



# UM 2005 Distribution System Planning Technical Work Group Agenda

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August 19, 2021

Oregon Public Utility Commission (PUC) Staff announces an agenda for the August 25, 2021, Distribution System Planning (DSP) Technical Work Group meeting.

The meeting will be conducted using Zoom. **Instructions for joining the workshop are below.**

## **Meeting Agenda**

**9:00 am - 12:00 pm Pacific**

9:00 am – Welcome, introductions, agenda review – Nick Sayen, PUC Staff

9:15 am – Questions/clarifications/etc. on follow up materials from June 30 & July 28 meetings  
– All participants

9:20 am – Unresolved questions from the July 28 meeting – All participants

9:45 am – New Questions – All participants

10:15 am – Break

10:30 am – Proposal for future Technical Work Group meetings and cadence – All participants

10:45 am – Proposal for areas of additional focus – All participants

11:25 am - Wrap up and review – Nick Sayen

11:30 am – Adjourn

## **To Join the Meeting**

Please use the following link to join the meeting:

<https://opuc-state-or-us.zoom.us/j/81532988556?pwd=WklWckdSeTF4TXJ2OHA1TldmSDFzUT09>

Dial-in: 1-971-247-1195

Meeting ID: 815 3298 8556

Passcode: P0v+=dJ3b9

The meeting will open approximately 5 minutes before the workshop is scheduled to begin.

Before joining a Zoom meeting on a computer or mobile device, you can download the Zoom Client for Meetings from the Zoom Download Center - <https://zoom.us/download>. If you have not used Zoom before, the Client will download automatically when you start or join your first Zoom meeting.

To familiarize yourself with Zoom, or to test your internet connection, join a test meeting - <https://zoom.us/test>.

### **Questions or Feedback**

Questions and comments can be directed to Nick Sayen via email at [nick.sayen@puc.oregon.gov](mailto:nick.sayen@puc.oregon.gov) or by telephone at 503-510-4355.

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Please reference Order No. 20-485 at the following link for the DSP Guidelines (Guidelines) as adopted in December 2020: <https://apps.puc.state.or.us/orders/2020ords/20-485.pdf>.



# UM 2005 Technical Work Group August 25, 2021 Meeting Materials

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August 19, 2021

The following are materials for discussion during the August 25 Technical Work Group meeting.

## **9:15 am – Questions/clarifications/etc. on follow up materials from June 30 & July 28 meetings – All participants**

- Please reference follow up materials from the June 30 meeting at the following link: <https://edocs.puc.state.or.us/efdocs/HAH/um2005hah9721.pdf>
- Please reference follow up materials from the July 28 meeting at the following link: <https://edocs.puc.state.or.us/efdocs/HAH/um2005hah1465.pdf>

## **9:20 am – Unresolved questions from the July 28 meeting – All participants**

The questions below were **not** discussed during the July 28 meeting due to the abbreviated meeting length and extended discussion on other topics. Staff circulated the draft responses below in **bolded blue** font after the meeting. These draft responses will be reviewed at the August 25 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 that 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 No. 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.

**9:45 am – New Questions – All participants**

Below are new questions received for discussion on August 25.

1. Some discussion/clarity about the hosting capacity maps would be helpful. Specifically, the difference between what is required in the Phase 1 report versus what is outlined in Stage 2 in the guidelines.

Figure 2 below shows published hosting capacity maps as part of Stage 2 (2023 and beyond):

<b>Figure 2</b>			
<b>Hosting Capacity Analysis</b>			
Stage 3	<p>Comprehensive hosting capacity considering both distribution and transmission.</p> <p>Increased level of detail regarding distribution constraints, asset performance, and DER performance metrics. Address emerging technology development.</p> <p>Maps indicate node/section-level hosting capacity.</p> <p>Update and publish hosting capacity maps and datasets sufficiently accurate and frequent to streamline interconnection.</p> <p>Conduct system-wide hosting capacity evaluations to inform Grid Needs Identification.</p>		
Stage 2	<p>If determined through Docket UM 2111, conduct hosting capacity analysis inform stakeholders of potential interconnection challenges, or replace portions of interconnection studies; publish <u>hosting capacity maps</u> with greater detail over time. Update areas with greater/faster DER adoption more frequently.</p> <p>Include distribution-level impacts to the substation and transmission system.</p> <p>Conduct hosting capacity evaluations to inform Grid Needs Identification.</p>		
Stage 1	<p>Conduct a system evaluation to identify areas of limited DER growth.</p> <p>Provide a plan to conduct hosting capacity evaluations in the near-term which may inform Grid Needs Identification, inform stakeholders of potential interconnection challenges, or replace portions of interconnection studies. Plan may address options that may provide more approachable and instructive data for communities.</p>		
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; text-align: center;"><b>2021-2022</b></td> <td style="width: 67%; text-align: center;"><b>2023 and beyond</b></td> </tr> </table>	<b>2021-2022</b>	<b>2023 and beyond</b>
<b>2021-2022</b>	<b>2023 and beyond</b>		

In the same section, the Guidelines also say:

Under these Guidelines, for initial Distribution System Plans, each utility should conduct system evaluations to identify generation constrained areas where it is difficult to interconnect DERs without system upgrades. Each Utility should present the results through an unredacted map that the utility should make available on its website on a continuing basis. <emphasis added>

A reasonable interpretation of the objective of the Stage 2 requirement is to enhance the original map. It would be great to discuss this further and clarify this interpretation, and expectations.

2. A base assumption for the Distribution System Planning process is that utilities are able to receive the benefits of grid services that certain Distributed Energy Resources (DERs) are able to provide. However, Oregon has not yet gone through the process of adopting the most current version of the IEEE 1547 interconnection standard that would allow us to work out some of the foundational questions around interconnecting advanced "smart" inverters and advanced battery energy storage systems so that they can provide those grid services. What is the pathway for adopting and implementing the IEEE 1547-2018 in Oregon?

For consideration:

In 2020, NARUC passed a resolution that states adopt and implement the IEEE 1547-2018 standard for interconnection.

- <https://irecusa.org/blog/regulatory-engagement/naruc-formally-recommends-states-adopt-national-interconnection-standards/>
- <https://pubs.naruc.org/pub/4C436369-155D-0A36-314F-8B6C4DE0F7C7>

IREC created a primer on adopting the IEEE 1547-2018 standard:

- <https://irecusa.org/resources/making-the-grid-smarter-primer-on-adopting-the-new-ieee-standard-1547-2018/>

The IEEE has a site where they collect information:

- <https://sagroups.ieee.org/scc21/standards/1547rev/>

### **10:30 am – Proposal for future Technical Work Group meetings and cadence – All participants**

Staff proposes that the *Technical Work Group Plan* be revised to reflect the following (the current working draft, dated April 28, 2021, is included below):

The Technical Work Group continue to meet under the name of *DSP Work Group*. The Purpose Statement be revised to lessen the focus on technical questions.

Meeting length should be scheduled for two hours as a default. Once the agenda is developed, if less time is needed the meeting can be shortened.

Meeting cadence should continue on a monthly basis. During agenda development, if a meeting is not needed it should be cancelled.

Future meeting dates:

- November 17, 2021 from 1:00 pm – 3:00 pm Pacific
- January 19, 2022 from 1:00 pm – 3:00 pm Pacific
- February 16, 2022 from 1:00 pm – 3:00 pm Pacific
- March 16, 2022 from 1:00 pm – 3:00 pm Pacific
- April 13, 2022 from 1:00 pm – 3:00 pm Pacific
- May 18, 2022 from 1:00 pm – 3:00 pm Pacific
- June 15, 2022 from 1:00 pm – 3:00 pm Pacific

### **10:45 am – Proposal for areas of additional focus – All participants**

Below is the current parking-lot of 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 the 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).

~~#7 – When to begin scheduling Technical Work Group meetings after August (from 7/28/21 Technical Work Group meeting)?~~ Proposal to address this issue to be considered 8/25/21.

In response to the discussion during the July meeting about better honing topics for the group, Staff proposes below areas of focus for working subgroups, through June 2022. The proposed topics are not intended to replace the practice of a general solicitation for agenda topics, rather they are intended to bolster and refine the ongoing work of the group. In each instance, the proposal is for *exploration and examination of policy options* for this group to consider, as well

as stakeholders more broadly to consider (perhaps through a workshop). To be clear, the proposal is not to *decide* a policy matter.

Proposed areas of focus through mid-2022:

I. Combine numbers five and four:

A 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). Consider in this effort identifying preferred sources of public data that include demographics and other details that adequately characterize our communities (from 6/30/21 Technical Work Group meeting).

II. A working subgroup to establish common definitions for distribution system planning discussions (from 5/7/21 Data Transparency Workshop).

III. A working subgroup to focus on practices for handling public accessibility of data, ***focusing specifically on the distribution system context (that is to say, to a lesser extent on customer energy-usage data concerns, and to a greater extent on grid-level data concerns)*** (originally from 6/30/21 Technical Work Group meeting, emphasis from Staff added 8/19/21).

Staff presents the following questions for consideration and discussion:

1. Is there capacity amongst participants to move forward on these efforts?
  2. If so, what is the timeframe for working subgroups?
  3. How should working subgroups communicate progress amongst this group?
  4. What is the necessary role of Staff to support working subgroups?
  5. Are there other practical, or logistical matters to consider?
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# UM 2005 Technical Work Group Plan

## Working Draft, April 28, 2021

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### **Background**

Based on feedback from UM 2005 discussions in 2020, as well as the draft DSP Guidelines (Guidelines) public comment period, Staff understands there is need for, and value in, a Technical Work Group to surface and, when possible, address technical questions that arise in the course of the utilities working on their plans.

Staff proposed the following Plan at the April 21, 2021 inaugural meeting of the Technical Work Group and requested stakeholder feedback. Staff received feedback on emailing materials in addition to posting materials to the docket, and also received a question about recording meetings. In response to this feedback Staff has revised the Plan (with alterations noted via track changes). Staff proposes the revised Plan as a Working Draft - that is a work-in-progress which may be revisited if needed - dated April 28, 2021:

### **Purpose statement**

The purpose of the Technical Work Group is to serve as a forum to identify, articulate, discuss, and when possible, resolve technical questions that arise in the course of the utilities preparing their plans.

The primary goal in addressing technical questions is to try to answer questions, solve problems, and find solutions to barriers that would otherwise inhibit completion of the utility plans.

This is distinct from other docket activities in which raising awareness, developing background, or providing education may be primary goals.

While still in development, the Group may engage in activities such as assisting utilities in vetting ideas needing stakeholder feedback, discussing data formats, clarifying terminology, or acting as a general point of discussion amongst utilities, stakeholders, and Staff.

### **Meeting timeline and deliverables**

Technical Work Group meetings will be open to stakeholder participation.

Initially the Group will meet monthly for 3 hours on a monthly basis. Cadence and meeting length will be revised as needed.

Staff will solicit questions and discussion topics approximately two weeks prior to each meeting, and from this develop an agenda.

Meeting agendas and materials will then be circulated one week prior to each meeting to allow participants to prepare in advance with the goal of making each meeting as productive as possible. **As the primary means of communication, meeting agendas and materials will be posted to the UM 2005 docket.** For participants' convenience Staff will develop a list of participants' email addresses, and will also send agendas and materials to these email addresses.

As is practical Staff may draft answers to questions for review during the meeting. Alternatively, questions may be resolved in the meeting. Alternatively~~Finally~~, a question may need more thought and consideration than is possible during the meeting in order to be resolved. **In this case, Staff will strive to provide feedback on the unresolved question as expeditiously as possible after a meeting.** Questions may also go unresolved, either in the meeting or after, and should that be the case it may not be a 'bad outcome'.

Staff will take notes during the meetings. The notes will summarize questions being asked, rationale provided surrounding the question and potential resolution, and any resolution. The notes are intended to serve as a reference, but are not intended to serve as a comprehensive transcript. To preserve a collaborative dynamic that promotes sharing of all ideas and concerns, meetings will not be recorded as a regular practice.

**Staff will provide notes as expeditiously as possible after a meeting. As the primary means of communication, meeting notes, and any feedback on unresolved questions, will be posted to the UM 2005 docket.** For participants' convenience Staff will also send notes and feedback on unresolved questions to participants' email addresses.