

Form **990**
Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047
2020
Open to Public Inspection

A For the **2020** calendar year, or tax year beginning **01-01-2020**, and ending **12-31-2020**

B Check if applicable:
 Address change
 Name change
 Initial return
 Final return/terminated
 Amended return
 Application pending

C Name of organization
ELECTRIC POWER RESEARCH INSTITUTE INC

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
3420 HILLVIEW AVENUE

City or town, state or province, country, and ZIP or foreign postal code
PALO ALTO, CA 94304

D Employer identification number
23-7175375

E Telephone number
(650) 855-2000

F Name and address of principal officer:
ARSHAD MANSOOR
3420 HILLVIEW AVENUE
PALO ALTO, CA 94304

G Gross receipts \$ 737,259,815

H(a) Is this a group return for subordinates? Yes No

H(b) Are all subordinates included? Yes No
If "No," attach a list. (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status: 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527

J Website: ▶ WWW.EPRI.COM

K Form of organization: Corporation Trust Association Other ▶

L Year of formation: 1972 **M** State of legal domicile: DC

Part I Summary

1 Briefly describe the organization's mission or most significant activities:
TO CONDUCT RESEARCH AND DEVELOPMENT RELATING TO GENERATION, DELIVERY AND THE USE OF ELECTRICITY FOR THE BENEFIT OF THE PUBLIC.

2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a)	3	34
4 Number of independent voting members of the governing body (Part VI, line 1b)	4	34
5 Total number of individuals employed in calendar year 2020 (Part V, line 2a)	5	1,176
6 Total number of volunteers (estimate if necessary)	6	36
7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	41,166,714
7b Net unrelated business taxable income from Form 990-T, line 39	7b	0

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	2,303	6,546
9 Program service revenue (Part VIII, line 2g)	386,295,799	419,326,072
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	30,379,865	10,861,492
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	4,365,609	872,873
12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	421,043,576	431,066,983
13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	1,183,319	994,262
14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	194,715,221	200,128,657
16a Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b Total fundraising expenses (Part IX, column (D), line 25) ▶ 0		
17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	233,310,004	213,295,282
18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	429,208,544	414,418,201
19 Revenue less expenses. Subtract line 18 from line 12	-8,164,968	16,648,782

	Beginning of Current Year	End of Year
20 Total assets (Part X, line 16)	409,964,311	430,915,185
21 Total liabilities (Part X, line 26)	242,199,995	246,244,268
22 Net assets or fund balances. Subtract line 21 from line 20	167,764,316	184,670,917

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer: *****
Date: 2021-10-29

PAMELA J KEEFE SVP CFO & TREASURER
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name: _____ Preparer's signature: _____ Date: _____

Check if self-employed PTIN: P01270238

Firm's name ▶ GRANT THORNTON LLP Firm's EIN ▶ 36-6055558

Firm's address ▶ 101 CALIFORNIA STREET SUITE 2700 Phone no. (415) 986-3900
SAN FRANCISCO, CA 94111

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III Yes No

1 Briefly describe the organization's mission:

SEE SCHEDULE O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 296,411,166 including grants of \$ 994,262) (Revenue \$ 419,595,900)
See Additional Data

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O.)
(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses ▶ 296,411,166

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 1 through 21, covering various organizational requirements and reporting obligations.

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question/Description, Yes, No. Rows include questions 22 through 38 regarding grants, compensation, tax-exempt bonds, excess benefit transactions, and controlled entities.

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V [checked]

Table with 3 columns: Question/Description, Yes, No. Rows include 1a (Form 1096), 1b (Forms W-2G), and 1c (gambling winnings).

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 1,176	2b	Yes		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			2b	Yes	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?			3a	Yes	
b If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation in Schedule O</i>			3b	Yes	
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			4a	Yes	
b If "Yes," enter the name of the foreign country: CA, EI, JA, KS, MX, PL, SF, SP, SZ, AE, UK See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).					
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			5a		No
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			5b		No
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?			6a		No
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			6b		
7 Organizations that may receive deductible contributions under section 170(c).					
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?			7a		No
b If "Yes," did the organization notify the donor of the value of the goods or services provided?			7b		
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c		No
d If "Yes," indicate the number of Forms 8282 filed during the year	7d				
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			7e		No
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			7f		No
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?			8		
9 Sponsoring organizations maintaining donor advised funds.					
a Did the sponsoring organization make any taxable distributions under section 4966?			9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?			9b		
10 Section 501(c)(7) organizations. Enter:					
a Initiation fees and capital contributions included on Part VIII, line 12	10a				
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b				
11 Section 501(c)(12) organizations. Enter:					
a Gross income from members or shareholders	11a				
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b				
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?					
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	12b				
13 Section 501(c)(29) qualified nonprofit health insurance issuers.					
a Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.			13a		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b				
c Enter the amount of reserves on hand	13c				
14a Did the organization receive any payments for indoor tanning services during the tax year?			14a		No
b If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation in Schedule O</i>			14b		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.			15	Yes	
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.			16		No

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions. Check if Schedule O contains a response or note to any line in this Part VI



Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a (34), 1b (34), 2, 3, 4, 5, 6, 7a, 7b, 8a, 8b, 9.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 3 columns: Question, Yes, No. Rows include: 10a, 10b, 11a, 11b, 12a, 12b, 12c, 13, 14, 15a, 15b, 16a, 16b.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed CA
18 Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records: PAMELA J KEEFE 3420 HILLVIEW AVENUE PALO ALTO, CA 94304 (650) 855-2000

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above	1f	6,546				
	g Noncash contributions included in lines 1a - 1f:\$	1g					
	h Total. Add lines 1a-1f			6,546			
Program Service Revenue	2a MEMBERSHIP FEE REVENUE	Business Code					
		541900	228,939,626	214,535,786	14,403,840		
	b SUPPLEMENTAL FUNDING	541900	182,209,003	163,627,287	18,581,716		
	c BILLABLE SERVICES	541900	8,177,443		8,177,443		
	d						
	e						
	f All other program service revenue.						
g Total. Add lines 2a-2f.		419,326,072					
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		3,870,590			3,870,590	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties		267,109			267,109	
	6a Gross rents	(i) Real					
		(ii) Personal					
		6a	332,221				
		b Less: rental expenses	6b	0			
	c Rental income or (loss)	6c	332,221				
	d Net rental income or (loss)			332,221		332,221	
	7a Gross amount from sales of assets other than inventory	(i) Securities					
		(ii) Other					
		7a	306,192,832	6,990,902			
		b Less: cost or other basis and sales expenses	7b	306,192,832	0		
	c Gain or (loss)	7c	0	6,990,902			
	d Net gain or (loss)			6,990,902		6,990,902	
8a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	8a						
b Less: direct expenses	8b						
c Net income or (loss) from fundraising events							
9a Gross income from gaming activities. See Part IV, line 19	9a						
b Less: direct expenses	9b						
c Net income or (loss) from gaming activities							
10a Gross sales of inventory, less returns and allowances	10a						
b Less: cost of goods sold	10b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue	Business Code						
11a SALE OF R&D REPORTS	900099	258,619	258,619				
b OTHER REVENUE	900099	11,209	11,209				
c SALE OF SOLAR POWER	900099	3,715		3,715			
d All other revenue							
e Total. Add lines 11a-11d		273,543					
12 Total revenue. See instructions		431,066,983	378,432,901	41,166,714	11,460,822		

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	902,750	902,750		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	27,000	27,000		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.	64,512	64,512		
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	11,044,643		11,044,643	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	131,622,406	80,022,175	51,600,231	
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions)	16,260,818	10,049,666	6,211,152	
9 Other employee benefits	31,447,132	19,435,257	12,011,875	
10 Payroll taxes	9,753,658	6,028,049	3,725,609	
11 Fees for services (non-employees):				
a Management				
b Legal	1,285,912	275,798	1,010,114	
c Accounting	385,787		385,787	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	253,117		253,117	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	4,333,324		4,333,324	
12 Advertising and promotion				
13 Office expenses	17,187,395	14,816,618	2,370,777	
14 Information technology	6,351,883		6,351,883	
15 Royalties				
16 Occupancy	7,672,332	5,670,635	2,001,697	
17 Travel	3,690,399	2,936,972	753,427	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	7,257,139	4,726,640	2,530,499	
20 Interest	36		36	
21 Payments to affiliates	9,105,717	2,561,842	6,543,875	
22 Depreciation, depletion, and amortization	9,976,813	7,373,881	2,602,932	
23 Insurance	972,349		972,349	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a R&D EXPENSES	139,352,925	139,352,925	0	0
b PRINTING & PUBLICATIONS	1,354,018	1,247,826	106,192	0
c STAFFING	1,245,588	0	1,245,588	0
d EQUIPMENT RENTAL & MAIN	1,193,574	0	1,193,574	0
e All other expenses	1,676,974	918,620	758,354	
25 Total functional expenses. Add lines 1 through 24e	414,418,201	296,411,166	118,007,035	0
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part IX

		(A) Beginning of year		(B) End of year
Assets	1 Cash—non-interest-bearing	105,497,392	1	100,959,975
	2 Savings and temporary cash investments	75,338,912	2	95,666,824
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	48,426,421	4	55,908,900
	5 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	6,913,410	9	7,533,694
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	135,384,281		
	b Less: accumulated depreciation	84,797,641		
	11 Investments—publicly traded securities		11	
	12 Investments—other securities. See Part IV, line 11	119,097,700	12	115,657,598
	13 Investments—program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	6,620,483	15	4,601,554
16 Total assets. Add lines 1 through 15 (must equal line 33)	409,964,311	16	430,915,185	
Liabilities	17 Accounts payable and accrued expenses	87,356,251	17	87,849,609
	18 Grants payable		18	
	19 Deferred revenue	142,554,189	19	146,171,624
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D	12,289,555	25	12,223,035
	26 Total liabilities. Add lines 17 through 25	242,199,995	26	246,244,268
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	167,764,316	27	184,670,917
	28 Net assets with donor restrictions		28	
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
32 Total net assets or fund balances	167,764,316	32	184,670,917	
33 Total liabilities and net assets/fund balances	409,964,311	33	430,915,185	

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	431,066,983
2	Total expenses (must equal Part IX, column (A), line 25)	2	414,418,201
3	Revenue less expenses. Subtract line 2 from line 1	3	16,648,782
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	167,764,316
5	Net unrealized gains (losses) on investments	5	257,819
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	184,670,917

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

- 1** Accounting method used to prepare the Form 990: Cash Accrual Other _____
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant?
 If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:
 Separate basis Consolidated basis Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant?
 If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:
 Separate basis Consolidated basis Both consolidated and separate basis
- c** If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?
 If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

	Yes	No
2a		No
2b	Yes	
2c	Yes	
3a	Yes	
3b	Yes	

Additional Data

Software ID:

Software Version:

EIN: 23-7175375

Name: ELECTRIC POWER RESEARCH INSTITUTE INC

Form 990 (2020)

Form 990, Part III, Line 4a:

EPRI'S MISSION IS TO CONDUCT RESEARCH & DEVELOPMENT THROUGH SCIENCE AND TECHNOLOGY WITH A VIEW OF PROVIDING BENEFITS TO ITS MEMBERS' CUSTOMERS AND THE U.S. PUBLIC. TO ACCOMPLISH THIS OBJECTIVE, EPRI DEVELOPS AND MANAGES RESEARCH AND DEVELOPMENT PROGRAMS FOR IMPROVING ENERGY GENERATION, DELIVERY AND USAGE. PROGRAM SERVICE EXPENSES ARE DIRECT CHARGES TO THE RESEARCH PROGRAMS. CERTAIN INDIRECT EXPENSES ARE INCLUDED IN THE MANAGEMENT AND GENERAL EXPENSE CATEGORY, AS EPRI DOES NOT SEPARATE THESE EXPENSES FOR FINANCIAL ACCOUNTING PURPOSES.

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
MICHAEL W HOWARD CEO THRU 12/20	40.00 0.00			X				1,964,761	0	501,913
ARSHAD MANSOOR PRESIDENT BEG 01/20	40.00 0.00			X				882,077	0	280,349
MARK MCGRANAGHAN VP DISTRIB & ENERGY UTIL THRU 12/20	40.00 0.00			X				859,753	0	63,087
PAMELA J KEEFE SVP CFO AND TREASURER	40.00 0.00			X				645,414	0	171,586
NEIL M WILMSHURST SVP ENERGY SYSTEMS RESOURCE	40.00 0.00			X				627,039	0	154,046
CAROLYN R SHOCKLEY VP PEOPLE AND PERFORMANCE	40.00 0.00			X				576,236	0	154,152
MICHAEL A COLEMAN VP INFORMATION TECH AND CIO	40.00 0.00			X				550,880	0	142,515
ROBERT N CHAPMAN VP SUSTAINABILITY & ELECTRIFICATION	40.00 0.00			X				541,285	0	149,113
SALVADOR A CASENTE JR VP GEN COUNSEL, CCO & SECRTY	40.00 0.00			X				536,391	0	146,912
CHARLES T ALLEY JR VP GENERATION	40.00 0.00			X				535,974	0	127,194

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
ANDREW J PHILLIPS VP TRANSMISSION & DISTRIBUTION	40.00 0.00			X				431,837	0	141,702
ANDA RAY SVP EXT RELAT&TECH RESRCS THRU 01/20	40.00 1.00			X				500,328	0	489
ROSA L YANG EPRI FELLOW	40.00 0.00					X		433,694	0	62,330
KURT W EDSINGER DIRECTOR RESEARCH & DEVELOP	40.00 0.00					X		360,680	0	62,820
THOMAS WILSON TECHNICAL EXECUTIVE	40.00 0.00					X		340,714	0	60,554
TINA TAYLOR SR DIRECTOR RESEARCH & DEVELOP	40.00 0.00					X		342,796	0	53,468
DANIEL BROOKS VP INTEGRATED GRID BEG 11/20	40.00 0.00			X				335,838	0	60,354
STEVEN SWILLEY SR DIRECTOR RESEARCH & DEVELOP	40.00 0.00					X		339,330	0	52,753
CATHERINE JEREZA VP CORPORATE AFFAIRS BEG 01/20	40.00 0.00			X				296,247	0	46,822
NEVA ESPINOZA VP LOW CARBON RESOURCE BEG 11/20	40.00 0.00			X				298,974	0	29,905

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
CHARMAINE DAVIS VP HUMAN RESRC & DIVERSITY BEG 11/20	40.00 0.00			X				215,617	0	40,263
JACQUELINE ROSATI VP GEN COUNL, CCO & SECRTY BEG 11/20	40.00 0.00			X				160,731	0	45,840
JANIS G MENDELSON ASSISTANT CORP SECRETARY	40.00 0.00			X				145,191	0	23,338
ARUN MAJUMDAR DIRECTOR THRU 11/20	1.00 0.00	X						10,750	0	0
DENNIS V MCGINN DIRECTOR	1.00 0.00	X						6,500	0	0
JOHN MOGG DIRECTOR THRU 4/20	1.00 0.00	X						5,000	0	0
COLETTE D HONORABLE DIRECTOR THRU 09/20	1.00 0.00	X						750	0	0
PEDRO J PIZARRO CHAIR	1.00 0.00	X		X				0	0	0
STANLEY W CONNALLY JR FIRST VICE CHAIR	1.00 0.00	X		X				0	0	0
DOUGLAS F ESAMANN SECOND VICE CHAIR	1.00 0.00	X		X				0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
LISA M BARTON DIRECTOR BEG 04/20	1.00 0.00	X						0	0	0
TERRY BASSHAM DIRECTOR THRU 04/20	1.00 0.00	X						0	0	0
WARNER L BAXTER DIRECTOR	1.00 0.00	X						0	0	0
JOHN R BEAR DIRECTOR BEG 04/20	1.00 0.00	X						0	0	0
SAMUEL L BELCHER DIRECTOR	1.00 0.00	X						0	0	0
NICHOLAS A BROWN DIRECTOR THRU 04/20	1.00 0.00	X						0	0	0
SHERYL CARTER DIRECTOR	1.00 0.00	X						0	0	0
BRETT C CARTER DIRECTOR BEG 04/20	1.00 0.00	X						0	0	0
JAE-HOON CHUNG DIRECTOR	1.00 0.00	X						0	0	0
KENNETH W CORNEW DIRECTOR	1.00 0.00	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
KEVIN FLETCHER DIRECTOR BEG 04/20	1.00 0.00	X						0	0	0
DAN FORD DIRECTOR	1.00 0.00	X						0	0	0
PAULA GOLD-WILLIAMS DIRECTOR	1.00 0.00	X						0	0	0
JOHN L HAIRSTON DIRECTOR BEG 10/20	1.00 0.00	X						0	0	0
THOMAS J HELLER DIRECTOR	1.00 0.00	X						0	0	0
MICHAEL HUMMEL DIRECTOR	1.00 0.00	X						0	0	0
LISA D JOHNSON DIRECTOR	1.00 0.00	X						0	0	0
JEFFREY J LYASH DIRECTOR	1.00 0.00	X		X				0	0	0
ELLIOT E MAINZER DIRECTOR THRU 08/20	1.00 0.00	X						0	0	0
JOHN MCAVOY DIRECTOR THRU 12/20	1.00 0.00	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
MARK C MCCULLOUGH DIRECTOR THRU 04/20	1.00 0.00	X						0	0	0
MARIE-JOSE NADEAU DIRECTOR BEG 04/20	1.00 0.00	X						0	0	0
BARBARA A NICK DIRECTOR THRU 07/20	1.00 0.00	X						0	0	0
JAN OBERHOLZER DIRECTOR	1.00 0.00	X						0	0	0
PAT O'DOHERTY DIRECTOR	1.00 0.00	X						0	0	0
PATRICK O'LOUGHLIN DIRECTOR BEG 07/20	1.00 0.00	X						0	0	0
MARIA POPE DIRECTOR	1.00 0.00	X						0	0	0
SCOTT PROCHAZKA DIRECTOR THRU 03/20	1.00 0.00	X						0	0	0
MICHAEL W RENCHECK DIRECTOR	1.00 0.00	X						0	0	0
BERNARD SALHA DIRECTOR	1.00 0.00	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
SCOTT W H SEU DIRECTOR BEG 03/20	1.00 0.00	X						0	0	0
VINCENT SORGI DIRECTOR BEG 04/20	1.00 0.00	X						0	0	0
WILLIAM H SPENCE DIRECTOR THRU 04/20	1.00 0.00	X						0	0	0
DAVID J TUDOR DIRECTOR	1.00 0.00	X						0	0	0
ENRICO VIALE DIRECTOR	1.00 0.00	X						0	0	0
PAT K VINCENT-COLLAWN CHAIR THRU 4/20, DIRECTOR BEG 5/20	1.00 0.00	X		X				0	0	0
RODERICK K WEST DIRECTOR	1.00 0.00	X						0	0	0

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
ELECTRIC POWER RESEARCH INSTITUTE INC

Employer identification number
23-7175375

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state:
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:
- 10 An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations _____
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization failed to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . .						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. . . .						
3 The value of services or facilities furnished by a governmental unit to the organization without charge..						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f). . .						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
7 Amounts from line 4. . .						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . . .						
9 Net income from unrelated business activities, whether or not the business is regularly carried on. . .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). . .						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2020 (line 6, column (f) divided by line 11, column (f))	14	
15 Public support percentage for 2019 Schedule A, Part II, line 14	15	
16a 33 1/3% support test—2020. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 33 1/3% support test—2019. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
17a 10%-facts-and-circumstances test—2020. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 10%-facts-and-circumstances test—2019. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	80,000			2,303	6,546	88,849
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	349,135,154	364,474,362	365,731,219	342,795,819	378,163,073	1,800,299,627
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5	349,215,154	364,474,362	365,731,219	342,798,122	378,169,619	1,800,388,476
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						0
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.	137,210,338	136,570,332	133,209,130	135,975,839	125,775,845	668,741,484
c Add lines 7a and 7b.	137,210,338	136,570,332	133,209,130	135,975,839	125,775,845	668,741,484
8 Public support. (Subtract line 7c from line 6.)						1,131,646,992

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
9 Amounts from line 6.	349,215,154	364,474,362	365,731,219	342,798,122	378,169,619	1,800,388,476
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	5,253,417	6,020,714	8,532,606	9,343,170	4,469,920	33,619,827
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.	5,253,417	6,020,714	8,532,606	9,343,170	4,469,920	33,619,827
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	1,054,891	603,484	974,407	519,609	269,828	3,422,219
13 Total support. (Add lines 9, 10c, 11, and 12.)	355,523,462	371,098,560	375,238,232	352,660,901	382,909,367	1,837,430,522

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here.**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2020 (line 8, column (f) divided by line 13, column (f))	15	61.590 %
16 Public support percentage from 2019 Schedule A, Part III, line 15	16	61.900 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2020 (line 10c, column (f) divided by line 13, column (f))	17	1.830 %
18 Investment income percentage from 2019 Schedule A, Part III, line 17	18	1.820 %

19a 33 1/3% support tests—2020. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization

b 33 1/3% support tests—2019. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, of Part I, complete Sections A and B. If you checked box 12b, of Part I, complete Sections A and C. If you checked box 12c, of Part I, complete Sections A, D, and E. If you checked box 12d, of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

		Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b	Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c	Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b	Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).</i>		

Part IV Supporting Organizations (continued)

		Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?		
a	A person who directly or indirectly controls, either alone or together with persons described in lines 11b and 11c below, the governing body of a supported organization?		
b	A family member of a person described in 11a above?		
c	A 35% controlled entity of a person described in line 11a or 11b above? <i>If "Yes" to 11a, 11b, or 11c, provide detail in Part VI.</i>		

Section B. Type I Supporting Organizations

		Yes	No
1	Did the officers, directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.</i>		

Section C. Type II Supporting Organizations

		Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		

Section D. All Type III Supporting Organizations

		Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization (s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
3	By reason of the relationship described in line 2 above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		

Section E. Type III Functionally-Integrated Supporting Organizations

1	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):		
a	<input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b	<input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c	<input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions)		
2	Activities Test. Answer lines 2a and 2b below.		
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>		
b	Did the activities described in line 2a constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
3	Parent of Supported Organizations. Answer lines 3a and 3b below.		
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No" provide details in Part VI.</i>		
b	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1** Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8	
Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):	1	
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	
Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (<i>prior IRS approval required - provide details in Part VI</i>)	5	
6 Other distributions (<i>describe in Part VI</i>). See instructions	6	
7 Total annual distributions. Add lines 1 through 6.	7	
8 Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions	8	
9 Distributable amount for 2020 from Section C, line 6	9	
10 Line 8 amount divided by Line 9 amount	10	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2020	(iii) Distributable Amount for 2020
1 Distributable amount for 2020 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2020 (reasonable cause required-- <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2020:			
a From 2015.			
b From 2016.			
c From 2017.			
d From 2018.			
e From 2019.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2020 distributable amount			
i Carryover from 2015 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2020 from Section D, line 7:			
\$			
a Applied to underdistributions of prior years			
b Applied to 2020 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2021. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2016.			
b Excess from 2017.			
c Excess from 2018.			
d Excess from 2019.			
e Excess from 2020.			

Part VI Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

990 Schedule A, Supplemental Information

Return Reference	Explanation
SCHEDULE A, PART III, LINE 12, EXPLANATION OF OTHER INCOME:	OTHER INCOME - 2016 AMOUNT: \$ 1,054,891. 2017 AMOUNT: \$ 603,484. 2018 AMOUNT: \$ 974,407. 2019 AMOUNT: \$ 519,609. 2020 AMOUNT: \$ 269,828.

990 Schedule A, Supplemental Information

Return Reference	Explanation
SCHEDULE A, PART III:	SUPPORT SCHEDULE FOR ORGANIZATIONS DESCRIBED IN SECTION 509(A)(2) EPRI REPORTS ITS MEMBERSHIP DUES AS GROSS RECEIPTS FROM SERVICES PERFORMED. THESE PAYMENTS ARE MADE IN CONNECTION WITH THE PERFORMANCE OF TAX EXEMPT SCIENTIFIC RESEARCH IN THE PUBLIC INTEREST, WHICH BY DEFINITION ALSO INCIDENTALY BENEFITS EPRI MEMBERS WHO MAY IN CERTAIN CIRCUMSTANCES HAVE A DIRECT AND IMMEDIATE BENEFIT FROM SUCH RESEARCH. THE RESEARCH RESULTS MAY ALSO, IN CERTAIN CIRCUMSTANCES, HAVE A MORE DIRECT BENEFIT TO THE EPRI MEMBERS THAN TO THE GENERAL PUBLIC CONTEMPLATED WITHIN TREASURY REGULATION SECTION 1.509(A)-3(G)(2).

990 Schedule A, Supplemental Information

Return Reference	Explanation
SCHEDULE A, PART III, LINE 12:	OTHER INCOME DESCRIPTION OTHER INCOME INCLUDES INCOME FROM PREVIOUSLY PUBLISHED SCIENTIFIC RESEARCH REPORTS AND SOFTWARE AVAILABLE FOR SALE TO THE GENERAL PUBLIC AND INCOME FROM RELATED SCIENTIFIC RESEARCH ACTIVITIES CONDUCTED BY EPRI IN THE PUBLIC INTEREST.

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities
For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶Complete if the organization is described below. ▶Attach to Form 990 or Form 990-EZ.
▶Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020
Open to Public Inspection

If the organization answered "Yes" on Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes" on Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes" on Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of the organization ELECTRIC POWER RESEARCH INSTITUTE INC	Employer identification number 23-7175375
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Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

- Provide a description of the organization's direct and indirect political campaign activities in Part IV (see instructions for definition of "political campaign activities")
- Political campaign activity expenditures (see instructions) ▶ \$ _____
- Volunteer hours for political campaign activities (see instructions)

Part I-B Complete if the organization is exempt under section 501(c)(3).

- Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$ _____
- Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$ _____
- If the organization incurred a section 4955 tax, did it file Form 4720 for this year? Yes No
- a Was a correction made? Yes No
- b If "Yes," describe in Part IV.

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

- Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$ _____
- Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ \$ _____
- Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b..... ▶ \$ _____
- Did the filing organization file **Form 1120-POL** for this year? Yes No
- Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
1				
2				
3				
4				
5				
6				

Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A** Check if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures
(The term "expenditures" means amounts paid or incurred.)

	(a) Filing organization's totals	(b) Affiliated group totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)		0
b Total lobbying expenditures to influence a legislative body (direct lobbying)	1,294	0
c Total lobbying expenditures (add lines 1a and 1b)	1,294	0
d Other exempt purpose expenditures	414,163,790	0
e Total exempt purpose expenditures (add lines 1c and 1d)	414,165,084	0
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.	1,000,000	0
g Grassroots nontaxable amount (enter 25% of line 1f)	250,000	0
h Subtract line 1g from line 1a. If zero or less, enter -0-	0	
i Subtract line 1f from line 1c. If zero or less, enter -0-	0	

If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:
Not over \$500,000	20% of the amount on line 1e.
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.
Over \$17,000,000	\$1,000,000.

Yes No

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) Total
2a Lobbying nontaxable amount	1,000,000	1,000,000	1,000,000	1,000,000	4,000,000
b Lobbying ceiling amount (150% of line 2a, column(e))					6,000,000
c Total lobbying expenditures	6,010	6,824	0	1,294	14,128
d Grassroots nontaxable amount	250,000	250,000	250,000	250,000	1,000,000
e Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000
f Grassroots lobbying expenditures					

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?			
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c Media advertisements?			
d Mailings to members, legislators, or the public?			
e Publications, or published or broadcast statements?			
f Grants to other organizations for lobbying purposes?			
g Direct contact with legislators, their staffs, government officials, or a legislative body?			
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
i Other activities?			
j Total. Add lines 1c through 1i			
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b If "Yes," enter the amount of any tax incurred under section 4912			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	1	
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3 Did the organization agree to carry over lobbying and political expenditures from the prior year?	3	

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

1 Dues, assessments and similar amounts from members	1	
2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year	2a	
b Carryover from last year	2b	
c Total	2c	
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues .	3	
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5 Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference	Explanation
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SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

OMB No. 1545-0047
2020
Open to Public Inspection

▶ Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization
ELECTRIC POWER RESEARCH INSTITUTE INC

Employer identification number
23-7175375

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.
Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? Yes No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? Yes No

Part II Conservation Easements.
Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

Preservation of land for public use (e.g., recreation or education) Preservation of an historically important land area

Protection of natural habitat Preservation of a certified historic structure

Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Yes No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? Yes No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.
Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ \$ _____

(ii) Assets included in Form 990, Part X ▶ \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ \$ _____

b Assets included in Form 990, Part X ▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

- 3** Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a** Public exhibition
 - b** Scholarly research
 - c** Preservation for future generations
 - d** Loan or exchange programs
 - e** Other
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5** During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . . **Yes** **No**

Part IV Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? **Yes** **No**
- b** If "Yes," explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|---|--------|
| 1c Beginning balance | |
| 1d Additions during the year | |
| 1e Distributions during the year | |
| 1f Ending balance | |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . . **Yes** **No**
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

Part V Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment ▶
 - b** Permanent endowment ▶
 - c** Term endowment ▶
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|--|---------------|----|
| (i) Unrelated organizations | 3a(i) | |
| (ii) Related organizations | 3a(ii) | |
| b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? | 3b | |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		1,532,485		1,532,485
b Buildings		32,389,510	17,815,504	14,574,006
c Leasehold improvements		16,277,598	7,509,173	8,768,425
d Equipment		43,053,516	27,749,236	15,304,280
e Other		42,131,172	31,723,728	10,407,444
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶				50,586,640

Part VII Investments—Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(A) LONG TERM INVESTMENTS	113,887,106	F
(B) INVESTMENT IN SUBSIDIARIES	1,769,410	F
(C) INVESTMENT IN OTHER COMPANIES	1,082	F
(D)		
(E)		
(F)		
(G)		
(H)		
(I)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.)	115,657,598	

Part VIII Investments—Program Related.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, col.(B) line 13.)		

Part IX Other Assets.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 15.)	

Part X Other Liabilities.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) ACCRUED POST RETIREMENT BENEFITS	9,119,252
(3) INTERCO PAYABLE WITH RELATED PARTY	1,791,552
(4) OTHER LONG-TERM LIABILITIES	1,312,231
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 25.)	12,223,035

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a		
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	
3	Subtract line 2e from line 1		3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1 :			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b		4c	
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		5	

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements		1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a		
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	
3	Subtract line 2e from line 1		3	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1 :			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b		4c	
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		5	

Part XIII Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation
See Additional Data Table	

Part XIII Supplemental Information *(continued)*

Return Reference	Explanation

Additional Data

Software ID:

Software Version:

EIN: 23-7175375

Name: ELECTRIC POWER RESEARCH INSTITUTE INC

Supplemental Information

Return Reference	Explanation
PART X, LINE 2:	FIN 48 (ASC 740) FOOTNOTE EPRI ADOPTED FIN 48 (CODIFIED AS ASC 740) IN 2009. THE ADOPTION IN 2009 DID NOT HAVE A MATERIAL IMPACT ON THE EPRI FINANCIAL STATEMENTS. THERE WAS NO CHANGE IN 2019 OR 2020. AS A RESULT, THE FINANCIAL STATEMENTS DO NOT HAVE AN ASC 740 LIABILITY RECORDED AND A FOOTNOTE FOR ASC 740 WAS NOT REQUIRED.

**SCHEDULE F
(Form 990)**

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
ELECTRIC POWER RESEARCH INSTITUTE INC

Employer identification number
23-7175375

Part I **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

- 1 For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes No
- 2 For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.
- 3** Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in the region	(d) Activities conducted in region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in the region	(f) Total expenditures for and investments in the region
See Add'l Data					
3a Sub-total	0	0			21,433,990
b Total from continuation sheets to Part I	0	0			78,804,185
c Totals (add lines 3a and 3b)	0	0			100,238,175

Part II Grants and Other Assistance to Organizations or Entities Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of noncash assistance	(h) Description of noncash assistance	(i) Method of valuation (book, FMV, appraisal, other)
		EUROPE	SPONSORSHIP	18,731	ELECTRONIC			
		EUROPE	SPONSORSHIP	25,897	ELECTRONIC			
		EUROPE	SPONSORSHIP	5,884	ELECTRONIC			

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter	▶ <u>3</u>
3 Enter total number of other organizations or entities	▶ <u>0</u>

Part IV Foreign Forms

- 1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)* Yes No
- 2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)* Yes No
- 3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with Respect to Certain Foreign Corporations. (see Instructions for Form 5471)* Yes No
- 4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see Instructions for Form 8621)* Yes No
- 5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with Respect to Certain Foreign Partnerships (see Instructions for Form 8865)* Yes No
- 6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990).* Yes No

Part V Supplemental Information

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

990 Schedule F, Supplemental Information

Return Reference	Explanation
PART III ACCOUNTING METHOD:	

990 Schedule F, Supplemental Information

Return Reference	Explanation
SCHEDULE F, PART I, LINE 2:	<p>PROCEDURE FOR MONITORING USE OF GRANT FUNDS OUTSIDE OF THE UNITED STATES EPRI OCCASIONALLY MAKES GRANTS TO OTHER INSTITUTIONS WHEN DOING SO IS CONSISTENT WITH AND FURTHERS EPRI'S CHARITABLE PURPOSE. GRANTS ARE MADE ONLY TO ENTITIES WHICH ARE WELL KNOWN TO EPRI AND AFTER APPROPRIATE DUE DILIGENCE. THE PERMITTED USES OF THE GRANTED FUNDS ARE ENUMERATED TO THE GRANTEE AND EPRI TYPICALLY RECEIVES REPORTS, TECHNICAL PAPERS, CONFERENCE AND SIMILAR MATERIALS DEMONSTRATING THE APPROPRIATE USE OF THE GRANTED FUNDS. FOR RESEARCH GRANTS, SCIENTIFIC PROGRESS AND FINANCIAL OVERSIGHT IS MONITORED THROUGHOUT THE GRANT TERM BY AN EPRI PROJECT MANAGER. EPRI OCCASIONALLY MAKES GRANTS TO INDIVIDUALS WHEN DOING SO IS CONSISTENT WITH AND FURTHERS EPRI'S CHARITABLE PURPOSE. GRANTS ARE MADE ONLY TO INDIVIDUALS THAT ARE KNOWN TO EPRI AND AFTER APPROPRIATE DUE DILIGENCE. THE GRANTS ARE TYPICALLY FOR THE INDIVIDUAL'S PARTICIPATION IN ACTIVITIES AND EPRI MEETINGS THAT FURTHER EPRI'S R&D EFFORTS. SCHEDULE F, PART I, LINE 3 ACCOUNTING METHOD USED TO CALCULATE EXPENSES THE EXPENSES PROVIDED IN COLUMN F OF PART I WERE PREPARED ON THE ACCRUAL BASIS OF ACCOUNTING IN CONFORMITY WITH ACCOUNTING PRINCIPLES APPLICABLE TO NOT-FOR-PROFIT ORGANIZATIONS.</p>

Additional Data

Software ID:

Software Version:

EIN: 23-7175375

Name: ELECTRIC POWER RESEARCH INSTITUTE INC

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
CENTRAL AMERICA AND THE CARIBBEAN	0	0	PROGRAM SERVICES	R&D PROJECT	123
EAST ASIA AND THE PACIFIC	0	0	PROGRAM SERVICES	R&D PROJECT	2,617,675

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
EUROPE	0	0	PROGRAM SERVICES	R&D PROJECT	15,118,685
MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICES	R&D PROJECT	57,803

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
NORTH AMERICA	0	0	PROGRAM SERVICES	R&D PROJECT	3,466,977
SOUTH AMERICA	0	0	PROGRAM SERVICES	R&D PROJECT	33,515

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
SOUTH ASIA	0	0	PROGRAM SERVICES	R&D PROJECT	24,824
SUB-SAHARAN AFRICA	0	0	PROGRAM SERVICES	R&D PROJECT	114,388

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
EUROPE	0	0	GRANTMAKING	SPONSORSHIP	55,512
NORTH AMERICA	0	0	GRANTMAKING	SPONSORSHIP	9,000

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
EAST ASIA AND THE PACIFIC	0	0	INVESTMENTS		21,596,186
EUROPE	0	0	INVESTMENTS		38,798,678

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
NORTH AMERICA	0	0	INVESTMENTS		14,568,742
SUB-SAHARAN AFRICA	0	0	INVESTMENTS		1,499,700

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
EAST ASIA AND THE PACIFIC	0	0	UNRELATED TRADE OR BUSINESS		21,317
EUROPE	0	0	UNRELATED TRADE OR BUSINESS		153,219

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
MIDDLE EAST AND NORTH AFRICA	0	0	UNRELATED TRADE OR BUSINESS		9,593
NORTH AMERICA	0	0	UNRELATED TRADE OR BUSINESS		2,092,238

Note: To capture the full content of this document as Filed, please select landscape mode (11" x 8.5") when printing.

**Schedule I
(Form 990)**

**Grants and Other Assistance to Organizations,
Governments and Individuals in the United States**

OMB No. 1545-0047

2020

**Open to Public
Inspection**

Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for the latest information.

Department of the
Treasury
Internal Revenue Service

Name of the organization
ELECTRIC POWER RESEARCH INSTITUTE INC

Employer identification number
23-7175375

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

(a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) See Additional Data							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶ 13

3 Enter total number of other organizations listed in the line 1 table ▶ 0

Part III Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.

Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1) PARTICIPATION ON ADVISORY COUNCIL	7	15,000			
(2) SPEAKER AT EPRI MEETING	3	7,000			
(3) PAPER PEER REVIEW	1	5,000			
(3)					
(4)					
(5)					
(6)					
(7)					

Part IV Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
SCHEDULE I, PART I, LINE 2:	PROCEDURE FOR MONITORING USE OF GRANT FUNDS IN THE UNITED STATES EPRI OCCASIONALLY MAKES GRANTS TO OTHER INSTITUTIONS WHEN DOING SO IS CONSISTENT WITH AND FURTHERS EPRI'S CHARITABLE PURPOSE. GRANTS ARE MADE ONLY TO ENTITIES THAT ARE WELL KNOWN TO EPRI AND AFTER APPROPRIATE DUE DILIGENCE. THE PERMITTED USES OF THE GRANTED FUNDS ARE ENUMERATED TO THE GRANTEE AND EPRI TYPICALLY RECEIVES REPORTS, TECHNICAL PAPERS, CONFERENCE AND SIMILAR MATERIALS DEMONSTRATING THE APPROPRIATE USE OF THE GRANTED FUNDS. FOR RESEARCH GRANTS, SCIENTIFIC PROGRESS AND FINANCIAL OVERSIGHT IS MONITORED THROUGHOUT THE GRANT TERM BY AN EPRI PROJECT MANAGER. EPRI OCCASIONALLY MAKES GRANTS TO INDIVIDUALS WHEN DOING SO IS CONSISTENT WITH AND FURTHERS EPRI'S CHARITABLE PURPOSE. GRANTS ARE MADE ONLY TO INDIVIDUALS THAT ARE KNOWN TO EPRI AND AFTER APPROPRIATE DUE DILIGENCE. THE GRANTS ARE TYPICALLY FOR THE INDIVIDUAL'S PARTICIPATION IN ACTIVITIES AND EPRI MEETINGS THAT FURTHER EPRI'S R&D EFFORTS.

Additional Data

Software ID:
Software Version:
EIN: 23-7175375
Name: ELECTRIC POWER RESEARCH INSTITUTE INC

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
REGENTS OF THE UNIVERSITY OF CALIFORNIA DAVIS ONE SHIELDS AVE DAVIS, CA 95616	94-6081352	501(C)(3)	40,000				CONTRIBUTION
THE UNIVERSITY OF TENNESSEE 201 ANDY HOLT TOWER KNOXVILLE, TN 37996	62-6001636	GOVERNMENT	110,000				CONTRIBUTION

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ARIZONA STATE UNIVERSITY 1151 S FOREST AVENUE TEMPE, AZ 85281	86-0196696	GOVERNMENT	52,000				CONTRIBUTION
GEORGIA TECH FOUNDATION INC 790 ATLANTIC DRIVE ATLANTA, GA 30332	58-6043294	501(C)(3)	50,000				CONTRIBUTION

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
THE OHIO STATE UNIVERSITY 1248 ARTHUR E ADAMS DR COLUMBUS, OH 43221	31-6025986	GOVERNMENT	27,500				CONTRIBUTION
REGENTS OF THE UNIVERSITY OF CALIFORNIA LOS ANGELES 405 HILGARD AVENUE LOS ANGELES, CA 90095	95-6006143	501(C)(3)	200,000				CONTRIBUTION

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
REGENTS OF THE UNIVERSITY OF CALIFORNIA SAN DIEGO 9500 GILMAN DRIVE LA JOLLA, CA 92093	95-2872494	GOVERNMENT	300,000				CONTRIBUTION
ENVIRONMENTAL RESEARCH AND EDUCATION FOUNDATION 3301 BENSON DR SUITE 101 RALEIGH, NC 27609	52-1804051	501(C)(3)	10,000				CONTRIBUTION

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FOUNDATION OF THE UNIVERSITY OF NORTH CAROLINA AT CHARLOTTE 9201 UNIVERSITY CITY BLVD CHARLOTTE, NC 28223	56-6059417	501(C)(3)	29,000				CONTRIBUTION
AMERICAN NUCLEAR SOCIETY INC 555 N KENSINGTON AVE LAGRANGE PARK, IL 60526	81-1658523	501(C)(3)	15,000				CONTRIBUTION

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NEURAL INFORMATION PROCESSING SYSTEMS FOUNDATION 1269 LAW ST SAN DIEGO, CA 92109	95-4364881	501(C)(3)	10,000				CONTRIBUTION
CALIFORNIA INSTITUTE OF TECHNOLOGY 1200 EAST CALIFORNIA BLVD PASADENA, CA 91125	95-1643307	501(C)(3)	30,000				CONTRIBUTION

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BATTELLE ENERGY ALLIANCE 2525 N FREMONT AVE IDAHO FALLS, ID 83415	84-1397960	501(C)(3)	0	172,800	FMV	EPRI REPORTS	CONTRIBUTION

Schedule J
(Form 990)

Compensation Information

OMB No. 1545-0047
2020
Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**
▶ **Attach to Form 990.**
▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

Department of the Treasury
Internal Revenue Service

Name of the organization ELECTRIC POWER RESEARCH INSTITUTE INC	Employer identification number 23-7175375
---	--

Part I Questions Regarding Compensation

	Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.		
<input checked="" type="checkbox"/> First-class or charter travel <input type="checkbox"/> Travel for companions <input type="checkbox"/> Tax idemnification and gross-up payments <input type="checkbox"/> Discretionary spending account <input type="checkbox"/> Housing allowance or residence for personal use <input type="checkbox"/> Payments for business use of personal residence <input type="checkbox"/> Health or social club dues or initiation fees <input checked="" type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)		
b If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	1b Yes	
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?	2 Yes	
3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.		
<input checked="" type="checkbox"/> Compensation committee <input checked="" type="checkbox"/> Independent compensation consultant <input checked="" type="checkbox"/> Form 990 of other organizations <input type="checkbox"/> Written employment contract <input checked="" type="checkbox"/> Compensation survey or study <input checked="" type="checkbox"/> Approval by the board or compensation committee		
4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:		
a Receive a severance payment or change-of-control payment?	4a Yes	
b Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b Yes	
c Participate in, or receive payment from, an equity-based compensation arrangement? If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.	4c	No
Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.		
5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:		
a The organization?	5a	No
b Any related organization? If "Yes," on line 5a or 5b, describe in Part III.	5b	No
6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:		
a The organization?	6a	No
b Any related organization? If "Yes," on line 6a or 6b, describe in Part III.	6b	No
7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III.	7 Yes	
8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.	8	No
9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	9	

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Return Reference	Explanation
PART I, LINE 1A	FIRST-CLASS TRAVEL SENIOR VICE PRESIDENTS AND THE CHIEF EXECUTIVE OFFICER, ALONG WITH CERTAIN BOARD MEMBERS FOR WHOM EPRI REIMBURSES TRAVEL, ARE AUTHORIZED TO BOOK AIR TRAVEL ONE CLASS ABOVE ECONOMY ON FLIGHTS WHERE THE PUBLISHED DURATION IS MORE THAN FOUR (4) HOURS, OR THE TRIP DURATION (DEPARTURE AIRPORT TO DESTINATION AIRPORT) REQUIRES ONE OR MORE STOPS FOR A TOTAL PUBLISHED DURATION OF MORE THAN SEVEN (7) HOURS. PERSONAL SERVICES EPRI MAKES AVAILABLE TO ITS KEY OFFICERS A FINANCIAL PLANNING BENEFIT THROUGH AN OUTSIDE VENDOR, WHICH EACH OFFICER MAY DETERMINE TO ACCEPT OR DECLINE. OFFICERS SELECTING THE SERVICE MAY ALSO USE THE PLANNER FOR TAX PREPARATION ADVICE. THE BENEFIT IS TREATED AS TAXABLE INCOME TO THE OFFICER. THERE WERE TEN OFFICERS THAT ACCEPTED A VOLUNTARY FINANCIAL PLANNING BENEFIT OFFERED BY EPRI WHICH RESULTED IN \$14,000 OF TAXABLE INCOME TO EIGHT OF THOSE OFFICERS, \$13,157 OF TAXABLE INCOME TO ONE OF THOSE OFFICERS AND \$5,833 OF TAXABLE INCOME TO ONE OF THOSE OFFICERS.
PART I, LINE 4A:	SEVERANCE ARRANGEMENTS THE INSTITUTE HAS ESTABLISHED SEVERANCE PLANS FOR ITS REGULAR EMPLOYEES, INCLUDING OFFICERS. EMPLOYEES HAVE NO PRE-EXISTING VESTED OR ACCRUED RIGHTS TO A SEVERANCE BENEFIT UNDER THESE PLANS, AND THE PLANS MAY BE CHANGED AT THE DISCRETION OF THE INSTITUTE. SEVERANCE BENEFITS IN EACH PLAN ARE CONTINGENT UPON QUALIFYING EMPLOYEE TERMINATIONS AND OTHER CONDITIONS AS REQUIRED IN THE PARTICULAR PLAN. GENERALLY, THE AMOUNT OF ANY SEVERANCE BENEFIT IS DEPENDENT UPON THE POSITION HELD BY THE EMPLOYEE AND LENGTH OF SERVICE UP TO FORTY-TWO WEEKS OF SALARY AND TWO MONTHS OF HEALTH BENEFIT CONTINUATION IN THE OFFICER PLAN. IN CONNECTION WITH THE LONG-TERM INCENTIVE PROGRAM, OFFICERS (AS DETERMINED BY THE BOARD OR A BOARD COMMITTEE) MAY BE ENTITLED TO A PAYMENT UPON QUALIFYING TERMINATIONS, AS REQUIRED IN THE PROGRAM. ANDA RAY RECEIVED A SEVERANCE PAYMENT OF \$460,350 DURING THE CALENDAR YEAR 2020. THERE WERE THREE OFFICERS WHO ENTERED INTO SEVERANCE ARRANGEMENTS WITH EPRI DURING CALENDAR YEAR 2020 AND WILL RECEIVE SEVERANCE PAYMENTS IN CALENDAR YEAR 2021. PART I, LINE 4B: SUPPLEMENTAL NONQUALIFIED RETIREMENT PLAN EPRI PROVIDES A RETIREMENT CONTRIBUTION FOR ITS EMPLOYEES BASED ON THEIR COMPENSATION. THIS RETIREMENT CONTRIBUTION IS USUALLY IN THE FORM OF AN EMPLOYER CONTRIBUTION TO ITS RETIREMENT PLANS. HOWEVER, IF THE CALCULATED RETIREMENT CONTRIBUTION EXCEEDS THE RETIREMENT PLAN EMPLOYER CONTRIBUTION LIMIT FOR THE YEAR, THE AMOUNT OF THE RETIREMENT CONTRIBUTION IN EXCESS OF THE LIMIT IS REPORTED ON THE EMPLOYEES' FORM W-2 AS TAXABLE INCOME AS REQUIRED AND REPORTED ON SCHEDULE J, PART II, COLUMN (B)(III) AS FOLLOWS: MICHAEL W HOWARD : \$98,855 ARSHAD MANSOOR : \$23,454 PAMELA J KEEFE : \$4,410 NEIL M WILMSHURST : \$6,173 CAROLYN SHOCKLEY : \$1,413
PART I, LINE 7:	NON-FIXED PAYMENTS OFFICERS, AS WELL AS EMPLOYEES, ARE ELIGIBLE FOR DISCRETIONARY INCENTIVE AWARDS BASED ON EPRI'S RESULTS AGAINST CORPORATE GOALS, WHICH ARE ESTABLISHED BY THE COMPENSATION AND LEADERSHIP DEVELOPMENT COMMITTEE OF THE BOARD, AND EACH INDIVIDUAL'S PERFORMANCE AND CONTRIBUTION TOWARD ACHIEVING THOSE GOALS. INCENTIVE AWARDS ARE STRONGLY TIED TO BOTH CORPORATE AND INDIVIDUAL PERFORMANCE. THE LEVEL OF INCENTIVE AWARDS FOR WHICH AN EMPLOYEE IS ELIGIBLE IS DETERMINED BASED AS A PERCENTAGE OF BASE SALARY, DEPENDING UPON THE EMPLOYEE'S POSITION, AND ARE CONSIDERED IN THE DETERMINATION BY EPRI OF A TOTAL REASONABLE COMPENSATION PACKAGE FOR THE POSITION. THE COMPENSATION AND LEADERSHIP DEVELOPMENT COMMITTEE OF THE BOARD OF DIRECTORS CONSIDERS AND, IN ITS DISCRETIONARY JUDGMENT, APPROVES INCENTIVE PAYMENTS FOR EACH OFFICER AT THE LEVEL OF VICE PRESIDENT OR ABOVE, WITH THE EXCEPTION OF THE INCENTIVE PAYMENT FOR THE CHIEF EXECUTIVE OFFICER WHICH IS CONSIDERED AND, IN ITS DISCRETIONARY JUDGMENT, APPROVED BY THE EXECUTIVE COMMITTEE OF THE BOARD.
PART II, COLUMN (C):	DEFERRED COMPENSATION FOR CERTAIN OFFICERS OF THE ORGANIZATION, DEFERRED COMPENSATION INCLUDES AMOUNTS EARNED OR ACCRUED (BUT NOT FUNDED OR VESTED) AT DECEMBER 31, 2020 IN CONNECTION WITH THE ORGANIZATION'S LONG-TERM INCENTIVE PROGRAM AND OTHER SPECIFIC RETENTION.

Form 990, Schedule J, Part II - Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees								
(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
21 CHARMAINE DAVIS VP HUMAN RESRC & DIVERSITY BEG 11/20	(i)	168,876	46,500	241	22,050	18,213	255,880	0
	(ii)	0	0	0	0	0	0	0
1 JACQUELINE ROSATI VP GEN COUNL, CCO & SECRTY BEG 11/20	(i)	124,584	36,000	147	17,616	28,224	206,571	0
	(ii)	0	0	0	0	0	0	0
2 JANIS G MENDELSON ASSISTANT CORP SECRETARY	(i)	121,787	22,500	904	14,622	8,716	168,529	0
	(ii)	0	0	0	0	0	0	0

SCHEDULE O
(Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Department of the Treasury

Name of the organization

ELECTRIC POWER RESEARCH INSTITUTE INC

Employer identification number

23-7175375

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART I, LINE 1 AND FORM 990, PART III, LINE 1:	ORGANIZATION'S MISSION AND MOST IMPORTANT ACTIVITIES ELECTRIC POWER RESEARCH INSTITUTE (THE INSTITUTE OR EPRI) CONDUCTS RESEARCH AND DEVELOPMENT RELATING TO GENERATION, DELIVERY AND USE OF ELECTRICITY FOR THE BENEFIT OF THE PUBLIC. AN INDEPENDENT, NONPROFIT ORGANIZATION, EPRI BRINGS TOGETHER ITS SCIENTISTS AND ENGINEERS AS WELL AS EXPERTS FROM ACADEMIA AND INDUSTRY TO HELP ADDRESS CHALLENGES IN ELECTRICITY, INCLUDING RELIABILITY, EFFICIENCY, HEALTH, SAFETY AND THE ENVIRONMENT. EPRI ALSO PROVIDES TECHNOLOGY, POLICY AND ECONOMIC ANALYSES TO DRIVE LONG-RANGE RESEARCH AND DEVELOPMENT PLANNING AND SUPPORTS RESEARCH IN EMERGING TECHNOLOGIES. EPRI'S PRINCIPAL OFFICES AND LABORATORIES ARE LOCATED IN PALO ALTO, CA; CHARLOTTE, NC; KNOXVILLE, TN; AND LENOX, MA.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 6	<p>EPRI HAS FIVE CLASSES OF MEMBERS, NAMELY: (A) CLASS I (1) ANY PERSON, FIRM, AGENCY OR CORPORATION OWNED BY THE FEDERAL GOVERNMENT, OR BY AN AGENCY, AUTHORITY OR INSTRUMENTALITY OF THE FEDERAL GOVERNMENT, WHICH IS ENGAGED TO A SUBSTANTIAL DEGREE IN THE PRODUCTION, TRANSMISSION OR DISTRIBUTION OF ELECTRIC POWER FOR PUBLIC USE WITHIN THE UNITED STATES; (2) ANY COOPERATIVE ASSOCIATION OR COOPERATIVE CORPORATION WHICH IS ENGAGED TO A SUBSTANTIAL DEGREE IN THE PRODUCTION, TRANSMISSION OR DISTRIBUTION OF ELECTRIC POWER FOR PUBLIC USE WITHIN THE UNITED STATES; (3) ANY NONFEDERAL GOVERNMENTAL OR OTHER PUBLIC AGENCY, AUTHORITY OR INSTRUMENTALITY, OR ANY NON-PROFIT CORPORATION, ASSOCIATION OR OTHER NON-PROFIT ORGANIZATION OPERATING PURSUANT TO GOVERNMENTAL OVERSIGHT OR REGULATION, WHICH IS ENGAGED TO A SUBSTANTIAL DEGREE IN THE PRODUCTION, TRANSMISSION OR DISTRIBUTION OF ELECTRIC POWER FOR PUBLIC USE WITHIN THE UNITED STATES; (4) ANY CORPORATION, ASSOCIATION OR OTHER ORGANIZATION OPERATING PURSUANT TO GOVERNMENTAL OVERSIGHT OR REGULATION, WHICH IS ENGAGED TO A SUBSTANTIAL DEGREE IN OPERATING, MAINTAINING OR ASSURING RELIABILITY OF SYSTEMS FOR THE TRANSMISSION OF ELECTRIC POWER FOR PUBLIC USES WITHIN THE UNITED STATES AND CANADA; OR (5) ANY GOVERNMENTAL OR OTHER PUBLIC AGENCY, AUTHORITY OR INSTRUMENTALITY WITHIN THE UNITED STATES WHICH IS ENGAGED TO A SUBSTANTIAL DEGREE IN DIRECTLY FUNDING RESEARCH AND DEVELOPMENT RELATED TO THE PRODUCTION, TRANSMISSION, DISTRIBUTION, SALE, AND UTILIZATION OF ELECTRIC POWER, INCLUDING BUT NOT LIMITED TO, ENERGY EFFICIENCY, RENEWABLES, AND ENVIRONMENTAL RESEARCH. (B) CLASS II REGULATED DOMESTIC ORGANIZATIONS ENGAGED TO A SUBSTANTIAL DEGREE IN THE PRODUCTION, DISTRIBUTION AND TRANSMISSION OF ELECTRICITY THAT HAVE AN OBLIGATION TO SERVE THE PUBLIC. (C) CLASS III NON-UNITED STATES PUBLIC/MUNICIPAL, COOPERATIVE, AND REGULATED INVESTOR-OWNED ORGANIZATIONS ENGAGED TO A SUBSTANTIAL DEGREE IN THE PRODUCTION, DISTRIBUTION AND TRANSMISSION OF ELECTRICITY, AS WELL AS ANALOGOUS RTO/ISO ORGANIZATIONS. (D) CLASS IV A NON-VOTING CLASS FOR UNREGULATED ORGANIZATIONS ENGAGED TO A SUBSTANTIAL DEGREE IN THE PRODUCTION, TRANSMISSION OR DISTRIBUTION INTO THE WHOLESALE MARKET OF ELECTRIC POWER, WHETHER DOMESTIC OR INTERNATIONAL. (E) CLASS V A NON-VOTING CLASS FOR OTHERS ELIGIBLE FOR MEMBERSHIP IN EPRI, THAT IS, THOSE DIRECTLY OR INDIRECTLY SUPPORTING A DOMESTIC OR INTERNATIONAL PROGRAM FOR ELECTRIC SECTOR RESEARCH.</p>

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 7A	MEMBER'S POWER TO ELECT OR APPOINT THE GOVERNING BODY IN 2020, THE MEMBERS OF EPRI'S BOARD OF DIRECTORS WERE ELECTED AND APPOINTED AS FOLLOWS: CLASS I MEMBERS MAY ELECT SEVEN MEMBERS OF THE BOARD. THE TENNESSEE VALLEY AUTHORITY AND THE BONNEVILLE POWER ADMINISTRATION MAY EACH APPOINT ONE MEMBER OF THE BOARD. CLASS II MEMBERS MAY ELECT FIFTEEN MEMBERS OF THE BOARD. CLASS III MEMBERS MAY ELECT SIX MEMBERS OF THE BOARD. THE EPRI GOVERNANCE AND NOMINATING COMMITTEE MAY APPOINT SIX MEMBERS OF THE BOARD.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 7B	GOVERNANCE DECISIONS RESERVED TO MEMBERS MEMBERS HAVE THE POWER TO AMEND THE ARTICLES OF INCORPORATION AND MAY HAVE OTHER POWERS CONFERRED BY THE NONPROFIT CORPORATION CODE OF THE DISTRICT OF COLUMBIA.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 11B	FORM 990 REVIEW PROCESS AN EXTERNAL TAX FIRM AND EPRI STAFF WORK TOGETHER TO GATHER THE INFORMATION NECESSARY TO COMPLETE THE TAX RETURN. THE TAX FIRM PREPARES AN INITIAL DRAFT RETURN AND REVIEWS THE INITIAL DRAFT RETURN WITH THE FINANCE AND LEGAL MANAGEMENT TEAM; ITEMS ARE DISCUSSED AND REVIEWED. RECOMMENDED CHANGES ARE REFLECTED IN THE RETURN AND A DRAFT TAX RETURN IS PREPARED. THE DRAFT TAX RETURN IS PRESENTED TO THE AUDIT COMMITTEE OF THE BOARD OF DIRECTORS FOR THEIR REVIEW AND A COPY IS PROVIDED THROUGH A SECURE LINK TO ALL MEMBERS OF THE BOARD OF DIRECTORS. THE AUDIT COMMITTEE MAY QUESTION EPRI MANAGEMENT AND THE EXTERNAL TAX FIRM OR ASK FOR CLARIFICATION ON ANY ITEM ON THE RETURN. AFTER THE COMMITTEE HAS REVIEWED THE TAX RETURN, THE RETURN IS FILED WITH THE APPROPRIATE GOVERNING TAX AUTHORITIES.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 12C	MONITORING AND ENFORCEMENT OF CONFLICT OF INTEREST POLICY IN ACCORDANCE WITH THE ORGANIZATION'S CONFLICT OF INTEREST POLICY, ALL DIRECTORS, OFFICERS, AND KEY EMPLOYEES FILL OUT AND SIGN A CONFLICT OF INTEREST DISCLOSURE FORM, WHICH IS REVIEWED AND MAINTAINED BY EPRI'S LEGAL AND COMPLIANCE DEPARTMENT. THE FORMS ARE FILLED OUT ON AN ANNUAL BASIS. IF A CONFLICT OF INTEREST WERE TO ARISE, THE KEY EMPLOYEE, OFFICER OR BOARD MEMBER WITH THE CONFLICT WOULD BE RECUSED FROM THE DECISION MAKING PROCESS.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 15	<p>PROCESS FOR DETERMINING COMPENSATION OF CEO, OFFICERS, AND KEY EMPLOYEES OFFICERS' COMPENSATION DECISIONS FOR THOSE AT THE LEVEL OF VICE PRESIDENT AND ABOVE ARE DETERMINED BY THE COMPENSATION AND LEADERSHIP DEVELOPMENT COMMITTEE OF EPRI'S BOARD OF DIRECTORS, WITH THE EXCEPTION OF DETERMINATION OF COMPENSATION LEVELS FOR THE CEO AND NEW OFFICERS, WHICH ARE USUALLY DETERMINED BY THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS. THE COMMITTEES OBTAIN AND ACT IN RELIANCE UPON APPROPRIATE COMPARABILITY AND BENCHMARKING DATA FOR THE OFFICER POSITIONS FROM A NATIONALLY RECOGNIZED INDEPENDENT SOURCE TO SUPPORT DETERMINATIONS OF FAIR MARKET VALUE OF OFFICERS' COMPENSATION FOR THE SERVICES RENDERED. THE COMMITTEES VOTE ON OFFICER COMPENSATION AT THEIR MEETINGS AND CONCURRENTLY DOCUMENT THE APPROVAL IN THE MINUTES. FORM 990, PART VI, SECTION B, LINE 16B: PARTICIPATION IN JOINT VENTURE/SIMILAR ARRANGEMENT WITH A TAXABLE ENTITY AS DEFINED BY THE FORM 990 INSTRUCTIONS, A JOINT VENTURE OR SIMILAR ARRANGEMENT (OR A "VENTURE OR ARRANGEMENT") MEANS ANY JOINT OWNERSHIP OR CONTRACTUAL ARRANGEMENT THROUGH WHICH THERE IS AN AGREEMENT TO JOINTLY UNDERTAKE A SPECIFIC BUSINESS ENTERPRISE, INVESTMENT, OR EXEMPT-PURPOSE ACTIVITY WITHOUT REGARD TO (1) WHETHER THE ORGANIZATION CONTROLS THE VENTURE OR ARRANGEMENT, AND (2) THE LEGAL STRUCTURE OF THE VENTURE OR ARRANGEMENT. EPRI PERFORMS SERVICES WORK AND OTHER UNRELATED BUSINESS ACTIVITIES AND REPORTS THAT WORK AS UNRELATED BUSINESS INCOME FOR APPROPRIATE TAX TREATMENT. PARTICULAR CARE IS TAKEN IN STRUCTURING BUSINESS ARRANGEMENTS SUCH AS COMMERCIALIZATION TRANSACTIONS, STRATEGIC ALLIANCES, SERVICE CENTERS, AND OTHER SIMILAR ARRANGEMENTS, INCLUDING OBTAINING ADVICE EARLY IN THE PROCESS, IN ORDER TO PROTECT EPRI'S TAX-EXEMPT STATUS AND MINIMIZE ANY LIABILITY.</p>

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION C, LINE 19	DOCUMENTS MADE AVAILABLE TO THE PUBLIC EPRI MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND AUDITED FINANCIAL STATEMENTS FOR THE PAST THREE YEARS AVAILABLE TO THE PUBLIC THROUGH ITS OWN WEBSITE.

**SCHEDULE R
(Form 990)**

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047

2020

**Open to Public
Inspection**

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.**
▶ **Attach to Form 990.**
▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

Department of the Treasury
Internal Revenue Service

Name of the organization
ELECTRIC POWER RESEARCH INSTITUTE INC

Employer identification number

23-7175375

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) 3420 HILLVIEW LLC 3420 HILLVIEW AVENUE PALO ALTO, CA 94304 83-2331086	REAL ESTATE	CA	0	1,022	EPRI

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1)ELECTRICITY INNOVATION INSTITUTE 3420 HILLVIEW AVENUE PALO ALTO, CA 94304 77-0562327	DORMANT	CA	501(C)(3)	12-I	EPRI INC	Yes	

Part III Identification of Related Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1) EPRI INTERNATIONAL INC 3420 HILLVIEW AVENUE PALO ALTO, CA 94304 52-2357247	INTL SALES	DE	EPRI	C	581,614	5,243,441	100.000 %	Yes	
(2) EPRI EUROPE DAC BLOCKS 9-10 NEXUS UCD BELFIELD OF DUBLIN D04 V2N9 EI	R&D APPLIC	EI	EPRI INTER INC	C	216,807	1,942,317	100.000 %	Yes	

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	1a	No
b Gift, grant, or capital contribution to related organization(s)	1b	No
c Gift, grant, or capital contribution from related organization(s)	1c	No
d Loans or loan guarantees to or for related organization(s)	1d	No
e Loans or loan guarantees by related organization(s)	1e	No
f Dividends from related organization(s)	1f	No
g Sale of assets to related organization(s)	1g	No
h Purchase of assets from related organization(s)	1h	No
i Exchange of assets with related organization(s)	1i	No
j Lease of facilities, equipment, or other assets to related organization(s)	1j	No
k Lease of facilities, equipment, or other assets from related organization(s)	1k	No
l Performance of services or membership or fundraising solicitations for related organization(s)	1l	Yes
m Performance of services or membership or fundraising solicitations by related organization(s)	1m	Yes
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	Yes
o Sharing of paid employees with related organization(s)	1o	Yes
p Reimbursement paid to related organization(s) for expenses	1p	No
q Reimbursement paid by related organization(s) for expenses	1q	No
r Other transfer of cash or property to related organization(s)	1r	No
s Other transfer of cash or property from related organization(s)	1s	No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) EPRI INTERNATIONAL INC	M	9,105,717	ACTUAL EXPENSE

Part VII **Supplemental Information**

Provide additional information for responses to questions on Schedule R. (see instructions).

Return Reference	Explanation
SCHEDULE R, PART II	ELECTRICITY INNOVATION INSTITUTE WAS CLOSED IN 2020.