



American Public Power Association

2017 RP₃ APPLICATION

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Discipline: Utility Demographics

Subsection: Employee Demographics

Question 0.0.0:

**This is an informational question only.*

Please fill in the number of employees **in your electric department** for each category below. Please **attach** an organizational chart and/or other supporting documentation that clearly illustrates your electric employee breakdown. For multi-service utilities (e.g. electric, gas, water, etc), look at the help text for additional information to complete this section.

Required – Overall Employee Demographics:

Employee Category	Number of Employees
Total for Entire Utility	
Total for Electric Only	
Total Professional/Office Employees (ex: HR, legal, accounting, etc)	
Total Operational Employees (ex: lineworkers, engineers, electricians, etc)	

Optional – Additional Employee Details:

NOTE: Total for each category should match overall number above.

Employee Category	Number of Employees
Professional/Office Employees	
Management (ex: general manager, office manager)	
Legal (ex: general counsel, attorney)	
Accounting (ex: billing manager, cashier)	
Administrative (ex: secretary, bookkeeper)	
Human Resources (ex: HR manager, payroll specialist)	
Other	
Operational Employees	
Lineworkers	
Engineers	
Electricians	
Metering Employees	
Generation Employees	
Transmission Employees	
Distribution Employees	
Other	

Please also **attach** a high-quality photo featuring your utility logo or your RP₃ team with your utility logo. This will be used during the awards ceremony at the E&O Conference should your utility achieve designation status.

Discipline: Reliability

Subsection: Reliability Indices Collection

Question I.A.1:

Does your utility monitor and track reliability data?

Yes

If **yes**, what method(s) does your utility use to monitor and track reliability data?

Hand calculations

(Attach Sample)

American Public Power Association's eReliability Tracker service

Alternate software program

(Attach Sample Screenshot)

Other method

If **other**, describe in detail the process your utility uses and/or attach a screenshot.

No

Question I.A.2:

Use the table below to indicate each reliability statistic tracked by your utility and provide the most recent year's calculation (**January 1, 2016 - December 31, 2016**). Please list the preferred time period of measure for each index below. If your utility uses a different time period or method of calculating the index, explain in the area below. Refer to the Institute of Electrical and Electronics Engineers (IEEE) 1366 standard for more information on reliability statistics. Also indicate your organization's goals/targets for each tracked index.

Please note that if the data is imported from the eReliability Tracker, the indices will be calculated by having an end and start date of the current date (the date in which the indices are imported) and a year prior to that date, respectively.

Index	Value of Index	Utility Goal/Target
SAIDI (Minutes/Year)		
CAIDI (Minutes/Year)		
ASAI (% based on year)		
MAIFI (Interruptions per year)		
SAIFI (Interruptions per year)		
Other		

Other: If **other**, please describe the index your utility uses.

Discipline: Reliability

Subsection: Reliability Indices Use

Question I.B.1:

Does your utility use service reliability indices to maintain and improve utility operations?

Yes

If **yes**, how is your utility using service reliability indices to improve the system?

NOTE: Leading practice is to use at least four of the methods listed below.

Check **all** that apply:

- Worst performing circuit identification
- Vegetation management (e.g., tree trimming)
- Install covered wire
- Distribution circuit inspection program
- Convert overhead to underground
- Install lightning arresters
- Install animal/squirrel guards
- Perform thermographic circuit inspections
- Perform transformer load management
- Economic development
- Send indices to Public Utilities Commission/City Council/Governing Board
- Produce publicly available report
- Underground cable replacements/injections and testing
- Other

If **other**, please describe or include attachment:

No

Question I.B.2:

Does your utility participate in a national reliability benchmarking survey or service?

Yes

If **yes**, identify the type of reliability survey your utility participates in.

Check **all** that apply:

- Our utility participates in the American Public Power Association's Distribution System Reliability & Operations Survey.
- Our utility uses the Association's eReliability Tracker benchmarking service.
- Our utility participates in some other reliability survey or service.

Attach documentation of the other survey or service that your utility uses.

No

Discipline: Reliability

Subsection: Mutual Aid

Question I.C.1:

Does your utility participate in a mutual aid program?

Yes

If **yes**, please identify which program types(s) your utility participates in and provide supporting documentation.

Check **all** that apply:

- National – American Public Power Association
- National - other
- Regional
- State
- Other

If **other**, please explain:

No

Discipline: Reliability

Subsection: Disaster Plan

Question I.D.1:

Does your utility have a disaster plan, or does your city have a disaster plan which includes an electric utility specific section?

NOTE: Leading practice is for disaster plans to include detailed information on how utility personnel should proceed in a disaster.

NOTE: A utility should review or revise their disaster plan on an annual basis.

Yes

If **yes**, attach an executive summary, table of contents, or the completed version of your utility's disaster plan including the revision date.

If **yes**, please indicate below when your utility's disaster plan was last revised or reviewed.

0-1 years ago

1-3 years ago

Over 3 years ago

No, we are in the process of developing a plan.

If **in development**, attach an executive summary, table of contents, or the completed portions of the draft from your utility's disaster plan including a draft date.

No

Discipline: Reliability

Subsection: Physical Security

Question I.E.1:

Has your city/utility addressed its physical security needs?

Yes

If **yes**, check the boxes below to indicate what protective measures have been taken in the area of physical security.

Check **all** that apply:

Security policy and plan awareness training for all employees

Continuous barrier (fence or wall) around sensitive utility infrastructure

Alarms and surveillance systems where needed

Lighting around sensitive utility infrastructure

Procedures for managing access control, such as recovering all keys and access cards from terminated utility employees or replacing locks on perimeter doors and gates as needed

Required identification for all visitors entering utility's facilities and access cards for employees

Background investigation concurrent with employment offer for all employees and special additional screening for fiduciary positions

Other

If **other**, describe the measures your utility uses:

No

Discipline: Reliability

Subsection: Cyber Security

Question I.F.1:

Does your utility have a policy or procedure in place that covers both cyber event prevention and cyber response in the event of a cyber security incident?

Yes

If **yes**, please check the boxes below to indicate the items addressed by your utility.

Check **all** that apply:

- Maintain an inventory of critical cyber or information technology assets
- Monitor networks and assets for suspicious activities
- Plan for relocation of information systems
- Plan for the recovery of information and system performance
- Ensure relevant employees are trained to respond to incidents
- Establish emergency contact information for cyber specific incidents
- Plan to identify new preventative measures
- Plan for conducting a business impact analysis
- Other

If **other**, please explain:

No

Question I.F.2:

Has your utility trained all relevant employees in cyber security awareness?

Yes

If **yes**, please check the boxes below to indicate the topics addressed in the training.

Check **all** that apply:

- Utility cyber security event policy and risk mitigation plan

- Understanding of sensitive information
- Use of security protections such as firewalls, data encryption, and password strength
- Additional training for employees with access to critical assets
- Assigning cyber security responsibilities to appropriate personnel
- Detecting and avoiding phishing or spam email
- Using secure communication networks
- Procedures for incident response
- Other

If **other**, please explain:

No

Question I.F.3:

Does your utility conduct periodic cyber security assessments of its system including identifying risks and potential mitigation actions?

NOTE: This assessment would involve looking at all cyber security risks including security gaps in network-connected devices.

Yes

If **yes**, what is the schedule for assessments of your system?

NOTE: The Leading practice is for a utility to conduct these assessments annually **and** when new systems are implemented.

Check **all** that apply:

- Every year (annually)
- Every 1-3 years
- When new systems are implemented
- Other

If **other**, please explain:

No

Discipline: Safety

Subsection: Safety Manual

Question II.A.1:

Does your utility use a safety manual?

Yes

If yes, please choose below:

Our utility uses the American Public Power Association's Safety Manual.

Which edition of the Association's Safety Manual is your utility currently

NOTE: Leading practice is to use the most updated edition.

Our utility uses a safety manual developed in-house.

When was your utility's safety manual last revised or reviewed?

Please attach a copy of your utility's safety manual.

NOTE: Leading practice is to revise or review the safety manual at least every five years.

NOTE: The date of revision or review must be clearly shown on any documentation you provide.

Our utility uses another safety manual or innovative approach.

Please attach documentation of your utility's innovative approach. Dates of any updates/reviews should be clear.

No

Question II.A.2:

Are all utility employees directed by utility management to use, read, and understand the designated safety manual?

Yes

If yes, **please provide documentation** of directive.

NOTE: Examples of a directive include minutes from a city/utility board meeting, a copy of a formal memo issued to all employees, a copy of an e-mail sent to all employees from utility management (such as General Manager), etc.

NOTE: A signed front page of a safety manual **does not constitute a formal directive** to all employees to use the safety manual, and will not be considered as documentation of a directive.

If **yes**, does your utility formally review the manual with employees on an annual (or more frequent) basis and when a new revision is published?

NOTE: This review can be a special meeting, or part of a regular safety meeting.

Yes

No

No

Discipline: Safety

Subsection: Safe Work Practices

Question II.B.1:

Does your utility conduct regular safety meetings for electric employees?

Yes

If **yes**, how often are the meetings held? Please indicate the frequency and duration (minutes/hours) of meetings for operations/field and management/administrative employees.

For both employee groups, **please attach a sample** attendee list from a safety meeting along with an agenda or outline and any handouts or materials for that meeting.

NOTE: Leading practice for meeting frequency and duration has been established as at least one hour per month for operations/field employees, and one hour per quarter for management/administrative/other employees. **Job briefings, such as tailboard discussions, are not considered safety meetings for the purpose of this question.**

Operations/Field Employees

Daily

Duration:

Monthly

Duration:

Quarterly

Duration:

Semi-Annually

Duration:

Other

Please explain:

Management/Administrative/Other Employees

Daily

Duration:

Monthly

Duration:

Quarterly

Duration:

Semi-Annually

Duration:

Other

Please explain:

No

Question II.B.2:

Does your utility have a practice or written policy to enforce its safety rules, including conducting monthly (or more often) job site inspections?

Yes

If yes, **please attach a copy** of your utility's practice/policy **and** job site inspection form.

No

Question II.B.3:

Does your utility require job briefings to be held for electric employees?

Yes

If **yes**, does your utility require the briefings to be documented?

Yes

If **yes**, please attach a sample job briefing template.

No

No

Question II.B.4:

Does your utility have a practice or procedure to conduct a safety orientation with all non-utility employees (e.g. contractors, mutual aid situations) working on your system to ensure compliance with your utility's safety standards?

Yes

If **yes**, please attach an example.

No

Question II.B.5:

Does your utility change its safety practices/rules or takes action to promote safety based on findings from accident investigations or near-miss reports when appropriate? (i.e. email to all staff to promote caution from a previous accident, changing a policy to reflect the accident, etc.)

NOTE: If no accidents or near-misses have occurred during the review period, the utility will receive full points if they provide a standard report form for near-misses and accidents.

Yes

If **yes**, provide examples of the changes made based on investigation if an accident or near-miss has occurred.

Please **attach a sample** copy of a report form.

No (either our utility does not change its safety practices/rules based on the findings OR our utility does not conduct accident investigations or near miss reports).

Question II.B.6:

Does senior management actively participate in the utility's safety training initiatives for all employees at least once per year?

Yes

If **yes**, specify **all** levels of involvement by checking the relevant box(es) below:

- Electric superintendent/general manager
- Management or department head
- Human resources
- Operations & maintenance
- Other

If **other**, please list:

No

Question II.B.7:

Does your utility provide annual refresher training for OSHA-type issues?

Note: Leading practice is for a utility to provide at least four types of safety training each year.

Yes

If **yes**, specify all types of safety training by checking the relevant box(es) below:

- Bucket-truck rescue
- Confined space rescue/permit required confined spaces
- CPR/AED
- Cranes/derricks
- Hazardous energy control
- HazMat
- Job briefing
- Ladder safety
- Lockout/tagout
- Pole-top rescue
- Enclosed spaces and working underground
- Underground electric transmission and distribution work
- Hazard recognition in trenching and shoring
- Other

If **other**, please list:

No

Question II.B.8:

Does your utility provide Automated External Defibrillators (AEDs) at all work site locations?

NOTE: "At all work site locations" means immediately available in any work site environment, from an office setting to a field job site; if employees are working at a site in the field, there must be an AED present.

Yes

If **yes**, please **describe** how the utility ensures that AEDs are available when needed.

No

Question II.B.9:

Has your utility performed an arc hazard assessment for all areas where your personnel are exposed to electric hazard?

Yes

If **yes**, has your utility notified and trained all affected employees regarding the arc hazard requirements for each type of job?

Yes

No

No

Question II.B.10 Continued

Does your utility conduct disaster drills that are electric-utility specific?

Yes

If **yes**, indicate which drill(s) were conducted and when the drill(s) were conducted in 2015, 2016, and 2017 (actual or planned drills), where applicable.

Attach a description of the procedures for each drill. Drills planned for the latter half of 2017 can also be included.

NOTE: An actual event can qualify as a "drill" **only if** the utility determined lessons learned from the event. Please provide documentation of lessons learned, if applicable.

NOTE: Leading practice is to conduct a minimum of one disaster drill each calendar year.

Drill Type	Drill Type: Table Top (T), Field (F), or Both (B)	Dates of 2015 Drills Performed	Dates of 2016 Drills Performed	Dates of 2017 Drills Performed (Actual or Planned)
Earthquake				
Fire				
Flood				
Hurricane				
Snow/Ice Storm				
Terrorist Attack				
Tornado				

Other				
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If **other**, please list other drill types and any additional information below:

No

Discipline: Safety

Subsection: Benchmarking

Question II.C.1:

Does your utility participate in safety index benchmarking?

Yes

If **yes**, please indicate the ways in which your utility benchmarks/participates.

The Association's 's Safety Awards of Excellence

OSHA 300 form (please attach form)

Other benchmarking survey/service

Please Explain:

If **yes**, please provide your utility's incidence rate:

Note: Incidence rate = (Total number of cases * 200,000) / Total worker hours of exposure

No

Discipline: Workforce Development

Subsection: Succession Planning and Recruitment

Question III.A.1:

Has your utility identified the demographics of its employees to prepare for succession planning?

Yes

If **yes**, what items does your utility identify for each employee?

Age

Eligibility for retirement

If your utility tracks this, what percent of employees are eligible for retirement within the next 5 years?

Position

Other

If **other**, please explain:

No

Question III.A.2:

Has your utility addressed knowledge management relative to the changing workforce?

Yes

If **yes**, please check **all** that apply, and please attach supporting documentation or describe how you utilize these tools:

Developed a succession plan

Cross training

Shadowing

Leadership programs

Procedure manuals/desk reference materials/task manuals for key positions

Hiring replacements for critical positions prior to departure

Establishing relationships with universities and trade or technical schools

Other.

If **other**, please explain:

No

Question III.A.3:

Does your utility have practices or procedures in place to address employee recruitment and retention?

Yes

If **yes**, please check **all** that apply:

- Established recruitment procedure and/or policy
- Maintain competitive total compensation packages
- Employee recognition
- Flexible hours
- Option to work from home
- Other.

If **other**, please explain:

No

Discipline: Workforce Development

Subsection: Employee Development

Question III.B.1:

At the time of annual review, or other time of the year, does your utility set personal and/or professional goals for every employee?

NOTE: For purposes of this application, a generic apprentice program is not considered part of a training program.

To be considered for the RP₃ application, specific personal and/or professional goals must be set for each individual.

Yes

If **yes**, please provide a description via an attachment of an example of development plan(s) **for each employee category** identified.

If **yes**, please indicate which category/categories of employees your utility prepares development plans and attach a sample development plan and/or goal for each category (you may black out the employee name for privacy if desired).

NOTE: A utility should have development plans for all employee categories. Annual reviews can fulfill this requirement, as long as the review incorporates defined development goals for employees.

NOTE: An individual development plan does not need to be an outline for employee promotion within the utility; rather, it should be designed to offer steps for employees to better themselves as individuals and employees.

- Operations/field employees (including lineworkers, meter readers, etc.)
- Management level employees
- Office personnel (including engineers, administrative, etc.)
- Other

If **other**, please identify:

- No

Discipline: Workforce Development

Subsection: Education, Participation and Service

Question III.C.1:

Does your utility have a written education policy, procedure, or program for professional development?

- Yes

If **yes**, attach a copy of your utility's **written education policy/procedure/program**.

If **yes**, what area(s) does your utility's policy, procedure or program cover?

Check **all** that apply:

- Tuition/reimbursement for courses, workshops, certificates, and credentials
- Internal university/school
- Alliance or agreement with an external university/school
- Other

If **other**, please describe:

If **yes**, indicate below how your utility communicates its policy/procedure/program.

Check **all** that apply:

- E-mail
- Internal newsletter
- Office posting (e.g., to bulletin boards in lunchroom)
- Other

If **other**, please describe:

If **yes**, how frequently is the policy/procedure/program communicated to employees?

NOTE: Leading practice is to communicate the policy/procedure/program upon hire **and** regularly throughout the year **as well as** when changes are made. This can happen at the time of annual performance evaluations.

Check **all** that apply:

- Upon hire
- Monthly
- Quarterly
- Annually
- When policy/procedure/program changes
- Other

If **other**, please describe:

No

Question III.C.2:

Does your utility support networking and personal/professional development by encouraging attendance across all employee groups at a wide variety of continuing education classes, workshops, local/state/national conferences, and attendance/participation in user/interest group meetings?

Yes

If **yes**, please provide a list with a representative sample of specific networking, development, and training opportunities attended by employees in different departments within the electric utility. **Be sure to include name of the event, type of the event (local, regional, national), employee group, and date of event.**

If **yes**, please indicate which types of networking and personal/professional development activities utility employees were involved in during the RP₃ application period (October 1, 2014-September 30, 2017) by marking the appropriate boxes in the table below:

Type	Operations/Field	Management/Administrative	Other (Please explain in attachment)
Classes/Workshops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local Conferences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State/Regional Conferences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

National Conferences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User/Interest Group Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

No

Question III.C.3:

Does your utility encourage and support active membership in professional and community organizations and service on committees and boards that benefit the utility?

Yes

Active membership in professional and community organizations

Yes

If **yes**, attach a representative listing of memberships your utility employees participated in during the last three years (October 1, 2014-September 30, 2017). Please include name of the employee, name of the organization and dates served.

NOTE: Include only electric employees and members of your utility's governing board.

No

Active service on committees and/or boards

Yes

If **yes**, attach a representative list of committees and/or boards your utility employees participated in during the last three years (October 1, 2014-September 30, 2017).

NOTE: Include only electric employees and members of your utility's governing board.

No

No

Discipline: System Improvement

Subsection: Research and Development

Question IV.A.1:

Is your utility a member of a research and development program?

Yes

If yes, please attach **proof of membership**. (For proof of DEED membership please see help text)

If **yes**, please indicate the specific type of program that your utility participates in.

- Our utility is a member of the Association's R&D program, DEED
- Our utility is a member of EPRI's R&D program
- Our utility is a member of our state or regional R&D program

Please provide program name:

Other

If **other**, describe in detail the research and development program your utility participates in:

Please indicate how your utility utilizes research and development program(s).

Check **all** that apply and if applicable, please list or attach project(s) or grant(s) below:

Currently involved in grants/scholarships.

Applied for grants/scholarships in past 3 years

Review of relevant research projects conducted by other utilities, for application to projects your utility is conducting (for example, DEED Project Database, DEED-published documents, or EPRI research papers)

Use of software or technology developed by a utility research group (for example, GridLAB-D)

Other

If **other**, please list:

No

Discipline: System Improvement

Subsection: System Maintenance and Betterment

Question IV.B.1:

Does your utility have and maintain records of all plant assets requiring maintenance, including a documented maintenance and inspection schedule?

Yes

If **yes**, please attach a representative sample of maintenance or inspection records for assets identified below.

If **yes**, in the chart below please provide the schedule for maintenance/inspection for all plant assets requiring maintenance on your system.

NOTE: Inspections are not limited to the list of examples provided in the chart below.

Asset Requiring Maintenance	Schedule for Maintenance/Inspection (e.g., yearly, every 10 years, daily, N/A)
Cable testing	
Capacitor switch testing	
Control house	
Crossarm/insulator testing/inspections	
Cut-out testing/inspections	
Instrument transformer verification	
Meter testing	
Pedestal inspections (single phase)	
Pole testing	
Relay testing	
Substation battery testing/inspection	
Substation switch testing	
Substation transformer testing/inspections	

Transformer inspections (3-phase)	
Tree trimming	
Other	

If **other**, please list or include attachment.

No

Question IV.B.2:

Does your utility have any processes/programs in place that address overall system loss?

Yes

If **yes**, what are your utility's current system losses? (Percentage)

NOTE: Typical range is between 3-8%

If **yes**, please attach documentation showing how your system loss was calculated.

If **yes**, check the applicable method(s) used to lower system losses.

Check **all** that apply:

- Operation improvement (balancing loads and phases)
- Adding parallel feeders to reduce loading
- Volt/VAR management (capacitors, equipment upgrades, controllable loads, etc.)
- Distribution transformer management (e.g., analysis/upgrade, transformer load management to reduce losses, multiple transformers versus single transformer based on system analysis, voltage management, etc.)
- Theft prevention
- Calculate and consider losses in improvement decisions
- Voltage upgrade
- Conductor upgrade
- Other

If **other**, describe in detail:

No

Question IV.B.3:

Has your utility performed an internal or external analysis or planning study to help evaluate the long-term needs of your utility's system infrastructure?

NOTE: If load forecast is not performed, please attach a statement as to why.

Yes

Please attach your utility's analysis or planning study.

If **yes**, check all items below that are addressed in the analysis or planning study:

- Load forecast
- Contingency analysis (e.g., alternate feed)
- Fuse coordination/fault analysis
- Project identification
- Equipment age analysis
- Land and environmental analysis (e.g., SPCC, ROW)
- Capacity studies
- Load control (demand response)
- Other

Please describe or include attachment:

If **yes**, please indicate the time frame for your utility's analysis or planning study:

- Conducted Annually/Ongoing Process
- Three Year System Plan
- Five Year System Plan
- Ten Year System Plan
- Other

Identify the year of your system plan (e.g., ___ Year System Plan)

No

If **no**, please provide an explanation as to why your utility does not conduct a load forecast.

Subsection: Financial Health

Question IV.C.1:

Please provide a detailed description of projects that your utility has recently completed or will be working on in the near term (with a focus on the **past two years** and the **next two years**) as a way to continually improve its system.

Please attach a copy of your capital and O&M budget, along with detailed descriptions and a funding breakdown of those projects.

Submission of your utility’s capital improvement plan will suffice for this question, as long as it includes detailed descriptions of projects with a funding breakdown and any other information that will provide a clear picture of your utility’s near-term capital and O&M projects. To sustain system excellence, a utility should regularly reinvest in maintaining and improving its system.

If your utility does not have a formal capital improvement plan, your write-up should be similar to what would be submitted to your utility and/or city board or council for approval and to inform them of projects to be completed in the current budget year. The write-up should include associated costs and projected budgets for all projects conducted in the past two years and planned for the next two years.

A document with project lists and estimated costs should be accompanied by detailed project descriptions.

Suggested items that may be addressed in this section include:

- Distribution line extensions, replacements, or upgrades
- Substation projects (new installation or upgrades)
- Transmission replacements or extensions
- Upgrades to utility software/hardware
- Equipment upgrades (trucks/buildings/etc.)
- Reconductoring projects
- General maintenance

You may use the area below to provide a list with descriptions and supporting information. **Separate attachments for each item are highly encouraged.**

Question IV.C.2:

Does your utility have a policy or procedure to address the impact of customer-owned distributed energy resources (DER) on your utility's distribution system?

Yes

If **yes**, please select the areas that your utility has addressed.

Check **all** that apply:

- Safety
- Power Quality
- System Optimization/DER circuit hosting capacity
- Interconnect Agreement
- Other

If **other**, please explain:

No

Question IV.C.3:

Has your utility implemented any policies and procedures to ensure financial health and stability?

Yes

If **yes**, what method(s) does your utility use to ensure financial health and stability?

- Has a cash reserve policy in place
- Financial ratio management
- Routinely conducts a cost of service study

Please provide date of last cost of service study and period covered.

Other

If **other**, please explain:

No