E Source

Style guide

Updated: August 2022

Contents

Introduction

What's the purpose of a style guide?

We're proud of our E Source brand, and we want to make sure our content and communications with customers accurately reflect the E Source brand. That's why we have the E Source style guide.

Style guides are also beneficial to your personal brand. A style guide helps you keep your work consistent, which makes it look that much more professional. Our customers trust E Source, and that trust extends to you when you meet customers' brand expectations.

Who should be using the style guide?

Any E Sourcer involved in web content creation.

We're not asking or expecting anyone to memorize every style rule. The style guide is meant to be an open-book resource.

How can I familiarize myself with the style guide?

Browse the table of contents and read sections of the style guide as you have time.

Take the Get to know the E Source style guide quiz to learn E Source style rules as you work your way through reading the style guide. We don't expect you to read the whole thing in one sitting!

Take the monthly style quizzes announced at the Research and Advisory meetings. If you don't attend those meetings and would like to be notified of when we release a new style quiz, email Editorial.

How do I search the style guide?

We recommend using Ctrl + F to search within the PDF. If you're having trouble finding a word or topic, try adjusting your search—for example, removing or adding hyphens, using an abbreviation, etc.

If your search results are coming up blank, try quickly scrolling through the PDF. Sometimes it takes a minute to load.

If you still can't find what you're looking for, email Editorial.

Writing about E Source

E Source company name

In general, refer to our company as E Source. In legal documents, our business name is E Source Companies LLC. When preparing a document—such as a proposal response or consulting deliverable—for a Canadian customer, use ES Energy Consulting ULC.

Use a nonbreaking space (Ctrl + Shift + Space) between the E and Source. Our business name should always appear together; don't let a line break separate it. If you can't insert a nonbreaking space and E Source is split across two lines, add a soft return (Shift + Enter) to keep it on one line.

✓ Our recent report shows the latest results from the E Source 2021 Business Customer Satisfaction Study.

✗ Our recent report shows the latest results from the E Source 2021 Business Customer Satisfaction Study.

You can use E Source as a noun or an adjective in regular text: "E Source offers" or "E Source research shows." Don't use the possessive E Source's with any of our divisions, departments, or products, including trademarks, tools, market research, etc.

✗ E Source's OneInform

E Source divisions and departments

We capitalize our division and department names in running text. Don't add division or department after these names. We never abbreviate these names in customer-facing content—abbreviations are for internal use only.

Divisions (this isn't a complete list):

- Data Science (ESDS)
- Research and Advisory (R&A)
- Solution Services

Departments (this isn't a complete list):

- Business Technology (BT)
- Customer Energy Solutions (CES)
- Customer Engagement Solutions (CXS)
- Management Consulting
- Market Research (MR)
- Software Planning and Implementation Consulting (SPI)
- Software Products (SoPro)
- Technology Planning and Implementation Consulting (TPI)
- Water Loss Consulting (WLC)

✓ We asked Sally Smith, manager of Customer Energy Solutions, how she feels about EVs.

✗ We asked Sally Smith, manager of CES, how she feels about EVs.

E Source subscription services

Always use the entire service name in customer-facing content and add E Source before the service name on first use. In a list of services, it's OK to omit the singular Service from each item and use the plural Services at the end of the list.

✓ Members of the E Source Account Management, Business Marketing, and Technology Assessment Services

We never abbreviate our service names in customer-facing content—abbreviations are for internal use only.

- [Account Management Service](#) (AMS)
- [Battery Next](#)
- [Business Marketing Service](#) (BIZ)
- [Corporate Communications Service](#) (COM)
- [Contact Center Optimization Service](#) (CCO)
- [Customer Experience Strategy Service](#) (CXS)
- [Demand-Side Management Service](#) (DSM)
- [Distributed Energy Resource Strategy Service](#) (DERS)
- [E-Channel Service](#) (ECS)
- [Market Research Service](#) (MRS)
- Mobility Service
- [Residential Marketing Service](#) (RES)
- [Technology Assessment Service](#) (TAS)

Sometimes we bundle our services into suites, but we rarely refer to them in customer-facing content:

- Customer Experience Suite—CCO, COM, CXS, and ECS
- Business Customer Suite—AMS and BIZ
- Marketing Suite—AMS, BIZ, COM, and RES
- Marcom Suite—BIZ, COM, and RES
- Efficiency Suite—DSM, DERS, and TAS

Ask E Source

Through our subscription services, members can ask unlimited [Ask E Source](#) questions within the topic areas of their existing subscriptions.

When referring to the program or referencing cases, use "Ask E Source question" or "Ask E Source program."

✓ We've received a lot of Ask E Source questions on ...

✗ We've received a lot of Ask Es on ...

When referring to questions we've repurposed and published on the website, [like this one](#), use "Ask E Source answer."

✓ In this Ask E Source answer, we discuss …

E Source in-person events

We never abbreviate our in-person event names in customer-facing content—abbreviations are for internal use only.

E Source Forum

The Forum is an annual member conference, usually held in the fall; registration for unlimited attendees is included with membership. Solution providers can exhibit or sponsor.

When referring to the Forum, on first mention, include E Source in front of the name and the year after the name. On later mentions, refer to it as "the Forum."

✓ Register for E Source Forum 2021.

✓ Welcome to the Forum.

Leadership councils

Leadership councils are invitation-only events held once or twice a year and are usually in person. The fall leadership councils are the day before the Forum.

When referring to our leadership councils, on first mention, include E Source, the season, and the year before the event name. On later mentions, drop those elements.

✓ E Source Fall 2021 Marketing and Communications Leadership Council

- Account Management Leadership Council (AMLC)
- Customer Energy Solutions Leadership Council (CESLC)
- Customer Experience Leadership Council (CXLC)
- Market Research Leadership Council (MRLC)
- Marketing and Communications Leadership Council (MCLC)

E Source tools

We never abbreviate tool names in customer-facing content—abbreviations are for internal use only. Include E Source before the tool name on first reference.

See Standard language for E Source content (DOCX) for how to write about our tools and other products.

- Business Customer Insights Center (BCIC)
- Business Energy Advisor (BEA)
- Canadian Brand Insights Center
- Canadian DER Insights Center
- Canadian Residential Customer Insights Center (RCIC-CAN)
- CX Maturity Assessment
- DSMdat
- DSM Evaluation Library (DEL)
- DSM Insights (DSMi)
- Emerging Technology Database (ETD)
- Energy AdVision (EAV)
- Energy RFP
- FieldSight
- GridInform
- Measure Insights
- OneInform
- TE Insights
- US Brand Insights Center
- US DER Insights Center
- US Residential Customer Insights Center (RCIC-US)

E Source market research studies

We never abbreviate our study names in customer-facing content—abbreviations are for internal use only. For studies, follow this format on first mention: E Source year Study Name.

✓ According to the E Source 2021 Digital Metrics Survey

Visit the market research study page for a more comprehensive product list.

- Account Management Assessment (AMA)
- Business Customer Satisfaction Study (BCSS)
- Contact Center Performance (CCP)
- Digital Metrics Survey (DMS)
- Residential Utility Customer Survey (RUCS)
- Social Media Survey (SMS)
- Utility Marketing Survey (UMS)

E Source trademarks and taglines

E Source trademarks

- Customer-Side Management™ (CSM™)
- NavigateOne™
- OneInform®

See the Symbols and special characters section for guidance on formatting trademark symbols.

E Source taglines

When referencing these as if they're E Source products, follow the capitalization we list below. When referencing these phrases generically, lowercase them.

- Audience of One
- Powering What's Next
- Sustainable Utility

Copyright

We take copyright seriously at E Source. We expect others to respect our copyrights and we should respect theirs.

All creative work is copyrighted from the moment of creation, whether it carries a copyright notice or not and whether it has been previously published or not.

Go to Editorial's Copyright intranet page to learn more about our copyright policies and when you need to request permission to use an image or other creative work.

Language and grammar

Tense

Default to present tense in most content.

Use past tense when:

- Talking about events that happened in the past
- Talking about specific market research data points (see the Writing about market research data section)
- Directly quoting or summarizing interviews (except in press releases when we quote E Source employees)

✓ George Smith said, "The data proved us wrong."

Jargon and clichés

Plainlanguage.gov says it best: "Jargon is unnecessarily complicated language used to impress, rather than to inform, your audience.

"When we say not to use jargon, we're not advocating leaving out necessary technical terms, but we are saying to make sure your language is as clear as possible. For example, there may not be another correct way to refer to a 'brinulator valve control ring.' But that doesn't prevent you from saying 'tighten the brinulator valve control ring securely' instead of 'Apply sufficient torque to the brinulator valve control ring to ensure that the control ring assembly is securely attached to the terminal such that loosening cannot occur under normal conditions.' The first is a necessary use of a technical term. The second is jargon."

Here are some common jargon terms and suggested replacements to make the text clearer.

✘ Jargon	✓ Suggested edit
a number of, many, a host of	Use a specific amount: 10%, 15 utilities, etc.
actionable insights	advice
best practices	tips, recommendations, essentials
bleeding edge	newest, emerging, latest
cutting edge	advanced, fresh, innovative
deep dive	research, study, find out
drill down	explore
leverage, utilize	use
low-hanging fruit	easy to get
one-stop shop	complete offering
value added	improved, valuable, beneficial

Introducing unfamiliar terms

In general, don't use quotes or italics when introducing unfamiliar or new terms in text, like in this mention of bots:

> Utilities use robotic process automation, or bots, to automate simple tasks into self-service options.

You can use quotes around a word or phrase if you're using it in a nontraditional sense or if you're implying that the label is suspect.

✓ Utilities that run flashy ads about how "green" they are don't usually get the results they're hoping for.

Profanity and obscenities

Avoid using obscenities unless they're part of direct quotations and there's a compelling reason for them. If you do use them, keep the first and last letter of the word and use two em dashes in between.

✓ d——m

✗ damn

Writing about people

Names

When referring to people, use their full name (first and last) on first mention. On all later references, use their last name only or their pronouns. Except in speaker bios and event descriptions, then use their first name only or their pronouns on all later references.

Don't use honorifics (Mr., Mrs., Dr., etc.) unless a source or speaker specifically requests it.

Don't include degrees (PhD) after names, except for industry-specific ones:

- Certified Customer Experience Professional (CCXP)
- Certified Energy Manager (CEM)
- Certified Engineer (CE)
- Professional Engineer (PE)

Gender

Always ask for someone's pronouns so we don't misgender them in text. Relay that information to Editorial. If a source or speaker doesn't give you their pronouns, refer to them by their name only or use they.

Avoid using gendered pronouns (he/she) for a nonspecific person. Use they instead. They can be singular or plural.

✓ A customer can use the app to check their account balance.

Avoid using gendered language in general. Here are some examples of commonly gendered terms and their gender-neutral alternatives.

✗ Gendered term	✓ Gender-neutral alternative
chairman	chair, chairperson
landlord	property owner
lineman	lineworker
man-hours	hours, work hours
manned	crewed
middleman	intermediary
salesman	salesperson

Age

Reference someone's age or age group only when it's relevant and necessary. For example, instead of "seniors who have trouble typing on smartphones," use "people with vision or dexterity issues" if the latter is the real concern. It avoids lumping people together by age unnecessarily, and it's more accurate.

If you're using market research age ranges (25–40, 41–55, etc.), you can use terms like "youngest group of respondents" instead of repeating the age range.

✓ older respondents

✗ elderly respondents

In most cases, you don't need to add "age" in front of the age range. Only do so if the sentence isn't clear without it. Never use "aged" in this context.

✓ Residents 25–35 participated in fewer HVAC programs.

✗ Residents aged 25–35 participated in fewer HVAC programs.

Race

Our general guidance when writing about race is to be as specific as possible. Use the terms we use in our market research studies when appropriate.

When referring to a group of people who aren't white, avoid using "minority" and "people of color." If you can, identify the specific group of people. If you can't, use the phrase "Black, Indigenous, and people of color (BIPOC)." BIPOC can be a noun or an adjective. Never say BIPOCs—the term is already plural.

Capitalize Black and Brown and lowercase white in any discussion of race. For example, "Hispanic, white, and Black residents in the service territory …"

Capitalize Indigenous when referring to native populations in the US. When talking about indigenous people of Canada, use "First Nations."

Avoid the term multicultural when describing groups of people. A person isn't multicultural, but a utility could have a multicultural marketing strategy.

When referring to Hispanic, Latino, or Spanish-speaking people, be specific. Don't say Latino if you really mean Spanish-speaking (without reference to country of origin or ancestry). For example, if you're talking about offering utility bills in other languages, state the specific languages.

Hard-to-reach customers

Try to be more specific than calling customers "hard to reach." The phrase isn't forbidden, but it's vague. For example, if you're trying to describe customers whom the utility has a hard time engaging through its programs, like small businesses, use "hard to engage." Or explain why they're literally hard to reach if that's the case (like if they live in a remote area).

If you're talking about customers who utilities might leave out, say "underserved," but use this carefully. If you're talking about a specific underserved group, like low-income groups or BIPOC, use the most specific descriptions you can.

Vulnerable customers

Describing customers as vulnerable isn't forbidden, but the term is vague. Be as specific as you can for clarity.

Vulnerable alludes to any needs-based group (low income, rural, Indigenous, seniors, unhoused people or people experiencing homelessness, etc.). It could refer to people who have a high energy burden or those at risk of disconnection for nonpayment. It could also refer to communities that are vulnerable to the effects of climate change (e.g., air-quality issues).

Sexual orientation

Reference this only when relevant and necessary such as describing a social media post from a utility during Pride Month.

✓ Utilities are expressing their support of the LGBTQ+ community.

Previously incarcerated

Use previously incarcerated or formerly incarcerated instead of convicted criminal, ex con, felon, or parolee.

Writing about companies

We go into specific detail on how to write about E Source in the Writing about E Source section of this style guide.

For specific examples of how we treat company names, see our Energy Business Company Names spreadsheet (XLSX) (column D).

Pronouns for organizations

When referring to one company, use the singular pronoun "it." Only use "they" when referring to more than one company.

✓ When the utility decided to … it was moving in a new direction.

✓ When the three companies decided to … they changed the industry.

Government entities

If a US government entity's name begins with a general term like National, North American, or Federal, don't use US before its name. If no indicator of its origin is in the name, such as Department of Energy or Energy Information Administration, use US before its name.

Symbols in company names

If a company uses a nonletter character in the spelling of its name or offering, substitute the appropriate letter in the text. See the Capitalization section for guidance on how to handle lowercase or all-caps company names.

✓ Energy Smart

✗ Energy $mart

Writing about places

Cities, states, and provinces

When referring to a city in text, include the state or country after it, except for the following. These cities can stand alone in text.

US stand-alone cities. Atlanta, Baltimore, Boston, Chicago, Cincinnati, Cleveland, Dallas, Denver, Detroit, Honolulu, Houston, Indianapolis, Las Vegas, Los Angeles, Miami, Milwaukee, Minneapolis, New Orleans, New York, Oklahoma City, Philadelphia, Phoenix, Pittsburgh, St. Louis, Salt Lake City, San Antonio, San Diego, San Francisco, Seattle.

International stand-alone cities. Amsterdam, Baghdad, Bangkok, Beijing, Beirut, Berlin, Brussels, Cairo, Djibouti, Dublin, Geneva, Gibraltar, Guatemala City, Havana, Helsinki, Hong Kong, Islamabad, Istanbul, Jerusalem, Johannesburg, Kuwait City, London, City of Luxembourg, Macao, Madrid, Mexico City, Milan, Monaco, Montreal, Moscow, Munich, New Delhi, Panama City, Paris, Prague, City of Quebec, Rio de Janeiro, Rome, San Marino, São Paulo, Shanghai, Singapore, Stockholm, Sydney, Tokyo, Toronto, Vatican City, Vienna, Zurich.

States and provinces. In running text, spell out the name of a state or province. Use a comma before and after the state when a city name comes before it.

✓ In Tempe, Arizona, the latest installation …

✗ In Tempe, AZ the latest installation …

In tables where city and state are listed, use two-letter postal abbreviations, no periods, and no zip code (Buffalo, NY). Where state names appear alone, spell them out.

Washington, DC

In running text, spell as Washington, DC, (with both commas) then refer to the territory as DC. Don't spell as District of Columbia.

Addresses

In running text, don't use abbreviations for street names. If an address includes compass points, do use abbreviations for two-letter compass points (NW, SW, NE, SE).

✓ 1060 East Prospect Avenue

✓ 456 NW Main Street

Numbers

Always spell out numbers that begin a sentence. The only exception to this rule is if you have a number as the first word in a bulleted list—in that case, use a numeral.

Use numerals for numbers 10 and up but spell out numbers under 10. However, use numerals for 1–9 if they appear in the same paragraph with two-digit numbers referring to the same concept.

✓ One hundred customers receive text alerts

✓ The survey had 12 participants but only 8 answered this question

✓ The ad won third place

✓ The utility's 10th campaign

When talking about time (hours, days, months, etc.), follow our standard number rules.

✓ three hours

Use numerals with percentages, units of measure, and monetary values even if the number is less than 10.

✓ 3%

✓ 4 kWh

✓ $6

Repeat symbols for number ranges but don't repeat the unit of measure.

✓ 12%–15%

✓ 150–350 Btu per hour

✓ $10–$20 million

Numbers in titles

If a report title or subtitle begins with a number, use a numeral. If the number isn't the first word, follow our standard number rules.

✓ 5 ways to design a CX dashboard

✗ How to design a CX dashboard in 5 steps

Decimals and fractions

Write fractions as decimals or spell them out. Always include a zero before the decimal for numbers less than one.

✓ two-thirds

✓ 0.5%

Keep decimal values consistent in all references.

✓ 38.4% of respondents chose yes, but 60.0% chose no.

✗ 38.4% of respondents chose yes, but 60% chose no

Telephone numbers

Use hyphens to format phone numbers. For 800 numbers, include the 1. For international numbers, use spaces as separators and add a plus sign in front of the country code.

✓ 123-456-7890

✓ 1-800-234-5678

✓ +1 607 000 0000

When listing phone numbers, email addresses, etc., don't use "tel," "email," "mobile," etc., in front of that information.

Time

We use the 12-hour clock. Include minutes in every reference and lowercase a.m. and p.m.

✓ 11:30 a.m.–2:00 p.m.

✗ 10 a.m.

Abbreviations

Define abbreviations on first mention. Include the abbreviation in parentheses after the definition. Then use the abbreviation in all following references.

✓ The demand-side management (DSM) program …

Exceptions

Some abbreviations can stand on their own without a definition. If Merriam-Webster has an entry for an abbreviation, we usually allow that abbreviation without the definition. For example, Merriam-Webster has an entry for FTE, so we don't need to define the term.

We list some of these exceptions in the **E Source word list**. The word list also includes industry abbreviations, including some chemical symbols and units of measure.

Units of measure

A unit of measure used without a numeral should always be spelled out, even in you defined the abbreviation earlier. The only exception to this rule is if you're referencing a unit of measure that's always abbreviated, such as Btu or mpg.

✓ Measuring kilowatt-hour savings

✗ Measuring kWh savings

Capitalization

We use down style at E Source, meaning we use capitals sparingly.

We mention two general approaches to capitalization in this section:

- *Sentence case.* Capitalize the first word and all proper nouns.
- *Title case.* Capitalize all words other than minor words such as and, from, in, of, then.

Company and brand names

For specific examples of how we treat company names, see the [Energy Business Company Names spreadsheet](#) (XLSX) (column D).

For names that begin with lowercase letters before capital letters, keep them as is, including in headings or the start of a sentence.

> ✓ thredUP

For all-lowercase names, capitalize the first letter.

> ✓ Ecobee

> ✗ ecobee

Keep a name in all caps if that's the organization's style.

> ✓ ENERGY STAR

E Source content types

When referring to content types in general terms, lowercase them: design guide, sector snapshot, exchange. But "Ask E Source answer" because [Ask E Source](#) is one of our products.

Job titles, divisions, and departments

Use title case when referring to company division and department names. Also see the [E Source divisions and departments section](#).

In running text, lowercase job titles.

> ✓ Bill Smith, manager of Customer Experience Solutions at Friendly Power, tried new ways to improve CX.

In contact blocks (like the example below), title-case job titles.

> ✓ Katie Smith, Senior Analyst, Data Science, E Source

Website elements (features, menus, buttons)

Title-case website features when writing about them generically. This includes references to E Source design guide features (My Account, My Energy Use, Home Page, Contact Us, etc.).

> ✓ Reviewers found the Make a Payment feature in the shortest amount of time.

When writing about features on a specific website, match the casing the website uses. If needed, add quotes around a feature for clarity.

> ✓ Friendly Power's "My energy use" page …

When writing about specific website elements, as if instructing someone how to click through a page, match the casing of the element you're referencing and use bold.

> ✓ Click **Report an outage** then fill out the information.

Elements on E Source websites

Sentence-case this text:

- Headings
- In-person and online event session titles
- Page titles and subtitles, including for online events

Title-case this text:

- Article titles on Business Energy Advisor
- Case studies on Business Energy Advisor
- In-person event names

Titles of works

When citing another work, follow the original title's casing, but if it's set in all caps, use title case. Don't use quotes around linked titles. Do use quotes if the title isn't linked and it's sentence case.

✓ You can find more information in the attached PDF "Programs to manage your energy bills." *[This example is specific to Ask E Source questions when you can't link to a document and need to upload it to your response.]*

Set all titles (including books, magazines, reports, articles, TV shows, movies, plays, and poems) in roman text—not italics.

✓ The New York Times

✗ *Los Angeles Times*

Citing sources, links

Link either the full title or use descriptive link text. Descriptive text needs to tell the reader exactly what to expect from the page you're linking to. Try to link full titles on first reference. You can repeat links throughout a deliverable if they add value.

✓ The US DOE's energy efficiency web page offers more information. *[This is an example of good descriptive link text.]*

✗ Learn more about the benefits of energy efficiency. *[The linked text doesn't give the reader context to where they'll be directed.]*

External (non-E Source) links

If an external (non-E Source) link title works in the context of your sentence, you can write it into the sentence.

✓ The US Energy Information Administration found that One in three U.S. households faced challenges in paying energy bills in 2015.

Internal (E Source) links

Because we regularly update page titles on the E Source website, we avoid writing E Source links into sentences. Instead, introduce links by their content type. Events can be an exception to this rule, specifically in-person events as those page titles will rarely change. Be careful when referring to future online events.

✓ Check out our report 5 tips for implementing a chatbot on your website.

✓ Register to attend E Source Forum 2021. *[It's OK to write in-person event names into the sentence without introducing it with "event" before it.]*

✓ To learn more, register for our webinar Improving your customers' outage experience. *[We don't write this online event name into the sentence because it hasn't happened yet, and the title could still change.]*

✓ We discussed 5 steps to ensure you get the most value from digital investments in a recent webinar. *[We can write this online event name into the sentence because it already happened, and the title won't change.]*

Our website automatically replaces E Source links with the page's title. To learn more about our automatic link replacement, go to the Link styles section of the E Source HTML styles web page.

Downloadable files

When linking to a downloadable file, such as a PDF, Excel spreadsheet, or Word file, add the file extension in all caps in parentheses following the file name.

✓ [Department of Energy Hydrogen Program Plan](#) (PDF)

If you need to reference a specific page number or range within your citation, follow this formatting:

[Department of Energy Hydrogen Program Plan](#) (PDF, 5–7)

Public content

If you're linking to permissioned E Source content from public content, include language about it being available to E Source members. If it's available to only one service, link to that service's public page (see the [E Source subscription services](#) section).

✓ Check out our report [Utility apps for voice assistants and smart speakers](#), available with certain E Source memberships.

✓ Register for the [Behavioral programs exchange](#), available to members of the E Source [Demand-Side Management Service](#).

Resource list

You can include a resource list at the end of your report to direct readers to more research. We usually focus these lists on E Source research, but you can also link to relevant external research.

Most follow an annotated format:

Linked page title + short description of the content.

✓ [Which customers are interested in smart speakers, and how do you reach them?](#) offers tips on how to identify and engage potential smart speaker adopters.

You can also use a more traditional resource list when you have limited space such as in a PowerPoint presentation:

Linked title (file type if applicable), authors, company name (publication year)

List all E Source authors in the order they're listed on the page. For external resources, list the primary author, followed by two more authors in alphabetical order. If there are more than three authors, include "et al."

E Source examples:

✓ [What utility programs can move upstream?](#), Jordan Tobey, E Source (2017)

✓ [Home Energy Reports—Residential Program Year 2017](#), E Source DSM Evaluation Library (2019)

✓ [Top 20 technologies and trends of 2020](#), Liza Minor, Luke Beckett, Essie Snell, Bryan Jungers, Steven Day, Jay Stein, Beth Fitzjarrald, Amy Schmidt, Miles Hayes, Meryl Compton, E Source (2021)

External examples:

✓ [Energy Efficiency in California's Public Power Sector](#) (PDF), California Municipal Utilities Association (2021)

✓ [Linking Corporate Social Responsibility to Corporate Reputation](#), C. Maden, E. Arikan, D. Kantur, et al., Procedia (October 2012)

E Source email accounts and contact links

We have a general customer service email and an event-specific customer service email, which we use only for E Source event communications.

If you're working on HTML content, use the URL. If you're working on email content, use the email address.

General:

Events:

Punctuation

Contractions

We use common contractions to create the casual voice of E Source. Here are some examples of contractions we use: aren't, can't, didn't, don't, isn't, let's, there's, they're, wasn't, we'll, we've, and won't.

We don't use contractions for would've, could've, and should've because there's the chance a reader would read those as would of, could of, and should of.

Commas

Serial comma (Oxford comma)

Separate items in a series by commas. When a conjunction (and, or, but) joins the last two elements in a series of three or more, add a comma before the conjunction. This construction is known as the serial or Oxford comma.

✓ How brand, customer experience, and employee engagement are linked

Commas in dates

Use commas in dates as follows:

✓ Join us Thursday, August 25, 2021, for a CX webinar.

✓ Join us August 25 for a CX webinar.

✓ Monday, April 1, was the first day of the new campaign.

✓ The business opened in June 2018 to the public.

Hyphenation

We follow the Chicago Manual of Style guidance on hyphenation: use hyphens to eliminate ambiguity. See the **E Source word list** for specific hyphenation examples for industry terms like "air-handling unit" or "first-contact resolution."

Hyphenate –est and –er adverbs.

✓ fastest-growing business

✓ better-known models

In general, hyphenate compounds formed with more, most, less, and least when describing quality rather than quantity.

✓ More-efficient methods would save $100 per year. *[We hyphenate "more-efficient" because more is modifying the efficiency, not the quantity of efficient methods.]*

✗ The least-efficient method will save $5 per year. *[In general, when "the" proceeds more, most, less, or least, you don't need to hyphenate the compound because there's little chance of ambiguity.]*

Hyphenation with units of measure

Don't hyphenate numerals with abbreviated units of measure as compound adjectives. But if the unit of measure is spelled out, then do add a hyphen.

✓ A 20 kW spike

✓ A 40-kilowatt reduction

✓ The 10 ft fence

✓ The 5-to-10-foot fence

Symbols and special characters

Ampersand (&)

We allow ampersands in:

- Abbreviations such as EM&V and O&M (use "and" when spelling these out)
- Art elements when space is limited
- Button text
- Drop-down features on the website
- PowerPoint slide titles when space is limited
- Proper nouns such as company names (PG&E, SDG&E)

Ellipsis (…)

Generally, we use ellipses only in quoted material. Use the ellipsis character (…) with spaces before and after it. If you use an ellipsis at the end of a sentence, add the ending punctuation after the last word, then add a space, then add the ellipsis.

✓ You would do this if you deliberately removed the end of a sentence you were quoting but still had a complete sentence. … Or if you omitted text between sentences in a quote.

If you intentionally left a quoted sentence incomplete, don't add ending punctuation; use just the ellipsis.

✓ Everyone knows that the Declaration of Independence begins with the sentence "When, in the course of human events …"

Percent sign (%)

Use the percent sign (%) rather than "percent," unless the percentage starts the sentence. In that case, spell out the number and use "percent." The only exception to this rule is if you have a percentage as the first word in a bulleted list—in that case, use a numeral.

✓ Thirty-five percent of respondents chose yes.

✓ Respondents chose yes 35% of the time.

✗ Respondents chose yes 35 percent of the time.

Trademarks (® ™)

Don't use these symbols unless referring to E Source trademarks.

Don't include the registered (®) or unregistered (™) trademark symbol in titles. Do include the symbols in the first body text reference—even in a hyperlink—and put it before any punctuation. Don't include the symbols on repeat references.

In content likely to be printed, it's OK to use the symbol in the title. We can also be flexible about using the symbols on later pages to build brand awareness—for example, on the back page of a flyer.

Math (operation signs: + − × ÷ =)

Add single spaces around operation signs.

✓ $a + b = c$

✗ $a+b=c$

Dimensions (×)

Use "by" rather than "×" to show dimensions. State the unit once at the end.

> ✓ Measuring 10 by 10 by 18 feet, the chiller footprint is huge.

Dollar sign ($)

When writing about money, our standard is to use the US dollar ($). If we're referring to a non-US currency or we reference multiple currencies within one deliverable, we need to identify the country before the dollar symbol on every reference.

> ✓ C$5

> ✓ US$5

For example, if one report mentions Canadian and US currencies, each dollar symbol needs the country abbreviation attached.

If you're writing a Canadian-specific report and every monetary value is in Canadian dollars, don't add the country abbreviation before the dollar sign. Instead, add a sentence at the beginning of the report to clarify the currency:

> Every monetary reference in this report uses the Canadian dollar.

Degree sign (°)

Use the degree sign (°) when writing temperature measurements. Put it immediately after the number, with no space. Add a space after the degree sign and before the unit of temperature on first reference—that's when you'll spell out Celsius or Fahrenheit.

> ✓ 40° Fahrenheit (F)

On later references, use the abbreviations and omit the space after the degree sign.

> ✓ 8°–15°C

Slash (/)

In running text, avoid slashes—they hurt readability. If you need to use a slash, close the space before and after it.

> ✓ An effective phase/gate system ...

> ✗ An effective phase / gate system ...

Pipe (|)

If you're using a title and subtitle in text and there are two colons, make the second colon a pipe (|) with spaces on both sides.

> ✓ Socialights: Customer Care 2018 | Social media highlights, insights, and spotlights.

Report organization and formatting

Titles and subtitles

When referencing E Source products in the title or subtitle of reports, don't include "E Source" in the text.

> ✓ Findings from the 2022 Digital Metrics Survey

> ✗ Findings from the E Source 2022 Digital Metrics Survey

We have a limited number of characters for these fields and removing E Source helps us get more-important keywords in there.

Headings

In long web-published reports, you can use up to three levels of headings. In our templates, those are heading 2 (h2), heading 3 (h3), and subheads (bold). For examples of how those headings look on the website, see our [Text styles section](#) of the E Source HTML styles web page.

In short web-published reports, you can use up to two levels of headings: h3s and subheads.

Headings always need to be in at least pairs. For example, you can't have a report with one h2 or only one subhead in a section. Here's an example of the proper order and use of headings:

> Heading 2
>   Heading 3
>   Subhead
>   Subhead
>   Heading 3
>   Subhead
>   Subhead
> Heading 2
>   Heading 3
>   Heading 3

Don't add links to headings or subheads.

Include keywords in your headings and try to write h2s and h3s in a question format. You should repeat keywords across headings.

✓ Which KPIs did utility contact centers use in 2020?

✓ More E Source research on utility contact center metrics

Key takeaways

The key takeaways section is a bulleted list of complete sentences that summarizes important and specific concepts in the deliverable. You should have three to five bullets (minimum of two). Each bullet should be one sentence. The order of takeaways should follow the report organization.

Define [abbreviations](#) upon first use in the takeaways (don't redefine them in the body text).

Include key takeaways for:

- Press releases (sometimes)
- Reports
- White papers
- The node of embedded infographics and e-books

Don't include key takeaways in Ask E Source answers, resource centers, blog posts, E News articles, event nodes, Business Energy Advisor topics, sector snapshots, or downloadable data resources.

Bulleted lists

Include an introductory sentence with a colon before a list. But if the list can stand on its own, it's OK to omit the introductory sentence.

Capitalize the first word of each list item.

If you use full sentences or multiple sentences across your list, add end punctuation to each list item. If the list has single words or short phrases, don't include end punctuation. Keep punctuation consistent within the list.

If you use lead-ins for your bulleted list, use italics and follow them with a period.

> When designing an EV experience, focus on three groups:
>
> - *Innovators.* These are your current owners.
> - *Early adopters.* These are your …

Use a numbered list only if the order of items is sequential:

> 1. Sign in to your account
> 2. Click **Pay My Bill**
> 3. Review the total amount due

Market research

Writing about market research data

Tense

We use past tense when talking about specific data points. But when we summarize trends, we use present tense.

> ✓ Fifty-one percent of respondents said that they prefer talking to a customer service rep.

> ✓ Respondents are more willing to use self-serve options and prefer mobile transactions.

> ✗ Fifty-one percent of respondents say that they prefer talking to a customer service rep.

Industry benchmark

Refer to only the following E Source studies as industry benchmarks:

- DSM Achievements and Expenditures
- Review of North American Electric and Gas Company IVRs
- Website Benchmark

All other studies aren't representative of the industry.

Significant, significance

Avoid using "significant" or "significance" in your writing unless you're referring to statistical significance. Where that's not the case, we should say that a particular finding or relationship is "interesting" or "noteworthy."

If you're not sure if a finding is significant, ask a Market Research team member.

Survey responses

When directly quoting a survey response, set the response in quotes (except for Other and Don't know). If paraphrasing the response, don't use quotes.

> ✓ Respondents who chose Other tended to be from the Northwest.

> ✓ Customers rated their utility low for "Is environmentally conscious."

But:

> ✓ Few business customers considered their utility to be environmentally conscious.

Percent change, percentage point change

Be careful when writing about percent change and percentage point change. These metrics can be easily confused and have different meanings.

To calculate percent change, use this formula:

$$percent\ change = \frac{(new\ amount\ -\ old\ amount)}{old\ amount} \times 100$$

To calculate percentage point change, use this formula:

$$percentage\ point\ change = old\ -\ new\ percentage$$

When talking about percent change in text, try to write it in simple terms [1]. If the text doesn't allow for this, use percent change, and include the percentage point change in parentheses [2]. It's OK to use percentage point change on its own [3, 4].

> ✓ From 2015 to 2019, EV adoption grew three times as much. [1]

> ✓ EV adoption grew 300% (4 percentage points). [2]

> ✓ EV adoption increased by 4 percentage points. [3]

> ✓ EV adoption went from 4% in 2015 to 8% in 2019. [4]

North America

Avoid these terms (North America, North American) if the study includes respondents only from the US and Canada.

✓ We surveyed respondents from the US and Canada

✓ **Base:** All respondents from the US and Canada

✗ We surveyed North American respondents

✗ **Base:** North American respondents

Quartiles

Use this language to explain quartiles in survey methodology sections:

> Quartiles divide a set of data into quarters, with the median value as the 50% mark.
>
> The first quartile (also called the top or upper quartile) is the top 25% of the data set. The second quartile is the next 25% of the data set—25% above the median value. The third quartile is 25% below the median value. And the fourth quartile (also called the bottom or lower quartile) is the bottom 25% of the data set.

Survey formatting

Survey sections

Include a section number and section title in multipart surveys.

✓ SECTION 1: About your utility

✓ SECTION 2: Your energy behaviors

Include the section number before each question number.

✓ S1_1. On a scale of 1–10 …

Survey introduction

Include introductory text and contact information for someone at E Source, using the Market Research survey email. Don't include a section number or title for the introduction.

Confidentiality statement

For voice-of-the-customer (VOC) studies, use this language:

> Your responses will be kept confidential. *[Include in the intro.]*
>
> Would you like to share your name with [utility] to improve the services it provides you with, or do you prefer to keep your responses anonymous? (1) Yes, my name may be linked with my survey comments (2) No, please keep my responses anonymous *[Include at the end of the survey.]*

For voice-of-the-utility (VOU) studies, use this language:

> We'll keep your name, your utility's name, and your specific responses confidential, and we will not share this information with any other parties unless you give us permission to do so. *[Include in the intro.]*
>
> Your name and utility will be linked with your responses to allow the E Source Market Research team to follow up with you about your responses to ensure that we're including high-quality data in this study. We'll keep your name, your utility's name, and your specific responses confidential, and we will not share this information with any other parties unless you give us permission to do so. Our members often ask us to connect them with peers at other utilities or whether we're aware of organizations with similar approaches and challenges. May we share? [REQUIRED] (1) Yes, E Source may share my name, utility name, and general survey information with other utility members with the purpose of connecting peers or providing useful insights (recommended) (2) No, please keep my name, utility name, and general survey information confidential *[Include at the end of the survey.]*

Instructions for programmers

Put notes for the survey programmer in all caps and in brackets.

✓ S4_2. Select your preferred method of contact for each of the following interactions with your utility. [REQUIRED] [RANDOMIZE ROWS]

Randomizing versus rotating in surveys

We want the response options to show in a different order for each survey taker to avoid any presentation bias. We prefer to randomize response options than to rotate them. When answers are rotated, they're sequentially moved about, with the bottom item in the list moving to the top each time someone new accesses the survey. If you see "rotate" in notes to programmers, query it.

Instructions for respondents

When writing instructions for respondents into the question, don't add any special formatting: italics, parentheses, etc.

✓ S4_2. Select your preferred method of contact for each of the following interactions with your utility. Select up to three.

When writing instructions for respondents in response options, set the instructions off in parentheses.

✓ Other (please specify):

Response options

Use a numbered list (instead of a bulleted list) to format response options in surveys. Don't use periods at the end of response options, even when it's a full sentence.

Ratings and scales

Always use numerals for scales, even if both numbers are under 10.

✓ On a scale of 1–5

If a survey question asks respondents to rate their responses on a scale, include the scale information in the question, even if you've defined the scale in an earlier question. Always include the scale information at the beginning of the question.

✓ On a scale of 0–10, where 1 means not at all likely and 10 means extremely likely, how likely are you to recommend your utility to your business colleagues?

✗ On a scale of 0–10, how likely are you to recommend your utility to your business colleagues? *[This example is incorrect because the scale isn't defined.]*

✗ How likely are you to recommend your utility to your business colleagues on a scale of 0–10, where 1 means not at all likely and 10 means extremely likely? *[This example is incorrect because the scale is at the end of the question.]*

Don't use quotes around scale definitions unless needed for clarity. Always set the scale definition off with commas. And use "where # means" instead of "where # =," "where # signifies," or "where # indicates."

✓ On a scale of 1–5, where 1 means "I would not recommend this service to a friend" and 5 means "I would recommend this service to a friend" *[We put the definitions in quotes because they're longer phrases that readers may read incorrectly if not set off with quotes.]*

✗ On a scale of 0–10, where 0 means "not at all likely" and 10 means "extremely likely" *[This example is incorrect because putting the definitions in quotes is unnecessary.]*

✗ On a scale of 0–10, where 1 = not at all likely and 10 = extremely likely *[This example is incorrect because it uses an equal sign instead of "means."]*

Figures

See the Figure styles and Table styles sections of the E Source HTML styles web page for examples of how these elements will look on the E Source website. See Editorial's Excel art samples (XLSX) template for more examples of our chart styles.

Figure titles, captions, and callouts

Figure titles and figure numbers

Images, charts, tables, videos, GIFs, audio, etc., need a figure number and title. Always title these elements "Figure X" in deliverables, not "Table X" or "Media X." The figure title follows the figure number and a colon. Sentence-case the figure title. Don't add punctuation at the end of a figure title.

> ✓ Figure 4: Where customers charge their EVs

Figure captions

Every figure needs a caption. Write these in complete sentences and avoid repeating information from the body text. Try coming up with new insights you haven't introduced in the body.

Figure callouts

Add figure callouts in bold in the paragraph directly before the figure. Lowercase figure callouts unless they start a sentence. You can set them in parentheses at the end of sentences or write them into the sentence.

> ✓ The average efficiency of refrigerators grew year over year (**figure 2**).

> ✓ **Figure 2** compares the average efficiency of refrigerators.

Figures in sidebars

Figures in sidebars have figure titles and captions. They don't have figure callouts or figure numbers.

Figure notes (copyright, source, base, question, notes)

The notes section of a figure will at minimum have a copyright statement—usually "© E Source"—or a source line. Follow this order for figure notes: source, base, question, notes. Keep all figure notes in one paragraph of text. Not every figure note will have all four elements.

Data source, copyright

Always include a source line in art—images, tables, etc. Add a period after your source line if you need to include other note elements (base, question, etc.).

If the data source is an E Source study, put the study name in parentheses with the study year at the front.

✓ © E Source (2018 Social Media Survey)

✗ © E Source (Social Media Survey 2018)

If the data source is an E Source tool (except for our tools that use Claritas data, see paragraph below), put the tool name in parentheses.

✓ © E Source (DSM Insights)

If the data source is the US Residential Customer Insights Center, the US Brand Insights Center, or the US DER Insights Center, include a mention of the Claritas Energy Behavior Track survey, like this:

© E Source (US Residential Customer Insights Center; data from the 20XX Claritas Energy Behavior Track survey)

© E Source (US Brand Insights Center; data from the 20XX Claritas Energy Behavior Track survey)

© E Source (US DER Insights Center; data from the 20XX Claritas Energy Behavior Track survey)

If you're building a chart, table, graphic, etc., that uses data from an external source, use the E Source copyright with a mention of the source.

✓ © E Source; data from US Department of Energy

✓ © E Source; adapted from National Renewable Energy Laboratory

If you're using an external source's art and not rebuilding it in E Source style, include a source line. Don't bold "Source:" in these cases. Before you use external media, review our copyright guidelines.

✓ Source: US Department of Energy

Base and sample size

The base shows the sample size. Use n to indicate the group of individuals who participated in the study. We almost always use this value. Use N to indicate the total population: the broader group of people to whom you intend to generalize the results of the study. We rarely use this value.

Base text in figures begins with "**Base:**" (in bold).

✓ **Base:** Respondents from the US and Canada who are considering purchasing an EV (n = 3,500).

For VOU studies, include "utilities" in the n value.

✓ **Base:** n = 23 utilities.

✓ **Base:** Utilities included in the IVR review (n = 90 utilities).

When publishing results from an online event poll, use this base language:

Base: Event attendees (n = X).

Question

Question text in figures begins with "**Question #:**" (in bold). If your chart or graph uses data from multiple questions, use "Question" only before the first question number but bold every question number to set it apart from the running text.

✓ **Question S1_1:** How satisfied are you with your utility account rep? **S2_1:** How much value do you feel your utility account rep provides?

Notes

Note text in figures begins with "**Notes:**" (in bold). Use the singular "**Note:**" if there's only one note or if you're only defining abbreviations. Note text follows this order:

- Abbreviations
- General notes about the entire figure, table, etc.
- Notes specific to a unique part of the figure, table, etc. (you'll mark these via an asterisk or superscripted letters within the art element)

Abbreviations. If you're using an abbreviation in an art element (table, chart, image, etc.), you need to define it in the graphic or in a note. This applies even if you've already defined the abbreviation in the body text of the deliverable. We treat art elements separate from the body text.

Use semicolons to separate each defined abbreviation in note text. Define unit abbreviations in the singular. Use this format to write abbreviations into notes: abbreviation = definition.

✓ **Note:** kW = kilowatt; kWh = kilowatt-hour.

For more on abbreviations in deliverables, see the Abbreviations section.

General notes. When showing survey data for fewer than 30 respondents, include this text in the note:

> Use caution when sample size falls below 30.

When showing data that's meant to add up to 100% of the sample size, include this text in the note if rounding changes that (for example, if it equals 99% or 101% instead):

> Percentages may not add to 100 due to rounding.

Specific notes. Use an asterisk (*) if you need only one specific note in the figure element. Don't superscript the asterisk. In the figure element, add the asterisk to the end of a data point, table heading, etc., with no space between the text and the asterisk—like this: 5.0%*. In the note text, set the asterisk immediately before the note it relates to, with no space between the text and the asterisk—like this: *This is a note explanation.

> ✓ **Note:** *For the purposes of this report, we define engagement total as the total number of interactions, such as likes, retweets, shares, etc.

If you need more than one specific note in a figure, use superscripted lowercase letters—a, b, c, etc. In the figure element, add the superscripted letter to the end of a data point, table heading, etc., with no space between the text and the letter—like this: 5.0%[a]. In the note text, don't superscript the letter. Keep it lowercase, and put a period and space after it—like this: a. This is a note explanation.

> ✓ **Notes:** a. For the purposes of this report, we define engagement total as the total number of interactions, such as likes, retweets, shares, etc.
> b. We define engagement rate per follower as the total interactions divided by the total number of followers expressed as a percentage.
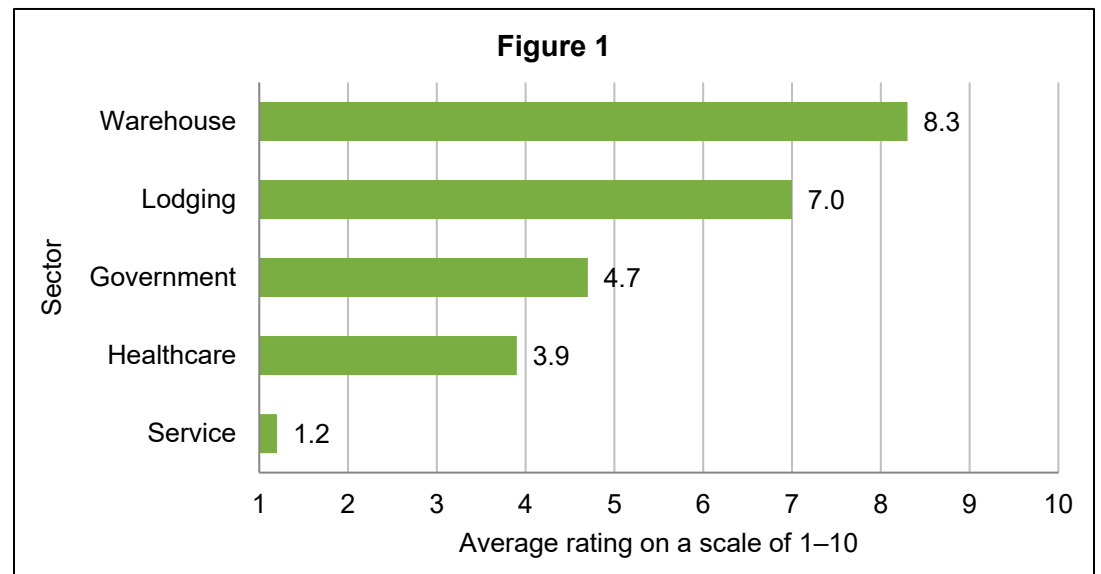
Chart formatting

Chart axis and scale

When working with percentages in charts, you have two options:

- If the highest data point is 50% or greater, use the 0%–100% scale in increments of 20%.
- If the highest data point is less than 50%, use the 0%–50% scale in increments of 10%.

When you use a rating scale of 0–10 (or 0–5), make sure the axis starts at 0. When it's 1–10 (or 1–5), the axis should start at 1 (**figure 1**).

Figure 1

(Horizontal bar chart)
- Warehouse: 8.3
- Lodging: 7.0
- Government: 4.7
- Healthcare: 3.9
- Service: 1.2

Y-axis: Sector
X-axis: Average rating on a scale of 1–10 (1 2 3 4 5 6 7 8 9 10)

When the sample size is less than 30, use "Number of respondents" as the axis value instead of "Percentage of respondents." The axis should equal the n value when possible.

If you're comparing charts in a report, use the same axis scale across each chart. For example, both scales should be 0–100 or both should be 0–50; not one of each.

Chart axis title

Keep axis titles singular when possible. Use the word "percentage" in axis titles rather than "percent."

✓ Percentage of respondents

✗ Percent of respondents

You can omit an axis title if it's extremely clear what the data is representing. For example, if the axis is depicting years, you don't need to include an axis title saying "Years."
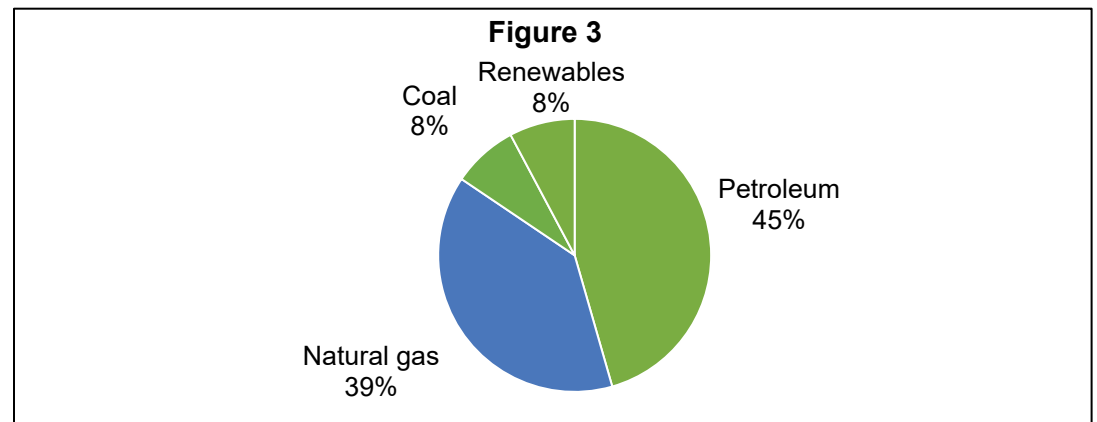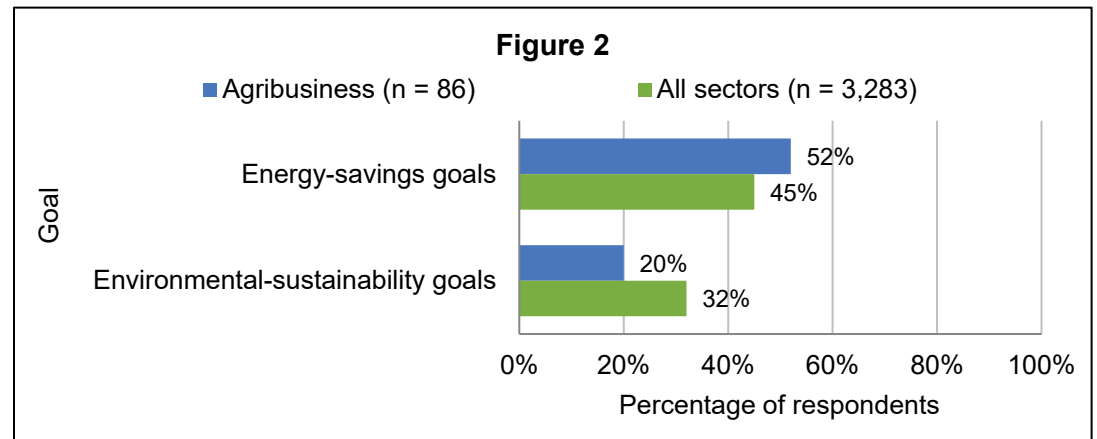
Chart category order

Standard bar chart. Chart order should generally go largest to smallest, left to right or top to bottom.

Use a logical sequence when displaying data in consecutive series of ranges (0–99, 100–499, 500–999) or categories like Once a day, Once a week, Once a month, Every so often, and Never. Responses that should always appear at the bottom or farthest right include, in this order: Other, Don't know, None of the above, Not applicable.

If you have multiple series of categories, either:

- Organize the bars of the first group as largest to smallest and use the same order in all groups (**figure 2**)
- Establish a logical order (such as alphabetical)

Pie and donut charts. Show data clockwise, largest to smallest, starting at 12 o'clock. For pie charts, the default is to use green for all slices, but if you need to emphasize a data point, use E Source blue (R, 74; G, 119; B, 187) (**figure 3**).

Figure 2

■ Agribusiness (n = 86)　　■ All sectors (n = 3,283)

Goal

Energy-savings goals — 52% / 45%

Environmental-sustainability goals — 20% / 32%

0%　20%　40%　60%　80%　100%

Percentage of respondents

Figure 3

Coal 8%
Renewables 8%
Petroleum 45%
Natural gas 39%

Stacked bar chart. When using a stacked bar chart with a scale of ratings of 1–10 or 0–10, split the results into three ranges: 9–10, 7–8, and 1–6 or 0–6. Order the scale from the highest to lowest value (**figure 4**).

For example, on a scale of 1–5, where 1 is high and 5 is low, you'd order it from 1 (highest value) to 5 (lowest value). But if the scale meant 5 was high and 1 was low, you'd order it from 5 (highest value) to 1 (lowest value).

Figure 4

■ Promoters (9–10)   ■ Passives (7–8)   ■ Detractors (0–6)

Average: 22% | 54% | 25%

Percentage of respondents

Data labels

Include symbols (%, $, etc.) in data labels and axis labels when relevant (**figure 4**).

Multiple charts in one figure

You can style a figure with multiple images two ways: labeled, separate images or figure carousels.

Labeled, separate images. Include A and B headings above the images and add (A) and (B) callouts in parentheses at the end of sentences within the caption. Don't bold callouts in the caption. If the charts are side by side, write the A and B headings in the chart title in the Excel chart template. If your charts will be placed one above the other, your A and B headings should go in the HTML.

> **A. Average energy use in New England**
>
> **B. Average energy use in Vermont**

Figure carousels. You can also use a figure carousel in HTML deliverables that viewers can click through to see the different images. See the Figure styles section of the E Source HTML styles web page for more details on a carousel layout.

Tables

We try to use HTML tables for all HTML deliverables, especially if the table includes hyperlinks. But if the table has too many columns, we can create images of tables created in Excel or upload an Excel file to the node and link to it. See the Table styles section of the E Source HTML styles web page for different examples of table layouts.

Order of data. Establish an order for the data in your table. Usually, sort by the entries in the first column in either alphabetical or numeric order, or some other order that's logical for the data.
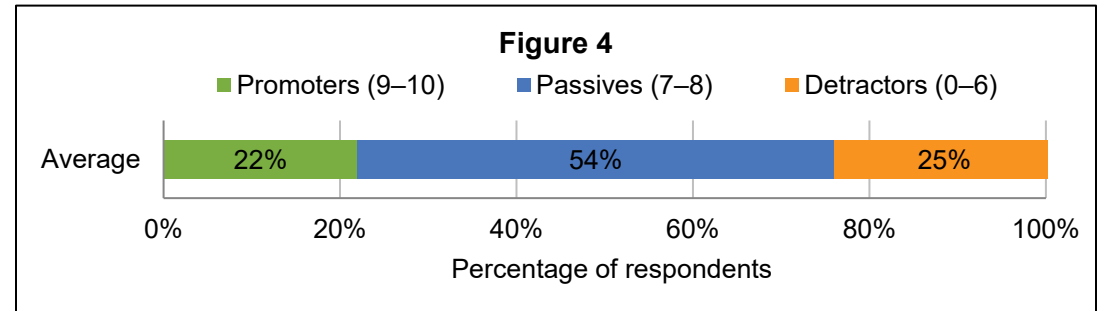
Formatting. Always left-align the first column in a table. For other columns, left-align text and center-align numbers. Heading alignment should mirror their columns. For example, the second column in **figure 5** shows percentages, so the heading and cells in that column are center-aligned. The other headings and cells are left-aligned.

Punctuation. Be consistent in voice and style: the phrasing in each column should match so that all text does or doesn't end with end punctuation. You may use bullets in columns where the text is a simple list.

Symbols and special characters. Use unit symbols (%, $, etc.) in cells (see the second column of **figure 5**). And use en dashes (–) when showing number ranges. For example: 13%–15%.

Abbreviations. To save space, you can use abbreviations in tables and define those abbreviations in the table note.

Links. You can link text in source lines and within table cells. Link text should follow the standard link guidelines.

Figure 5

Program purpose	Participation rate	Rebate or incentive
Demand reduction during peak grid load and lower energy prices	13%	Incentive is based on the average kilowatt used per DR event. This average is based on the season.
Demand reduction during peak grid load, backup power during outages, and lower transmission costs	10%	Batteries are charged during off-peak hours when electricity rates are lower. Customers then use this energy when rates are high, during peak demand, which saves them money.

© E Source (DSM Insights) **Note:** DR = demand response.