



NARUC

National Association of Regulatory Utility Commissioners

Task Force on Natural Gas Resource Planning: Roadmaps Release Webinar

Kiera Zitelman, Technical Director, NARUC Center for Partnerships & Innovation

Danielle Sass Byrnett, Senior Director, NARUC Center for Partnerships & Innovation

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AGENDA



Introduction



Overview



Roadmap
details



Other
resources



Q&A



GAS TASK FORCE LEADERSHIP AND SPEAKERS



Chairman Fitz Johnson
Georgia Public Service Commission
Reliability Cohort



Co-Vice Chair Tammy Cordova
Public Utilities Commission of Nevada
Affordability Cohort



Co-Vice Chair Kathryn Zerfuss
Pennsylvania Public Utility Commission
Affordability Cohort



Commissioner Emeritus Jamie Van Nostrand
Massachusetts Department of Public Utilities
Clean Energy Cohort



Commissioner Kim David
Oklahoma Corporation Commission
Economic Development Cohort



GAS TASK FORCE OBJECTIVES



Provide a forum for state utility regulators to discuss technological and policy changes impacting natural gas regulation



Improve public utility commission visibility into long-term natural gas distribution utility investments

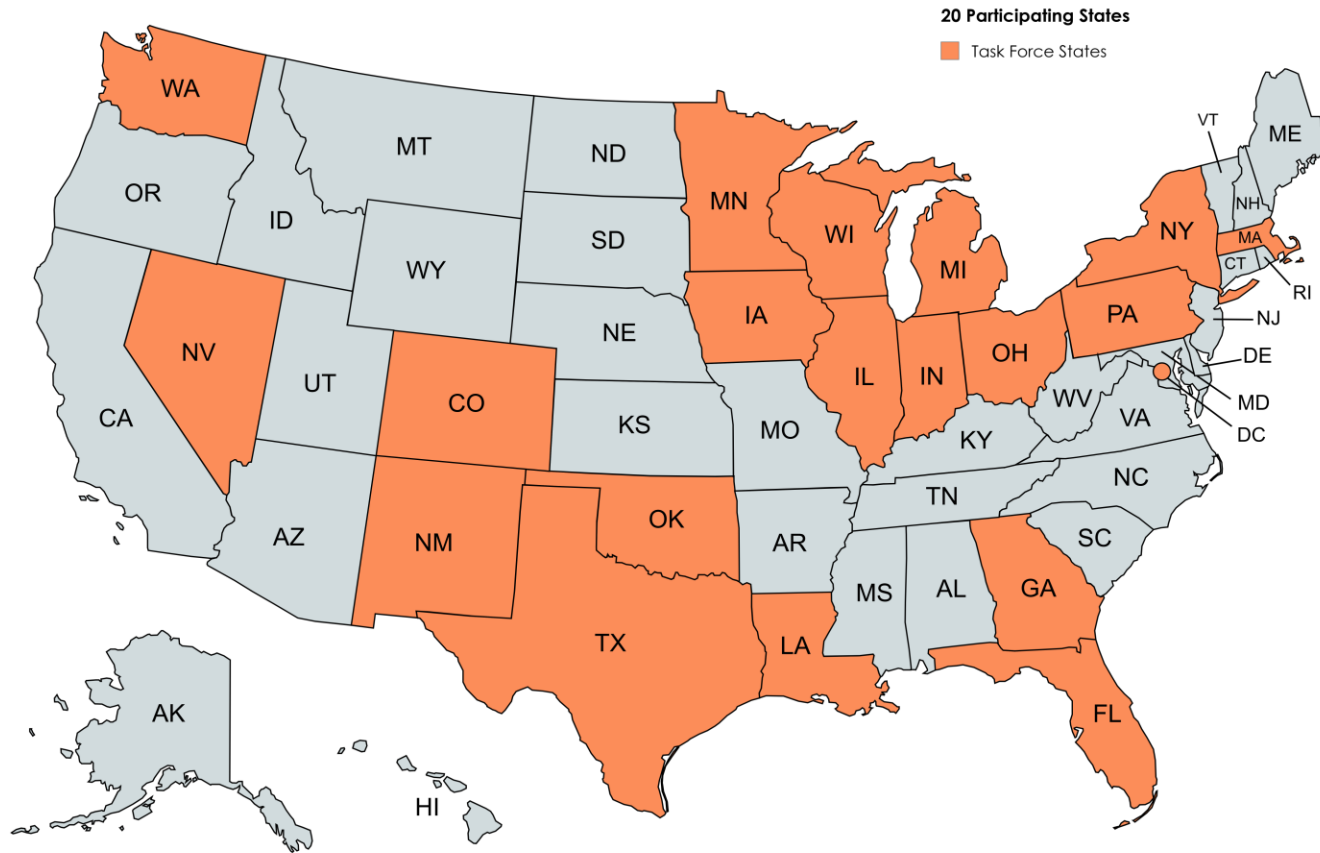


Envision ideal planning processes to align natural gas distribution utility investment plans with state policy goals

For discussion of wholesale natural gas markets and gas-electric coordination, see the NARUC [Gas-Electric Alignment for Reliability \(GEAR\) Task Force](#).



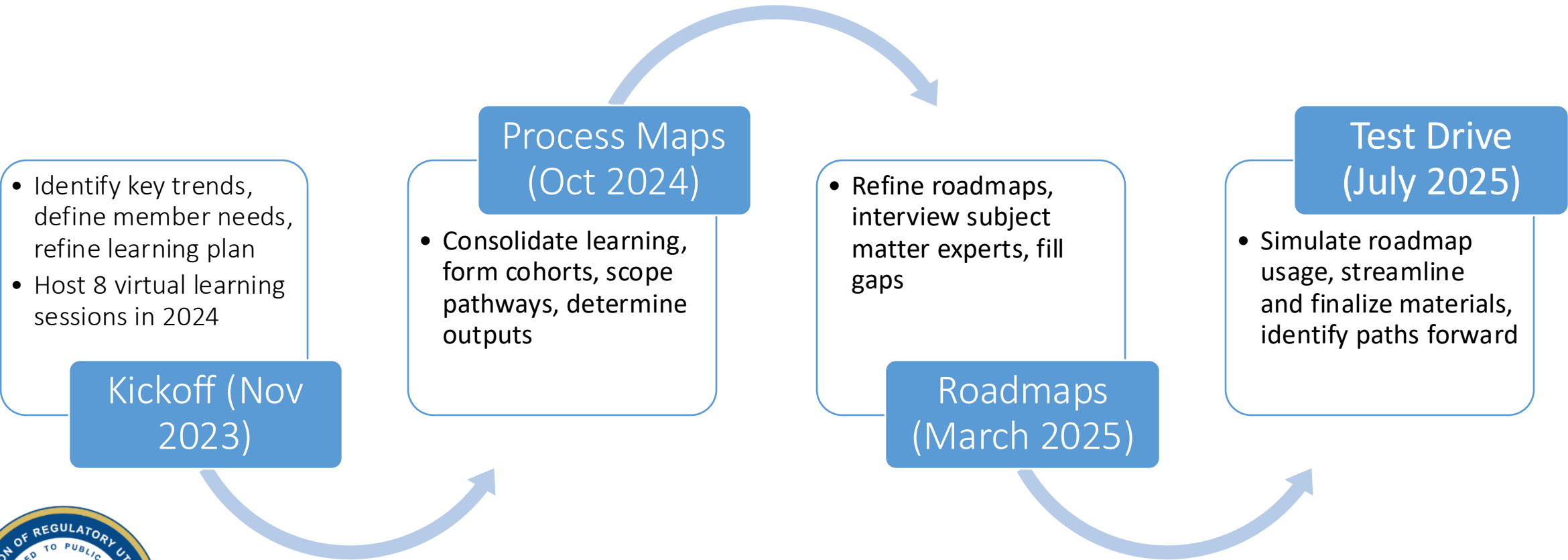
PARTICIPATION FROM 20 STATES IN 4 COHORTS



- Members from 20 states requested to join and were appointed by NARUC leadership
- Diverse in geography, political environment, end uses of natural gas, other factors
- Members formed four policy-focused cohorts:
 - [Affordability](#)
 - [Clean Energy](#)
 - [Economic Development](#)
 - [Reliability](#)

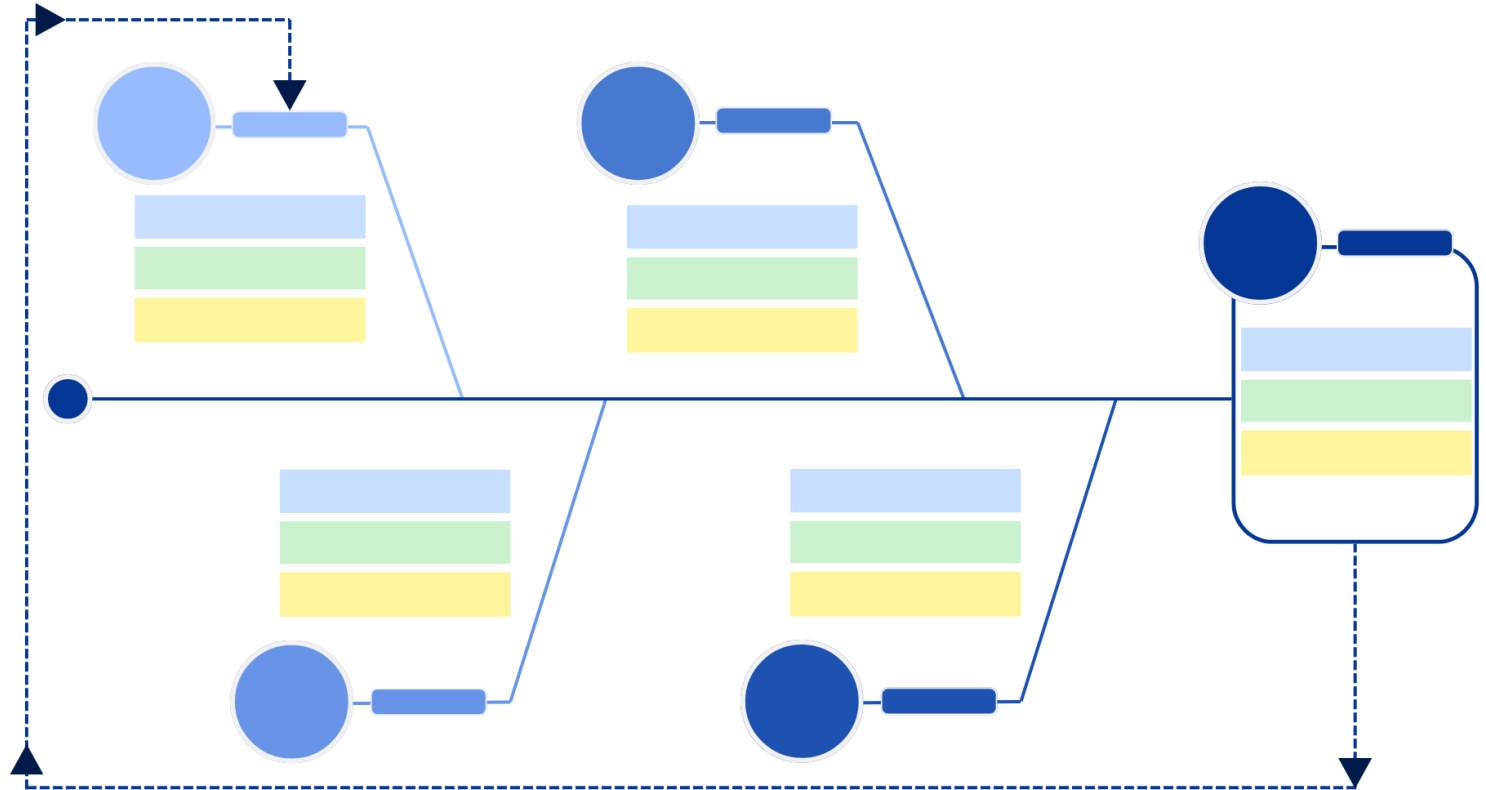
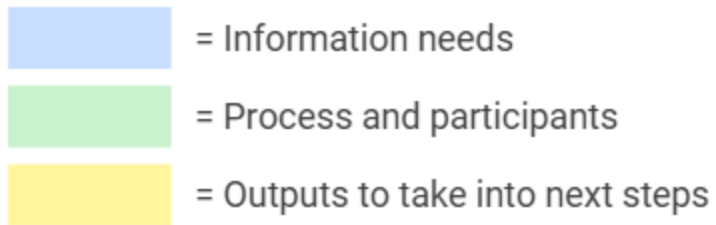


HIGHLY COLLABORATIVE 2-YEAR PROCESS



ROADMAPS OVERVIEW

- BLUE SKY VISION, leveraging successful strategies from current state experience
- FICTIONAL, REPRESENTATIVE STATE for each cohort with key characteristics articulated
- COMMON KEY with questions, tips, examples, tools to leverage



Cohorts:

- Affordability
- Economic Development
- Clean Energy
- Reliability



ABOUT THE AFFORDABILITY COHORT

Geography and Economy

- This is among the top five largest states in the country, by area.
- The population is dispersed but concentrated in big cities across the state.
- Diverse climatic conditions exist across different regions in the state.
- The state is a net natural gas importer.

Infrastructure

- The state is heavily reliant on aging gas infrastructure in need of replacement, but some new infrastructure is being built.
- New gas infrastructure is potentially at risk of being stranded due to customers looking to electrify or to find other alternatives to natural gas service.
- The state is exploring more expensive alternative fuels for use in the future.
- Demand for gas is growing in sparsely populated rural areas but declining in densely populated urban areas. It is unclear what the net effect of these trends will be on overall peak demand.
- Customers have legacy appliances and rely predominately on gas heating. Approximately 70 percent of customers use gas for heating.

Utility Demographics

- The state has multiple jurisdictional utilities; some are combined gas and electric utilities.
- Federal policies and funding incentivizing new clean energy investments are being accessed by the state, utilities, and customers. There is some uncertainty about the duration of these policies as some federal energy subsidies, funding, and assistance programs have been discontinued.
- The Commission has deemed planning for expected new large loads to be important and is prioritizing rate design, gas-electric coordination, and cost allocation.
- Gas and electric utilities are required to develop integrated resource plans.
- The state may need to severely overbuild the natural gas distribution system to maintain resilience during more frequent, severe, and longer extreme cold events.

Customer Characteristics

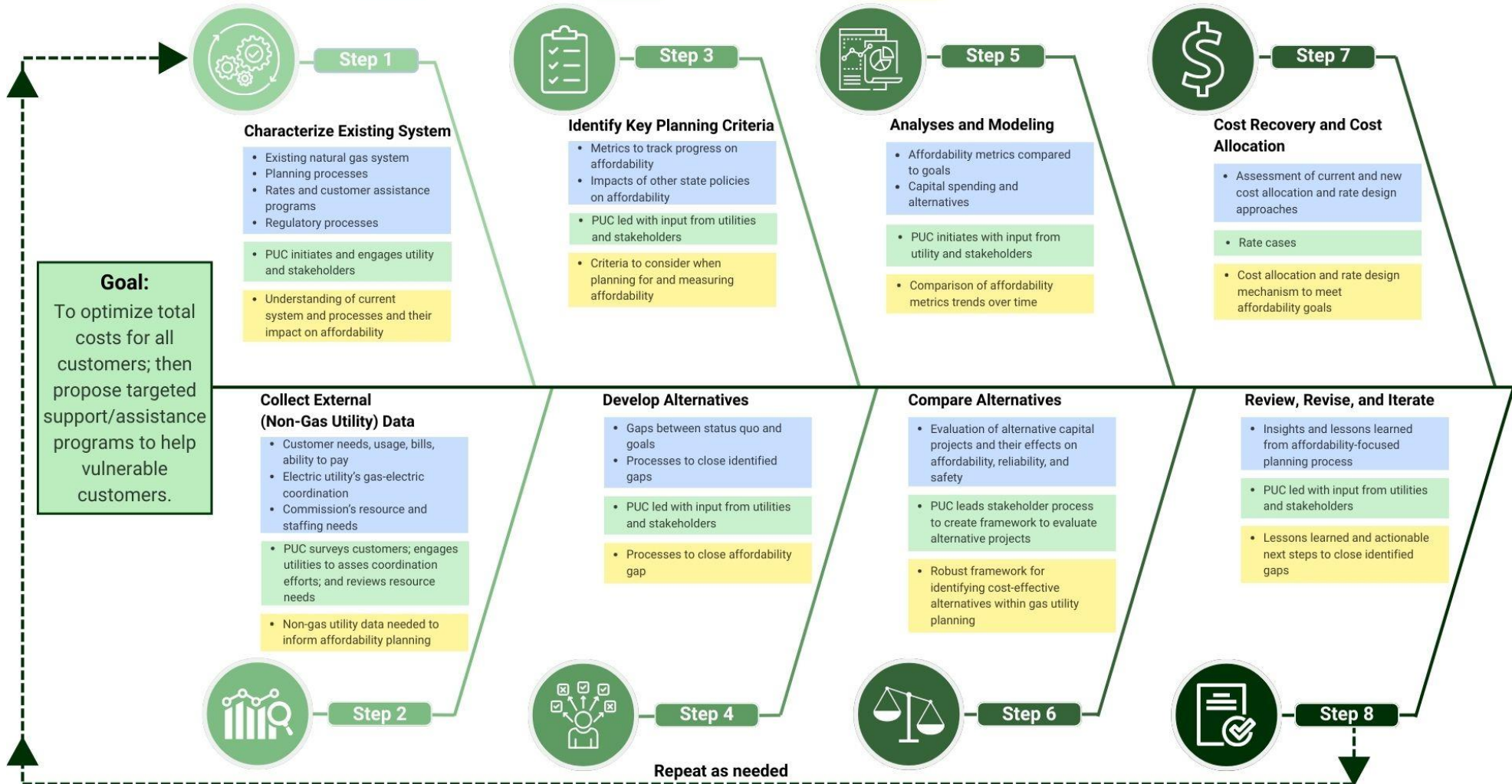
- The majority of gas utility customers are residential and small businesses with a small number of industrial users.
- Rates are steadily increasing for gas and electric customers through frequent rate cases.
- 40 percent of the state's population struggles to pay their utility bills.
- Policies, procedures, participation, and assistance programs are seen as complicated and difficult to access for customers.



AFFORDABILITY ROADMAP

AFFORDABILITY COHORT ROADMAP

= Information needs
 = Process and participants
 = Outputs to take into next steps



AFFORDABILITY ROADMAP

Step 1. Characterize Existing System

Step 2. Collect External (Non-Gas Utility) Data

Step 3. Identify Key Planning Criteria

Step 4. Develop Alternatives

Step 5. Analysis and Modeling

Step 6. Compare Alternatives

Step 7. Cost Recovery and Cost Allocation

Step 8. Review, Revise, and Iterate

Collect External (Non-Gas Utility) Data

- Customer needs, usage, bills, ability to pay
 - Electric utility's gas-electric coordination
 - Commission's resource and staffing needs
- PUC surveys customers; engages utilities to assess coordination efforts; and reviews resource needs
- Non-gas utility data needed to inform affordability planning

Develop Alternatives

- Gaps between status quo and goals
 - Processes to close identified gaps
- PUC led with input from utilities and stakeholders
- Processes to close affordability gap



ABOUT THE CLEAN ENERGY COHORT

Geography and Economy

- The population is split between urban and rural areas: densely populated urban cores and large rural tracts. The gas system is concentrated in urban and suburban areas; rural areas generally do not have gas.
- The state has a cold climate with significant winter heating needs. Winter heating drives high winter gas demand.
- Overall, the economy and the population are both growing. Specifically, the manufacturing sector is expanding.
- The state is not a gas producer.

Infrastructure

- The gas distribution system has aging and often leak-prone gas pipes that must be mitigated.
- There is an ongoing leak-prone pipe replacement program that is 50 percent complete at this point.
- Buildings are predominantly gas heated, particularly in urban and suburban areas; delivered fuels are more common in rural areas.
- Electrification is the primary driver of load growth on the electric system; the electric system is decarbonizing through adoption of renewables. The electricity system is currently summer peaking.
- The state provides some incentives for electric heat pumps.

Utility Demographics

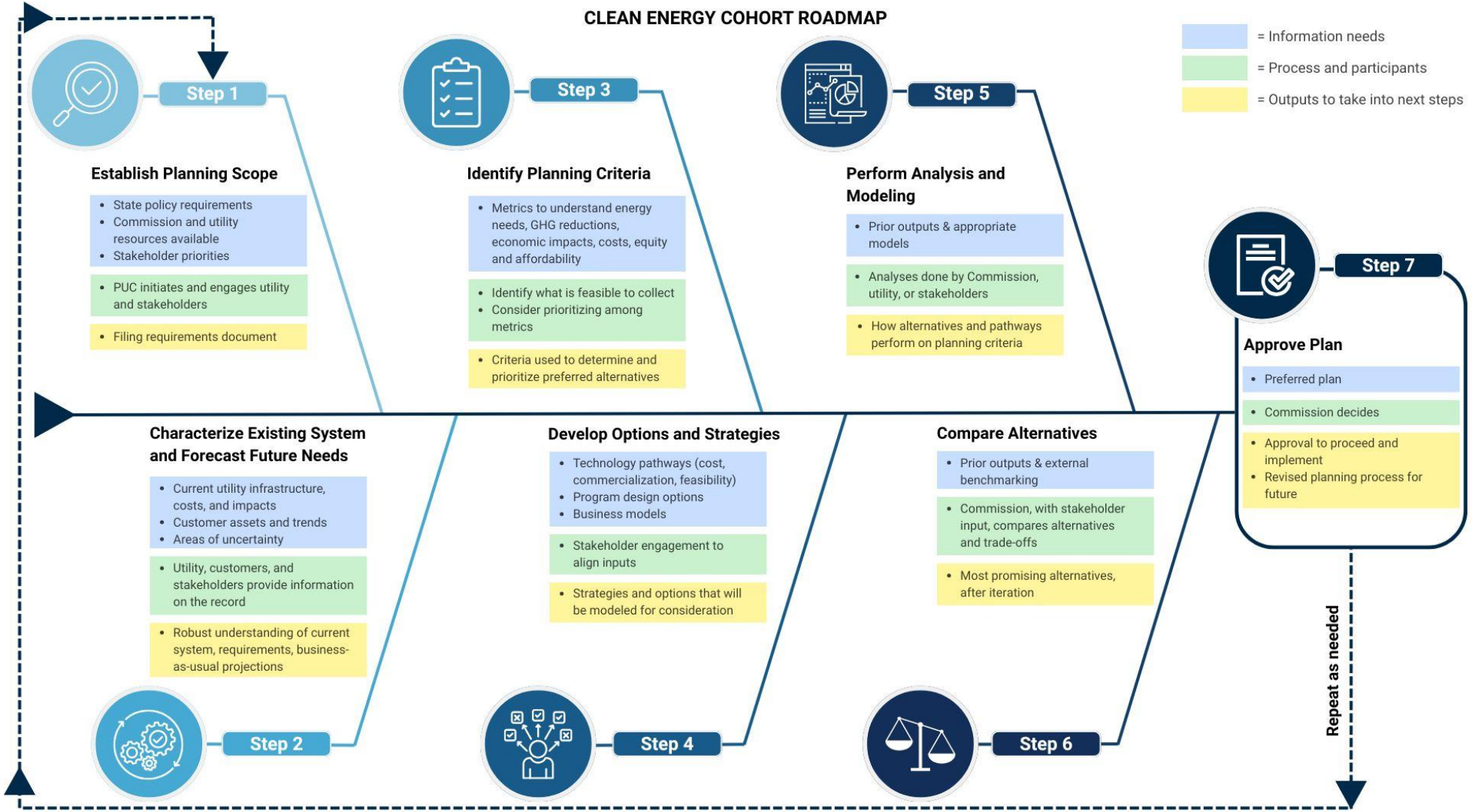
- The state primarily has gas-only utilities with different territories, but there are a few dual-fuel utilities in-state as well.
- Gas utilities are required to develop integrated resource plans.
- Rates are trending upwards leading to affordability concerns.
- Wholesale commodity prices are relatively stable.
- The state is still using historic rate designs which have not been examined recently. Rates are mostly volumetric.

Customer Characteristics

- The state has a mix of residential, commercial, and industrial customers.
- There are a significant number of low-income customers in particular areas (low-income gas customers are mostly in urban areas).



CLEAN ENERGY ROADMAP



CLEAN ENERGY ROADMAP

Step 1. Establish Planning Scope

Step 2. Characterize Existing System and Forecast Future Needs

Step 3. Identify Planning Criteria

Step 4. Develop Options and Strategies

Step 5. Perform Analysis and Modeling

Step 6. Compare Alternatives

Step 7. Approve Plan



Establish Planning Scope

- State policy requirements
- Commission and utility resources available
- Stakeholder priorities

- PUC initiates and engages utility and stakeholders

- Filing requirements document



Identify Planning Criteria

- Metrics to understand energy needs, GHG reductions, economic impacts, costs, equity and affordability

- Identify what is feasible to collect
- Consider prioritizing among metrics

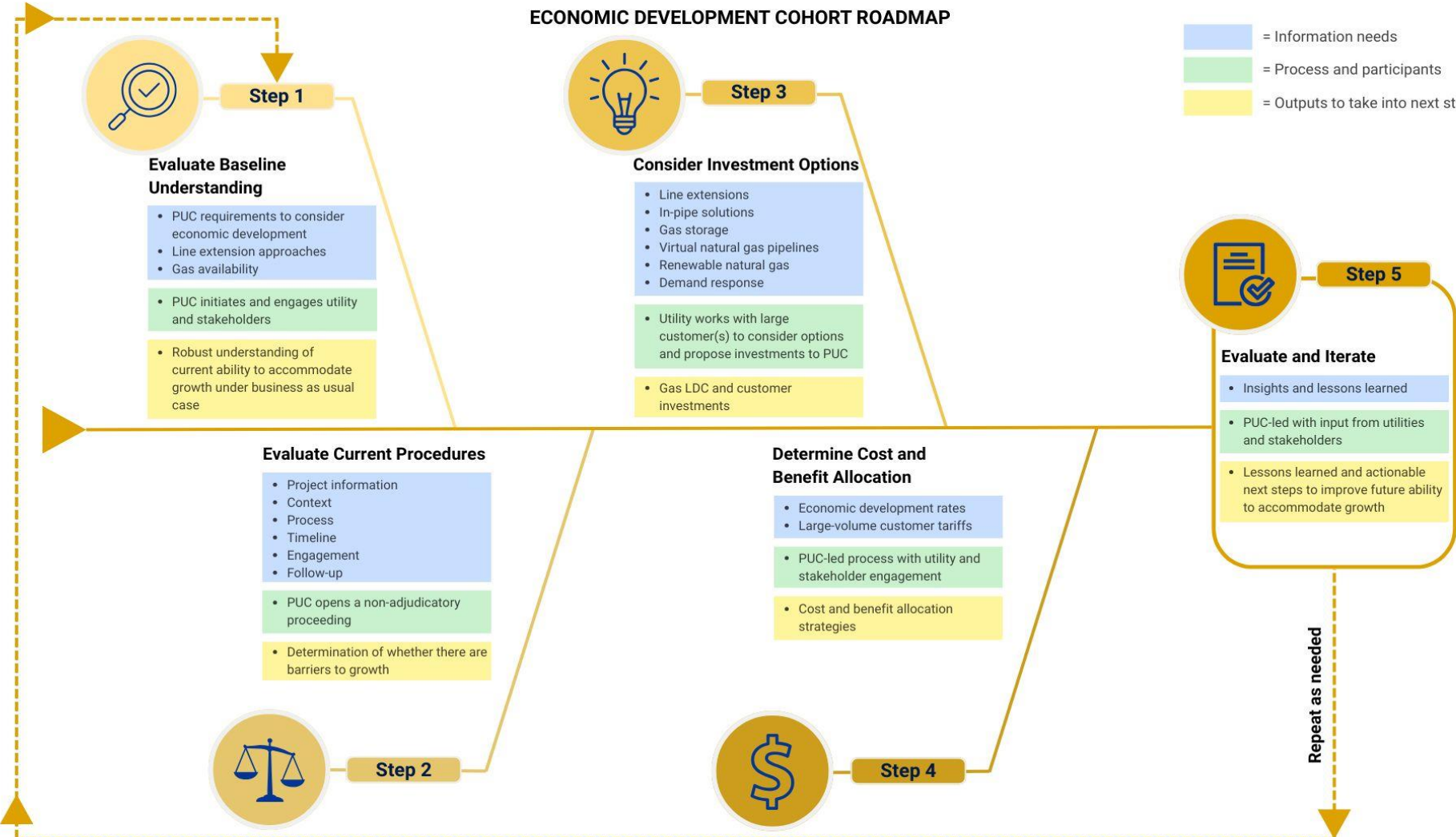
- Criteria used to determine and prioritize preferred alternatives



ECONOMIC DEVELOPMENT ROADMAP

ECONOMIC DEVELOPMENT COHORT ROADMAP

- = Information needs
- = Process and participants
- = Outputs to take into next steps



ECONOMIC DEVELOPMENT ROADMAP

Step 1. Establish Baseline Understanding

Step 2. Evaluate Current Procedures

Step 3. Consider Investment Options

Step 4. Determine Cost and Benefit Allocation

Step 5. Evaluate and Iterate

Evaluate Current Procedures

- Project information
 - Context
 - Process
 - Timeline
 - Engagement
 - Follow-up
- PUC opens a non-adjudicatory proceeding
- Determination of whether there are barriers to growth

Consider Investment Options

- Line extensions
 - In-pipe solutions
 - Gas storage
 - Virtual natural gas pipelines
 - Renewable natural gas
 - Demand response
- Utility works with large customer(s) to consider options and propose investments to PUC
- Gas LDC and customer investments



ABOUT THE RELIABILITY COHORT

Geography and Economy

- The state is geographically large with population distributed across rural and urban areas.
- The state has aggressive economic growth goals and seeks to maintain its agricultural interests.
- The state experiences strong weather patterns across the four seasons with a few recent extreme cold snaps and some natural disasters. It is a top destination for winter tourism.
- The state expects large amounts of load growth on the electric system, which will be unevenly distributed.
- Gas demand within the state generally peaks during the winter.
- The state is a net importer of energy, with limited in-state energy production resources.

Infrastructure

- Gas distribution infrastructure is aging and in need of modernization.
- Smart gas meters are in place.
- Customers are predominantly heated by gas-based systems, but policies and incentives exist to enable electrification.
- Questions about expansion, replacement, and abandonment of gas systems have been raised by various stakeholders.

Utility Demographics

- Gas-electric and gas-only utilities operate in the state and have performance-based incentives.
- Policies are in place to increase reliability and to decarbonize.
- An integrated resource planning (IRP) process is established for gas and electric utilities.
- Gas bills have high fixed charges, fluctuate frequently, are increasing steadily overall, and are higher than electric bills.

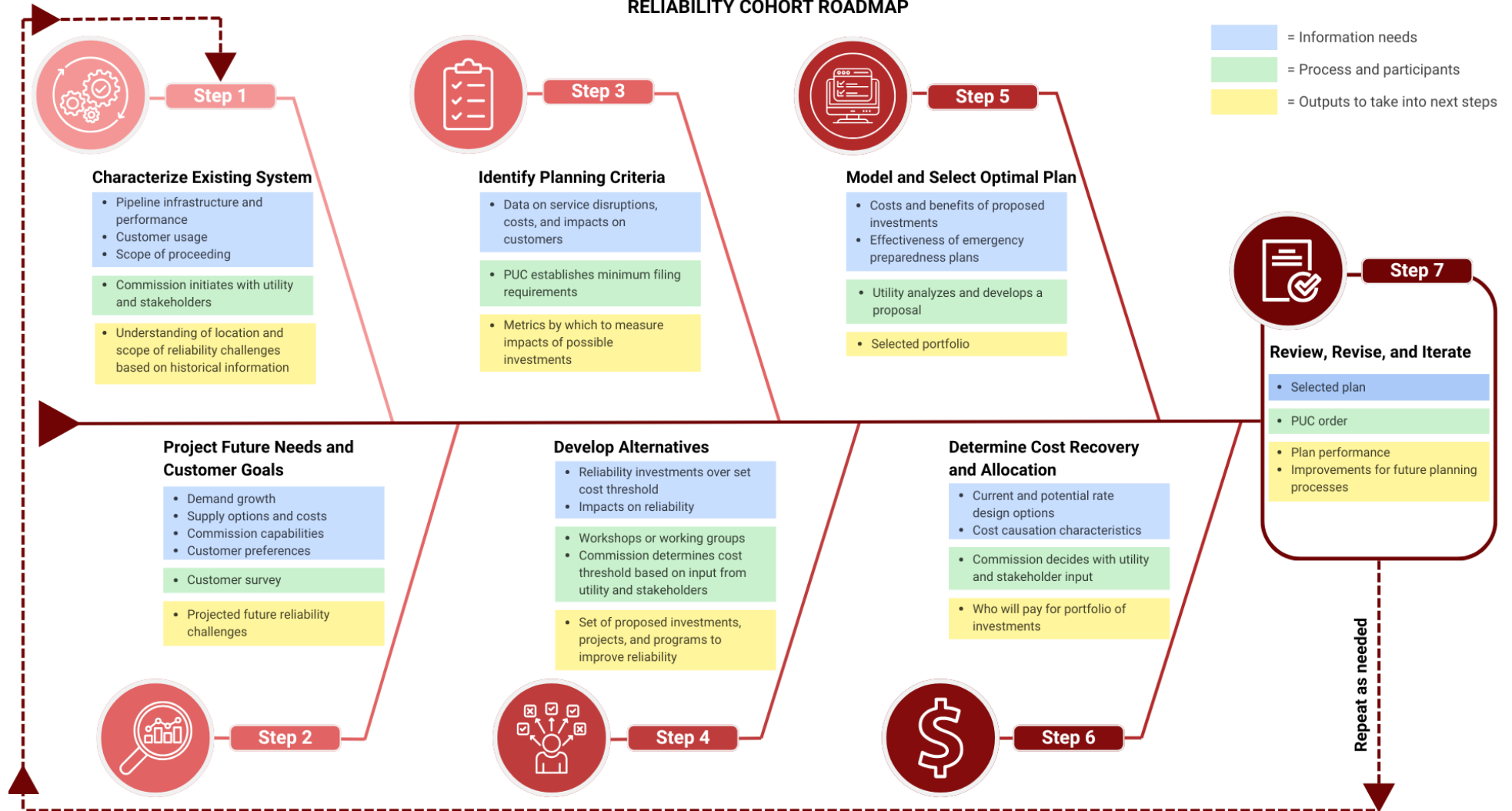
Customer Characteristics

- A significant proportion of the population is low- and fixed-income that struggle with utility bills.
- Environmental justice concerns have been raised by some customers.



RELIABILITY ROADMAP

RELIABILITY COHORT ROADMAP



RELIABILITY ROADMAP

Step 1. Characterize Existing System

Step 2. Project Future Needs and Customer Goals

Step 3. Identify Planning Criteria

Step 4. Develop Alternatives

Step 5. Model and Select Optimal Plan

Step 6. Determine Cost Recovery and Allocation

Step 7. Review, Revise, and Iterate

Identify Planning Criteria


- Data on service disruptions, costs, and impacts on customers
- PUC establishes minimum filing requirements
- Metrics by which to measure impacts of possible investments

Develop Alternatives

- Reliability investments over set cost threshold
- Impacts on reliability
- Workshops or working groups
- Commission determines cost threshold based on input from utility and stakeholders
- Set of proposed investments, projects, and programs to improve reliability



ADDITIONAL RESOURCES: [BIT.LY/NARUCGASTASKFORCE](https://bit.ly/narucgastaskforce)



NARUC
National Association of Regulatory Utility Commissioners

NARUC Task Force on Natural Gas Resource Planning

The National Association of Regulatory Utility Commissioners (NARUC), with support from the U.S. Department of Energy, has convened representatives of 20 state utility commissions to discuss and develop strategies to align natural gas distribution utility planning with a diverse set of state policy goals.

The Challenge

The rapid pace of technological and policy changes in the natural gas sector poses complicated questions for state utility commissions. Presented with proposals that reflect growing costs for routine safety-related infrastructure upgrades, expansions to serve new customers, investments to maintain supply, evolving energy efficiency programs, and more complex, longer-term system changes, utility regulators must make decisions today that will have practical effects on customer bills, infrastructure investments, and the likelihood of achieving state policy goals far into the future. Commissioners seek to ensure that they have sufficient information for decision making in this environment.

Following a series of scoping meetings and learning sessions, Gas Task Force members divided themselves into four cohorts based on the challenges facing their states. The cohorts recognize the key role of commissions in implementing state policies through regulatory decisions and are not advocating for the adoption of these or any other specific state goals or policies. The member cohorts focused on:

- Maintaining affordability of natural gas bills in the face of rising costs
- Achieving clean energy goals for gas distribution established by state legislatures
- Supporting economic development through expanded natural gas distribution infrastructure
- Improving reliability of the natural gas pipeline system to meet customer needs

Members from 20 States Participated

Colorado	Minnesota
District of Columbia	Nevada
Florida	New Mexico
Georgia	New York
Illinois	Ohio
Indiana	Oklahoma
	Pennsylvania



In Brief

- Commissioners and commission staff from 20 diverse and representative states envisioned ideal planning processes to align natural gas distribution utility investment plans with state policy goals.
- Members created four distinct roadmaps that describe how state policy goals related to affordability, clean energy, economic development, and reliability can be reflected in long-term gas utility planning overseen by Commissions.
- Utility leaders, subject matter experts, and stakeholders shared their perspectives with Gas Task Force members, helping illuminate challenges, opportunities, and decision making options for gas utilities and answering questions from utility regulators.
- The Gas Task Force's materials are now available for all states to use as a starting point for achieving their own goals related to gas utility planning. Visit <https://bit.ly/NARUCgasTaskForce>.

Natural Gas Resource Planning Library

The NARUC Task Force on Natural Gas Resource Planning developed resources throughout the 2023-2025 initiative to facilitate Task Force members' deeper learning about timely natural gas planning topics. These materials may be useful to all NARUC members to support their own efforts.

Materials below are organized by topics of interest identified by Gas Task Force members. Materials include monthly topical expert learning sessions between January and September 2024 and additional resources. The links included below are provided to share resources, inclusion is not an endorsement of the content of Task Force members.

- Gas Integrated Resource Planning
- Gas Infrastructure Investments
- Volatility in Gas Demand, Supply, and Price
- Emerging Supply- and Demand-Side Technologies
- Ratemaking and Affordability
- Coordination Between the Gas and Electric Sectors at the Distribution Level
- Renewable Natural Gas
- Evaluating Non-Pipeline Alternatives

Modeling and Analytical Tools

This section provides an overview of the quantitative tools estimate future conditions, effectiveness of different techn for evaluating planning options that improve affordability, c integrity of the gas distribution system.

Tools discussed include:

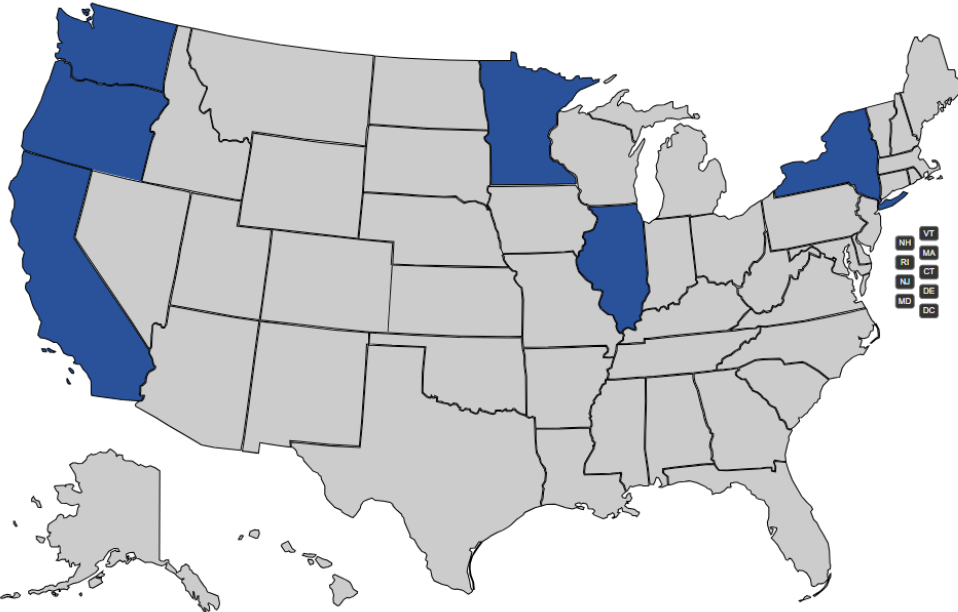
1. Life Cycle Analysis
2. Hydraulic Modeling
3. Pathways Analysis
4. Demand Forecasting
5. Techno-Economic Analysis
6. Benefit Cost Analysis
7. Bill Impact Analysis
8. Energy Wallet Analysis

State Policies

This map summarizes state policies relevant to the Task Force on Natural Gas Resource Planning.

Select a Category:

7 results found.



VT
MA
RI
NH
CT
NY
NJ
DE
MD



WHAT'S NEXT



NARUC can facilitate briefings for Commissions interested in the roadmaps



Printed copies of the roadmaps will be available at the Winter Policy Summit (February 8 – 11, 2026 in Washington, DC)



Future work could include:

Update on state pipeline modernization programs
Additional research based on state requests



bit.ly/NARUCGasTaskForce

QUESTION & ANSWER OPPORTUNITY

With
Thanks
to...

Task Force leadership, cohort leaders, and members

Subject matter experts and stakeholders

NARUC leadership

NARUC Center for Partnerships & Innovation staff

The Brattle Group

U.S. Department of Energy

