
Business Practice: Transmission Planning**Posted:** January 29, 2010**Effective:** February 1, 2010**Revision No.:** 5

Disclaimer: Transmission planning processes are dynamic and involve interactions with multiple stakeholders. Some of the links, and the documents they lead to, are not under the direct control of PGE. Documents and links may be updated periodically during PGE's biennial planning cycles. The links to referenced documents are provided here to facilitate an open and transparent transmission planning process as prescribed in PGE's OATT Attachment K. Prior to the beginning of Q1 and Q5 of the Local Transmission Planning process (i.e. January of each year), PGE will validate and update links to documents, in addition to periodic updates during the planning cycles. Most documents will contain a version or date to indicate the date on which it was created or last revised. It should be noted, however, that documents may be valid even if they are older than one year.

Please refer to the Transmission & Reliability Services Contact List on OASIS for questions regarding this business practice.

1. Purpose

This Transmission Planning Business Practice supplements the transmission planning information provided in Attachment K of Portland General Electric Company's (PGE's) Open Access Transmission Tariff (OATT). Additional detail is presented in this business practice regarding PGE's transmission planning process, to assist PGE's customers and stakeholders in addressing their transmission planning issues and/or engaging in PGE's transmission planning process.

2. Definitions

- 2.1. **NTTG:** The Northern Tier Transmission Group (NTTG) is a group of transmission providers and customers that are actively involved in the sale and purchase of transmission capacity of the power grid that delivers electricity to customers in the Northwest and Mountain States.

- 2.2. **Economic Study Request:** A written request submitted by an Eligible Customer or stakeholder to the Transmission Provider, asking the Transmission Provider to model the ability of specific upgrades or other investments to the Transmission System or Demand Resources, not otherwise considered in the Local Transmission Plan (produced pursuant to Section 3.2.3 or Section 3.2.7 of Attachment K), to reduce the cost of reliably serving the forecasted needs of the Transmission Provider and its customers set forth in the Local Transmission Plan.

Business Practice: Transmission Planning	Revision 5
Effective Date: February 1, 2010	Page 1 of 7

- 2.3. **Planning Horizon:** The Local Transmission Plan evaluates a ten (10) year planning horizon, which consists of summer/winter Near Term Cases (years 1-5) and summer/winter Longer Term Cases (years 6-10).
- 2.4. **Local Transmission Plan:** Transmission plan of the Transmission Provider that meets NERC compliance obligations by identifying the upgrades and other investments to the Transmission System and Demand Resources necessary to reliably satisfy, over the Planning Horizon, the following: Network Customers' resource and load growth expectations for designated Network Load; Transmission Provider's resource and load growth expectations for Native Load Customers; Transmission Provider's obligations pursuant to grandfathered, non-OATT agreements; and Transmission Provider's point-to-point transmission service customers' projected service needs including obligations for rollover rights.
- 2.5. **WECC:** The Western Electricity Coordinating Council or its successor.

3. Requirements

- 3.1. Attachment K of Portland General Electric's Open Access Transmission Tariff (OATT): Transmission Planning Process.

4. Local Transmission Planning Process – Part A of Attachment K

- 4.1. **Biennial Planning Cycle and Schedule:** PGE's biennial schedule and study cycle for the Local Transmission Plan (LTP) eight (8) quarter process can be accessed on PGE's OASIS site at: http://www.oatioasis.com/PGE/PGEdocs/Att_K_Timeline.pdf.
 - 4.1.1. During Quarters 1 and 5 of the planning cycle, any stakeholder may submit data to be evaluated as part of the preparation of the Local Transmission Plan. The information must include a sufficient level of detail (e.g. location, data sources, resource type, existing and expected peak capacity, transmission voltage levels, in service dates(s), associated loads/resources, etc.) to properly evaluate the proposal. Any stakeholder may also propose alternatives for consideration along with any system upgrades identified in prior Near Term or Longer Term Local Transmission Plans. Any data or alternatives should be submitted in writing to the addressee listed in section 4.1.2 below, no later than the end of Quarters 1 or 5, as applicable. Incomplete requests will first be returned for completion to the requesting party. If not timely completed and returned, such request will be rejected. All stakeholder submissions will be evaluated on a basis comparable to data and submissions required for planning the transmission system for both retail and wholesale customers, and alternatives will be evaluated based on a comparison of their relative economics and ability to meet reliability criteria. The methodology used will be consistent with PGE's planning methodology which can be accessed at PGE's OASIS site at <http://www.oatioasis.com/PGE/PGEdocs/Methodology.pdf>.
 - 4.1.2. During Quarters 3, 4, 7 and 8 of the planning cycle, any stakeholder may submit comments, additional information about new or changed circumstances, including updates to loads, resources and transmission projects, and may also propose alternatives to be considered as part of the Near Term or Longer Term Local

Business Practice: Transmission Planning	Revision 5
Effective Date: February 1, 2010	Page 2 of 7

Transmission Plans. Any comments or additional information should be submitted in writing to:

Supervisor, Transmission & Distribution Planning
Portland General Electric
121 SW Salmon Street
3WTC0406
Portland, Oregon 97204

4.1.3. During Quarter 3 of the planning cycle, PGE will host a public meeting to review PGE's draft Near Term Local Transmission Plan, and in Quarter 7 of the planning cycle, PGE will host a public meeting to review the draft Longer Term Local Transmission Plan. Any stakeholder is welcome to participate in these public meetings.

4.2. Economic Study Requests: To submit an economic study request under Attachment K of the Tariff, requestor must complete the written Economic Study Request form located on PGE's OASIS site under the Transmission Planning – Economic Studies folder at: http://www.oatioasis.com/PGE/PGEdocs/Att_K_economic_study_request_form.xls. The completed Economic Study Request form should be submitted in writing to:

Manager, Transmission Contracts, Planning and Expansion
Portland General Electric
121 SW Salmon Street
3WTC0402
Portland, OR 97204

4.2.1. Economic Study Requests will be classified by PGE as Local, Subregional or Regional per Part A, subsection 7.3 of Attachment K. Any Economic Study Requests received, along with any responses to such, are maintained on PGE's OASIS site: (<http://www.oatioasis.com/pge/index.html>) under the Transmission Planning folder – Economic Studies folder.

4.3. Critical Energy Infrastructure Information Request: To submit a request for Critical Energy Infrastructure Information (CEII), requestor must follow Processing CEII Requests, located on PGE's OASIS under the Business Practices folder and Requests for CEII subfolder:
([http://www.oatioasis.com/PGE/PGEdocs/Processing_CEII_Requests_r3_\(4-20-2009\).pdf](http://www.oatioasis.com/PGE/PGEdocs/Processing_CEII_Requests_r3_(4-20-2009).pdf)).

4.3.1. If it is determined that the release of CEII to the requester may be appropriate, the requestor will be required to submit a completed PGE Non-Disclosure Agreement, located on PGE's OASIS under Order 890 folder – Attachment K Supporting Documents folder (http://www.oatioasis.com/PGE/PGEdocs/CEII_Non-Disclosure_Agreement.pdf).

4.3.2. Submit all completed forms to:

Manager, Transmission Contracts, Planning and Expansion

Portland General Electric
121 SW Salmon Street
3WTC0402
Portland, OR 97204

- 4.4. Other supporting documents or additional information, related to PGE's local transmission planning process, can be found via the links listed under "RelevantPGE links" in Section 7 below.

5. Sub-regional Transmission Planning Process – Part B of Attachment K

- 5.1. Biennial Planning Cycle and Schedule Sub-regional transmission planning is performed in conjunction with NTTG. The following diagram is taken from the NTTG Planning Charter. The biennial schedule and study cycle is comprised of the following milestone activities during an eight (8) quarter study cycle as outlined below:

Figure 1: NTTG Study Cycles

NTTG Biennial Transmission Planning Cycle			NTTG Economic Planning Studies		
	Quarter	Activity		Quarter	Activity
Year 1	Qtr 1	Information Gathering *	Year 1	Qtr 1	Receive and Prioritize Requests *
	Qtr 2	Study Plan and Assumptions *		Qtr 2	Study
	Qtr 3	Draft Plan Analysis *		Qtr 3	Report/Review Results *
	Qtr 4			Qtr 4	
Year 2	Qtr 5	Draft Study Results and Review *	Year 2	Qtr 1	Receive and Prioritize Requests *
	Qtr 6	Economic Studies and Cost Allocation Process		Qtr 2	Study
	Qtr 7	Final Plan Report and Review *		Qtr 3	Report/Review Results *
	Qtr 8	Final Plan Approval		Qtr 4	

* Stakeholder and public participation required

As stated in Part B of PGE's Attachment K, stakeholders may submit data to be evaluated as part of the preparation of the coordinated sub-regional study process. The information must include a sufficient level of detail (e.g., location, data sources, resource type, existing and expected peak capacity, transmission voltage levels, in service date(s), associated loads/resources, etc.) to properly evaluate the proposal. All stakeholder submissions will be evaluated on a basis comparable to data and submissions required for planning the transmission system for both retail and wholesale customers, and solutions will be evaluated based on a comparison of their relative economics and ability to meet reliability criteria. The Chair of the NTTG Planning Committee will distribute instructions and form for submission (which is also available on the NTTG website) in Quarters 1 and 5 of each planning cycle. Incomplete requests will first be returned for completion to the requesting party. If not completed, such request will be rejected.

- 5.2. Other supporting documents or additional information, related to NTTG's transmission planning process, can be found via the links listed under "Relevant NTTG links" in Section 7, below.
6. Regional Transmission Planning Process – Part C of Attachment K

- 6.1. Regional transmission planning is performed in conjunction with WECC, and NTTG participates in the WECC processes. To provide stakeholders an overview of the processes please refer to the information in Section 7, below, under “Relevant WECC links”, and the document at:

http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=501&Itemid=31

7. References

7.1. Transmission Planning Notices

- 7.1.1. PGE has a Transmission Planning folder on its OASIS site <http://www.oatioasis.com/pge/index.html> in which interested parties can view additional documents that further describe the planning process, and obtain information regarding PGE’s transmission planning.

7.2. Relevant PGE Links

- 7.2.1. PGE Interchanges w/ Adjacent Control Areas
http://www.oatioasis.com/PGE/PGEdocs/Interconnections_within_PGE_-_9-1-2009.pdf
- 7.2.2. PGE Actual and Forecast Loads
http://www.oatioasis.com/PGE/PGEdocs/PGE_LoadData.pdf
- 7.2.3. PGE Designated Resources
[http://www.oatioasis.com/PGE/PGEdocs/DNR_List_\(01-01-2010\).pdf](http://www.oatioasis.com/PGE/PGEdocs/DNR_List_(01-01-2010).pdf)

7.3. Relevant NTTG Links

- 7.3.1. Planning Committee Page: Contains members, process documents and meeting information, data submittals, reports, and other general information, in addition to the links to specific documents described below.
http://nttg.biz/site/index.php?option=com_content&task=view&id=13&Itemid=85
- 7.3.2. Planning Committee Charter (Process) – Contains the biennial study process, timelines, data submittal process, participation, and decision processes for the Northern Tier sub-regional planning process.
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=800&Itemid=31
- 7.3.3. NTTG Planning Agreement – Contains membership requirements and obligations for joining the Planning Committee.
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=464&Itemid=31
- 7.3.4. NTTG Steering Committee Charter - Contains the Committee’s membership requirements, responsibilities, and review process.
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=587&Itemid=31

Business Practice: Transmission Planning	Revision 5
Effective Date: February 1, 2010	Page 5 of 7

- 7.3.5. NTTG Cost Allocation Committee Charter – Contains the Committee’s operating structure and procedures, the cost allocation process, and the cost allocation principles.
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=205&Itemid=31
- 7.3.6. NTTG Cost Allocation Principles – Contains an explanation of the NTTG cost allocation principles and process.
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=193&Itemid=31
- 7.3.7. NTTG Study Plan – Study plan containing the assumptions, data, and tools used in conducting the current biennial planning cycle.
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=422&Itemid=31
- With a supplement at:
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=470&Itemid=31
- 7.3.8. NTTG Transmission Plan report – Current transmission plan document, when such becomes available.
http://nttg.biz/site/index.php?option=com_content&task=view&id=200&Itemid=102
- 7.3.9. NTTG Funding Agreement
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=917&Itemid=31
- 7.3.10. Western Systems Transmission Planning Guidance for Customer and Stakeholder Participation – Contains description of local, sub-regional, and regional transmission planning process.
http://nttg.biz/site/index.php?option=com_docman&task=doc_download&gid=501&Itemid=31
- 7.4. Relevant WECC Links
- 7.4.1. WECC Transmission Expansion Planning Policy Committee – Contains members, process documents, meeting information, reports, and other general information regarding the regional planning processes, in addition to the links to certain of the documents described below.
<http://www.wecc.biz/committees/BOD/TEPPC/default.aspx>
- 7.4.2. WECC PCC Handbook – Contains organization guidelines, procedures and policies, planning and operating criteria, and description of subcommittees.
http://www.wecc.biz/committees/StandingCommittees/PCC/Shared%20Documents/PCC_Handbook_Complete.pdf
- 7.4.3. Overview of Policies and Procedures for Regional Planning Project Review, Project Rating Review, and Progress Reports – Contains policies, guidelines, planning process, member responsibilities, and study methodology regarding the process of planning and placing a project in service.

http://www.wecc.biz/library/WECC%20Documents/Miscellaneous%20Operating%20and%20Planning%20Policies%20and%20Procedures/Overview%20Policies%20Procedures%20RegionalPlanning%20ProjectReview%20ProjectRating%20ProgressReports_07-05.pdf

- 7.4.4. WECC TEPPC Charter – Contains Committee responsibilities, composition and governance.
[http://wecc.biz/committees/BOD/TEPPC/Shared%20Documents/Charter/TEPPC%20Charter%20Document%20\(2008\).pdf](http://wecc.biz/committees/BOD/TEPPC/Shared%20Documents/Charter/TEPPC%20Charter%20Document%20(2008).pdf)
- 7.4.5. WECC TEPPC Planning Protocol – Contains description of TEPPC planning process, role of sub-regional planning groups, and synchronized study cycle.
[http://wecc.biz/committees/BOD/TEPPC/Shared%20Documents/TEPPC-Planning-Protocol_V1-3\(Clean\).doc](http://wecc.biz/committees/BOD/TEPPC/Shared%20Documents/TEPPC-Planning-Protocol_V1-3(Clean).doc)

8. Revision History

Revision	Date	Change Summary
0	December 7, 2007	Initial Posting
1	October 29, 2008	Incorporates FERC Order 890 Attachment K process
2	March 11, 2009	Incorporates revised FERC Order 890 Attachment K process and reformatting changes
3	April 1, 2009	Updated links to CEII Requests
4	October 15, 2009	Add more information for stakeholders on biennial planning cycle and schedule and where to send information to PGE
5	January 29, 2010	Updated links within document