

Annual Meeting: Coordinated Electricity Planning September 13-15, 2021

Update: This will be an interactive virtual meeting via Zoom

Attendees are encouraged to participate by video.



**NATIONAL COUNCIL
ON ELECTRICITY POLICY**

Meeting Materials:

- [Registration open](http://www.electricitypolicy.org/updates) at www.electricitypolicy.org/updates
- Innovations in Modeling Training (virtual): Oct 1 - Nov 1, 2021 – [Registration open](#)
- [Speaker Biographies](#)

Further Resources and Materials:

- [NCEP T&D Resource Catalog \(May 2021 update\)](#)
- [Past NCEP Annual Meetings and Resources](#)
- [NARUC-NASEO Task Force on Comprehensive Electricity Planning](#)
- [Bulk Power System Learning Modules \(Spring 2021\)](#)
- [Distribution Systems and Planning Learning Modules – Western \(Winter 2021\)](#)
- [Distribution Systems and Planning Learning Modules – Midwest \(Fall 2020\)](#)
- [Distribution Systems and Planning Learning Modules – Southeastern \(Winter 2020\)](#)

Meeting Overview	
Monday, September 13, 2021 12:30 to 5:15 PM Eastern	<i>State and Stakeholder Perspectives on Comprehensive Planning</i> <ul style="list-style-type: none">• Introduction to Modern Integrated and Comprehensive Planning• State Agency Roles in Comprehensive Electricity Planning• Stakeholder Perspectives on Comprehensive Planning• 3rd Jan Brinch Award for Collaboration in Public Service
Tuesday, September 14, 2021 9:30 to 11:00 AM and 12:30 to 5:00 PM Eastern	<i>Utility and System Operator Perspectives on Comprehensive Planning</i> <ul style="list-style-type: none">• Bonus morning session: Federal Perspectives• Emerging Approaches to Aligning Distribution System Planning with Bulk Power System Planning• Utility Comprehensive Planning Examples and Case Studies• Current Issues in Comprehensive Planning: Research and Resources
Wednesday, September 15, 2021 12:30 to 5:00 PM Eastern	<i>Bringing State and System Operator Perspectives Together for a Path Forward</i> <ul style="list-style-type: none">• Regional-State Perspectives on Planning for a High DER Future• Analytical Capabilities to Support Comprehensive Electricity Planning• Planning for Operational Coordination• Valuing Multiple Benefits of Distributed Resources in Planning• Regulatory Process Innovation

Detailed agenda begins on page 3.

Meeting Scope

In 2021, the National Council on Electricity Policy (NCEP) community of state electricity policy-makers, decision-makers, and implementers will explore developments in modern planning techniques and tools to align planning processes across distribution, resource, and transmission planning. NCEP will explore:

- What is a state's role in aligning planning for maintaining a well-managed, efficient electricity system, now with rapidly changing requirements and many more participants?
- What planning capabilities exist and are needed for potential distribution-system level markets and transmission system operator and distribution system operator coordination?
- What coordination opportunities exist for states, utilities, customers, RTOs, federal entities, and research institutions?

Background on Multi-Year Theme: T&D Interfaces

At the 2018 Annual Meeting and Workshop, the National Council on Electricity Policy (NCEP) gathered state decision-makers and stakeholders to discuss the state of interfaces between distribution and transmission systems in light of increasing installation of distributed energy resources. In 2019, NCEP further explored this topic by focusing on transmission, distribution, and customer (TDC) system operational needs and their influence on planning and markets. In 2020, NCEP explored states' roles in developing and managing markets and questions of who pays and how, in light of granular information across the TDC system. The [NCEP T&D Resource Catalog](#) documents examples and resources from these workshops to support state electricity system decision-makers in learning from experts and one another. The 2021 meeting will expand these discussions and resources by exploring opportunities and actions steps towards comprehensive or coordinated electricity planning that spans all levels of the electricity system. See www.electricitypolicy.org for previous workshop materials.

Multi-Year Objectives

- Discuss state, utility, RTO, and DER experiences coordinating planning, operations, and markets across TDC interfaces of the electricity system.
- Examine ideas around the needs of a coordinated system and how states play a role in developing a future-proofed system.
- Hear insights and lessons learned from experts, state utility regulators, energy directors, utility managers, technologists, legislators, consumer advocates, and other stakeholders.

Annual Meeting Agenda

Day 1 (Monday, September 13, 2021)	
12:00 PM EASTERN	Virtual Meeting Room Open <i>All speakers and meeting participants are welcome to log in to Zoom to check their microphone and camera.</i> <ul style="list-style-type: none">Icebreaker: Please introduce yourself, affiliation, and share either how you found out about the NCEP meeting or what you are looking to get out of the meeting.
12:30 PM EASTERN	Welcome to the NCEP Annual Meeting 2021 The sessions today will focus on state perspectives on comprehensive electricity planning. <ul style="list-style-type: none">Led by the Honorable Paul Kjellander, President of NCEP and President at the Idaho Public Utilities Commission (PUC)Facilitated by Danielle Sass Byrnett and Kerry Worthington, NARUC
12:45 PM EASTERN	3rd Jan Brinch Award for Collaboration in Public Service In 2019, NCEP initiated an award in memory of Jeannette “Jan” Brinch, who energetically facilitated the National Council on Electricity Policy (NCEP) from 2014 to 2018 and passed away in 2018. Jan’s career was marked by progress on energy and environmental issues from a wide range of public service positions. One of the hallmarks of her success in each of these roles was her desire to collaborate with others with diverse perspectives, positions, and organizations. This award honors other public servants who similarly view their positions as opportunities to bring people together to accomplish public interest goals in the electricity sector. <i>The Awardee will be announced at the event.</i>
1:00 PM EASTERN	Introduction to Modern Integrated and Comprehensive Planning Typically, electric utility system planning processes include integrated resource planning, transmission planning, distribution system planning, and more. What capabilities exist and are needed for aligning and integrating planning processes at key decision points? What benefits would more coordinated approaches offer? This foundational session will provide an update on the latest thinking on comprehensive electricity planning and key considerations for policymakers by reviewing the NARUC-NASEO Task Force on Comprehensive Electricity Planning outputs. Task Force staff leaders will walk attendees through the visions and roadmaps developed by members for states in five different market and regulatory structures. Moderator: Hon. Ted Thomas, Arkansas Public Service Commission Panelists: Johanna Zetterberg, U.S. Department of Energy Danielle Sass Byrnett, NARUC Kirsten Verclas, National Association of State Energy Officials

Continued

Day 1 (September 13, 2021)

2:15 PM EASTERN	Break
2:30 PM EASTERN	State Agency Roles in Comprehensive Planning In addition to market and regulatory structure, state governance will influence the roles and responsibilities of state agencies in carrying out more holistic electricity planning. Task Force members will share how they are approaching comprehensive planning in their own states. Moderator: Hon. Dave Danner, Washington Utilities and Transportation Commission Panelists: Carrie Gill, Rhode Island Office of Energy Resources Chris Ayers, North Carolina Utilities Commission Hon. Dan Scripps, Michigan Public Service Commission
3:30 PM EASTERN	Break
3:45 PM EASTERN	Stakeholder Perspectives on Comprehensive Planning Increasingly, states have begun leveraging the involvement and perspectives of diverse stakeholders in planning processes. The load-serving utility system has traditional stakeholders such as residential, industrial, and commercial consumers and environmental protection agencies. New stakeholders are emerging at the distribution level as well, such as solar and storage aggregators, local community groups, and building managers. Further, regional stakeholders are emerging as distribution grid decisions impact wholesale entities and markets. Moderator: Senator Eric Koch, Indiana State Senate Panelists (no presentations): Kat Cox-Arslan, Borrego Solar Joe Daniel, Union of Concerned Scientists Tanuj Deora, Uplight
4:45 PM EASTERN	Day 1 Discussion All attendees will be led through an interactive discussion session. Participants will have an opportunity to share their experiences, examples, available resources, and questions or research needs. <i>The discussion will provide resources that NCEP will add to the NCEP T&D Resource Catalog. Non-attributable research needs will be summarized and posted for national labs, industry, research institutions, and NGOs to better understand the needs of states. The Resource Catalog will be updated as resources become available that address needs.</i>
5:15 PM EASTERN	Closing <i>Day 1 Evaluations</i>

Day 2 (Tuesday, September 14, 2021)

9:15 AM EASTERN	<p>Virtual Meeting Room Open for Bonus Session</p>
9:30 AM EASTERN	<p>Bonus Session: Federal Perspectives (<i>update: will be held virtually</i>) Attendees will hear briefs from federal partners on current and emerging issues in a fireside chat format.</p> <p>Moderator: Hon. Sarah Freeman, Indiana Utility Regulatory Commission</p> <p>Speakers:</p> <p>9:30 – 9:55: Patricia Hoffman, Acting Assistant Secretary, Office of Electricity (OE), U.S. Department of Energy (DOE)</p> <p>10:00 – 10:25: Michelle L. Manary, Acting Deputy Assistant Secretary, Energy Resilience Division, OE, DOE</p> <p>10:30 – 10:55: Andrew Wishnia, Deputy Assistant Secretary for Climate Policy, Office of the Assistant Secretary for Transportation Policy, U.S. Department of Transportation (DOT)</p>
12:00 PM EASTERN	<p>Virtual Meeting Room Open <i>All speakers and meeting participants are welcome to log in to Zoom to check their microphone and camera.</i></p> <ul style="list-style-type: none"> • Icebreaker TBD
12:30 PM EASTERN	<p>Welcome to Day 2 The sessions today will focus on utility and system operator perspectives on comprehensive planning.</p> <ul style="list-style-type: none"> • Led by The Honorable Paul Kjellander, President of NCEP, President of NARUC, and President at the Idaho PUC • Facilitated by Danielle Sass Byrnett and Kerry Worthington, NARUC
12:45 PM EASTERN	<p>Emerging Approaches to Aligning Distribution System Planning with Bulk Power System Planning On an ongoing basis, utilities and system operators grapple with how their generation and procurement portfolios will meet their load forecasts. Increasingly, load forecasts themselves are changing due to DERs, demand flexibility, rate design, extreme weather, and other factors. System operators will share their view of system needs and current approaches for aligning planning between the distribution system and bulk power system.</p> <p>Moderator: Hon. ToNola Brown-Bland, North Carolina Utilities Commission</p> <p>Panelists:</p> <p><u>Michael Milligan, Milligan Grid Solutions</u> <u>Tim Burdis, PJM Interconnection</u> <u>Zach Smith, NYISO</u></p>

Continued

Day 2 (September 14, 2021)

1:45 PM EASTERN	Break
2:00 PM EASTERN	<p>Utility Comprehensive Planning Examples and Case Studies Utility operators will present emerging approaches to aligning processes and plans across customer, distribution, resource, and transmission planning to maintain reliability and resilience fundamentals while achieving state and company goals.</p> <p>Moderator: Michael Dowd, Virginia Department of Environmental Quality</p> <p>Panelists: Nathan Gagnon, Duke Energy Colton Ching, Hawaiian Electric</p>
3:00 PM EASTERN	Break
3:15 PM EASTERN	<p>Current Issues in Comprehensive Planning: Research and Resources Broadly, states, utilities, and regional operators are looking for paths that leverage planning to bridge technology, business interests, and utility regulation. Panelists will share emerging opportunities to consider state goals, incorporate regional dynamics, and leverage new tools to advance comprehensive electricity planning.</p> <p>Moderator: Jennifer Easler, Office of the Consumer Advocate of Iowa</p> <p>Panelists: Dr. Kelli Joseph, Fifth Third Bank Matt McDonnell, Strategen Justin Gundlach, Institute for Policy Integrity at NYU</p>
4:30 PM EASTERN	<p>Day 2 Discussion All attendees will be led through an interactive discussion session. Attendees will have an opportunity to share their experiences, examples, available resources, and questions (research needs).</p> <p><i>The discussion will provide resources that NCEP will add to the NCEP T&D Resource Catalog. Non-attributable research needs will be summarized and posted for national labs, industry, research institutions, and NGOs to better understand the needs of states. The Resource Catalog will be updated as resources become available that address needs.</i></p>
5:00 PM EASTERN	<p>Closing <i>Day 2 Evaluations</i> We look forward to seeing you for the interactive workshop tomorrow!</p>

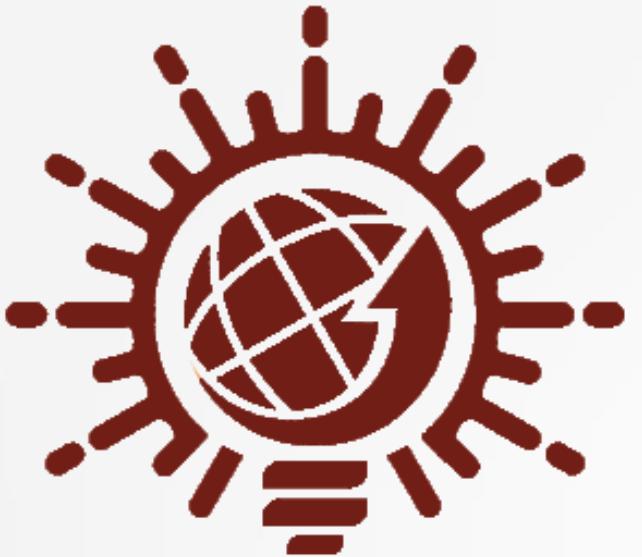
Day 3 (Wednesday, September 15, 2021)

12:00 PM EASTERN	<p>Virtual Meeting Room Open</p> <p><i>All speakers and meeting participants are welcome to log in to the Zoom to check their microphone and camera.</i></p> <ul style="list-style-type: none"> • Icebreaker TBD
12:30 PM EASTERN	<p>Welcome to the Workshop on Comprehensive Grid Planning</p> <p>The sessions today will focus on how to bring the state and system operator perspectives articulated during the prior two days together in devising a path forward for comprehensive planning.</p> <ul style="list-style-type: none"> • Led by The Honorable Paul Kjellander, President of NCEP, President of NARUC, and President at the Idaho PUC • Facilitated by Danielle Sass Byrnett and Kerry Worthington, NARUC
12:45 PM EASTERN	<p>Regional State Perspectives</p> <p>Collaborative state organizations who participate in RTO processes have a unique vantage point on aligning state and regional customer and utility needs and opportunities. Panelists will address what challenges they are currently grappling with related to comprehensive planning and how decisions are evolving as states, utilities, and regional operators prepare for high-DER scenarios.</p> <p>Moderator: Hon. Upendra Chivukula, New Jersey Board of Public Utilities</p> <p>Panelists: Marcus Hawkins, Organization of MISO States <u>Branden Sudduth, Western Electricity Coordinating Council</u> Paul Suskie, Southwest Power Pool</p>
1:45 PM EASTERN	<p>Break</p>

Continued

Day 3 (September 15, 2021)

2:00 PM EASTERN	<p>Snapshot Sessions Discussion leaders will share visions for how we can collectively work together to evolve our capabilities to accelerate comprehensive electricity planning. For each topic, the leader will discuss where we are, where we need to go, and what information, tools, resources, and examples we need to move forward.</p> <p>During the group prompt, audience members will share their reactions to the proposed vision of the future and contribute additional suggestions and examples for a path forward</p> <p>Moderator: Hon. Paul Kjellander, Idaho Public Utilities Commission (PUC)</p> <p>2:00 – 2:20 Discussion Leader: Samir Succar, ICF</p> <p>2:20 – 2:35 Group Prompt Topic: Analytical Capabilities to Support Comprehensive Electricity Planning</p> <p>2:35 – 2:55 Discussion Leader: Paul De Martini, Newport Consulting Group</p> <p>2:55 – 3:10 Group Prompt Topic: Planning for Operational Coordination</p> <p>3:10 – 3:20 Break</p> <p>3:20 – 3:40 Discussion Leader: Karl Rábago, Rábago Energy</p> <p>3:40 – 3:55 Group Prompt Topic: Valuing Multiple Benefits of Distributed Resources in Planning</p> <p>3:55 – 4:15 Discussion Leader: Jeff Ackermann, North Star Collaborative</p> <p>4:15 – 4:30 Group Prompt Topic: Regulatory Process Innovation</p>
4:30 PM EASTERN	<p>Final Group Discussion All attendees will be led through an interactive discussion session. Attendees will have an opportunity to share their experiences, examples, available resources, and questions (research needs).</p> <p><i>The discussion will provide resources that NCEP will add to the NCEP T&D Resource Catalog. Non-attributable research needs will be summarized and posted for national labs, industry, research institutions, and NGOs to better understand the needs of states. The Resource Catalog will be updated as resources become available that address needs.</i></p>
5:00 PM EASTERN	<p>Adjourn <i>Day 3 Evaluations</i></p>

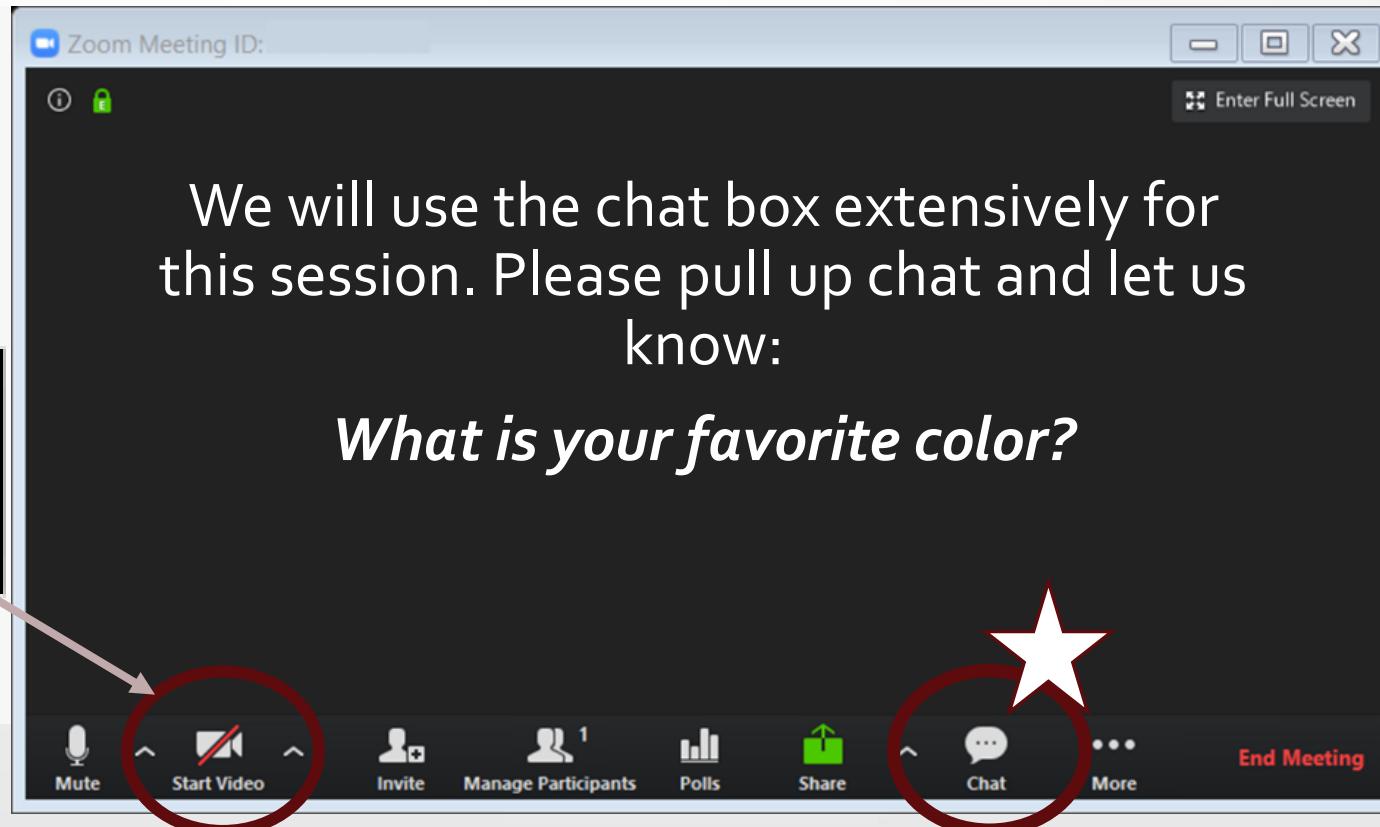


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Annual Meeting 2021

Discussion

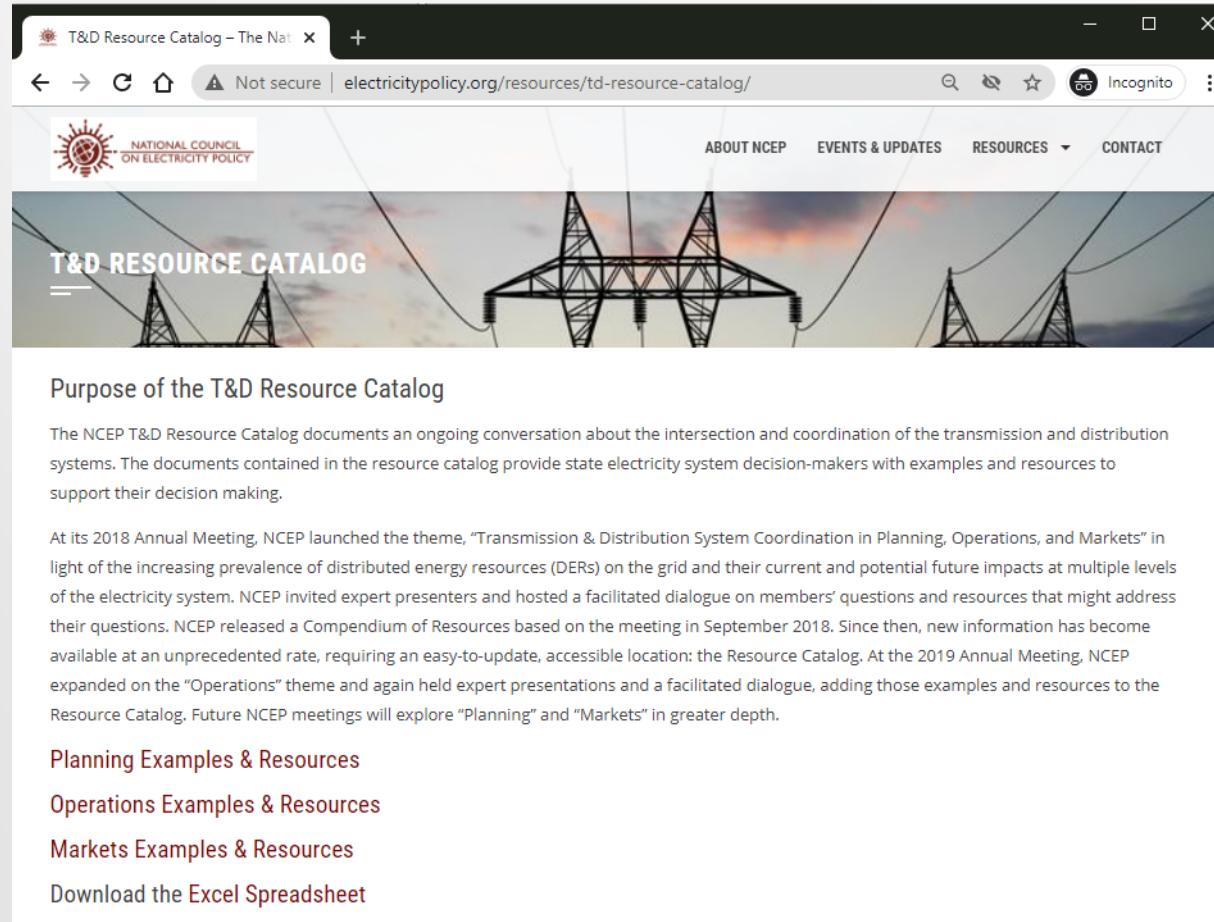
All Attendee Discussion / Contributions



End of Day Discussions: (Modified) Chatham House Rules

- Resources, examples, and questions will be integrated into the T&D Resource Catalog.
 - Cleaned notes will also be available in the Annual Meeting materials, posted online next week.
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- This will be an active, participatory discussion. Please speak up, use chat, and engage with the panelists.
 - Please adhere to modified Chatham House rules for this session:
 - It is OK to share who was there and what was said, but not who said what.
 - **Virtual world:** Do not take screen shots of participants without their permission.

T&D Resource Catalog ➔ Discussion Questions



The screenshot shows the homepage of the T&D Resource Catalog. The header features the NCEP logo and the title "T&D RESOURCE CATALOG". Below the header is a large image of a transmission tower against a sunset sky. The main content area includes a section titled "Purpose of the T&D Resource Catalog" which describes the catalog's purpose and history. It also includes sections for "Planning Examples & Resources", "Operations Examples & Resources", and "Markets Examples & Resources", along with a link to "Download the Excel Spreadsheet". The top navigation bar includes links for "ABOUT NCEP", "EVENTS & UPDATES", "RESOURCES", and "CONTACT".

T&D Planning, Operations, and Markets Resource Catalog

Questions For NCEP Community

- **Resources**
Where can attendees find useful information to inform their decision making?

- **Examples**
What other projects, policies, or examples offer insights into these topics?

- What lingering questions do you have about this topic?
- What research is needed? “known unknowns”

Resources	Examples
Publication 1	Example 1
NARUC Public Utility Commission Stakeholder Engagement: A Decision-Making Framework, https://pubs.naruc.org/pub/7A519871-155D-0A36-3117-96A8DoECB5DA	Rhode Island Road to 100% Renewable Electricity: complete project materials available www.energy.ri.gov/100percent/
Interstate Renewable Energy Council model interconnection resources & guidelines: https://irecusa.org/our-work/connecting-to-the-grid/	RI System Data Portal – Heat Maps: https://ngrid.apps.nationalgrid.com/NGSysDataPortal/RI/index.html
SEPA - Beyond the Meter - https://sepapower.org/resource/beyond-meter-recommended-reading-modern-grid/ And DER Capabilities Guide - https://sepapower.org/resource/distributed-energy-resources-capabilities-guide/ Beyond the Meter series – volume I , volume II , and locational valuation challenge	North Carolina's DEP/Energy Office led stakeholder process to develop the Clean Energy Plan, https://deq.nc.gov/energy-climate/climate-change/nc-climate-change-interagency-council/climate-change-clean-energy-16
Joint Utilities of NY – regulatory resources - https://jointutilitiesofny.org/regulatory-resources	MI Power Grid advanced planning workgroup filed “Integration of Resource, Distribution, and Transmission Planning Final Report” in May 2021; awaiting Commission action and next steps - https://www.michigan.gov/documents/mpsc/MI_Power_Grid_Advanced_Planning_Final_Report_726567_7.pdf
Local Governments, Sustainability, and Energy Efficiency policy goals - https://iclei.org/en/Home.html	Duke Energy ISOP - https://www.duke-energy.com/our-company/isop
DOE transmission symposium provided 5 documents, one on planning. here is the link: https://www.energy.gov/oe/transmission-innovation-symposium	Duke Energy (Carolinas) IRP and stakeholder process - https://www.duke-energy.com/our-company/about-us/irp-carolinas
New England Energy Vision Work - https://newenglandenergyvision.com/transmission-planning/	

Resources	Examples
Publication 1	Case study / project 1
https://acore.org/how-transmission-planning-and-cost-allocation-processes-are-inhibiting-wind-and-solar-development/ (MISO and SPP)	PR: mini-grid
NESP: National Standard Practice Manual (NSPM) for Benefit-cost Analysis of Distributed Energy Resources (DERs)	Minnesota
ENTSO-E in Europe. (it is the ENTSO Ten Year Development Plan) https://www.entsoe.eu/	GMLC (march 2021) All source procurement practices https://escholarship.org/content/qt6vs7k6w1/qt6vs7k6w1_noSplash_zdb31a88fc3b6403ba585do8acc2caa.pdf?t=qqffuj
Joule - The Value of Inter-Regional Coordination (Patrick R. Brown and Audun Botterud)	MISO Cost Allocation Task Force

Questions

What do we still need to know? Why aren't things done differently? How could X, Y, Z be accomplished?

How do we address 'comprehensive' planning across multiple utilities in a state?

What is 'comprehensive' planning in the context of municipalities/coops relative to states/IOUs?

I wonder whether the speakers or those involved in the Task Force on Comprehensive Electricity Planning cohorts included SIPs (state implementation plans for air quality) in the areas being considered in resource planning / comprehensive planning?

To what extent have speakers/cohorts considered tools like EJ SCREEN in comprehensive planning efforts?

Since we have to integrate many considerations (e.g., moving power from remote renewable resources to load centers, electrification, resilience, & utilization of DERs across T&D), would it make sense to consider regional planning (across states) coupled with distribution system planning? (IRP planning and trans planning are still too fragmented and do not consider factors holistically.)

Is there a source of consultants by subject matter that a commission could reference before sending out before an IRP?

What opportunities are there to get more precise in valuing 'value of lost load'?

How are cost allocation policies evolving across states and what are some of the guiding principles associated with that evolution?

How do we grow stakeholder competence (and technical resource access) in standard distribution planning and operation practices so that they can play a more meaningful role, moving beyond "engagement" to participation in risk assessment, prioritization, and mitigation (spending) decision-making?

