Distribution Operations & Planning – Program 200
Membership and Participation Guide

Welcome
Welcome to the EPRI Distribution Operations and Planning program (P200)! We appreciate your participation and look forward to working with you to address your challenges as you modernize distribution operations, planning, protection and analytics.

This document is intended to introduce you to the people and process of P200 and to answer your questions on:
- Your role as an advisor,
- Access to materials and meetings, and
- EPRI's overall mechanics.

Program Numbers and Project Sets
Each EPRI base research program corresponds with a number, and we sometimes use these numbers instead of the full program title. P200 or Program 200 is the Distribution Operations and Planning Program.

EPRI programs are further divided into specific research topics called "Project Sets" or "PSETs" for short. When a company joins the program, they elect to either join the full program, or specific PSETs within the program. P200 is presently organized in four technical PSETs plus a "Technology Transfer" set of activities that is required for all members:
- P200A – Technology Transfer (required for all membership)
- P200B – Distribution Planning
- P200C – Distribution Operations
- P200D – Distribution Protection
- P200E – Operations & Planning Analytics

There is a cost discount when the full program is selected such that participation in three of the four technical PSETs is approximately the same as participating in the whole program.

Understanding Base, Supplemental, and Individual Projects
P200's projects fall into three primary categories: the base research portfolio, supplemental projects, and individual projects.

The Base Research Portfolio

The terms "base program" and "ARP" refer to the annual (January-December) research performed by P200 through the PSETs. As further described in the following section, the base research is planned and published during the prior year and participation is determined by the annual funding decisions of the members (which usually occurs in the fourth quarter of the prior year). Depending on the process at your company, action may be required on your part (e.g., discussion with your Manager of EPRI Technology Transfer, or METT) to make sure that participation in the program is renewed. It is typically not automatic.

Supplemental Projects

Throughout the year, additional distribution operations and planning research needs may be identified. To address these, "supplemental" projects are created. This entails EPRI documenting the proposed projects in one-page "Supplemental Project Notice" (SPN) documents and conducting accompanying webcasts to present the project opportunity to members. Supplemental projects are typically focused on implementing and demonstrating new methods/tools to gain hands on experience, prove out technology and integration and obtain results specific to your system.

Distribution Operations & Planning – Program 200
Membership and Participation Guide

Any interested utility can join a supplemental project, regardless of program or PSET selections. When your company joins EPRI base research programs, 25% of the funding is reserved in a utility-specific account called "Self-Directed Funds" (SDF). These funds can be applied throughout the year to join supplemental projects. This arrangement is consistent across EPRI and was established so that additional funds do not necessarily need to be identified in order to join supplemental projects. Supplemental projects can also be joined with additional (non-SDF) funds.

Individual Projects

EPRI works with utilities on an individual basis. These projects can begin at any time and can be short- or long term. Example activities include:

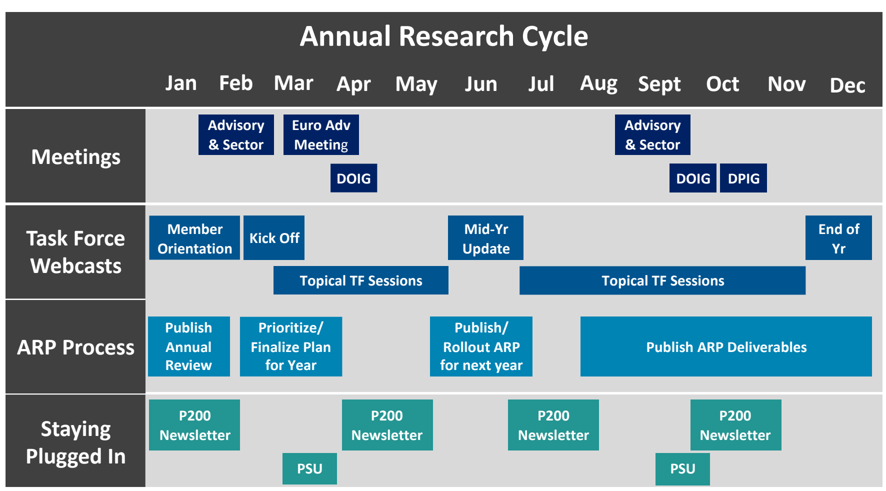
- Conducting laboratory and field demonstrations of new technologies
- Performing system analysis to assess planning alternatives, hosting capacity, and operational solutions
- Developing and implementing tools to improve grid modeling
- Assessing and developing grid modernization roadmaps
- Developing and implementing new processes and strategies in the distribution control center

What to Expect Throughout the Year?

Annual Base Research Process

P200 is part of the overall EPRI annual research portfolio (ARP) and operates on an annual cycle aligned with the calendar year. The process begins in the April-May timeframe of the prior year when research needs are identified. EPRI staff will reach out to members during this time to seek advice on pressing needs in the area of distribution operations, planning, protection, and analytics. Feedback will be consolidated and documented into the plan for the coming year. The plan is published around mid- year and made available for review and consideration by existing and prospective members. A rollout webcast is conducted during the summer to present the plan and receive further comment.

Because things are rapidly changing in the distribution space, P200 staff review the research plan as the year begins and adjust as needed. Our process includes an online survey and invitation for members to prioritize planned and newly identified needs.



Engagement Opportunities

Beyond the ARP process, there are multiple ways to engage in the program throughout the year. A detailed calendar of events is updated regularly online. There are three primary engagement opportunities.

Task Force Meetings

The best way to engage throughout the year is in the Task Force. These are regular webcasts for PSET funders to provide deeper dives on the ongoing research as well as get your input. We are planning more frequent task force meetings again this year based on your input from last year. If you have not already, please let us know who from your company should be included in each of the task force areas.

Distribution Operations & Planning – Program 200
Membership and Participation Guide

<u>Advisory Meetings</u>
There are two major face-to-face meetings each year that are referred to as “advisory meetings”. The Winter meeting typically occurs in February and is more forward-looking. The Fall meeting typically occurs in September and focuses on the research-in-process. If course corrections are needed, they are made during these meetings. The advisory meetings include all of the EPRI Power Delivery and Utilization (PDU) sector programs meeting in parallel. They are large-scale meetings and an excellent opportunity to meet with other utilities. As a P200 advisor, we encourage you to attend these meetings and to share your perspectives.

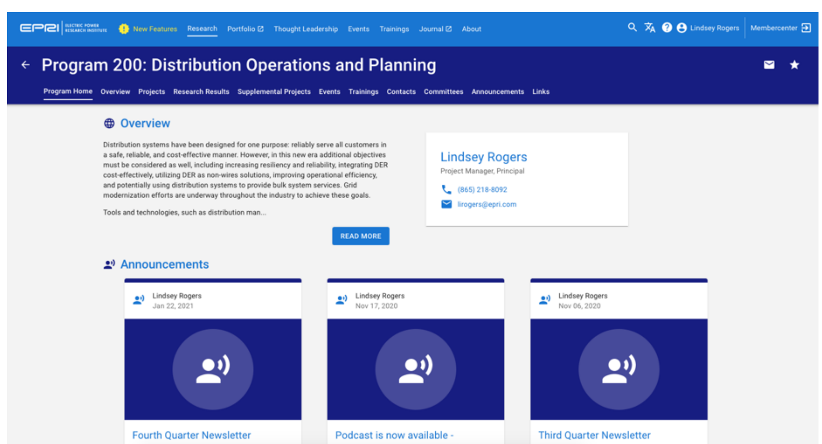
<u>Interest Groups</u>
Interest groups are collaborative organizations of utility professionals that are facilitated by EPRI and focus on issues associated with a specific topic of interest. Interest groups are part of our technology transfer efforts and are open to all interested utilities regardless of whether they are EPRI members. Periodic meetings are hosted by utilities and provide members the opportunity to speak directly on key challenges that they're facing. The groups also provide strategic input to the EPRI research portfolio. P200 currently has two interest groups:

- **Distribution Operations Interest Group (DOIG) -** Provides control center managers and staff the opportunity to discuss experiences related to critical issues, including practices, training, automation, DMS, change management, and DER. Learn More Here.
- **Distribution Planning Interest Group (DPIG) -** Provides distribution planners the opportunity to share challenges, solutions and experiences including changing methods/tools, data needs, forecasting, interconnection, staffing, and training. Learn More Here.

Accessing the Distribution Ops & Planning Websites and Materials

Many resources are available to you and accessible through the EPRI website: https://www.epri.com/. Access to the member’s only content requires a user account and password. These are setup on an individual basis. If you do not have one, you can get one here.

The hub for P200 information is the Distribution Operations and Planning Program Cockpit. You can find it from the front page of the EPRI website by clicking on the “Research > Program Index”, then scrolling down to P200. You can bookmark the program cockpit (recommended) and check the box to the right to identify it as one of your favorites. Next time you return to the site you can visit the “My Dashboard” link in the top right to get a quick view of the latest updates from your bookmarked programs and navigate to program cockpits.



Further to the right on the same webpage is a checkbox to subscribe to Technology Innovation Product Updates “TIPs” for the program. This system sends you automated email notifications on new research results, notices of product and software releases, upcoming workshops, events, and webcasts.

On the “Links” tab of the cockpit, we have a Guide to P200 section which points you to several useful documents to get up to speed including the Member Orientation.

The cockpit also has an area for meetings and webcasts where you can stay up to date and informed on the program's event details and descriptions. Meeting materials, including webcast recordings, are posted following each event.

Manager of EPRI Technology Transfer (METT)

Every utility has one or more individuals who are managers of the overall relationship with EPRI. The METT has a number of roles and can be a valuable point of contact within your own organization for managing and maintaining the business relationship with EPRI. If you are unsure who your METT is, you may search here: METT Contact List. Your METT can help identify the programs and projects in which your utility is participating, as well as provide assistance in joining supplemental projects.