



UM 2005 Technical Work Group January 20, 2022 Notes + Survey

February 9, 2022

Below are notes from the January 20, 2022, DSP Work Group meeting, as well as **revised future Work Group meeting dates and times**.

In addition, **Staff requests Work Group participants respond to the survey at this link:**

<https://forms.office.com/g/38KSCVVHTN>

The survey – discussed further in the Notes below – is to identify and prioritize issues for the Work Group to take up as areas of additional focus in the coming months.

Attendees included (but were not limited to):

- PUC
 - Nick Sayen, Staff
 - Ted Drennan, Staff
- PacifiCorp
 - Tyler Jones
 - Heide Caswell
 - Melissa Nottingham
 - April Brewer
- Energy Trust
 - Jeni Hall
- OSSIA: Angela Crowley Koch
- CCC: Nikita Daryanani
- Renewable NW: Micha Ramsey
- PGE
 - Andy Eiden
 - Angela Long
 - Bachir Salpagarov
- OCEAN: Shannon Souza
- IMT
 - Jake Duncan
- Idaho Power
 - Alison Williams
 - Marc Patterson
- IREC: Yochi Zakai
- TeMix: Stephen McDonald

Questions/clarifications/etc. on follow up materials from August 25, 2021, meeting

There were no questions or clarifications on the follow up materials from the August 25, 2021, meetings.

Review from August meeting: parking lot issues, and proposed areas of focus for working subgroups

In order to level-set for new participants, and as a refresh for returning participants, Staff lead a review of the Work Group's next steps as were discussed in August 2021. This included a review of all the issues in the parking lot, the areas proposed for additional focus, as well as the proposed working subgroup process. The areas of additional focus included:

I. A working subgroup to focus on demographic and socioeconomic data, useful energy planning metrics, and quantifying measures and data sources for equity. Consider identifying preferred sources of public data that include demographics and other details that adequately characterize our communities.

II. A working subgroup to establish common definitions for distribution system planning discussions.

III. A working subgroup to focus on practices for handling public accessibility of data, focusing specifically on the distribution system context.

New issues to consider, and/or revised priorities

Staff asked participants if there were new issues to consider which should be added to the list, or whether priorities for the current issues may have changed. Participants noted the following:

- Common definitions still seem to be a valuable area of focus, and given the timing of preparation of the Part 2 filings, the utilities may have an opportunity to advance this now
- Cost effectiveness methodology
- DSP intersections with implementation of HB 2021
- How energy efficiency and DER forecasts feed into IRP processes
- Envisioning the future state of DSP in several years (no need to wait for 2023 to consider reviewing the Guidelines)
- Identifying areas of overlap (and/or potential collaboration) in utilities' current practices, with the goals of 1) minimizing discrepancies, but not with a goal of establishing policy in these practices, and 2) maximizing stakeholder bandwidth (in other words, having one conversation about cost effectiveness, not a PGE conversation, a PAC conversation, and an Idaho Power conversation)
 - Practices may include for example, cost effectiveness methodologies, forecasting approaches, developments in hosting capacity analysis

Part way through the discussion and compilation of these issues, Staff paused to distinguish several different workflows to address policy questions. The first workflow is a review of the DSP guidelines in 2023. This will be a stakeholder process once the first Plans (Parts 1 and 2) have been filed and acted on by the Commission. The intent is to improve the Guidelines adopted in 2020 with the benefit of a full planning cycle (fix errors, remove unnecessary requirements, address gaps, etc.). It is expected that this process will include substantive issues that may need to go before the Commission for resolution, for example cost effectiveness methodology. A second workflow is the DSP Work Group. The Work Group has been a forum to surface and, when possible, address questions or barriers that arise in the course of the utilities working on their plans. While that effort at times leads towards policy questions, the policy questions are more targeted, and less substantive when compared to those likely included in the 2023 Guideline review, and generally have been resolved with consensus. Staff noted while that today's discussion can begin to identify issues for the 2023 Guideline review, the Work Group should maintain a focus on addressing questions or barriers that come up as utilities prepare their plans.

As part of this discussion PGE presented slides (included below) illustrating questions and discussion topics they have encountered beginning preparations for the Part 2 filing. The examples were numerous, and intended to be illustrative, not exhaustive or prescriptive.

Staff asked Pacific Power and Idaho Power participants if they have encountered concerns similar to PGE's. Idaho Power confirmed interest in collaboration where possible, as well as identifying areas for overlap between the utilities; however Idaho Power also noted various exemptions, as well as unique aspects of their service territory may limit opportunities for collaboration. Pacific Power confirmed similar concerns, and also noted there are new workstreams resulting from recent legislation that ought to be accounted for as well.

After some discussion of the legislatively-driven new workstreams - all big picture, substantive issues - Staff agreed that having the relevant Commission Staff assigned to each workstream provide brief updates to DSP stakeholders on these big picture issues would be helpful. Staff will work on arranging this.

Discussion of how the group can make progress in proposed areas of focus without constraint of limited Staff bandwidth

Staff noted the substantial number of issues that could be taken up by the Work Group, and also noted Staff's own limited bandwidth as a constraint to progress on those issues. In light of this, Staff asked participants for feedback on options to move forward. The group reached consensus to continue the approach of forming working subgroups; given the substantial number of issues, there should be a step of identifying and prioritizing issues. The discussion resulted in three next-steps:

1. Staff will revise and extend the time for the next several DSP Work Group meetings.
2. Staff will solicit Work Group participants for topic ideas.
3. Once topic ideas have been assembled, Staff will ask participants to prioritize the topics, and volunteer for working subgroups. Working subgroups could then determine specifics about meeting frequency and length.

Revised Future Work Group Meeting Dates and Times

Previous Date and Time	Date and Time
March 3, 2022, 1:00 – 3:00 pm Pacific	March 10, 2022, 1:00 – 4:00 pm Pacific
March 24, 2022, 1:00 – 3:00 pm Pacific	March 31, 2022, 1:00 – 4:00 pm Pacific
April 14, 2022, 1:00 – 3:00 pm Pacific	April 21, 2022, 1:00 – 4:00 pm Pacific
May 19, 2022, 1:00 – 3:00 pm Pacific	Same date, 1:00 – 4:00 pm Pacific
June 16, 2022, 1:00 – 3:00 pm Pacific	Same date, 1:00 – 4:00 pm Pacific

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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Illustration of Potential Working Group Topics

January 20, 2022



DSP Part Two Minimum Regulatory Requirements Summary

Due August 15, 2022

Forecasting of Load Growth, EV/DER Adoption

- Describe current state for Load Forecast - process, tools, data
- DER/EV:
 - Forecast methodology and geographic allocation
 - Adoption by substation - high/med/low scenarios
 - Forecast of load growth and adoption




Grid Needs Analysis

- Document process to assess grid adequacy and identify grid needs
- Discuss criteria used to assess reliability and risk - methods and modeling tools used
- Present prioritized constraints publicly, including prioritization criteria and timeline to resolve constraints



Solution Identification

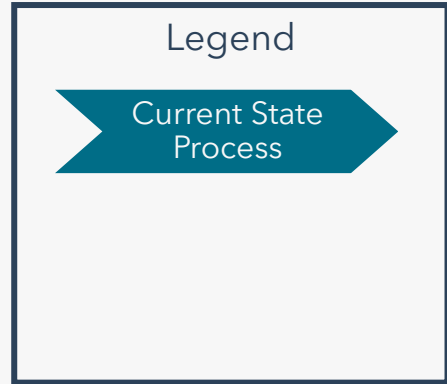
- Document process for identifying the range of solutions to address grid needs
- For each need, describe the data used to support investment decisions
- For large projects, describe process for engaging communities and getting input
- Propose 2 NWS pilot projects



Near-term Action Plan (2-4yrs)

- Provide 2-4 yr. plan to address grid needs
- Disclose planned spending, timeline and recovery mechanism
- Discuss relationship between planned investments
- Discuss pilots being conducted to enhance the grid

Distribution Planning and Project Development

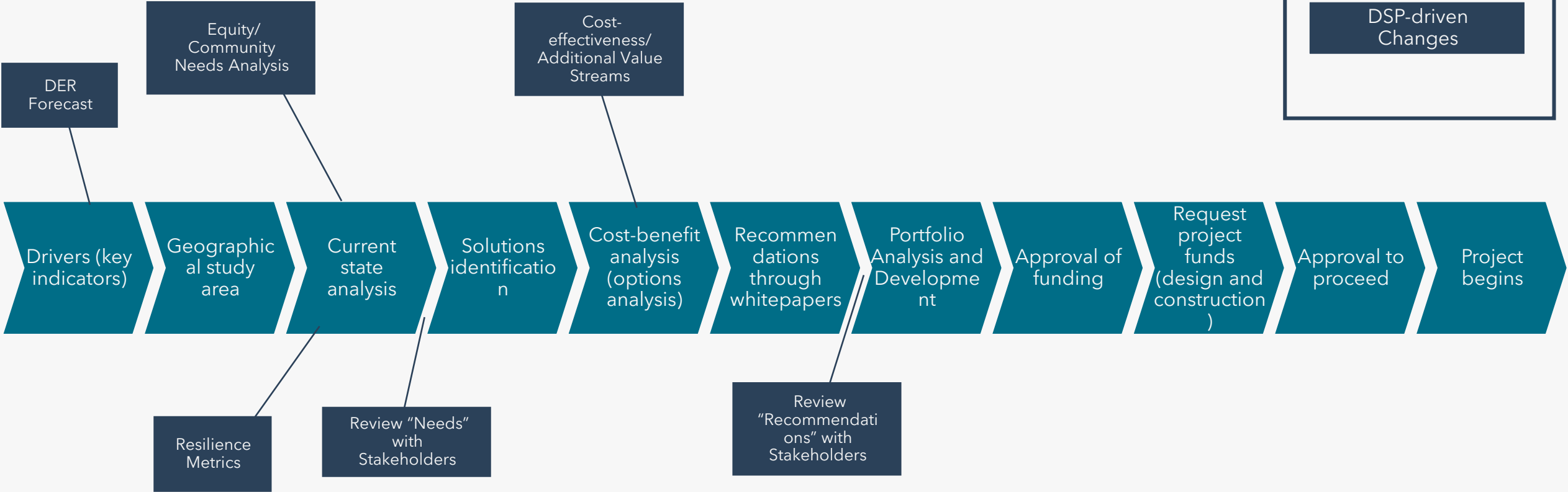
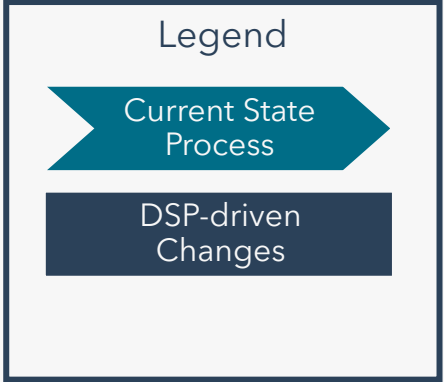


Grid Needs Analysis

Solution Identification

Near-term Action Plan

Distribution Planning and Project Development



Distribution Planning and Project Development

