

# Small Customer Plan 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).

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. Small customers may request to submit a Small Customer Plan (SCP) instead of an IRP if (1) the annual energy sales/usage is less than 25 GWh, or (2) they are end-users. Requests from electric utilities must include data on total annual energy sales and usage for the previous five years. Western will average this data to determine overall annual energy sales and usage so that uncontrollable events, such as extreme weather, do not distort leveled energy sales and usage. Requests from end-use customers must only document that the customer does not purchase electricity for resale.

Western will respond to small customer status requests within 30 days of receiving the request.

## **CHECKLIST**

1. Does the SCP consider all reasonable opportunities to meet future energy service requirements using demand side management techniques, renewable energy resources, and other programs that provide retail consumers with electricity at reasonable cost (905.15(b) (1))?
2. Does the SCP minimize to the extent practical, adverse environmental effects (905.15(b) (2))?
3. Does the SCP provide, in summary form, the customer name, address, phone number, email and Web site if applicable, and contact person (905.15(b) (3) (i))?
4. Does the SCP identify the type of customer (905.15(b) (3) (ii))?
5. Does the SCP, in summary form, provide current energy and demand profiles, and data on total energy sales and usage for the previous 5 years for utility customers, or current energy and demand use for end-use customers, which Western will use to verify that customers qualify for these criteria (905.15(b) (3) (iii))?

6. Does the SCP, in summary form, provide information on future energy services projections (905.11(c) (2) (iv))?
7. Does the SCP, in summary form, **explain how** all reasonable opportunities to meet future energy service requirements using demand side management techniques, renewable energy resources, and other programs that provide retail consumers with electricity at reasonable cost were considered (905.15(b) (3) (v))?
8. Does the SCP, in summary form, **explain how**, to the extent practical, adverse environmental effects will be minimized (905.15(b) (3) (v))?
9. Does the SCP, in summary form, have an action plan identifying actions to be implemented over the customer's planning timeframe (905.15(b) (3) (vi))?

### **Maintaining Small Customer Status**

1. Every year on the anniversary of Western's approval of the plan, small customers must submit a letter to Western verifying that either their annual energy sales and usage is 25 GWh or less averaged over the previous 5 years, or they continue to be end-use customers.
2. The letter must identify their achievements against targeted action plans, as well as the revised summary of actions if the previous summary of actions has expired.