



# Oregon

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**Public Utility Commission**

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Oregon Public Utility Commission  
Administrative Hearings Division  
201 High St. SE Suite 100  
Salem, OR 97308



**Re: UM 2024 – Procedural Schedule**

Judge Allwein,

In accordance with Commission Order No. 21-146 in OPUC Docket No. UM 2163, Staff hereby submits the framework for a procedural schedule in OPUC Docket No. UM 2024. Staff has worked collaboratively with the parties to UM 2024, and understands the attached framework to be generally agreeable to all parties to this proceeding with the potential exception of Portland General Electric (PGE). PGE has indicated that it is unable to agree to a procedural schedule framework without a schedule set in UM 2143, the Commission's investigation into Resource Adequacy. Staff anticipates circulating a draft procedural schedule in UM 2143 today, but notes that additional time is necessary in order to determine the best path forward with that proceeding, particularly following the recent passage of HB 2021. Staff also views the UM 2024 proceeding as broad enough to move forward separately, but in a coordinated fashion, with the UM 2143 proceeding.

Staff proposes that parties be permitted to file comments on the attached procedural schedule until July 8, 2021, and that a prehearing conference be scheduled the week of July 19, 2021 in order to determine the procedural schedule in this case.

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Policy and Economic Analysis Manager  
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## UM 2024 Staff Proposed Schedule Outline

### Initial Straw Proposal

- Approximately six week period of time in which parties are obligated to work in good faith to respond to discovery requests seeking information another party needs to develop a straw proposal. Parties should also work in good faith to ensure their discovery requests are clear, properly scoped, and limited such that they are commensurate with the needs of the case.
- Each party to file a straw proposal that identifies changes the party believes should be made to the utilities' existing direct access programs or existing Commission direct access policies.
  - Following straw proposals, Parties can serve discovery, which should be used to inform testimony positions.

Two rounds of simultaneous testimony following straw proposals.

- Approximately eight weeks following the posting of straw proposals, the initial round of testimony will be due.
- Cross-answering and reply testimony due approximately four weeks following opening testimony.

Two Rounds of simultaneous briefs

**Mid-August: Straw Proposal**

**Mid-October: Opening Testimony**

**Mid-November: Cross-answering and Reply Testimony**

**Early-December: Hearing**

**Mid-December: Opening Briefs**

**Early-January: Closing Briefs**

**Mid-February: Commission Decision**

Other Considerations:

- UM 2143 will progress concurrently with UM 2024. Staff expects some progress to be made in UM 2143 prior to the filing of opening testimony. Staff will convene a workshop four weeks prior to the opening testimony due date to determine if parties believe sufficient information is available regarding RA for direct access customers to proceed with the adopted schedule or file to amend the schedule.
- The Testimony rounds should provide the Commission with a comprehensive list of parties' positions, clearly indicating areas of requested change supported by evidence. As is the case with testimony, generally, parties should narrow issues as rounds of testimony progress—new issues that respond to issues raised in the straw proposals may be appropriate in the initial round of testimony, but entirely new issues should not be brought up in the final round. Parties are not prohibited from making responsive arguments.
- The dates and sequencing of items in the proposal are meant to provide clarity and guidance but may be subject to change based on party/Commission availability, events pertinent to the docket but beyond the scope, or other items. Staff believes parties can work collaboratively to address any scheduling issues that come up as they arise.