Developing Requirements for Utility Distribution Plans:
Example State Practices

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Example State Practices (1)

- Establish distribution system planning (DSP) goals, objectives, and priorities with stakeholder engagement
  - Maine – "…the commission shall … identify the priorities to be addressed in a filing by a covered utility regarding a grid plan that will assist in the cost-effective transition to a clean, affordable and reliable electric grid. The commission shall hold technical conferences or stakeholder workshops before the filing to identify priorities, assumptions, goals, methods and tools that will assist the covered utility in developing a grid plan."
  - See Berkeley Lab presentation on goals and objectives in other states here

- Build on work by other states, tailored to your state's interests
  - Forthcoming catalog of state DSP requirements (slide 6)
- Host presentations to increase stakeholders' understanding
  - Colorado, Illinois, Maine, Massachusetts, Michigan, New Mexico, Oregon
- Require utilities to engage stakeholders and communities in the planning process
  - Joint Utilities of NY stakeholder plan and timeline
  - Oregon's community engagement plans – see chapter 3 in Portland General Electric (PGE) plan
- Ask utilities to respond to a questionnaire to gather baseline information on their distribution system and planning practices — and ask for stakeholder comments
  - Minnesota utilities; Oregon utilities and third-party energy efficiency administrator and stakeholders; New Jersey (questionnaire for utilities forthcoming)

Example State Practices (2)

- Determine whether any current filings can be integrated/consolidated in DSP filings
  - Oregon PUC suspended smart grid filings (e.g., order on PGE's DSP part two)
  - Minnesota PUC integrated grid modernization plans and transportation electrification plans into DSP
- Prepare a white paper to lay out PUC staff's vision for DSP processes and provide guidance for utility filings
  - Minnesota – Defined grid modernization for Minnesota, proposed a phased approach, and identified principles to guide it
  - New York – Proposed changes in filing requirements for effective interaction with the PSC's Coordinated Grid Planning proceeding to achieve the state's climate goals
  - Oregon – Outlined rationale and key drivers for opening a DSP investigation, desired outcomes and future planning process, near-term scope and schedule for investigation, and planning considerations

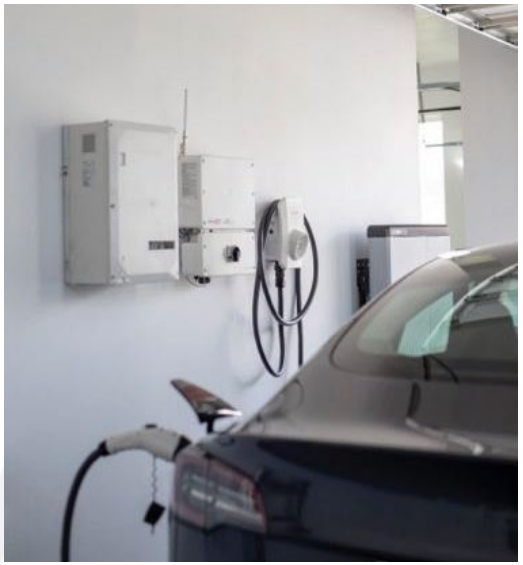

Photo courtesy of Sunrun

Example State Practices (3)

- Host work groups to help develop and refine requirements — and address emerging planning issues
  - Hawaii – Stakeholder council, technical advisory panel, and working groups
  - Maine – Working groups on forecasting, solutions evaluation criteria, and data availability/collection
  - New Jersey – Facilitated working groups with electric distribution companies and stakeholders will make recommendations for integrated distributed energy resources (DER) planning — forthcoming
  - Oregon – DSP Work Group serves as a forum to identify, articulate, discuss and, when possible, resolve technical and other questions that arise. The primary objective is finding solutions to barriers that would otherwise inhibit completion of the utilities' plans.
- Consider pilots for new processes and technologies
  - Non-wires alternatives (Oregon)
  - Resilience — Resilient Minneapolis project (Minnesota)
  - Hosting capacity analysis — start with solar PV, expand to other DERs, and add use cases*
  - Time-based rates — for general service rates and managed electric vehicle charging (e.g., Oregon, Minnesota, Hawaii, New York)

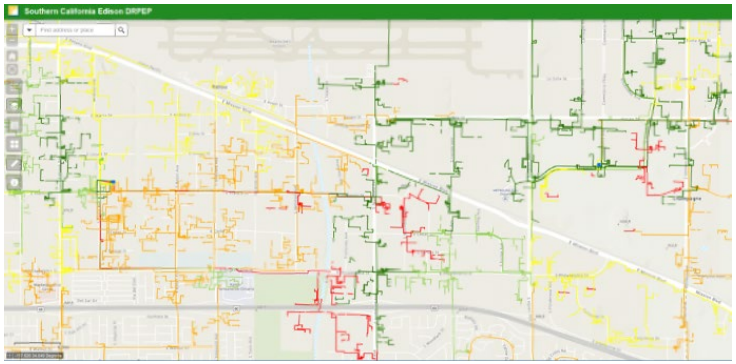

Figure source: Southern California Edison

*See Minnesota PUC orders in Docket Nos. 15-962, 18-684, 19-666, and 21-694

Catalog of State Distribution System Planning Requirements

- *Available soon* – Detailed table summarizing DSP requirements by topic and state
- *Later this year* — Report updating our 2017 and 2018 publications on state engagement in DSP and our presentations on regulatory approaches
  - Materials will be posted on Berkeley Lab's IDSP website
- **General information and procedural requirements**
  - Planning goals and objectives, type of plan (grid modernization plan, distribution system plan, integrated grid plan, DER plan, T&D improvement plan), filing frequency, planning horizon, term of action plan, stakeholder engagement and equity, type of commission action on filed utility plans
  - Links to legislation and regulations, commission proceedings and orders, and utility plans
- **Substantive requirements**
  - Baseline information required on current distribution system
  - Load and DER forecasting
  - Reliability and resilience analysis and metrics
  - Grid needs assessment and solution identification, including non-wires alternatives
  - Hosting capacity analysis
  - Grid modernization strategy and roadmap
  - Coordination with other types of planning

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