



# UM 2005 Technical Work Group July 28, 2021 Notes and Questions

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Aug 10, 2021

Below are notes from the July 28, 2021, Technical Work Group meeting. The meeting was abbreviated due to scheduling conflicts and ran from 9:00 am - 10:00 am Pacific.

## Attendees:

- PUC Staff: Nick Sayen
- Energy Trust
  - Spencer Moersfelder
  - Gina Saraswati
- Renewable NW: Micha Ramsey
- OSSIA: Angela Crowley Koch
- PacifiCorp
  - Erik Anderson
  - Teri Ikeda
  - Heide Caswell
  - Adam Lint
- ODOE: Jason Sierman
- NWECC: Fred Heutte
- PGE
  - Angela Long
  - Nihit Shah
  - Joe Boyles
  - Misty Gao
  - Shadia Duery
  - Jason Salmi-Klotz
  - Kalia Savage
  - Bachir Salpagarov
- CUB: Sudeshna Pal
- Idaho Power: Mark Patterson
- TeMix: Stephen McDonald (joined late in the call)

## Follow up from June 30 meeting

PUC Staff explained that notes and follow up materials from the June 30 meeting still had not been circulated, but would be soon. Staff would request that any feedback/questions/clarifications on the materials be submitted via email, since time did not allow for this during the meeting.

Several discussions from the June 30 meeting led to the possibility of likely follow up through sub-groups. Staff will work to move these discussions, and possible follow up, forward.

## Consideration of Technical Work Group meetings and cadence for autumn 2021 and beyond

Staff reviewed the purpose and goal of this group as documented in the Distribution System Planning Technical Work Group Plan, the meeting cadence and times to-date, as well as the administration practices to-date. Staff explained that both PUC management and Staff would

like to get a sense of the value of this group, in order to plan and prioritize workload; this prompted the development of the questions for discussion today:

- a. Is it useful for the Technical Work Group to continue to meet beyond August?
- b. Is the meeting length – three hours – optimal, or should it be changed?
- c. Is the meeting cadence – monthly – optimal, or should it be changed?
- d. When timely, are the current administration practices (agenda item solicitation, agenda and materials circulation pre-meeting, notes and follow up materials circulation post-meeting) optimal, or should they be changed?

Stakeholder feedback included:

- Regarding usefulness: stakeholder sentiment was unanimous that the Technical Work Group has been valuable and should continue.
- Regarding meeting length: consensus developed around scheduling a two-hour meeting instead of a three-hour meeting.
- Regarding meeting cadence: consensus developed around maintaining a monthly cadence, cancelling if/when a meeting is not needed.
  - There was **not** consensus on the topic of when to begin scheduling meetings after August; meeting in September and October may not be needed with Part 1 filings due October 15; beginning again in November or December may be difficult due to the holiday season.
  - Staff will follow up on this question.
- Regarding purpose and goal: it was noted that discussions to-date have not been particularly focused on technical matters; looking forward, it would be helpful to better understand the kinds of discussions the group may need to have, and then and develop those topics/discussions.
  - That being said, once Part 1 filings have been submitted, there may be an abundance of substantive topics to discuss, technical and not.
  - There **are** currently substantive issues in the parking-lot now, some technical, some not.
  - Part of the value of the Technical Work Group is embedded in a consistent forum/opportunity to socialize issues and questions, technical or not.
  - Possibly the purpose and goals (and name) could be revised to reflect a less technical focus.
- Is there value in a small group volunteering to assist in leading/steering the Group?

Stakeholder discussion also covered the following topics:

- Like the Technical Work Group might take up an engineering practice (such as a topic related to hosting capacity analysis) in order to educate and clarify, identify best-practices, and develop consensus aspects, etc., the Group should take up the topic of inclusive community engagement.

- There was broad support for this, though it was noted that current participants in the Technical Work Group don't include vital participants for the topic inclusive community engagement; this would lead to omission of critical questions, critical perspectives, and an incomplete discussion.
- It was noted that the work and questions, needed for community engagement, equity, and inclusion, could necessitate a separate work group – a *community work group*.
- There would likely be rich opportunity for cross-pollination, and two-way sharing of ideas, between these two efforts

In conclusion:

- The Technical Work Group has been valuable and should continue on a monthly cadence, cancelling if/when a meeting is not needed. Meetings should be scheduled for two hours.
- Staff will follow up on the question of when to begin scheduling meetings after August.
- It would be useful to revisit the purpose and goal of the Work Group. This should consider:
  - Issues currently in the parking-lot,
  - Issues likely to result from upcoming Part 1 filings, and
  - The value in in a consistent forum/opportunity to socialize issues and questions.
- Finally, there is broad sentiment to include discussions on community engagement, equity, and inclusion in the Technical Work Group, but uncertainty about how to do so.

### **New questions for discussion and consideration**

The questions below were **not** discussed during the July 28 meeting due to the abbreviated meeting length and the extended discussion on the future purpose, meetings, and cadence of the Technical Work Group. Staff has included draft responses below in **bolded blue** font. These draft responses will be reviewed at the August 25, 2021 meeting.

#### Long-term Plan

1. See requirement 4.4.c which focuses on the smart grid investments:

*4.4 This section of the Distribution System Plan will consist of the utility's long-term distribution system investment plan and inform broader goals related to maximizing reliability, customer benefits, and efficient operation of the distribution system. A utility should include:*

*c) Smart Grid investment opportunities*

*i) List and describe smart-grid opportunities that the utility is considering for investment over the next 5-10 years and any constraints that affect the utility's investment considerations*

*ii) Describe evaluations and assessments of any smart-grid technologies, applications, pilots, or programs that the company is monitoring or plans to undertake”*

Does Staff and the TWG see these requirements as a way to update each activity from the previous smart grid report and talk about new activities at a granular level; or to talk about the umbrella activities where several smart grid initiatives work together to drive value?

**Response:**

**Staff notes this question was submitted with the additional comment that *these requirements represented the bulk of the smart grid report content and usually focused on providing updates to on-going activities in the space.***

**In order to respond to requirement 4.4c, a utility does not have to include the bulk of the smart grid report with similarly granular content. However, updating any on-going activities which are also key aspects of the utility’s long-term vision and plan, would be helpful to stakeholders.**

**Staff also notes that requirement 4.4b focuses on planned investments and is more prescriptive in detail and content. As a contrast, requirement 4.4c focuses on opportunities that the utility is considering for investment and does not include the same level of prescription and detail; a higher-level discussion (the question notes *umbrella activities where several smart grid initiatives work together to drive value as one such example*) would be responsive to the requirement.**

2. It would be helpful to review the actual order of the steps and the content in the long-term plan. There is a logical order that suggests we have a vision articulated in phase 1, get feedback and incorporate into phase 2 and the fold into long term plan.

**Response:**

**Staff notes that the sequencing of the filing of Parts 1 and 2 in the first DSP Plan was necessary to accommodate existing utility planning processes, and to provide enough time to adjust to new practices resulting from Order 20-485. However, this sequencing resulted in the Long-Term Plan (5-10 year) being filed prior to the Near-Term Action Plan (2-4 year).**

**This partly confused the logic of the underlying planning mechanics: a comprehensive review of the current distribution system, a holistic forecasting process, identifying system faults, identifying solutions to those faults, proposing investments needed in**

the near-term to execute those solutions, coupled with a long-term plan for the distribution system, all of which should include a new level of community engagement.

It is anticipated that future DSP Plans will be filed in one step, will follow the more linear planning mechanics as noted above, and thus will place the Long-Term Plan in more appropriate context.

Utilities should file their Long-Term Plan in Part 1 in October 2021. Should the analytical exercises done to prepare Part 2 (to be filed in August 2022) result in necessary revisions to the Long-Term Plan (for example shifting the timing of investments, or the relative priorities of investments), utilities should update their Long-Term Plan when filing Part 2.

### **Parking-lot for outstanding issues and questions**

#1 – Where and how data will be stored is an important question to discuss early so there is a way to manage, keep safe, and access data as it comes in (from 5/7/21 Data Transparency Workshop)

#2 – Volunteers to work on establishing common definitions for distribution system planning discussions (from 5/7/21 Data Transparency Workshop)

#3 – Volunteers to work on further completing Figure 2 for priority data types (from 5/7/21 Data Transparency Workshop)

#4 – What are preferred sources of public data that include demographics and other details that adequately characterize our communities? (from 6/30/21 Technical Work Group meeting)

#5 – Working subgroup to focus on demographic and socioeconomic data, useful energy planning metrics, and quantifying measures and data sources for equity (from 6/30/21 Technical Work Group meeting)

#6 – Working subgroup to focus on practices for handling public accessibility of data (from 6/30/21 Technical Work Group meeting)

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