

# Energy Efficiency/Renewable Energy Report Review and Evaluation Checklist

10 CFR Part 905 (Energy Planning and Management Program) requires that customers provide certain information in their Integrated Resource Plans (IRP) or IRP option.

Western has developed the following checklist to help customers comply with IRP requirements. Western may reject an IRP if not all checklist items are reasonably addressed.

Customers who are required by State, Federal or Tribal law to invest a portion of their resources in demand-side management (DSM) initiatives, including energy efficiency and load management, and/or renewable energy (EE/RE) activities within a specified timeframe can now provide a copy of that report in lieu of an IRP. This investment is also referred to as a public benefits charge.

Customers must submit a request to Western to include:

1. The source of the EE/RE reporting requirements, such as number, title, date, and jurisdiction of law or regulation (905.17(a) (1)).
2. Data on the initial, annual, and other reporting requirements of the report (905.17(a) (2)).
3. Summary outline of the EE/RE report's required data or components, including any requirements for documenting customer energy efficiency and renewable energy activities (905.17(a) (3), and 905.17(b))

Western will respond to EE/RE report request with 30 days of receiving the request.

## **CHECKLIST**

1. Does the EE/RE report include the name, address, phone number, email, and Web site if applicable, and contact person (905.17(d) (1))?
2. Does the EE/RE report specify the authority or requirement to complete the EE/RE report, including the source of the requirements, such as number, title, date, and jurisdiction of law (905.17(d) (2))?

3. Does the EE/RE report include a description of the customer's required energy efficiency and/or renewable energy activities (905.17(d) (3))?
4. Does the EE/RE report include the level of investment or expenditure on energy efficiency and/or renewable energy, and quantifiable energy savings or use goals, if defined by the EE/RE reporting requirement (905.17(d) (3) (i))?
5. Does the EE/RE report contain annual actual or estimated energy and/or capacity savings, if any, associated with energy efficiency and resulting from the EE/RE reporting requirement (905.17(d) (3) (ii))?
6. Does the EE/RE report contain actual or estimated energy and/or capacity, if any, associated with renewable energy and resulting from the EE/RE reporting requirement (905.17(d) (3) (iii))?
7. Does the EE/RE report contain a description of the energy efficiency and/or renewable energy activities to be undertaken over the next 2 years as a result of the EE/RE reporting requirement (905.17(d) (3) (iv))?

#### **Maintaining Energy Efficiency/ Renewable Energy Reporting Status**

1. Every year on the anniversary of Western's approval of the first EE/RE report, customers choosing this option must submit an annual EE/RE letter to Western containing summary information identifying customer annual energy and capacity savings associated with energy efficiency, if any (905.17(g)).
2. The letter must contain annual energy and capacity associated with renewable energy, if any (905.17(g))
3. The letter must verify that the customer remains in compliance with the EE/RE reporting requirement (905.17(g)).
4. The letter must include a revised description of customer DSM and/or renewable energy activities if the description from the EE/RE report has changed or expired (905.17(g)).