



# UM 2024 Workshop Agenda

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Monday, Jan. 8, 2024

11:30 a.m. - 2 p.m.

[Link to Teams Meeting](#)

Call-In: 1-503-446-4951 Meeting ID: 192 403 657#

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## UM 2024 Workshop: Contested Case Phase

### Agenda

**11:30 p.m.**

#### **Introductions and Overview**

**11:40 p.m.**

#### **Updated Straw Proposals**

- Adhere to the updated Chapter 860 Division 38 rules.
- Address linked issues holistically. Ensure proposed policies aren't at odds with each other.
- Include details based on expertise. For example, utility companies have essential information on how to operationalize preferential curtailment.
- Provide sufficient detail to test assumptions and stances.

**12:15 p.m.**

#### **Scope of Issues and Settlement Potential**

- See issues list on page 2 for more detail.
- Discuss issues with potential for progress prior to testimony, for example:
  - Operationalizing preferential curtailment.
  - Methodology for recovering charges/credits.
  - Additional issues raised by parties.

**1:30 p.m.**

#### **Procedural Schedule**

- See draft schedule on page 3.

**1:50 p.m.**

#### **Remaining Questions & Next Steps**

## UM 2024 Issue List

### Curtailment Issues:

- Utility's step-by-step process for preferentially curtailing customers.
  - Defining utility liability when making curtailment decisions.
- Determining the categories and estimates of costs for infrastructure to enable curtailment.
- Explore potential for demand response in conjunction with these new infrastructure upgrades.

### Methodology for calculating and recovering transition charges/credits and other non-bypassable charges.

**Many of the issues in this case are related and impact each other. The following should be considered holistically when developing proposals for key policies such as caps or resource adequacy:**

### Returning customers and default supply:

- Determining a calculation that captures the "Uncommitted Supply Rates" or "market rate" in OAR 860-038-0290(11) and (14).
  - What are the differences in treatment between curtailable and non-curtailable customers?
- Setting an amount of time a returning customer may remain on default supply.
  - How should customers be treated who use "standard offer" exclusively?
- Penalty charges for returning to cost-of-service.

### Defining thresholds for customer eligibility and waiver options

### Resource Adequacy Issues:

- Capacity Backstop Charges or other safeguards.

### Program Caps:

- The structure of a cap on non-curtailable load per OAR 860-038-0290(7).
- Frequency of recalculations for cap limits.
- The threshold that is appropriate for a cap, on a specific type of load or on the overall Direct Access program.
- Potential waiver process for load above caps.

### Other Issues:

- Determining the process for Direct Access customers to return to cost-of-service at the conclusion of this investigation should they choose to do so.
- Discussion of changing Nov. 15 indicative pricing and election window to accommodate final power cost orders.

### Draft Schedule Following Straw Proposals

February, 2024	Settlement Conference Series
March, 2024	Settlement Conference Series if necessary
April 8, 2024	Target Stipulation Date
May 3, 2024	Opening Testimony
Mid-May, 2024	Settlement Conference if necessary
July 19, 2024	Cross Answering/Reply Testimony
Early August, 2024	Settlement Conference if necessary
September 30, 2024	Final Testimony
October 11, 2024	Settlement Conference if necessary
October 18, 2024	Settlement Stipulation Due
October 28, 2024	Hearing
November 29, 2024	Opening Brief
January 3, 2025	Closing Brief
February 28, 2025	Commission Order

If you have any questions, please contact:

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