



U.S. DEPARTMENT OF
ENERGY



NASEO
National Association of
State Energy Officials



Training and Action Planning Workshop for States Integrated Distribution System Planning 2.0: Planning for Load Growth and Local Resources

Agenda

Detroit, Michigan

March 11-12, 2024

Optional Site Visit on March 13

Day 1

Time	Lead	Session Details
8:30am 20 min	LBL, NARUC, NASEO	Welcome and Agenda Review <ul style="list-style-type: none"> • TBD, U.S. Department of Energy • NARUC and NASEO • Lisa Schwartz, Berkeley Lab
8:50am 65 min	LBL	Integrated Distribution System Planning Overview <i>Lisa Schwartz and Natalie Mims Frick, Berkeley Lab</i> <ul style="list-style-type: none"> • Planning framework • Integrating state policy objectives in planning guidance for utilities • Data and analysis state agencies can ask for • Cost-effectiveness evaluation • Cost recovery for grid modernization investments
9:55am 15 min	N/N	Individual Journaling to Define & Refine Topic <i>Participants journal on page 1 of the Action Planning Worksheet.</i> <ul style="list-style-type: none"> • Propose or revisit the question, challenge, or opportunity you are exploring or would like to explore and for which you want to develop an action plan. • Participants may choose to answer guiding questions in the worksheet including: <ul style="list-style-type: none"> • Priority: Why is this topic important to you? To your agency? • Current state: What is the state of this issue now in your state / agency? • Future state: Where would you like it to be? • Personal: How can your role influence outcomes related to the topic? What is your focus? • Challenges: Where are you stuck; where would you like to begin?

10:10am 15 min	NA	BREAK
10:25am 55 min	LBL	<p>Forecasting Loads and Local Resources: Emerging Methods for New Challenges <i>Margot Everett and Chris Lawrie, Kevala</i></p> <ul style="list-style-type: none"> • Overview of forecasting for distribution system planning • Growth of large loads, such as data centers and manufacturing • Building and transportation loads • Scenario analysis
11:20am 45 min	LBL	<p>Distribution Planning Modeling <i>Cody Davis, Electric Power Engineers</i></p> <ul style="list-style-type: none"> • Assumptions and inputs • Methods and tools
12:05pm 10 min	N/N	<p>Reflection & Updates to Action Plan <i>Participants reflect on the past sessions and incorporate any relevant learnings into their lesson plan</i></p>
12:15pm 45 min	NA	Lunch, Introductions and Networking
1:00pm 60 min	LBL	<p>Distribution Planning With Local Resources: Integration and Valuation <i>Cody Davis, Electric Power Engineers</i></p> <ul style="list-style-type: none"> • Capabilities by technology • Value streams and benefit-cost analysis • Hosting capacity analysis for solar and electric vehicle charging • Costs and benefits of proactive grid investments and cost allocation approaches
2:00pm 30 min	N/N	<p>Paired walk (with prompt) & Break (refreshments provided)</p> <ul style="list-style-type: none"> • Sample prompt: What is one professional accomplishment you've had in the last year that you're proud of, and why?
2:30pm 45 min	LBL	<p>Coordination Across Planning Processes <i>Grace Relf, Berkeley Lab</i></p> <ul style="list-style-type: none"> • Coordinating distribution system planning with other utility and state plans, such as grid modernization, resilience, and State Energy Security Plans • State agency roles and responsibilities
3:15pm 30 min	LBL	<p>Engaging Stakeholders <i>Natalie Mims Frick, Berkeley Lab</i></p> <ul style="list-style-type: none"> • State and utility practices and case studies • Metrics for success • Engagement throughout the planning process
3:45pm 15 min	N/N	<p>Reflection & Updates to Action Plan <i>Participants reflect on the past sessions and incorporate any relevant learnings into their lesson plan</i></p>

4:00pm 60 min	N/N	Roam the Room: peer sharing & ask the expert to advance action planning worksheet and identify actions participants can take in their state <i>Participants roam the room – and connect with colleagues & experts on their topic.</i>
5pm		END OF DAY ONE

Day 2

Time		Session
8:30 am 10 min	LBL, N/N	Welcome and Agenda Overview <ul style="list-style-type: none"> • Opening remarks • Day 2 overview
8:40 am 15 min	N/N	Action Plan Development – 5 W Questions <i>Framing: Before we hear more on dx planning from LBNL, think about your topic & its key stakeholders, challenges, and decision points. You will have an opportunity to reflect and iterate on this later today.</i> Participants journal on 5 questions in their worksheet (“5 W questions”) <ul style="list-style-type: none"> • Who are the stakeholders? Who do you need to talk to? • What is the biggest challenge and how will you navigate it? • Where are the decision points? How can your action influence the outcome? • What resources do you need? How will you get them? • When are the timelines or data-driven events that may impact your approach?
8:55 am 55 min	LBL	Distribution Planning for Load Growth: Buildings <i>Natalie Mims Frick and Andy Satchwell, Berkeley Lab</i> <ul style="list-style-type: none"> • Distribution planning challenges and solutions • Energy efficiency and demand flexibility programs to manage building loads • Value of these programs for future grids with high loads and local resources • Energy and bill impacts of investments to manage load growth and efficacy of alternative rate designs
9:50 am 10 min	NA	BREAK
10:00 am 55 min	LBL	Distribution Planning for Load Growth: Transportation <i>Nancy Ryan, NER Consulting</i> <ul style="list-style-type: none"> • How EV loads differ from other types of loads • Light-, medium- and heavy-duty charging loads • Role of rates and managed charging in shaping EV loads • Grid impacts of EV charging — local distribution grid vs. bulk power system <ul style="list-style-type: none"> ○ Challenges to existing grid planning and finance paradigms ○ New sources of data and planning tools
10:55 am	LBL	Rate Design

40 min		<p><i>Andy Satchwell, Berkeley Lab</i></p> <ul style="list-style-type: none"> • Rate design 101 • State policy and utility objectives • Time-varying rate design elements • Experience with EV rate design to date
11:35am 45 min	NA	Lunch
12:20 pm 45 min	NARUC, NASEO	<p>Regional State Panel on Distribution Planning Challenges and Potential Solutions</p> <p><i>Facilitated by National Association of State Energy Officials and National Association of Regulatory Utility Commissioners</i></p>
1:05 pm 10 min	N/N	<p>Reflection & Updates to Action Plan</p> <p><i>Participants reflect on the past sessions and incorporate any relevant learnings into their lesson plan</i></p>
1:15 pm 45 min	LBL	<p>DER Interconnection</p> <p><i>Grace Relf, Berkeley Lab, and Cody Davis, Electric Power Engineers</i></p> <ul style="list-style-type: none"> • Data access and transparency • Process and timeline • Economic efficiency • Grid reliability, resilience, and security
2:00 pm 40 min	N/N	<p>Peer-to-peer coaching exercise on Action Plan</p> <p>For this exercise, there will be a “client” and two “consultants.” There will be three rounds, so each person will get to be the client. Each round is 8 minutes.</p>
2:40 pm 10 min	NA	BREAK
2:50 pm 15 min	N/N	<p>Reflect & Share Commitments</p> <p><i>Participants identify one action they want to commit to and share it with their table. Facilitators capture the action.</i></p> <ul style="list-style-type: none"> • Use template of: “I commit to...” (include name/state)
3:05 pm 50 min	LBL	<p>Office Hours – Ask experts questions about specific issues in your state</p> <ul style="list-style-type: none"> • Distribution planning policies and regulatory guidance • Forecasting loads and local resources • Distribution planning modeling; integration and valuation of local resources • Coordination across planning processes • Stakeholder engagement • Distribution planning for load growth: Transportation; rate design • Distribution planning for load growth: Buildings
3:55pm 5 min	NARUC	Closing remarks from NARUC / NASEO
4:00pm		END OF DAY TWO