

Integrated Resource Plan Review and Evaluation Checklist

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

In general, each customer must address its power resource needs in an IRP prepared and submitted to Western (905.10(a)). IRPs must consider electrical energy resource needs (905.11(b)). In order to satisfy the specific requirements of the regulation, Western must address the following questions. If Western concludes that the customer has satisfactorily addressed the criteria in the regulation as evidenced by an affirmative response to these questions, and that the IRP is otherwise reasonable, Western should approve the IRP.

CHECKLIST

1. Does the IRP evaluate the full range of alternatives for new energy resources (905.11(a))?
 - a. New generating capacity?
 - b. Power purchases?
 - c. Energy conservation and efficiency?
 - d. Cogeneration and district heating/cooling applications?
 - e. Renewable energy resources?
2. Does the IRP provide adequate and reliable service to the customer's electric consumers (905.11(a))?
3. Does the IRP take into account the following necessary features for system operation (905.11(a))?
 - a. Diversity?
 - b. Reliability?
 - c. Dispatchability?
 - d. Other risk factors?
4. Does the IRP take into account the ability to verify energy savings achieved through energy efficiency (905.11(a))?
5. Does the IRP take into account the projected durability of such savings measured over time (905.11(a))?
6. Does the IRP treat demand and supply resources on a consistent and integrated basis (905.11(a))?

7. The IRP must consider electrical energy resource needs. The IRP may, at the customer's option, consider water, natural gas, and other energy resource options (905.11(b)).

8. Does the IRP identify and compare resource options? An assessment and comparison of existing and future supply and demand-side resource options available to the customer based on its size, type, resource needs, geographic location, and competitive situation must be conducted. The options should relate to the customer's unique resource situation as determined by profile data (service area, geographical characteristics, customer mix, historical loads, projected growth, existing system data, rates, financial information, load forecasts, etc.) (905.11(b)(1))?

- a. Supply-side options include, but are not limited to, purchased power contracts, and conventional and renewable generation options (905.11(b)(1)(i)).
- b. Demand-side options alter the customer's use pattern to provide for an improved combination of energy services to the customer and ultimate consumer (905.11(b)(1)(ii)).
- c. Considerations that may be used to develop potential options include cost, market potential, consumer preferences, environmental impacts, demand or energy impacts, implementation issues, revenue impacts, and commercial availability (905.11(b)(1)(iii)).

9. Does the IRP clearly demonstrate that decisions were based on a **reasonable** analysis of the options (905.11(b)(1)(iv))?

10. Does the IRP include an action plan describing specific actions the customer will take to implement the IRP (905.11(b)(2))?

11. Does the IRP list the time period that the action plan covers (905.11(b)(2)(i))?

12. Does the IRP include an action plan summary consisting of (905.11(b)(2)(ii)(A-C)):

- a. Actions the customer expects to take in accomplishing the goals identified in the IRP?
- b. Milestones to evaluate accomplishments of those actions during implementation?
- c. Estimated energy and capacity benefits for each action planned?

13. Does the IRP, to the extent practicable, minimize adverse environmental effects of new resource acquisitions and document these efforts (905.11(b)(3))?

14. Does the IRP include a qualitative analysis of environmental effects in a summary format (905.11(b)(3))?

15. Does the IRP provide ample opportunity for full public participation in preparing and developing the IRP (905.11(b) (4))?
16. Does the IRP include a brief description of public involvement activities (905.11(b) (4))?
 - a. How the customer gathered information from the public?
 - b. How public concerns were identified?
 - c. How information was shared with the public?
 - d. How public comments were responded to?
17. Does the IRP document that the MBA board approved the IRP, confirming that all requirements have been met (905.11(b) (4) (i))?
18. Does the IRP contain the signature of the MBA board's responsible official, or document passage of an approval resolution by the appropriate governing body (905.11(b) (4) (i))?
19. Does the IRP contain a statement that the customer conducted load forecasting? See (905.11(b) (5) for data that should be included in load forecasting.
20. Does the IRP contain a brief description of measurement strategies for identified options to determine whether the IRP's objectives are being met (905.11(b) (6))?
21. Does the IRP identify a baseline from which the customer will measure the benefits of IRP implementation (905.11(b) (6))?
22. Does the IRP specify the responsibilities and participation levels of individual members of the MBA and the MBA (905.12(b) (2))?

Integrated Resource Plan Reporting Status:

1. Every year on the anniversary of Western's approval of the first IRP, customers must submit an annual IRP status report to Western.
2. The annual report must describe accomplishments achieved under the action plan, including projected goals and implementation schedules, and energy and capacity benefits and renewable energy developments achieved as compared to those anticipated.
3. The annual report shall also set forth a revised summary of actions if the previous summary of actions has changed or expired.