OEB Regional Planning Process Review Consultation

Regional Planning Process Advisory Group (RPPAG) – Meeting #4

EB-2020-0176

May 25, 2021

Agenda

- Welcome and Introduction

- OEB staff Update: 2006 Bulletin on Cost Responsibility

- ESL Subgroup: Proposal Update

- Load Forecast Subgroup
  - Standardization Proposal – Progress update
  - Load Forecast Option recommendation

- IESO Recommendation: *Improve Integration & Coordination with Related Processes*

- IESO Recommendations*: Outstanding Issues*

- Next Steps and Action Items

ESL Subgroup - Proposal Update

- **Expect Service Life (ESL) Information**: Clarify difference between what has now been agreed upon (Asset Demographics) and what IESO initially recommended – scope of information and timeframe (previously referred to as "Long List")

- **End of Life (EOL) Information:** Clarify difference between what has now been agreed upon and what IESO initially recommended – scope of information and timeframe (previously referred to as "Short List")

- **ESL & EOL Information:** Clarify what entities it is now being recommended to collect information from and what IESO initially recommended (all Transmission Asset Owners – transmitters & applicable LDCs)

Note: Template for 10-year EOL Equipment Information circulated separately..

Load Forecast Subgroup – Progress Update & Recommendation

- **Standardization Guidance/Template Proposal** – Information update

    - A work in progress
    - Goal is to provide proposal to group for discussion at next meeting

- **Subgroup Option recommendation** – Followed by group discussion

    - Options considered

        - **Option 1** (One-time detailed comprehensive for Needs Assessment and all subsequent stages, not updated)
        - **Option 2** (Higher level for Needs Assessment, Detailed Comprehensive update if IRRP required)
        - **Option 3 - Hybrid** (Higher level for NA if not IRRP in last cycle, Comprehensive for NA if IRRP required in last cycle)

Improve Integration & Coordination with Related Processes – *IESO Recommendation*
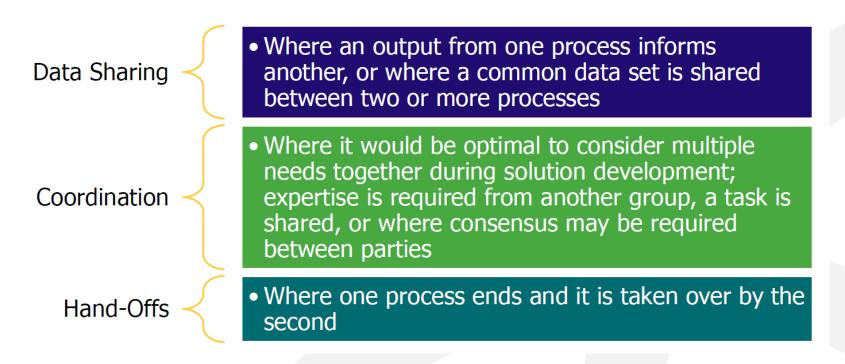
- This recommendation is shared by IESO & OEB

- **Objective –** Interdependencies (data sharing, coordination, hand-off points) between regional planning and related processes should be well defined
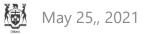
- **Examples identified by IESO**
  - End-of-Life (EOL) asset replacement
  - Distribution planning & Bulk planning
  - Regulatory proceedings (i.e., transmitter & distributor rate / LTC applications)
  - Community energy planning
  - Connection assessments & approvals
  - Markets or procurement mechanisms (competitive Tx, Gx, or NWAs)
  - Energy-efficiency program planning

Improve Integration & Coordination with Related Processes

Primary Forms of Process Integration

Data Sharing
- Where an output from one process informs another, or where a common data set is shared between two or more processes

Coordination
- Where it would be optimal to consider multiple needs together during solution development; expertise is required from another group, a task is shared, or where consensus may be required between parties

Hand-Offs
- Where one process ends and it is taken over by the second

Improve Integration & Coordination with Related Processes

- For each related process, following to be identified:
  - What, when & how data / information should be shared
  - Common stakeholders & strategies for overlapping engagements
  - Key decision points that impact or are impacted by regional planning decisions
  - Any overlap in accountabilities, scope & objectives

- OEB requires that utility applications include both a Regional Plan and a Distribution System Plan, and regional EOL needs are currently identified by the transmitter in the Needs Assessment in the regional planning process
  - Cost responsibility rules specific to EOL asset replacement are set out in OEB Codes (amended in 2018 to modernize)
  - Based on prior meetings, RPPAG will now recommend formalization of 10-year outlook for EOL asset replacement from all transmission asset owners in regional planning process (draft template provided by subgroup)

Improve Integration & Coordination with Related Processes

- Are there other processes beyond those identified by IESO?
  - For example, OEB staff believes Municipal Planning is key

- Does the OEB require improvement in any areas?

- While a shared recommendation, OEB staff believes IESO identified itself as the primary lead because they have procurement processes that are relatively new or not tested yet such as the Capacity Auction, Competitive Transmission procurement and NWA procurement

- Most complex to coordinate are likely Transmission procurement and NWA procurement since transmission projects require OEB approval as do all NWAs owned by LDCs under OEB's CDM Guidelines (i.e., not only an internal IESO matter)

IESO Recommendations: *Outstanding Issues*

Recommendation	Considerations	Questions for RPPAG
Standardize & Streamline Load Forecast	- Option 1 (only once & 20-year comprehensive) **or** Option 2 (10-year higher level first, comprehensive as needed) **or** Hybrid Option (base on if IRRP in prior cycle)	- Does RPPAG support Load Forecast subgroup's recommended option?
Clarify Difference in Scope between IRRP & RIP products & Optimize Timelines between 2 stages	- IESO initially recommended reviewing the IRRP process to ensure efficient, as time taken to complete IRRP should differ based on complexity - "Sizing of IRRP". IESO Final Report says further work not necessary	- Recommending RIP should be maintained as is and no concerns with 6-month timeline (only report with all wires solutions) - Not agree formal sign off should be required on reports in process - RPPAG recommending any change?
Better Consider Cost Responsibility	- RPPAG recommending update to 2006 Bulletin and a Plain Language document prepared by OEB staff. Clarity on Non-Wires to be addressed in separate OEB consultation (FEI)	- Is OEB staff's understanding correct that "who pays'" would be discussed among TWG members but not recommending detailed cost estimates in regional plans?

IESO Recommendations: *Outstanding Issues*

Recommendation	Sub-Recommendation	Questions for RPPAG
Better Address End-of-Life (EOL) Asset Replacement in Regional Planning Process	- Formalize incorporating a process where all transmission asset owners (TAO's – all transmitters & applicable LDCs) develop a long list of facilities with expected service life (ESL) – 20-year Outlook - *Note:* Last update was now to limit to HONI and Bulk Planning process	- Does RPPAG agree with ESL subgroup's recommended approach?
	- Formalize including a short list of end-of-life (EOL) needs as an input to regional planning process (information from all TAOs with short list based on long list) – 10-year Outlook	- Does RPPAG agree with subgroup's recommended approach? - Has it changed at all from initial recommendation?
	- Note: Explanation to be provided related to what information would not be made public & why	- Does RPPAG agree after hearing explanation?

Next Steps and Action Items

- Finalize Recommendations

- Discuss preparation of report to OEB Executive team (i.e., CEO)

- Discuss any "other" recommendations (beyond RPPAG position on IESO Recommendations)
  - Must be within scope

- Next meeting to be scheduled during week June 28th

Questions / Comments?