester; Maintenance Manager
Ken Perrigan; Meter Manager

3. Prayer and Pledge of Allegiance

Mr. Cornett opened the meeting in prayer and led the Pledge of Allegiance.

4. Approval of the Amended Agenda - Vice Chairman

Mr. Miller motioned to approve the Amended Agenda, Mr. Taylor seconded and the Board approved with a unanimous vote.

5. Public Query and Comment - Vice Chairman

There was no public query or comment.

6. Approval of the Consent Agenda - Vice Chairman

A. Approval of Minutes

- January 22, 2018 Regular Meeting Minutes
- February 21, 2018 ESCO/Meter Replacement Committee Meeting Minutes
- January 22, 2018 Recessed Board Meeting Minutes (held February 26, 2018)
- February 26, 2018 Regular Meeting Minutes

B. Routine Reports: February 2018

- Water Production
- Water Distribution
- Meter Department
- Wastewater Operations
- Customer Service
- Maintenance
- Engineering
- Accounting
- Health & Safety Report

C. Financial Reports: February 2018

- Balance Sheet
- Income Statement
- Check Register / General Manager Financial Statement (*Except for Checks 040151, 040160, 040167, 040152 and 040057*)

Mr. Taylor motioned to approve the Consent Agenda, Mr. Miller seconded and the motion carried with a 5-0-0-2 vote.

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7. Consideration of Check Numbers 040151 to Food City, 040160 to Misty Mountain Spring Water and 040167 The Corporate Image (Newsletter Printing by KVAT) – Vice Chairman

As Mr. Orfield is an employee of Mid-Mountain Foods Inc., he abstained from discussions or voting on this agenda item.

Mr. Campbell made a motion to approve the above listed checks, Mr. Taylor seconded and the Board approved voting 4-0-1-2.

8. Consideration of Check Number 040057 to Mountain Materials – Vice Chairman

Mr. Taylor disqualified himself from voting on or otherwise participating in this transaction as he is an employee of W&L Construction who has an affiliated business entity relationship with Mountain Materials.

Mr. Campbell motioned to approve item check number 040057, Mr. Orfield seconded and the Board approved with a 4-0-1-2 vote.

9. Legal Counsel Report and Update – Thomas Dene

Mr. Dene had nothing to report.

10. Water and Wastewater Construction Projects Update – Ryan Kiser

Mr. Kiser reviewed the attached presentation.

11. Operations Manager's Report and Update – Dave Cheek

An outline of the Operations Report and Update reviewed by Mr. Cheek is attached.

During his review, Mr. Cheek invited Mr. Mark Osborne to address the Board. Mr. Osborne discussed in detail actions

recently taken by WCSA to detect and repair water leaks resulting in a savings of approximately 1.5 MGD that equates to a cost savings of approximately \$3,000 per day or \$1.1 million per year.

Mr. Osborne requested the Boards consideration to reallocate funds in the Distribution Department's budget for the purchase of a correlator (\$18,985) and 8 listening devices (\$17,632) in order for Staff to proceed with purchasing the needed equipment and continue efforts to reduce nonrevenue water as good stewards of our water resources and for the sake of cost savings to WCSA, said Mr. Osborne.

Mr. Miller made a motion to approve Mr. Osborne's request. Mr. Campbell seconded and the motion passed with a 5-0-0-2 vote.

12. General Manager's Report and Update – Robbie Cornett

Please see the attached outline of Mr. Cornett's presentation.

Mr. Miller asked for a 6 month review of the new WCSA health insurance plan. Melinda Jett offered to provide that information to the Board at the April meeting.

**13. Engineer's Report & Update
Hurt & Proffitt – Dennis Amos**

- Exit 13 Phase 3 Sewer Design

The Lane Group – Bobby Lane

- Water Intake Permit Modification for South Fork and Middle Fork Intakes
- Galvanized Line Replacement Project - Phase III
- Mill Creek Water System Improvements

The Lane Group – Kevin Heath

- Route 58 Water Supply Improvements Project

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- Abingdon Tank Improvements Project
- Lee Highway Corridor Sewer Project Phase 1 – Study

14. Consideration of Bond Counsel Procurement – Melinda Jett

After Mrs. Jett's review of Item 14, she recommended the Board consider approving the contract between WCSA and McGuire Woods, LLP.

Mr. Miller motioned to approve the contract between McGuire Woods, LLP, and WCSA. Mr. Campbell seconded and the Board approved voting 5-0-0-2.

15. Consideration of HomeServe Annual Report Card – Holly Edwards

Mrs. Edwards presented the attached HomeServe Partnership Review.

16. Consideration of a High Bill Abatement Policy Amendment – Holly Edwards

Mrs. Edwards asked the Board's consideration to approve a change in the High Bill Abatement Policy as follows:

If the customer determines that the abnormally high use was the result of a leak, subject to adequate documentation and or inspection by WCSA, he or she may cause the deletion or discontinuation of that plumbing fixture (humidifier, yard hydrant, etc.) and request an abatement.

Mr. Taylor motioned to approve the amendment. There was no second to the motion. Mr. McCall called for a Board vote. Mr. Taylor and Mr. McCall were in favor of the amendment; Mr. Miller, Mr. Campbell and Mr. Orfield were opposed. The motion did not carry.

17. Consideration of the Route 58 Water Supply Improvements Project

Contract 1 Change Order No. 2 – Kevin Heath

Mr. McCall stepped down as acting Chairman and abstained from discussions or voting on this Agenda Item as he is employed by King General Contractors, the contractor for the Route 58 Water Supply Improvements Project. Mr. Taylor took over as Board Chairman for this item.

Mr. Campbell motioned to approve Change Order No. 2. Mr. Miller seconded and the Board approved voting 4-0-1-2.

17A. Consideration of Check Number 040152 to King General Contractors – Acting Chairman, Ken Taylor

Mr. McCall stepped down as acting Chairman and abstained from discussions or voting on Agenda Item 17A as he is an employee of King General Contractors.

Mr. Taylor was Acting Chairman for Agenda Item 17A.

Mr. Orfield motioned to approve check number 040152, Mr. Campbell and the Board approved voting 4-0-1-2.

18. Closed Meeting – 7:43 pm

Mr. Campbell moved that the Board of Commissioners of the WCSA adjourn to Closed Meeting in accordance with the Virginia Freedom of Information Act, Code of Virginia Section 2.2-3711 Paragraph (A) (1); Personnel

1. To discuss and consider the performance and disciplining of specific public employees of the Washington County Service Authority.

Code of Virginia Section 2.2-3711 Paragraph (A) (7); Litigation

2. Consultation with legal counsel and briefings by staff members

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pertaining to actual litigation, where such consultation or briefing in open meeting would adversely affect the negotiating or litigating posture of WCSA, specifically involving the case of Washington County Service Authority vs. Bundy, currently pending in the Circuit Court of Washington County, Virginia.

Code of Virginia Section 2.2-3711 Paragraph (A) (29): Contracts

3. To discuss the award of a public contract involving the expenditure of public funds, including interviews of bidders or offerors, and discussion of the terms or scope of such contract, where discussion in an open session would adversely affect the bargaining position or negotiating strategy of the Washington County Service Authority, specifically involving the award of an engineering services contract or contracts for the second phase (completion) of the preliminary engineering report ("PER") for the Lee Highway Corridor Sewer Project.

In addition to the Board the presence of Thomas Dene, WCSA General Counsel, and Robbie Cornett, WCSA General Manager, were requested.

Mr. Taylor seconded the Motion of Closed Meeting and the motion carried with a 5-0-0-2 Board vote.

Return to Public Meeting – 9:01 pm

Mr. Taylor moved that the Board return to Open Session. Mr. Miller seconded and the motion carried with a 5-0-0-2 vote.

Mr. Campbell then read the following Certification of Closed Meeting;

Whereas, the Board of Commissioners of the Washington County Service Authority has convened a Closed

Meeting on this date pursuant to an affirmative recorded vote and in accordance with the provisions of the Virginia Freedom of Information Act; And Whereas, Section 2.2-3712 Paragraph D of the Code of Virginia requires a certification by this Authority that such Closed Meeting was conducted in conformity with Virginia law;

And Now, therefore, be it resolved that the Committee of Board of Commissioners of the Washington County Service Authority hereby certifies that to the best of each member's knowledge, (1) only public business matters lawfully exempted from open meeting requirements by Virginia law were discussed in the Closed Meeting to which this certification resolution applies, and (2) only such public business matters as were identified in the motion convening the Closed Meeting were heard, discussed or considered by the Board.

Aye by Mr. Miller, Mr. Campbell, Mr. Taylor, Mr. McCall and Mr. Orfield confirming no outside discussion took place other than Closed Meeting topics.

19. Late Items

There were no late items discussed.

20. Recess to April 23, 2018 at 4:00 PM for a 2018-2019 Fiscal Year Budget Workshop – 9:02 pm

Mr. Campbell made a motion to recess, Mr. Miller seconded and the Board approved with a 5-0-0-2 vote.

Mr. Jim McCall, Vice Chairman

Carol Ann Shaffer, Assistant Secretary



Water Line Extension Projects

- Rattle Creek – Staff has received Construction Permit for the project and will be advertising the project soon. Staff is working with Mount Rogers Planning District for DHCD funds.
- Chip Ridge – Staff has awarded project to McFall Excavating. A pre-construction has been scheduled for April 4th.
- Rich Valley Road – Easements have been secured for the project. Staff plans to submit plans to VDH for review in April.



Water Line Extension Projects

- Sugar Cove Road – Staff will be working on finalizing plans and specifications. Staff received surveying quotes last week. Low quote was received from Addison Surveyors. Staff will be working with property owner, surveyor and attorney for site survey and deed.
- Staff plans to present the proposed site purchase at your April meeting.
- Hidden Valley Phase 2 – Staff continues to work with property owner for proposed well site.

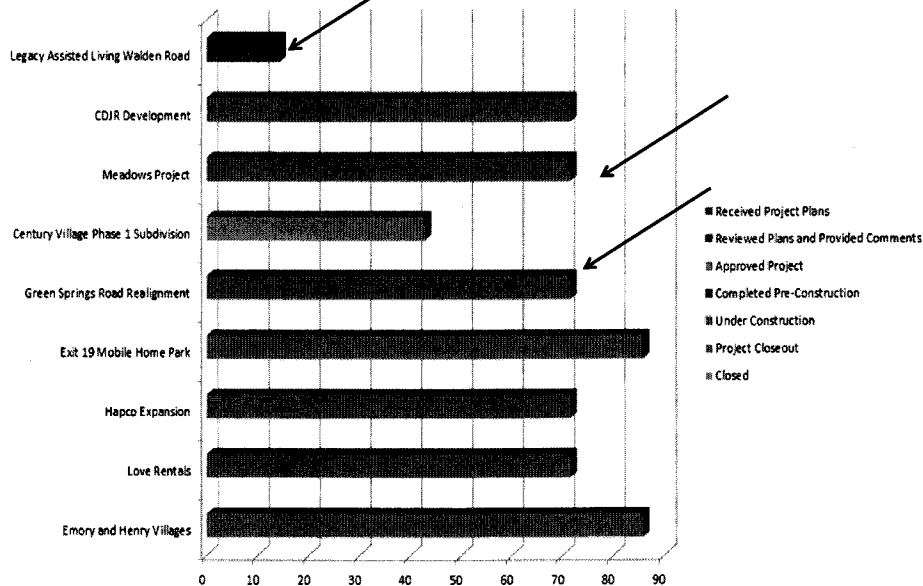








Potential New Water Line Extensions





Mendota and Mary's Chapel Road

- Staff has been working on funding applications for the projects. Applications will be submitted prior to April 1.

Private Development Projects



- 1  **February 2018
Operational Update**
March 26, 2018
- 2  **Discussion Items**
 - ▶ People
 - ▶ Safety
 - ▶ Department Highlights
 - ▶ Financials less Comp & Benefits
 - ▶ Forward Looking Statement
- 3  **People**
 - ▶ Promotions
 - Crew Chief (2)
 - Todd Mitchell
 - Chris Howington
 - Crew Member to Operator (4)
 - Brian Philips
 - Harry "Roho" Frye
 - Trey Burke
 - Travis "Bill" Thompson
 - ▶ New Hire Crew Member (3 Vacancies, Filled 2)
 - Crew Member
 - Chris Childress
 - Jason Mitchell
- 4  **Safety**
 - ▶ Some Participated in Office Safety Training
 - ▶ Continued Adding Strobes to Trucks
- 5  **2018 Feb Water Production Highlights**
 - ▶ SFI, MFDWP & Mill Creek Issue Resolution
 - Raw Water Feed to the Plant
 - Cla-Val, Performing much better, still need to provide PID loop control to raw water pumps
 - Mill Creek Plant Replacement
 - Expect to Commission 1st Skid in the next few weeks
 - Koch plant to cease operation by April 1st, be removed by April 15th.
 - ▶ System Operation
 - Water Quality
 - Brumley Gap Area, Systematic Approach – Definite Improvement
 - Hidden Valley DBP – Exploratory Well Approved, Site Selected, Working with Out of State Landowner – Latest DBP Results very, very good.
 - Water Production
 - MFDWP Finished Water Production down about 5% to 4.6 MGD, due to many accomplishments, but leak repair from TV major contributor.
 - Brought in "Expert" who has helped identify leaks in Damascus Area
- 6  **2018 Feb Wastewater Process Highlights**

- ▶ I&I
 - Team Approach with Maintenance
 - Primary Variable Cost (BVU \$4.4k Over)
 - Prioritized and Categorized I&I Issues
 - Working on Customer Notifications for Smoke Testing
- ▶ Operational
 - Hall Creek Internal Plant SCADA
 - Collection System SCADA
- ▶ Capital
 - Scoping Equipment needs for Hall Creek Headworks
 - Plan is to utilize RFP Process
 - Pumps Installed – Move to Higher Priority
 - Scoping Process to Retrofit Damascus Plant to extend useful life
- 7  **2018 Feb Distribution Highlights**
 - ▶ Providing Technical Support to SFI and MFDWP Issues
 - ▶ Executing PSV/PRV Preventive Maintenance Program
 - Establishing Baseline for each PRV, Hydraulic Grade lines
 - ▶ Continued with Customer Education & Inspections of Cross Connections and Back Flow Prevention
 - ▶ Recall we are systematically approaching water losses, Non Revenue Water, NRW
 - ▶ Scheduling AWWA Water Audit in Near Future
- 8  **Request BOC Permission to Redistribute Approved 2017/2018 Distribution Budget**
- 9  **2018 Feb Metering Highlights**
 - ▶ Meter Replacement, Very Large Project
 - Found Issue with >3" meters
 - Maintenance Inspecting each to determine Scope to Bring the vaults up to standards so meters can be tested or exchanged
- 10  **2018 Feb Water Maintenance Highlights**
 - ▶ System Improvements
 - ~~Roses & Food City Fire System Isolation Valves~~
 - ~~Potable Water at MFDWP Energy Recovery Building~~
 - ~~Jumping Over on Wallace Pike (80%, 1 mile) & Old Saltworks (70%, 1 Mile from Hillman to Walden Rd) to eliminate dual lines~~
 - Next is Pocahontas towards Ramblewood
 - ▶ Routine Activities
 - Leaks – 17 (2015 Avg. 30)
 - Main Line Breaks – 8 (2015 Avg. 6)
 - After Hours Responses – 42 down from 160 (2015 Avg. 38) (See Overtime)
 - *After Hours Responses a Target Area for Improvement*
 - ▶ Costs
 - Preventive Maintenance
 - Mobile Equipment
 - Tanks

- Pump Stations
- Fire Hydrants

11  **Monthly We are Tracking Under Budget**

12  **Year to Date we are Tracking Under Budget**

13  **Forward Looking Statement**

- ▶ Customer Relationships
 - Fire Departments
 - Hydrants & Training – Well in Progress
 - Water & Sewer Customers
 - More Customer Engagement at Time of Contact
 - Door Hangers
- ▶ Quality
 - System Pressure/Flow Variations as Detected During Hydrant Stress Tests
 - Hidden Valley DBP
- ▶ Costs
 - Production Costs (Water Loss and I&I)
 - Continue to work with all Departments to reduce Non Revenue Activities (NRA)
 - Hydrants as a Device to “Stress Test” our Water Delivery System to identify Problems Early
 - Construct Hydraulic Grade lines in our GIS to aid in Troubleshooting and Early Detection
 - Work with Engineering/Operations on How to Work Together to Obtain the Most Value in our Construction Projects

14 

1  **General Manager's Report and Update**

March 26, 2017

2  **Introduction**

- ▶ Safety
- ▶ Financials
- ▶ Customer Service
- ▶ Accounting
- ▶ Notable Items
- ▶ Looking Ahead

3  **Safety**

- ▶ Office Safety
 - Noise Reduction
 - Air Quality
 - Ergonomics
 - Stress
 - Workplace Violence
 - Accident Prevention
 - Back Safety
 - Falls
 - Electrical Hazards
 - Emergency Preparedness

4  **Financials: Water Revenue**

5  **Financials: Wastewater Revenue**




6  **Financials: Water Expenses**

7  **Customer Service**

- ▶ Highlands Union Bank - Remit Plus
 - Six Months in; Stable Results
- ▶ HomeServe
 - Water Loss Reimbursement Material Expected in April 2018
 - Managing Publication Review and Approval
 - Annual Report Tonight
- ▶ Cash Drawers
 - Drawer for Each Person
 - Secure at all Times
 - Installing Currently
- ▶ Rules and Regulations Update
 - Piecemeal
 - Some may not be Current
 - Marathon not a Sprint

8  **Accounting**

- ▶ Fringe Benefit Audit
 - Pant and Coverall Issues Have Been Resolved

- ▶ Compensation & Benefit Study
 - March: Market Survey, Job Analysis and Assessment
 - April: Recommendations
 - ▶ Reserve Investment
 - April Recommendation
 - ▶ Bond Counsel Procurement
 - Advertised February 2018
 - Recommendation Tonight
- 9  **Notables**
- ▶ Lee Highway Corridor Sewer Project
 - Working With The Lane Group to Develop a Engineering Agreement to Complete Preliminary Engineering Report
 - March 14, 2018: Met With the IDA About Confirming Industrial Sewer Capacity
 - ▶ Good Friday Holiday
 - Business Office Closed
 - Operating Plants Open
 - Operations On-call (Some)
- 10  **Notables**
- ▶ FYE 2019 Budget
 - Propose April 23, 2018 Budget Workshop
 - Staff Developing Expense and Capital Budgets Now
 - Goal to Finish and Incorporate Compensation & Health Benefit Study Recommendations
 - Review Water and Sewer Rates
 - ▶ Facility Tours
 - Mr. Tim Orfield and Mr. Eddie Copenhaver
 - Others Welcome Anytime
- 11  **Looking Ahead**
- ▶ Water Quality
 - ▶ FYE 19 Budget
 - ▶ Water Withdrawal Permit
 - ▶ Lee Highway Corridor Sewer Project
 - ▶ Meter Replacement
 - ▶ Comp. & Benefit Study
 - ▶ Rate & Financial Plan

Partnership Review

March 2018



HomeServe Overview



Provide emergency repair service plans to more than 3.4 million households

Connecticut Top Workplace winner for the past four years



Offer services to more than 500 municipal, utility and association partner brands

Winner of 17 Stevie Awards for Sales and Customer Service in 2018



15 YEARS

Serving customers in North America for more than a decade

Receive 100% satisfaction rating from WCSA customers after providing services



The North American arm of HomeServe plc, a London Stock Exchange listed company

BBB Accredited Business with an A+ rating



HomeServe/WCSA Partnership

- HomeServe’s partnership with WCSA began in November 2016 and will continue through November 2021
- We launched the first mailing to customers in February 2017 and issued an additional 4 mailings over the remainder of the year
- In 2018, we are scheduled to issue 5 mailings to customers based on the schedule below. We mail to WCSA customers who have not yet enrolled in the program and to existing HomeServe customers to see if they’d be interested in other available repair plans

WCSA 2018 Mail Schedule											
Jan 2018	Feb 2018	March 2018	April 2018	May 2018	June 2018	July 2018	Aug 2018	Sept 2018	Oct 2018	Nov 2018	Dec 2018

Scheduled mailing to existing customers

HomeServe Repair Plans

Plumbing Services

Exterior Water Service Line – \$4.49 per month

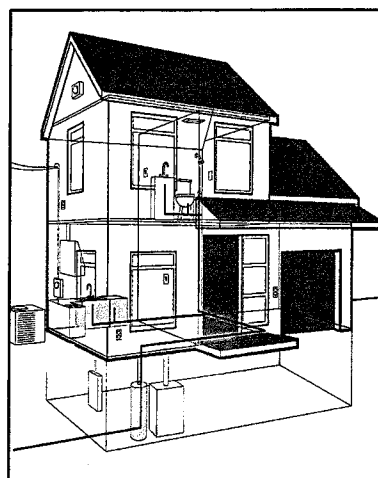
- Protects against high repair costs of exterior water line damage, including locating, excavating and repairing leaks or replacing segments of pipe
- Unlimited annual coverage amount and number of service calls with up to \$10,000 per call

Exterior Sewer/Septic Line – \$6.99 per month

- Covers work to replace a collapsed or damaged section of sewer pipe, or unclog a sewer line as needed
- Unlimited annual coverage amount and number of service calls with up to \$5,000 per call

Interior Plumbing & Drainage – \$10.49 per month

- Covers homeowners from the cost of repairing or replacing interior leaking water and drainage piping, or unblocking clogged sinks and toilets
- Coverage amount is \$3,000 annually – two service calls of up to \$1,500 per call









Customer Benefits

- ✓ 24-hour, toll-free **service hotline**, available seven days a week, 365 days a year, including holidays
- ✓ **Covered repairs guaranteed** for one year
- ✓ No need to spend time searching for a **qualified contractor** in an emergency
- ✓ **Affordable service plans** starting at \$4.49 per month
- ✓ **Local, licensed, insured and qualified contractors** dispatched to make the necessary repairs to the covered systems
- ✓ **30-day money back guarantee** with the ability to cancel at any time
- ✓ **Covered repairs completed at no charge** up to the annual benefit amount
- ✓ **No deductible**, service trip fees included and **no paperwork** – just sign to say you're satisfied



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Partnership Metrics Since the February 2017 Launch

<p>1,896</p> <p>Customers are covered for a home emergency repair</p> 	<p>2,300</p> <p>Coverage contracts are maintained</p> 	<p>15%</p> <p>Penetration rate on eligible customers</p> 
<p>51</p> <p>Completed covered repairs to date</p> 	<p>\$60K</p> <p>Customer savings on the 51 repairs with HomeServe coverage</p> 	<p>100%</p> <p>Customer satisfaction maintained based on post-repair surveys</p> 


Marketing Response

Supporting multiple channels provides flexibility to customers


← Allows them to enroll however they're most comfortable →



1,848 Postal Enrollments
80% of all enrollments came through the mail




259 Online Enrollments
11% of all enrollments came via the website



193 Phone Enrollments
9% of all enrollments came over the phone

Total active contracts: 2,300



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Customer Claims

Many customers have received quality service from a policy through the HomeServe/WCSA relationship

42 Water Service Line	\$56,110 in customer savings
4 Sewer/Septic Line	\$1,573 in customer savings
5 Internal Plumbing	\$2,803 in customer savings

Together, we have saved customers over \$60,000!



Customer Satisfaction

HomeServe is committed to delivering best-in-class customer satisfaction and delivering on exceptionally high standards

"We were very satisfied with the way HomeServe handled our call and how quickly the man got to us and got our problem fixed. We highly recommend the service to anyone."

"I felt that I couldn't pay if there was ever a breakage in the line. It would be a tremendous cost and so I thought that I would buy the service, in order to take care of myself."

"The reason I thought that I needed it is because I live alone and if I did have some trouble I would need someone to call."

"It turned out we did not have a problem, but the repair crew came, checked it out and there was no problem at all."



Customer Complaints and Follow-up

HomeServe has responded to 13 customer complaints through the first year of the program

Of the 13 complaints received, 5 were related to claims or repairs:

- **June 2017:** Customer experienced delay in service and HomeServe confirmed with contractor that they were waiting for the City to first mark the utility lines. Customer appreciated the confirmation.
- **June 2017:** This was a Level 1 complaint, which means it was resolved immediately over the phone by our Call Center agent. No further notes are kept for Level 1 complaints.
- **November 2017:** Customer reported a water line break and was told contractor could not service the repair until the next day, based on availability. HomeServe contacted contractor and arranged to have job serviced that same day.
- **January 2018:** Customer called to question completeness of water line repair. In response, HomeServe approved a full line replacement.
- **February 2018:** Customer reported a water line leak and was told contractor could not complete repair right away due to the weather. Restoration was completed 3 days later once contractor was able to service the job.

Customer Complaints and Follow-up (cont'd)**HomeServe has responded to 13 customer complaints through the first year of the program**

The remaining 8 complaints were related to Marketing or Call Center issues. These are normal "growing pains" experienced during new program launches:

- Received a "Do Not Mail" request, which was processed immediately.
- Customer did not receive enrollment documents. Welcome Kit was mailed out in response.
- Customer called to question if we had received their payment, which the HomeServe agent confirmed over the phone.
- Customer complained of receiving misleading literature. This is a common response from customers after hearing about program for the first time. HomeServe agent was able to resolve over the phone.
- Customer complained HomeServe tried to sell other products on phone. During Welcome Calls we place with new customers, the agent will ask if they'd like to hear about other available products and give them the option to agree or decline.
- Customer questioned the different payment options available, which the agent was able to explain in full over the phone.

Customer Complaints and Follow-up (cont'd)**HomeServe has responded to 13 customer complaints through the first year of the program**

- HomeServe received 2 complaints regarding our Call Center agents:
 - **March 2017:** Customer called to request a mailer sent to her home. HomeServe agent tried to conduct sale directly over the phone, which customer did not appreciate. In response, a mailer was sent to the customer as requested.
 - **April 2017:** Customer called to inform HomeServe their payment had not been processed. Upon further investigation, the customer's enrollment form was located. HomeServe agent followed up with the customer and confirmed that their Welcome Kit materials were being sent to their home.