



EDISON ELECTRIC  
INSTITUTE

# Low-Income/At-Risk Customers Best Practices Workshop



February  
22-24

Sheraton New Orleans  
New Orleans, LA

2010



## Best Practices Workshop

February 22-24, 2010

Sheraton New Orleans • New Orleans, LA

Meet with fellow member professionals responsible for low-income/at-risk customer programs, customer services, consumer and community affairs, and credit and collections to learn best practices, lessons learned and case studies on new and better ways to serve the needs of the growing number of low-income and at-risk utility customers.

### Monday, February 22, 2010

8:00 am to 4:00 pm

#### **\*\*DAY-OF-SERVICE\*\***

Join your colleagues in volunteering your time for a Day-of-Service with the St. Bernard Project (SBP). The SBP is a community-based nonprofit organization that relies on volunteer labor, skilled supervisors and affordable building supplies, to help families return to their homes that suffered catastrophic damage in hurricanes Katrina and Rita. Through the efforts of SBP more than 200 families have been able to return to their homes.

The schedule for the day follows:

- 8:00 am – Depart from Sheraton New Orleans hotel
- 8:30 am to 9:00 am – Orientation
- 9:00 am to 9:30 am – Travel to Work Site
- 9:30 am to 12:00 am – Working on rebuilding homes
- 12:00 N to 1:00 pm – Lunch
- 1:00 pm to 3:30 pm – Working on rebuilding homes
- 3:30 pm to 4:00 pm – Depart work site and return to Sheraton New Orleans hotel

Please be sure to check the appropriate box on the registration form indicating your participation and we will send out more details about the logistics.

5:30 pm to 6:00 pm

#### **New Member Orientation and Meet and Greet**

6:00 pm to 7:00 pm

#### **Networking Reception**

### Tuesday, February 23, 2010

7:30 am to 8:30 am

#### **Registration and Continental Breakfast**

8:30 am to 8:45 am

#### **Opening Remarks**

8:45 am to 9:15 am

#### **Utility Executive Address**

*Mr. Rod West, President and CEO, Entergy-New Orleans*

9:15 am to 9:45 am

#### **LIHEAP Update – The latest legislative news on LIHEAP funding**

*Ed Rissing, Rissing Strategic, LLC*

9:45 am to 10:15 am

#### **Economic Update – Updates on the current state of the economy and what's still to come.**

*John Caldwell, Edison Electric Institute*

10:15 am – 10:30 am

**Break**

10:30 am to 11:30 am

**Utility Frustrations and Consumer Rate Fatigue – Understanding the Regulatory Process**

- What is the role of the regulator in maintaining the balance between keeping consumer bills affordable and assuring utilities economic viability, especially given the potential revenue impacts from climate policies?
- What more can regulators do to assure both customer and utility interests are represented?
- What can utilities do to mitigate negative impacts on customers?

**Moderator:**

*Lynn Vasquez, Northeast Utilities*

**Speakers:**

*Lisa Thibdaue, Northeast Utilities*

*Jeff Hall, Cleco Corporation*

11:30 am to 12:30 pm

**Just One Paycheck Away**

Rising prices and the need for more communications, the downturn in our economy, coupled with a variety of complex public policy issues have created a tipping point with many of our customers. The complexities of our industry as well as that of the social service world are misunderstood by most; and few appreciate the effects of their own personal choices. Utilities are seeing an increasing number of customers who are frustrated or fearful and many are angry with us.

- How do we reach out to this new population of customers who have never needed to call for a payment arrangement let alone ask for assistance?
- How are we communicating with this new group of customers and what new or existing programs are out there to help?

**Moderator:**

*Christine McCabe, Avista Corp.*

**Speakers:**

*David Johnson, DTE Energy Company*

*Janet L. Randolph, Pepco Holdings Inc.*

*John Caldwell, Edison Electric Institute*

12:30 pm to 1:45 pm

**Lunch**

1:45 pm to 2:45 pm

**Taming the Beast – Preventing, Managing and Resolving Arrearages**

- What is the recipe for a successful arrearage forgiveness program when the arrearage is still manageable?
- What ingredients to leave in and what to leave out?
- Take a cold, hard look at the truly gargantuan arrearages (and admit it, we all have some): What causes them? What could prevent them?

**Moderator:**

*David Conn, Baltimore Gas & Electric Co*

**Speakers:**

*Patricia King, PECO Energy*

*Kyro Ojulo, Central Hudson Gas & Electric Corp.*

2:45 pm to 3:45 pm

**Hitting the Bulls Eye –Targeting the Right Program for the Right Customer**

- What can utilities do to help military families with their energy bills?
- What is “Are You Listening” – a creative program using radio waves as an education tool to engage Spanish speaking customers?
- What innovative programs are utilities putting in place to help limited income customers keep their heads above water?
- Q&A – what are utilities doing to reach targeted customer segments?

**Moderator:**

*Patty Riddlebarger, Entergy*

**Speakers:**

*Louis Gonzalez, Florida Power and Light Co.*

*Annette Miller, Madison Gas and Electric*

*Jamie Stringfellow, Entergy Arkansas, Inc.*

3:45 pm to 4:00 pm

**Break**

**Tuesday, February 23, 2010**  
(continued)

4:00 pm to 5:00 pm

**Impact of New Technology**

New and improved technologies seem to spring up daily, and we are bombarded by requests to be “linked-in” or “my Facebook friend.”

- Can these new web-based programs and social marketing schemes benefit the low-income families we serve?
- And how do they affect our companies’ bottom line?

**Moderator:**

*Betsy Bolding, Tucson Electric Power Co*

**Speakers:**

*Enid Wallace-Simms, Pepco Holdings Inc*

*Jessie Wuerst, Avista Utilities*

5:00 pm

**Meeting Adjourns and dinner on your own.**

**Wednesday, February 24, 2010**

8:00 am to 8:30 am

**Continental Breakfast**

8:30 am to 9:30 am

**Transformational Impact of Stimulus Funds –  
The Green Impact Zone**

The Green Impact Zone initiative is an effort to concentrate resources — with funding, coordination, and public and private partnerships — in one specific area to demonstrate that a targeted effort can literally transform a community.

**Speakers:**

*Roland Maliwat, Kansas City Power and Light*

*Anita Maltbia, Director, the Green Impact Zone Initiative*

9:30 am to 10:00 am

**Weatherization – Successful Partnership to  
Increase Trained Home Energy Raters**

As states begin implementation of the weatherization programs funded with federal stimulus funds, a critical need that has emerged in some areas of the country has been severe shortages of trained home energy raters. To address the situation, Entergy New Orleans voluntarily approached and partnered with Delgado Community College, the Louisiana Department of Natural Resources and the local Home Builders Association to jointly create an Energy Efficiency Specialist Course. Learn how the groups came together in a public private partnership to quickly raise seed money, establish a curriculum, market the course, and begin training home energy raters. Since this program launched in September of 2008, six classes have roughly doubled the number of qualified energy auditors in the state. Virtually all of these new entrants are now actively employed in the delivery of vital efficiency services. Green jobs are taking root in New Orleans, proof positive that energy efficiency can be a boon to the economy.

**Moderator:**

*Patty Riddlebarger, Entergy*

**Speakers:**

*Cathy Herren, Director, Housing Initiatives for Entergy New Orleans*

*Delgado Community College (Invited)*

10:15 am to 11:00 am

**Ask the Experts - Interactive Discussion**

The utility industry is seeing a steady increase in customer with delinquencies, as well as those simply unable to pay their utility bill. As the economy struggles to stabilize, the residual impacts of increasing arrearages and disconnections continue to be a challenge for utilities. In addition to internal pressures many utilities are also facing tough external pressures from legislators, regulators and even their own customers to step up their game and come up with a solution.

This interactive session will take a hard look at the current perceptions, both internal and external, of utility low-income/at-risk customer programs and the challenges facing utilities in trying to maintain

the balance between their fiduciary responsibility to their shareholders and the growing needs of their customers.

What makes this discussion unique is that the participants are the people who know these programs from the inside, out and work with these issues every day. The goal will be to leverage their insights, experiences and knowledge, and build solid strategic solutions that can not only be taken back to their utility, but also shared with regulators, consumer advocates, legislators, etc.

**Challenges**

- Expanding group of customers at risk of being overwhelmed by growing financial hardships.
- Inadequate funding levels for federal assistance programs (LIHEAP, Weatherization) that fall short of the total need.
- Perception of the utility as a social agency
- Lack of regulatory support allowing recovery of lost revenues due to un-collectibles.
- Increased consumer opposition during rate proceedings.

**Goals**

- Making a long-term investment in customers/customer service/customer satisfaction is just as critical as any other issue facing utilities today.
- Change the industry perception that sees customers only as the “ratepayer base” and customer service as cost center, and move to a more proactive customer-centric approach.

**Facilitator:**

*Becky Harsh, Edison Electric Institute*

11:00 am to 11:45 am

**What Keeps You Up at Night –  
Open Forum Discussion**

- Top Ideas that deliver the most “bang” for the buck. What does “bang” mean? What defines a successful program? Lack of measurable results?
- Impact of real-time rate structure on low-income and/or at risk customers – good or bad?

- Customers on life support based on medical doctor verification - what are your collection practices? What are others doing about these collectibles and how are they mitigating risk and exposure?
- What programs are providing education that leads to self-sustaining behaviors?
- Where is prepay metering working these days, and are any utilities reconsidering now given the current economy?

11:45 am to 12:00 N

**Workshop Feedback**

12:00 N

**Meeting Adjourns**



## General Information

### Registration

The registration fee for this meeting is \$395. You may register online by visiting [www.eei.org/meetings-lowincome](http://www.eei.org/meetings-lowincome), or use the attached form.

### Cancellation Policy

Cancellation Policy: Written requests for refund ([gcroom@eei.org](mailto:gcroom@eei.org)) received by February 1st, 2010 will be honored- less a \$50 processing fee. No cancellation refund will be honored after this date. You may send a substitute to the Workshop at any time.

### Hotel

Sheraton New Orleans Hotel  
500 Canal Street  
New Orleans, LA 70130  
Reservations: 888-627-7033 or 504-525-2500  
Please contact the hotel directly for reservations. Refer to EEI Member Low-Income Best Practices Workshop for the rate of \$149.00 per night. Hotel cut-off is at 5pm CT on February 5, 2010.

### Dress

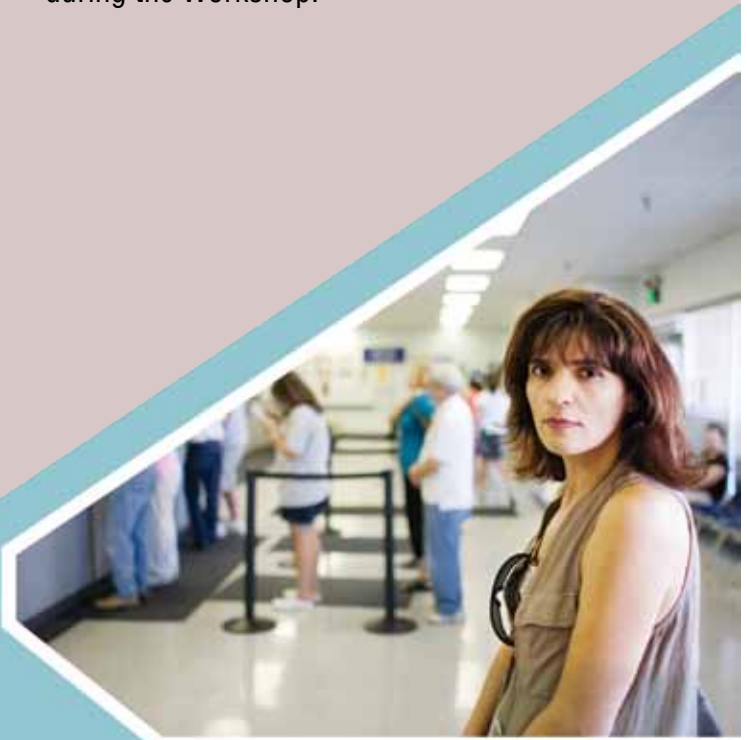
Business casual dress is recommended for the Workshop sessions.

### Transportation

The Sheraton New Orleans Airport is approximately a 30 minute ride from the Louis Armstrong New Orleans International Airport. The average taxi rate from the airport to the hotel is \$33, and the Airport Shuttle service rate is \$20.

### ADA Requirements

Please contact Gail Croom at 202-508-5548 or [gcroom@eei.org](mailto:gcroom@eei.org) if you require any special needs during the Workshop.



## Best Practices Workshop

(also available online at [www.eei.org/meetings-lowincome](http://www.eei.org/meetings-lowincome))

February 22-24, 2010

Sheraton New Orleans • New Orleans, LA

*Registration is limited to utility companies only*

Name \_\_\_\_\_

Badge Name (Nickname) \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-Mail (required) \_\_\_\_\_

Yes, please sign me up for the Day-of-Services, scheduled Monday, February 22. *(Details are available on the agenda)*

## Registration Fee: \$395.00

### Method of Payment

Paid by enclosed check made payable to Edison Electric Institute. To ensure proper credit, please reference the following account number on the check and include registration form with check: 1-43-50/12-1561/431-0

Please charge my credit card:     VISA         MASTERCARD         AMERICAN EXPRESS

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Card holder Signature \_\_\_\_\_

Billing Address (if different from above) \_\_\_\_\_

\_\_\_\_\_

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Please return this form to: Mail: Gail Croom  
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Fax: 202-508-5038; Email: [gcroom@eei.org](mailto:gcroom@eei.org)



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