



# SMART ENERGY PROVIDER

American Public Power Association

## SEP Application

December 2025



## Application Sections

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## Contact Information

Name	Title		
Utility Name			
Address	City	State	Zip
Phone	Email		

## Utility Demographics

# of residential customers served:
# of commercial customers served:
# of employees (FTE):
# of full time equivalent “smart energy” employees (NOTE: This includes energy services, efficiency, demand response, sustainability, and environmental-related employees, but excludes employees that spend all their time on regulatory compliance):
Average annual MWh sales:

## I. Smart Energy Information

### Question I.A.1 Goals and Objectives

Has your utility established “smart energy” goals, objectives, and/or plans?

*Note: For the purposes of this program, smart energy encompasses the areas of energy efficiency, distributed energy resources, renewable energy, and environmental initiatives conducted by a utility as part of efforts to provide low-cost, quality, safe, and reliable electric service.*

*Note: If smart energy goals, objectives, and/or plans are designed by Joint Action Agency or a third party, your utility must show that these goals, objectives, and/or plans are specific to and are implemented in your service area.*

- Yes
- No

If **yes**, please provide a description and/or attachment that includes the actionable items and approved budget of your “smart energy” goals, objectives, and/or plans. You can attach supporting materials, examples, or documentation of your utility’s “smart energy” goals, objectives, and/or plans if you believe this will help the SEP Review Panel understand your utility’s “smart energy” plan.

*Note: Please write “See attachment” if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file ‘utility name\_A1\_document title’.*

*Note: Attachments must be branded with your utility name/logo. Website screenshots should include the utility name/logo.*

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If **yes**, how are your smart energy goals or plans reflected in your planning for energy demand? Check all that apply.

- Capital plans
- Distribution system planning
- Resource planning for energy demand
- Other: \_\_\_\_\_

#### Question I.A.2 Research and Development

What mechanisms does your utility use to engage in and/or learn from research and development on the topics of energy efficiency, distributed energy resources, and/or sustainability?

Check all that apply.

- Direct involvement in a research and development initiative, such as applying for or receiving an APPA Demonstration of Energy Efficiency Developments (DEED) grant, implementing and evaluating emerging technologies or processes, and conducting studies to gain insights and drive innovation.
- Engaging in knowledge-sharing and learning through national, utility-focused research and development programs (e.g. participation in APPA DEED webinars and similar collaborative initiatives)
- Investing in research and development through utility-focused programs such as the Electric Power Research Institute (EPRI), APPA DEED, or other regional, state, or local utility-specific initiatives

- Collaborating directly with national laboratories, such as Lawrence Berkeley National Laboratory, in a Research and Development program. (Additional examples can be found in the application guide)
- Other, explain or attach a description or documentation:  
*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_A2\_other'.*

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- None

#### Question I.A.3 Customer Financial Assistance

Does your utility promote, facilitates, or offers financing options, tax credits, or grants to support participation in any of its “smart energy” programs (e.g., on-bill or off-bill financing, PACE, low interest loans, federal or state loans, grants, tax credits, local financing)?

*Note: This includes any financing options offered during the past three years.*

- Yes
- No

If **yes**, please describe or attach supporting materials, examples, or documentation of how your utility promotes, facilitates, or offers financing options.

*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_A3\_document title'.*

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#### Question I.A.4 Benchmarking

Does your utility collect, analyze, and compare any “smart energy” program savings or related cost data with benchmarking or performance data from other similar utilities or organizations?

- Yes
- No

If **yes**, which program areas are compared:

- Energy efficiency/distributed energy resources
- Environmental/sustainability
- Customer satisfaction
- Building or transportation electrification

If **yes**, how often are benchmarking or performance data compared?

- Yearly
- Every 2-3 years
- Every 4-5 years
- Other: \_\_\_\_\_

#### Question I.A.5 Equity Programs

Does your utility ensure equitable access for all customers to participate in its smart energy programs (e.g., translation services, ADA-compliant resources, tiered income-based rebates, income-based technical assistance)?

- Yes
- No

If **yes**, please describe or attach supporting materials, examples, or documentation of your equity programs.

*Note: Please write “See attachment” if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file ‘utility name\_A5\_document title’.*

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## II. Energy Efficiency and Distributed Energy Resources

### Question II.B.1 Supply-side Programs

Does your utility engage in supply-side energy efficiency programs?

- Yes
- No

If **yes**, which of the following supply-side energy efficiency programs does your utility engage in? Check all that apply.

- Conductor or line loss upgrades
- Conservation voltage reduction
- Transformer efficiency upgrades
- VAR support with capacitor banks
- Active management of distribution system to limit line loss
- Phase balancing and re-phasing to some portions or all of a feeder
- Infrared Scans
- Grid Distributed Energy Resource Management System
- Other, please explain or attach supporting materials or documentation of how it improves efficiency:

*Note: "Other" must be a distinct, unique program, not a subset of the options above.*

*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_B1\_other'.*

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- None

## Question II.B.2 Demand Response Programs

Does your utility offer demand response programs?

- Yes
- No
- Study conducted, not right fit

If a study was conducted, but it didn't fit your system, please describe or attach study materials, or executive summary.

*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_B2\_study conducted'.*

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If yes, which of the following demand response programs does your utility offer? Check all that apply.

*Note: This includes programs offered through third party contractors and other types of partnerships (e.g. direct payment to retailers). Rebates for installing thermostats, water heaters, etc., without signaling or utility control aspect is NOT considered a demand response program for purposes of the SEP designation.*

*Note: Energy storage programs included in your response to this question cannot be counted in Question II.B.8.*

Demand Response Program	Check
Dispatchable energy storage	<input type="checkbox"/>
Utility controlled customer equipment (e.g., water heater control, HVAC, EV charging, appliances, smart thermostat) Note: Visit the Application Guide to read about what is considered "utility controlled"	<input type="checkbox"/>
Utility notification programs (e.g., behavioral demand response, etc.) Note: This program must have a component telling customers to reduce their energy usage Note: Visit the Application Guide to read about what is considered a "utility notification program"	<input type="checkbox"/>

Interruptible customer rates/contracts	<input type="checkbox"/>
Thermal water heating program/incentives	<input type="checkbox"/>
Cold water storage for chiller systems program/incentives	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>
<i>Note: "Other" must be a distinct, unique program, not a subset of the options above.</i>	

For each checked box, please describe or attach supporting materials, examples, or documentation of each of your selected financial incentives/rebates.

*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_B2\_checkbox name'.*

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### Question II.B.3 Dynamic Pricing/Time Varying Rates

Does your utility offer dynamic pricing options for your customers or a subset of your customers?

*Note: This includes pricing options such as time-of-use, critical peak, and coincident peak rate structures.*

*Note: This does **NOT** include interruptible rates covered under Question II.B.2, Demand Response Programs.*

- Yes
- No

If **yes**, please describe or attach supporting materials, examples, or documentation of your dynamic pricing options.

*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_B3\_document title'.*

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#### Question II.B.4 Demand-side Energy Efficiency Programs

Does your utility offer demand-side energy efficiency programs?

*Note: For each attachment, name the file 'utility name\_B4\_checkbox name'.*

*Note: If you provided multi-page attachments, specify page numbers you are referencing.*

- Yes
- No

If **yes**, which of the following demand-side energy efficiency programs (including rebates and incentives) does your utility offer? Check all that apply.

*Note: This includes programs offered through third party contractors and other types of partnerships (e.g. direct payment to retailers).*

Energy Audits	Check
Commercial energy audits	<input type="checkbox"/>
Residential energy audits	<input type="checkbox"/>
Online/Virtual energy audits	<input type="checkbox"/>

Residential Efficiency Programs	Check
Energy efficient lighting and Energy Star appliances	<input type="checkbox"/>
Efficient new construction	<input type="checkbox"/>
Building envelope retrofits (e.g., sealing and insulation upgrades)	<input type="checkbox"/>
Heat, ventilation, and air conditioning (HVAC) (e.g., Heat Pumps, Condensing Furnaces, High SEER2 AC)	<input type="checkbox"/>
Electrified outdoor equipment (e.g., battery operated equipment: lawn mowers, leaf blowers, string and hedge trimmers)	<input type="checkbox"/>
Other: _____	
<i>Note: "Other" must be a distinct, unique program, not a subset of the options above.</i>	<input type="checkbox"/>
None	<input type="checkbox"/>

Commercial Efficiency Programs	Check
Energy efficient lighting and lighting controls	<input type="checkbox"/>
Efficient new construction	<input type="checkbox"/>
Building envelope retrofits (e.g., sealing and insulation upgrades)	<input type="checkbox"/>
Retro commissioning	<input type="checkbox"/>
Heat, ventilation, and air conditioning (HVAC)/variable frequency drive (VFD)/motors	<input type="checkbox"/>
Food service and refrigeration equipment	<input type="checkbox"/>
Other: _____	
<i>Note: "Other" must be a distinct, unique program, not a subset of the options above.</i>	<input type="checkbox"/>
None	<input type="checkbox"/>

Other Program Offerings	Check
LEED, Green Globes, RESNET HERS rating, BPI programs (excluding audits), or ISO 50001 (EnMS)	<input type="checkbox"/>
EPA, ENERGY STAR portfolio management resources (benchmarking)	<input type="checkbox"/>
Energy efficiency and behavioral education and outreach program	<input type="checkbox"/>
Strategic energy management program	<input type="checkbox"/>
Energy management information system (e.g., data dashboard, comparative analysis, online portal)	<input type="checkbox"/>
Online consumer efficiency product store	<input type="checkbox"/>
Other: _____	
<i>Note: "Other" must be a distinct, unique program, not a subset of the options above.</i>	<input type="checkbox"/>
None	<input type="checkbox"/>

For each checked box, please describe or attach supporting materials, examples, or

documentation of each of your selected financial incentives/rebates. **DO NOT** provide website links or very large attachments. If referencing a webpage, attach a screenshot of the relevant information from the website.

*Note: Please write “See attachment” if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file ‘utility name\_B4\_checkbox name’.*

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#### Question II.B.5 Tailored Energy Solutions for Specific Customer Groups

Are your energy savings programs marketed to or designed for specific customer segments, such as those that are underserved or hard to reach? If so, please check all specific customer groups you target.

- Customers located in areas with transmission & distribution constraints (either current or future)
- Low-to-moderate income residents
- Areas that are isolated or have low population density
- Small businesses
- Multi-family (owner-occupied)
- Owner/Renters
- Key accounts and business retention (large commercial/industrial)
- Non-English-speaking customers
- Customers on fixed incomes (e.g. senior citizens)
- Customers requiring medical equipment
- Other, please explain or attach supporting materials or documentation:

*Note: Please write “See attachment” if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file ‘utility name\_B5\_other’.*

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## Question II.B.6 E-mobility Programs

Does your utility currently offer e-mobility programs? If so, please check all that you offer.

- E-mobility rebate and/or grant (e.g., electric vehicles (EVs), electric bikes, electric buses, electric forklifts, etc.)
- Residential charging station rebate
- Commercial and/or multifamily charging station rebate
- Discounted/free charging
- Electric vehicle building codes
- Utility-owned public charging stations
- Electric vehicle education and outreach for customers (e.g. ride and drive events)
- Electric vehicle engagement and outreach to car dealers or manufacturers
- Demand response coordinated charging and/or discharging (e.g., customer notifications, vehicle-to-grid (V2G) program, etc.)
- Electric vehicle fleet support (e.g. make ready work for infrastructure to support private charging stations for customers/utility)
- Online EV resources and tools
- Other \_\_\_\_\_
- None

### Question II.B.7 Energy Storage Programs

Does your utility offer energy storage programs or initiatives? Check all that apply.

*Note: If your utility has run energy storage pilot programs during the last two years, you can select the corresponding checkboxes for those pilots.*

- Promoting energy storage infrastructure or running feasibility studies (e.g., interconnection agreement, accommodative building codes, etc.)
- Education for customers and/or vendors
- Energy storage incentives
- Utility-owned energy storage lease program
- Supply-side energy storage/community storage program

- Other \_\_\_\_\_
- Study conducted, not right fit
- None

#### Question II.B.8 Distributed Generation Programs

Does your utility offer distributed generation programs or initiatives (e.g., behind-the-utility or behind-the-retail meter solar, wind, or hydropower)? Check all that apply

*Note: If you already included energy storage programs in Question II.B.2, you cannot double count this program here.*

- Customer-owned program
- Incentivized rate structure
- Multiple-customers (shared) program
- Utility-owned/distributed
- Utility power purchase agreement (resources must be located behind the utility meter)
- Other, please explain or attach a description or documentation:

*Note: Please write “See attachment” if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file ‘utility name\_B8\_other’.*

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- None

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### III. Environmental and Sustainability Programs/Initiatives

#### Question III.C.1 Sustainability Programs

Which types of environmental/sustainability-related programs does your utility support? Check all that apply.

- Renewable energy supply acquisition program (utility scale)
- Landscaping/tree planting program
- Sustainability reporting
- Informational/educational program
- Voluntary green pricing
- Electronic waste program (e.g., appliances, lights)
- Paperless billing
- Other, please explain or attach a description or documentation:  
*Note: Please write "See attachment" in the text box below if you elect to attach supporting materials rather than write a description. For each attachment, please name the file 'utility name\_C1\_other'.*
- None

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#### Question III.C.2 Cross-Organizational Collaboration

Do staff and leaders from your electric utility collaborate with other infrastructure service providers (gas, water, wastewater, transportation, school districts, other city or state government departments, etc.) to optimize/improve environmental performance?

- Yes
- No

If **yes**, please describe or attach supporting materials, examples, or documentation of your collaboration(s) with other organizations.

*Note: Please write "See attachment" in the text box below if you elect to attach supporting materials rather than write a description. For each attachment, please name the file 'utility name\_C2\_document title'.*

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### Question III.C.3 Other Electrification (Non-E-mobility)

Which electrification initiatives does your utility offer? Check all that apply.

*Note: Electric transportation does not count for this question.*

- Heat pumps
- Water heaters (resistive and heat pump)
- Residential cooktops (resistive and induction)
- Industrial applications
- Commercial food service equipment
- Yard/property care
- Other (except E-mobility). Please explain or attach a description or documentation:  
*Note: Please write "See attachment" in the text box below if you elect to attach supporting materials rather than write a description. For each attachment, please name the file 'utility name\_C3\_other'.*
- None

#### Question III.C.4 Power Supply Resources and Emissions Tracking

Does **your utility** track renewable resources in its power supply portfolio and/or the greenhouse gas (GHG) emissions from the energy delivered to customers? This includes emissions from utility owned generation and purchased power.

- Yes
- No

If **yes**, describe or attach an example of how your utility tracks renewable resources in its power supply portfolio and/or the greenhouse gas (GHG) emissions associated with the energy it delivers to its customers

*Note: Please write “See attachment” in the text box below if you elect to attach supporting materials rather than write a description. For each attachment, please name the file ‘utility name\_C4\_document title’.*

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Please list any organizations (local, national, or international) or stakeholders to which **your utility** reports your power supply resources and/or associated greenhouse gas emissions.

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#### Question III.C.5 Program Savings Tracking

Does **your utility** evaluate energy saved and/or emissions avoided resulting from your “smart energy” programs?

- Yes
- No

If **yes**, please describe or attach the methodology your utility uses to determine energy saved and/or emissions avoided from its smart energy programs, or relevant documentation outlining your approach.

*Note: Please write “See attachment” in the text box below if you elect to attach supporting materials rather than providing a written description in the text box below. For each attachment, please name the file ‘utility name\_C5\_document title’.*

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<sup>2</sup> <https://www.epa.gov/ghgemissions/overview-greenhouse-gases>

If **yes**, please list all customer groups, organizations, or other stakeholders with whom **your utility** shares your program savings results and benefits.

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## IV. Communication/Education and Customer Experience

### Question IV.D.1 Stakeholder Involvement

Does your utility involve internal/external stakeholders in developing “smart energy” goals and/or plans for your utility?

- Yes
- No

If **yes**, please describe or attach supporting materials, examples, or documentation of how you involve stakeholders, which stakeholders are involved, and how these stakeholders are involved.

*Note: Please write “See attachment” if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file ‘utility name\_D1\_document title’.*

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If **yes**, does your utility seek equitable solutions by engaging underserved customers in developing “smart energy” goals and/or plans?

- Yes
- No

If **yes**, please describe how your utility is engaging underserved customers in this process:

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### Question IV.D.2 Communication

Does your utility communicate your “smart energy” efforts to the community?

- Yes
- No

If **yes**, which groups or organizations does your utility engage?

- Governing boards/elected officials
- Customers
- Utility/city staff
- Community leaders
- Civic groups
- Schools
- Home Owners Associations (HOAs)
- Trade allies and contractors
- Other \_\_\_\_\_

If **yes**, which methods are used to engage and communicate? Check all that apply for programs from any rate or customer class.

- Pamphlets/flyers
- School programs
- Bill stuffers/messaging
- Booth events
- Board reports
- Social media
- Media (press release, newspaper, television)
- Mobile App
- Website
- Email/newsletters
- Paid advertisements
- Other \_\_\_\_\_

#### Question IV.D.3 Customer Satisfaction

Does your utility evaluate customer satisfaction specifically for any of its “smart energy” program elements?

- Yes
- No

If **yes**, please describe or attach utility-specific supporting materials, examples, or documentation of how customer satisfaction information is collected and utilized. Highlight which elements/results/questions are directly related to your utility's smart energy programs. **DO NOT** just provide general customer satisfaction. Please explain how supporting materials, examples, or documentation relate to smart energy program elements.

*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_D3\_document title'.*

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#### Question IV.D.4 CSR Training

Do you offer training to customer service representatives (CSRs) or bill/city clerks on how customers' behaviors affect their energy consumption? (e.g., thermostat setting, heating/cooling days, energy savings tips)

*Note: This training must be for employees that work directly with customers and must have been done within the last two years (May 1, 2023 – April 30, 2026).*

- Yes
- No

If **yes**, please describe or attach supporting materials, examples, or documentation of CSR training specific to your smart energy programs.

*Note: Please write "See attachment" if you elect to attach supporting materials rather than write a description in the text box below. For each attachment, please name the file 'utility name\_D4\_document title'.*

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#### Question IV.D.5 Customer Access to Usage Data

Does your utility help your customers better understand and manage their utility bill by providing easy access to their energy usage data?

- Yes; Provide detailed interval data (15-minute or hourly)
- Yes; Provide daily data
- Yes; Provide monthly usage data, comparing historical usage
- No