

Appendix

Appendix A. DSP plan guidelines compliance checklist

Forecasting of Load Growth, DER Adoption, and EV Adoption	DSP guideline	Chapter section
Discussion of current utility processes for distribution system load growth forecasting including:	5.1.a	3.1, 3.2, 3.3, 3.4
Forecasting method and tools used to develop the forecast	5.1.a.i	3.2, 3.3, 3.4
Forecasting time horizon(s)	5.1.a.ii	3.3.1, 3.3.2, 3.4.3.2
Data sources used to inform the forecast	5.1.a.iii	3.2, 3.3, 3.4.2, 3.4.3
Locational granularity of the load forecast	5.1.a.iv	3.4.2
Forecast of DER adoption and EV adoption by substation	5.1.b	Appendix M
The forecast should include high/medium/low scenarios for both DER adoption and EV adoption	5.1.b.i	Appendix M
A utility should fully describe its methodologies for developing the DER forecast, EV forecast, high/medium/low scenarios, and geographical allocation in its plan (for example methods and tools, time horizons, data sources).	5.1.b.ii	3.5, Appendix C
For the initial Plan, the methodology for geographical allocation (to the substation) is at the utility's discretion. The Commission may provide direction for subsequent Plans.	5.1.b.iii	Not applicable
A utility may consider leveraging information such as: historical utility program trends, historical customer adoption trends, data from ETO, data from Transportation Electrification Plans and pilots, or studies on DER technical and economic potential used in other dockets. Utilities should use the most recent data available.	5.1.b.iv	Not applicable
Results of forecasting load growth, DER adoption, and EV adoption	5.1.c	3.5.5, Appendix M
Document existing and anticipated constraints on the distribution system	5.1.c.i	4.5
Grid Needs Identification	DSP guideline	Chapter section
Document the process used to assess grid adequacy and identify needs.	5.2.a	4.2, 4.3
Discuss criteria used to assess reliability and risk, and methods and modeling tools used to identify needs.	5.2.b	4.4
Present a summary of prioritized grid constraints publicly, including criteria used for prioritization.	5.2.c	4.5
Provide a timeline by which the grid need(s) must be resolved to avoid potential adverse impacts.	5.2.d	4.5

Solution Identification	DSP guideline	Chapter section
Document the process to identify the range of possible solutions to address priority grid needs.	5.3.a	5.3, 5.3.2
For each identified Grid Need provide a summary and description of data used for distribution system investment decisions including: discussion of the proposed and various alternative solutions considered, a detailed accounting of the relative costs and benefits of the chosen and alternative solutions, feeder level details (such as customer types on the feeder; loading information), DER forecasts and EV adoption rates.	5.3.b	5.3, Appendix J
For larger projects (this may exclude, for example, regular maintenance projects, or inspection projects), engage with impacted communities early in solution identification. Facilitate discussion of proposed investments that allow for mutual understanding of the value and risks associated with resource investment options.	5.3.c	5.4
Evaluate at least two pilot concept proposals in which non-wire solutions would be used in the place of traditional utility infrastructure investment.	5.3.d	6.2, 6.3, 6.4
<p>The purpose of these pilots is to gain experience and insight into the evaluation of non-wire solutions to address priority issues such as the need for new capacity to serve local load growth, power quality improvements in under-served communities. These pilots will prepare utilities to achieve the goals listed in Stages 2 and 3 of Figure 6.</p> <p>In its pilot concept proposals, a utility should discuss the grid need(s) addressed, various alternative solutions considered, and provide detailed accounting of the relative costs and benefits of the chosen and alternative solutions. The pilot concept proposals should be reasonable and meet the Guidelines, even if the individual proposal may not be cost-effective. In addition, evaluation of pilot concept proposals should utilize the community engagement process developed in Section 4.3. (a) (ii) and address:</p>		
Community interest in clean energy planning and projects	5.3.d.i	2.4, 6.3.1
Community energy needs and desires	5.3.d.ii	2.4, 6.4.1.4
Community barriers to clean energy needs, desires, and opportunities	5.3.d.iii	2.4
Energy burden within the community	5.3.d.iv	2.6
Community demographics	5.3.d.v	3.5.5.3, 6.4.1.4, 6.4.2.4
Any carbon reductions resulting from implementing a non-wires solution rather than providing electricity from the grid's incumbent generation mix	5.3.d.vi	6.4.1.8, 6.4.2.8
Near-term Action Plan	DSP guideline	Chapter section
Action Plan: Provide a 2-4 year plan consisting of the utility's proposed solutions to address grid needs and other investments in the distribution system	5.4.a	7.3
Projected spending: Disclose projected system spending to implement the action plan, timeline for improvement, and anticipated requests for a cost recovery mechanism	5.4.b	7.3
Relation to other investments: As applicable, the Action Plan should identify areas of relation and interaction with other investments such as transmission projects and demand response programs	5.4.c	7.3
Document current innovations and pilots being conducted to improve, modernize, and/or enhance the grid beyond its current capabilities	5.4.d	7.3, Appendix K