NARUC-NASEO Task Force on Comprehensive Electricity Planning

Informational Webinar

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Rodney Sobin, NASEO

December 13, 2018

Today’s Call

1. Background
2. Overview and Status
3. Multi-Year Project Plan
4. Task Force Leadership & Support
5. Participation
   • Participant Commitment
   • Who Should Join
   • Why Join
6. Monthly Timeline for Year 1
7. Roles of Stakeholders & Others
8. How to Apply
9. Questions
What’s Happening in the Electricity System Right Now?
Electricity Planning and Investment Decisions are Inter-Related

With greater alignment of electricity planning processes, states & utilities could:

- Improve reliability and resilience
- Optimize use of distributed and existing resources
- Avoid unnecessary costs
- Support state priorities
- Increase transparency of investment decisions

Task Force will focus on aligning Resource and Distribution planning
NARUC-NASEO Task Force

Purpose: Develop new pathways for aligned electricity planning

• 4 workshops over 2 years (start spring 2019)
  • Two member-only workshops
  • Two member-stakeholder workshops

• 12 to 15 states
  • Commission and state energy office from each state working together
  • Participants TBA February 2019
Targeted Outcomes

1. **Innovation**: Pioneer new tools and roadmaps for aligning planning to meet state needs
   
   • Participants will convene in multi-state cohorts with others operating in similar market, regulatory, and policy environments

2. **Action**: Apply insights to directly benefit your state
   
   • Each state will develop concrete steps / an action plan at the end of the initiative

3. **Replication**: NARUC and NASEO will publish templates to support all members

   *Participants will be supported by each other, technical experts, and facilitators*
## Task Force Process

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<tr>
<th>Step</th>
<th>Pre</th>
<th>Wkshp 1</th>
<th>Wkshp 2</th>
<th>Wkshp 3</th>
<th>Wkshp 4</th>
<th>Post</th>
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<tbody>
<tr>
<td>Phase</td>
<td>Preparation</td>
<td>Status quo, vision, problem scoping</td>
<td>Consideration of alternatives</td>
<td>Solution generation</td>
<td>Solution refinement &amp; action planning</td>
<td>Solution implementation</td>
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<td>Participants</td>
<td>Stakeholders</td>
<td>Key</td>
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<td>We are here</td>
<td>• IOUs</td>
<td>• In-person meeting, only state members</td>
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<td>• Consumer advocates</td>
<td>• Consumer advocates</td>
<td>• In-person meeting, states &amp; stakeholders</td>
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<td>• NGOs</td>
<td>• Large energy consumers</td>
<td>• Interim virtual mtgs / webinars</td>
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<td>• Energy service companies</td>
<td>• DER / technology providers</td>
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<td>• ISOs/RTOs</td>
<td>• State legislators</td>
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<td>• Governors offices</td>
<td>• Stakeholders</td>
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### Stakeholders
- IOUs
- Consumer advocates
- NGOs
- Large energy consumers
- DER / technology providers
- Energy service companies
- ISOs/RTOs
- State legislators
- Governors offices

### Activities
- Catalog current resource and distribution system planning practices, requirements, and constraints
- Conduct needs assessments with participating states
- Sketch status quo planning practices
- Articulate vision for optimized alignment
- ID current practices that do / do not support optimized alignment
- ID changes needed to current practices
- Consider systemic impacts of changes
- ID barriers and opportunities to change current practices
- Draft improved planning alignment diagrams
- Pressure test solutions
- Articulate benefits of improvements
- Pressure test & refine solutions
- ID steps needed to achieve improved planning alignment
- Develop action plans
- Share action plan progress updates among participating states
- Publish developed approaches for non-participating states to leverage

### Vision
Aligned resource and distribution planning can better optimize [utility, vendor, customer] investments to produce a safe, reliable, and affordable power system while supporting state policy goals.

### End Products
- State- & stakeholder-developed tools, roadmaps, and approaches for aligned resource and distribution system planning processes for different types of regulatory / market / policy environments
- State action plans
Task Force Co-Chairs

Hon. Jeff Ackermann
Chairman
Colorado Utilities Commission

Dr. Laura Nelson
Executive Director
Utah Office of Energy Development

Task Force Co-Vice-Chairs

Hon. Beth Trombold
Commissioner
Public Utilities Commission of Ohio

Dr. Andrew McAllister
Commissioner
California Energy Commission
Task Force Support

Core Team:
- Danielle Sass Byrnett, NARUC
- Rodney Sobin, Stephen Goss, Shemika Spencer, NASEO
- Johanna Zetterberg, Virginia Castro, U.S. DOE/EERE
- Joe Paladino, U.S. DOE/OE
- Paul DiMartini, Newport Consulting
- Samir Succar, ICF
- Lorenzo Kristov
- Carl Linvill, John Shenot, RAP

Funding and Technical Support provided by:
- U.S. Department of Energy (DOE) Office of Electricity (OE)
- DOE Office of Energy Efficiency and Renewable Energy (EERE)

Travel stipends available for up to 3 participants per state
## Participant Commitment

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<th>State Public Utility Commissioner</th>
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<td>State Energy Office Director / Deputy Director</td>
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<td><em>Optional</em>: one additional state government official</td>
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### Required:
- Attend and engage in all 4 in person sessions (April & Oct. 2019 & 2020)
  - First workshop: 1st or 2nd week in April (likely Denver, CO)
  - 2 days of meeting time over 3 days
- Participate in 3 phone interviews over 2 yrs: pre-workshop, mid-course, post-effort
- Review near final products
- Develop state-specific action plans

### Optional:
- Attend distribution systems and planning training (March 7-8, 2019, Washington DC)
- Attend webinars between workshops to advance learning
# Who Should Join

| **State Participants** | State public utility commissioner AND State energy office leader  
| 2 to 3 people representing each of 12 to 15 states  
| Each state will determine participants, based on how planning occurs in the state  
| Likely includes commissioner, energy office leader, and a senior PUC staff person; but third slot could be senior DEQ official, governor’s advisor, etc. |

| **Potential Participating States** | Have Active / Anticipated Proceedings or Explorations:  
| Grid modernization, distribution system planning, distributed energy resources, hosting capacity analyses, etc.  
| Face PUC / SEO Coordination Needs:  
| SEO drafts forecasts or IRP; PUC authorizes utility investments  
| SEO runs DER programs; PUC oversees utility DER investments  
| SEO manages state energy plan development; PUC decisions impact realization |

| **Task Force Composition**  
(~35 travel stipends available) | Seeking overall diversity in:  
| Geography / region  
| Market model  
| Stage of proceedings / in state actions  
| Role of commissions / state energy offices |
## Why Join?

**Task Force participation gives you an opportunity to:**
- Support state priorities while learning from peers and experts
- Find space to innovate on a vision and path for future electricity planning processes
- Engage in a creative, collaborative process with stakeholder representatives outside of proceedings
- Forge new partnerships within your state and with other states in similar situations

**If You Can’t Join:**

NARUC and NASEO will share ongoing efforts with members through:
- Sessions at NARUC and NASEO meetings
- Materials developed for the Task Force
- Webinars for Task Force participants

Consider participating in the NASEO-NARUC Grid Integrated Efficient Buildings Working Group
Draft Monthly Timeline for Year 1

- Nov. 18 – Announced
- Dec. 18 – State Recruitment
- Jan. 19 – Needs Assessment Calls
- Feb. 19 – States Announced & NARUC mtgs. (DC)
- May 19 – Monthly Webinar Series starts
- Apr. 19 – First workshop (states only)
- July 19 – NARUC mtg. (IN)
- Aug. 19 – Invite stakeholders for Oct. workshop
- Sept. 19 – NASEO mtg. (CA)
- Oct. 19 – Second workshop (w/stakeholders)
- Nov. 19 – NARUC mtg. (TX)
Stakeholders & Others

Advisory Group:
- Provide input to Core Team re: process steps, workshop agendas, webinars
- Review product development plans and deliverables
- Ex.: Former commission staff, former utility / government executives, expert consultants, economists, engineers

Subject Matter Experts:
- Present at workshops (limited) and on webinars re: specific topics
- Share relevant resources and publications that answer participant questions
- Ex: DOE national labs (LBNL, NREL, PNNL, ORNL), NGOs (RMI, SEPA, NRRI, etc.), consultants (Synapse, Brattle)

Key Stakeholders:
- Will be invited to 2nd & 4th workshops to share representative perspectives
- Ex.: EEI members, PJM/MISO/etc, NASUCA members, technology providers, AEE/SEPA members, NAESCO members, governors’ energy advisors, Legislative Energy Horizons Institute members

Other Interested Parties
- Added to distribution list for email updates
How to Apply

• **Letter of Intent Due JANUARY 18, 2019**
  • Name participants from both Commission and Energy Office
  • Agree to attend 4 in person workshops over 2 years and actively engaging throughout
  • Agree to develop state-specific action steps at the end of the initiative
  • Note whether travel funding is needed
  • State why your participation would be valuable for your state and valuable for the Task Force

• Sample available; will be sent to all webinar registrants

• Submit to: PlanningTaskForce@naruc.org

• Questions: Danielle Sass Byrnett, dbyrnett@naruc.org or Rodney Sobin, rsobin@naseo.org
Questions
Grid-Interactive Efficient Buildings:
Facilitating State-Supported Research Coordination and Analysis, and Development of State-Led Pilots

- Advancing technologies opens opportunities:
  - More impactful, flexible load management—reduce peaks, “dispatch” buildings
  - Integrate variable resources, storage
  - Improve energy efficiency

- DOE, states, utilities would benefit from greater exchange to:
  - Understand technological status and trends
  - Inform federal, private, and state RD&D decisions
  - Clarify electric system (consumer and grid-facing) requirements
  - Identify opportunities and impediments
  - Recognize temporal and locational value of energy efficiency and other distributed resources
  - Enhance energy system reliability, resilience, and affordability
Grid-Interactive Efficient Buildings: Facilitating State-Supported Research Coordination and Analysis, and Development of State-Led Pilots

- NASEO-NARUC State Working Group
  - SEOs, PUCs, DOE reps, invited experts – ~10 states
  - Inform states on the status of GEB research and technological gaps
  - Identify state market issues that foster or hinder GEB integration
  - Inform GEB RD&D priorities and potential pilots
  - Conference calls, webinars, briefing papers, Fall 2019 workshop
  - Work with states engaged in distribution planning

- Utility Working Group (led by ACEEE)
  - Complementary engagement of utilities (IOUs, co-ops, munis)
  - Research, technological gaps, workforce issues
  - Issues supporting or hindering GEB integration
  - Inform RD&D, pilots, and programs
  - Webinars, resources, technical assistance
Grid-Interactive Efficient Buildings:
Facilitating State-Supported Research Coordination and Analysis, and Development of State-Led Pilots

- NASEO and NARUC announcement and state recruitment:

  Informational webinar for states early January
  To be announced soon - Stay tuned!

Questions/inquiries:
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Danielle Sass Byrnett dbyrnett@naruc.org