

NARUC-NASEO Task Force on Comprehensive Electricity Planning

Workshop 3 – Park City, Utah April 21-23, 2020

Workshop Attendees:

Task Force (TF) members plus invited observer state representatives, utility planners, and subject matter experts (“SMEs”)

Workshop 3 Objectives:

- Develop roadmaps: enhance process maps by augmenting with guidance, resources, and examples for how aligned planning processes could be implemented
- Cohorts incorporate insights from utility planners and SMEs as they develop roadmaps
- Observer states learn from TF member states and are able to apply aligned planning principles to their own near-term activities

Anticipated Workshop Outputs:

- Five process maps – one per cohort
- Five roadmaps – one per cohort
- Clarity on Task Force member state next steps in preparation for Workshop 4 (state action plans)

| Legend for Attendee Participation | |
|--|--|
|  | All attendees |
|  | States: Task Force members & observers |
|  | Invited guests: utilities, SMEs |

DRAFT AGENDA for TRAVEL PURPOSES

| Time | Activity | Participants |
|--|---|---|
| Tuesday, April 21, 2020 – Arrival Day & Pre-Workshop | | |
| 1:00-3:00pm | Registration open | All |
| 3:00-5:00pm | Breakout: Orientation for invited guests only | Utility Planners, SMEs, & Observer States |
| 3:00-5:00pm | Breakout: Cohort team meetings (each cohort on its own) | Task Force members |
| 6:00-8:00pm | Optional No Host Dinner | All |
| Wednesday, April 22, 2020 – Workshop Day 1 | | |
| 7:00-8:00am | Breakfast | |
| 8:30-9:00am | Plenary: Welcome, Introductions, Overview | All |
| 9:00-10:00am | Breakout: Level setting on current Task Force cohort process maps & specific requests for feedback | All attendees – in cohorts |
| 10:00-10:30am | Break | |
| 10:30am-12:00pm | Breakout: Innovations in utility planning towards alignment of processes | All attendees – in cohorts |
| 12:00-1:00pm | Lunch | |
| 1:00-4:00pm, including break | Breakout: Identify and discuss strengths, weaknesses, and improvements for process maps / roadmaps to make them as valuable as possible | All attendees – in cohorts |

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| 4:00-5:00pm | Breakout: Reflections on potential barriers to implementing roadmaps and ideas for how those could be overcome | All attendees – in cohorts |
| 5:00-6:30pm | Reception | All attendees |
| Thursday, April 23, 2020 – Workshop Day 2 | | |
| 7:00-8:00am | Breakfast | TF members & observer states only |
| 8:00-9:30am | Plenary: Potential barriers to roadmap implementation | TF members & observer states only |
| 9:30-1:00pm, incl. AM break & lunch | Breakout: Final refinement of roadmaps | TF members & observer states only |
| 1:00-1:45pm | Plenary: Share roadmaps and ideas for implementation | TF members & observer states only |
| 1:45-2:30pm | Plenary: Begin transition to state action planning, including “homework” before workshop 4 | TF members & observer states only |
| 2:30pm | Adjourn to catch flights leaving after 5pm | All |

Overview of Task Force Products

Process maps (W1 & W2): Cohort vision for WHAT steps need to happen in what SEQUENCE to better align planning processes.

Roadmaps (W3): HOW a cohort-level process map could be implemented. Roadmaps will include short written descriptions of each major step in the process map, with annotations that identify existing guidance, resources, or examples (“GREs”) that could support operationalizing those major steps. Some steps may not have existing guidance, resource, or examples, which will help identify gaps in the HOW and signal areas where additional tool and resource development is needed to better align planning processes.

Roadmaps will be made publicly available so that all commissions and stakeholders can gain from the efforts of the Task Force initiative. To ensure non-participating states will gain value from roadmaps, the Core Team will develop a “Getting Started Guide.” The guide will provide a step-by-step set of recommendations for how to apply Task Force outputs in one’s state, based on the experience of Task Force members. The guide will contain discrete, action-oriented steps that someone would use to start devising a better aligned planning process. It will not be an exhaustive discussion of all elements of aligned planning.

Following workshop 3, activities will transition away from cohort work, toward state-specific activities to apply the work that has been done. This phase of the effort may result in:

State-specific roadmaps: State-specific adaptations of a roadmap, specifying WHO will need to take action to implement any step. Roles and responsibilities vary widely and do not need to be determined at the cohort level. The state-specific adaptation of a roadmap could either be developed before a state action plan (before workshop 4) or be created as a result of a state action plan (after workshop 4).

State action plans (W4): Strategy or set of actions that a PUC and SEO will take to work towards realization of a state-specific version of a roadmap.