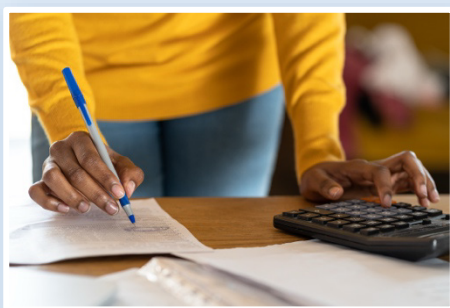


# INCOME-QUALIFIED PROGRAM ASSESSMENT



## PROJECT HIGHLIGHTS

- Evaluate company income-qualified programming and its impact on key metrics.
- Understand leading practices and program maturity across program design, community engagement, customer relationship management, and financial outcomes.
- Drive progress in identifying short- and long-term opportunities for program enhancement.

## Background, Objectives, and New Learnings

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Utilities that manage affordability well can better support customers while mitigating liabilities and risk. Embracing leadership in this space can drive significant positive outcomes for customers and utilities alike.

A bottom-up approach to engaging customers who are struggling economically can help protect these customers and the utility through this period of change impacting affordability, reliability, and decarbonization.

This Income-Qualified Program Assessment applies a maturity framework and other research learnings to examine and assess the effectiveness of company programs designed to expand access, participation, and outcomes for income-qualified customers and communities and improve customers' ability to pay their bills and avoid disconnections and arrearages.

Companies have various opportunities to take their approach to the next level. This assessment seeks to address these challenges by documenting existing programmatic capabilities at a company and identifying gaps, illuminating leading practices, and providing opportunities to drive progress. The results can then inform subsequent activities, including assessing priorities, risk and opportunity mapping, and goal setting. The non-proprietary new learning is also used to evolve and enhance EPRI's maturity framework and inform other research.

## Benefits

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An Income-Qualified Program Assessment provides a better understanding of an organization's maturity and effectiveness. Participants will finish with a roadmap to help guide the impact programs have on utility economics, customers, and community partnerships. New learnings that benefit companies, customers, and society include advancing maturity, identifying leading practices, and understanding impacts and outcomes improving affordability and revenue recovery.

Key areas of focus include:

- Clarity of objectives including financial objectives (arrears), and alignment across the relevant teams and stakeholders
- Use of data and technology to maximize impact
- Alignment with community partners to drive efficient and effective outcomes
- Alignment between income-qualified payment programs and programs designed to increase affordability
- The impact of continuous improvement initiatives on utility objectives and customer outcomes and experience.

## Project Approach and Summary

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This project's approach consists of:

- **Desktop research** reviewing publicly available and internal sources of income-qualified program materials seeks to document examples of how your company compares to leading practices, as well as gaps that reveal opportunities for future improvement.
- **Internal interviews** include the person(s) primarily responsible for program management or income-qualified assistance and energy efficiency programs. These interviews will primarily seek to explore future opportunities for program development, as well as understand potential roadblocks and what's needed to advance program objectives.
- **External interviews** with representatives from community-based organizations and partners will highlight how they work with the company and community members, how stakeholders align including through data, and to gather learnings that could be applied at your company.
- **Analysis and findings** presented in a final report and at a final project briefing can include a conversation to understand maturity, opportunities to advance, and support.

## Deliverables

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Deliverables are designed to provide a tactical roadmap to help establish a program or develop new initiatives. The customized maturity matrix serves as a "report card"

to document progress and identify next steps in your evolution, as well as highlight new opportunities to drive positive outcomes. Key deliverables:

- Regular project progress meetings
- Final briefing
- PowerPoint project briefing
- Final report

## Price of Project

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The project costs \$60,000 for a standard assessment or \$80,000 for an expanded assessment with an additional focus on finance and IT operations. Changes to the scope, such as the addition of Executive Education/Alignment Sessions, would impact the price. This project qualifies for use of Self-Directed Funds (SDF).

## Project Schedule

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The project duration is expected to be approximately three months, subject to availability and access to key resources and information.

## Who Should Join

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Any company seeking to establish, evaluate, and/or evolve affordability efforts and income-qualified programs.

## Contact Information

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For more information, contact the EPRI Customer Assistance Center at 800.313.3774 ([askepri@epri.com](mailto:askepri@epri.com)).

### Technical Contact

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