



California Public  
Utilities Commission



CALIFORNIA  
ENERGY  
COMMISSION

**Electric Grid Education and Outreach Workshop**  
High DER Future Grid Proceeding (R.21-06-017)  
August 23, 2022 (9:00am to 3:30pm)

**Participation Details**

Join the Meeting (preferred method)	<ul style="list-style-type: none"> <li>• <a href="https://cpuc.webex.com/cpuc/onstage/g.php?MTID=e7ec6ec5f0b68b5b38385e69ea551be68">https://cpuc.webex.com/cpuc/onstage/g.php?MTID=e7ec6ec5f0b68b5b38385e69ea551be68</a></li> <li>• Password: psU9C2m7azX</li> </ul>
Join by Video System (alternate method)	<ul style="list-style-type: none"> <li>• Dial <a href="tel:24877091305">24877091305@cpuc.webex.com</a></li> </ul> <p>You can also dial 173.243.2.68 and enter the meeting number.</p>
Join by Phone (alternate method)	<ul style="list-style-type: none"> <li>• Call: 1-855-282-6330 (United States toll-free) 1-415-655-0002 (United States toll)</li> <li>• Event number (access code): 2487 709 1305</li> </ul>
Contact	<ul style="list-style-type: none"> <li>• Rob Peterson at <a href="mailto:robert.peterson@cpuc.ca.gov">robert.peterson@cpuc.ca.gov</a></li> </ul>

**High DER Grid Planning Proceeding Context<sup>1</sup>**

- The primary objective of the California Public Utilities Commission (CPUC) High DER proceeding is to prepare the electric grid for a high distributed energy resource (DER) future by determining how to integrate millions of DERs within the distribution grid to maximize societal and ratepayer benefits while ensuring grid reliability and affordable rates.
- **Track 1** of the proceeding, Distribution Planning Process and Data Improvements, has several goals. One of these goals is to improve utility distribution planning to be more responsive to the needs and plans of communities, including, tribes, Environmental and Social Justice (ESJ) communities, and local communities. An external consultant is anticipated to create and implement a Community Engagement Needs Assessment to determine what communities want and need from distribution planning. The scope and cost of the needs assessment would be approved by the CPUC via a Decision. The scope of work for the needs assessment will be developed in a stakeholder workshop and released via a staff proposal planned for the Fall of 2022.
- **Track 2** of the proceeding, Distribution System Operator (DSO) Roles and Responsibilities, explores how alternative DSO models compare in their ability to plan and operate a high DER grid, unlock economic opportunities for DERs to provide grid services, limit market power, reduce ratepayer costs, increase equity, support grid resiliency, and meet State policy objectives. A technical report, called the Future Grid Study, is the primary deliverable planned for Track 2. The Track 2 Outreach Plan presented at this workshop is an Energy Division led effort to engage with tribes, community-based organizations, and local governments to hold listening sessions to understand these stakeholders’ needs and

<sup>1</sup> The November 15, 2021, Scoping Ruling for the proceeding can be found [here](#).

preferences for alternative DSO models prior to conducting a series of highly technical workshops designed for Study development. Further details are provided on page 4 below.

**Workshop Goals and Objectives**

The goals of today’s workshop are to: 1) provide foundational education to stakeholders on distribution planning and DSO topics to support meaningful engagement and participation in the High DER proceeding; and 2) present new and existing plans for community engagement for proceeding tracks 1 and 2 and coordination with California Energy Commission (CEC) outreach efforts. The workshop objectives are:

1. Attendees achieve a foundational understanding of:
  - a. How California’s investor-owned utilities operate the electric grid;
  - b. Why alternative DSO models are being investigated in proceeding Track 2; and
  - c. What alternative models for grid operations may be considered in the proceeding’s Future Grid Study.
2. Draft Outreach Plan for Future Grid Study presented for feedback and discussion.
3. Updated High DER proceeding schedule explained and discussed, including a preview of a future workshop and staff proposal to develop a scope of work for a Community Engagement Needs Assessment designed to determine what communities want and need from distribution planning.<sup>2</sup>
4. Attendees are empowered to ask questions during and after the workshop.
5. Attendees are motivated to participate in listening sessions planned to follow this workshop.
6. Attendees are informed about opportunities for further engagement and comments (both oral and written).

**Agenda**

#	Agenda Item	Presenter, Facilitator	Duration	Start Time	End Time
1	<u>Introduction</u> <ul style="list-style-type: none"> <li>• Welcome and Logistics</li> <li>• Opening remarks               <ul style="list-style-type: none"> <li>○ Commissioner Houck, CPUC</li> <li>○ Vice Chair Gunda, CEC</li> </ul> </li> </ul>	CPUC, CEC	15 min	9:00am	9:15am
2	<u>DER Proceedings Overview</u> <ul style="list-style-type: none"> <li>• Today’s Workshop Objectives</li> <li>• CPUC High DER Proceeding</li> <li>• CEC DER Informational</li> </ul>	CPUC, CEC	30 min	9:15am	9:45am

<sup>2</sup> Track 1, Phase 1, Scoping Question #5: “What initial analysis is needed for the Commission to determine in Track 1, Phase 2, of this proceeding how best to improve local engagement in utility distribution planning?” [Scoping Ruling](#) at 13, “Energy Division will conduct a workshop on the scope and funding of a potential community engagement needs assessment ... .”

	Proceeding <sup>3</sup>				
3	<u>Electric Grid Operations (Part 1)</u> <ul style="list-style-type: none"> <li>• Basics of grid operations</li> <li>• Grid topology</li> <li>• Generation, transmission, and distribution</li> <li>• Ensuring power quality</li> <li>• Q/A and engagement</li> </ul>	PG&E, SCE, SDG&E	55 min	9:45am	10:40am
	<u>Break</u>		5 min		
4	<u>Electric Grid Operations (Part 2)</u> <ul style="list-style-type: none"> <li>• Planned and unplanned outages</li> <li>• Load transfer</li> <li>• DERs and two-way power flows</li> <li>• DER penetration and the future grid, price signals</li> <li>• Grid modernization components, and rollout timeframes</li> <li>• Q/A and engagement</li> </ul>	PG&E, SCE, SDG&E	55 min	10:45am	11:40am
	<u>Break</u>		5 min		
5	<u>Why Alternative Grid Operations Models are Being Investigated (Part 1)</u> <ul style="list-style-type: none"> <li>• California's climate &amp; energy goals (e.g., climate change mitigation, decarbonization, equity, resiliency, electric vehicles and other DERs)</li> <li>• Role of DER in achieving California's goals</li> <li>• New distribution utility functions required by high DER future</li> <li>• Q/A</li> </ul>	Lorenzo Kristov	45 min	11:45am	12:30pm
	<u>Lunch</u>		30 min	12:30pm	1:00pm
6	<u>Grid Operations Models/Options for a Future Electric Grid (Part 2)</u> <ul style="list-style-type: none"> <li>• Basic DSO concepts and core functions</li> <li>• Key DSO design choices</li> <li>• Comparing alternative DSO</li> </ul>	Lorenzo Kristov with Gridworks	45 min	1:00pm	1:45pm

<sup>3</sup> Refer to the CEC's website for, *Order Instituting Informational Proceeding on Distributed Energy Resources in California's Energy Future*, at <https://www.energy.ca.gov/proceedings/energy-commission-proceedings/order-instituting-informational-proceeding-distributed>.

	<ul style="list-style-type: none"> <li>models</li> <li>Q/A and facilitated discussion</li> </ul>				
	<u>Break</u>		5 min		
7	<u>Outreach Plan and Ongoing Education</u> <ul style="list-style-type: none"> <li>Listening sessions and summary report (Track 2)</li> <li>Future Grid Study workshop series and record development (Track 2)</li> <li>Distribution planning community engagement and needs assessment (Track 1)<sup>4</sup></li> <li>Draft Future Grid Study education and comment facilitation (via Track 1)</li> <li>Future Grid Study En Banc (Track 2)</li> <li>Updated High DER work plan/schedule (all tracks but focus on Track 2)</li> </ul>	CPUC	50 min	1:45pm	2:35pm
	<u>Break</u>		5 min		
8	<u>Discussion and Attendee Feedback</u> <ul style="list-style-type: none"> <li>Facilitated Q/A and discussion</li> <li>Survey of key points from today and feedback</li> </ul>	CPUC with Gridworks	40 min	2:40pm	3:20pm
9	<u>Next Steps</u> <ul style="list-style-type: none"> <li>Comments on outreach plan and updated schedule due <b>8/31/22</b></li> <li>Ruling to adopt final outreach plan</li> <li>Listening sessions (invitation to join us)</li> <li>Closing remarks</li> </ul>	Commissioner Houck	10 min	3:20pm	3:30pm

**Preliminary, Draft Track 2 Outreach Plan Overview**

The Track 2 Outreach Plan to be presented at the August 23, 2022 workshop is expected to be organized according to three main principles: educate, listen, and focus. These principles would provide the framework for Track 2 outreach activities. The August 23, 2022, workshop will

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<sup>4</sup> Track 1, Phase 2, Scoping Question #3: “Leveraging the analysis identified in Track 1, Phase 1, are there ways in which utility distribution planning representatives could better engage with local and tribal governments, ESJ communities, and local developers to ensure new planned loads and developments are factored into Utility DPPs and local concerns regarding distribution planning are adequately addressed?”

provide foundational grid operations **education** to stakeholders and will be recorded for future access. A **listening** session series would follow and is currently being planned to occur in September and October as follows.

- Listening sessions would complement other more traditional proceeding stakeholder feed-back methods. Listening sessions would not replace these other feed-back methods but would enable more diverse voices and perspectives to be heard to support Future Grid Study development.
- In coordination with the CEC, up to eight listening sessions may be planned, as follows:
  - Up to five sessions with community-based organizations.
  - One session with tribes.
  - One session with rural local governments.
  - One session with urban/suburban local governments.
- Presentations and recording from August 23, 2022, Electric Grid Education and Outreach Workshop will be used as background for listening session participants.
- A listening session summary will be prepared by the CPUC, reviewed by session participants, and shared with the High DER proceeding Service List. The CPUC Office of the Tribal Advisor may separately provide the session comments and details to session participants upon request.

Track 2 would then **focus** on the technical aspects of Future Grid Study development. Where appropriate, additional education and listening sessions would be scheduled as needed to accompany the following, focused technical sessions.<sup>5</sup>

- Workshop #1 (Q1 2023): Visions and Objectives for a Future Grid
- Workshop #2 (Q1/Q2 2023): Operations Needed for the Future Grid
- Workshop #3 (Q2 2023): Gap Assessment: Collect Additional Gap Information
- Workshop #4 (Q2/Q3 2023): Present and Socialize DSO Model Proposals
- Workshop #5 (Q3 2023): Identify Barriers, Actions, Trade-Offs

Workshop summary reports would be prepared for each technical session. All presentations and documents developed for each technical workshop would be included in the proceeding record following each session, and formal comments would be requested. The Draft Future Grid Study would be issued in 2023 following the workshop series and formal comments would be requested.

As identified in the Scoping Ruling (at 10), an En Banc<sup>6</sup> would follow issuance of the Draft Future Grid Study to present study findings and gather additional feedback. A Proposed

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<sup>5</sup> The technical sessions are further described in the white paper, “Evaluating Alternative Distribution System Operator Models for California,” available at <https://gridworks.org/initiatives/california-future-grid-study>. Refinements are being considered to session contents and organization based on feedback received during the May 3, 2022, workshop.

<sup>6</sup> En Bancs are Commission-hosted public events held for a proceeding that are attended by all commissioners instead of the assigned commissioner alone.

Decision to adopt the Future Grid Study would follow the En Banc, and the final Future Grid Study would be published as adopted by Decision. Outstanding issues identified in the Future Grid Study for further exploration are expected to be considered for inclusion in a successor proceeding.

To ensure robust comments are received on the Draft Future Grid Study, including from stakeholders that have not traditionally participated in CPUC proceedings on energy issues, Staff propose that outreach already scoped for Track 1 be coordinated with Track 2. This would be accomplished by ensuring that the scope of work to be developed for the Track 1 Community Engagement Needs Assessment (see [Scoping Ruling](#) at 13) includes widespread education and outreach support specific to the Draft Future Grid Study. Scope of work approval, including funding for consultant support, would be determined in a Track 1 Proposed Decision.

### **Track 2 Outreach Plan Questions for Stakeholder Comment (due August 31, 2022)**

1. What additional steps or actions should be added to the Draft Track 2 Outreach Plan?
2. Are there Track 2 Outreach Plan areas that need more emphasis/additions?
3. What unique Track 2 issues should be considered for tribal, rural, or disadvantaged communities?
4. What unique Track 2 issues should be considered for local governments?
5. What information should the CPUC seek from listening session participants? What questions should CPUC pose to participants?

The Draft Track 2 Outreach Plan may be revised based on the discussion and feedback at the August 23, 2022, workshop and formal comments received on August 31, 2022. The Final Track 2 Outreach Plan will be released shortly after formal comments are received.