

November 19, 2024
12:00 Central Time

FERC Order 2222 and DER Policy Tracking Initiative



www.FERC2222.org

Facilitating Collaboration Among Policy Makers on DER Integration

Suzanne Bertin – suzanne.bertin@cusln.org

David Kathan – david.kathan@cusln.org

Chris Hickman – chris.hickman@cusln.org

Joseph Paladino – joseph.paladino@hq.doe.gov

James Ogle – james.ogle@pnnl.gov

Chris Klasen – christopher.klasen@pnnl.gov



Empowering the Energy Transition



DOE Project Information



This is a project in collaboration with PNNL sponsored by the DOE Office of Electricity. The view and opinions expressed in this presentation are CUS' alone and do not necessarily reflect those of DOE or PNNL.

This material was prepared as an account of work sponsored by an agency of the United States Government. Neither the United States Government nor the United States Department of Energy, nor the Contractor, nor any of their employees, nor any jurisdiction or organization that has cooperated in the development of these materials, makes any warranty, express or implied, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness or any information, apparatus, product, software, or process disclosed, or represents that its use would not infringe privately owned rights.

Reference herein to any specific commercial product, process, or service by trade name, trademark, manufacturer, or otherwise does not necessarily constitute or imply its endorsement, recommendation, or favoring by the United States Government or any agency thereof, or Battelle Memorial Institute. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof.

FERC Order 2222 & DER Policy Tracking



Initiative has six major elements:

- 1. Bi-Monthly Report** – Began with a report in September 2024 and will be released at the end of every other month (November 2024, January 2025, etc.). Each report will contain three sections:
 - a. Current News and New Developments,
 - b. Key Issues Analysis, and
 - c. Tracker Tips and Highlights.
- 2. Bi-Monthly Webinar** – Beginning on October 24, 2024, bi-monthly webinars will be held to present current information and allow discussion on topics.
 - a. November 19, 2024 – Webinar will introduce this initiative and explain how Collaborative Utility Solutions (CUS) will coordinate with policy makers. Register for Webinar at: <https://t.ly/fKrS3>
 - b. December 12, 2024 – Webinar will provide a tutorial on the FERC2222.org website, how to search content and generally how to interact with CUS to develop and make available relevant DER information. Register for Webinar at: <https://t.ly/Ctevy>
- 3. FERC2222.org website & Policy Tracker** – To be launched in November. The first release of the website will provide access to the new Policy Tracker that will aggregate policy related to FERC Order 2222 and DER policy that is shared with Collaborative Utility Solutions. This information will be ‘tagged’ by state, ISO, and key issue to allow effective searching. It will also provide a library of key DER-related papers and other relevant information. The second release of the website in December will provide secure chat rooms that will allow policy makers a forum to discuss key issues.
- 4. White Papers** – David Kathan will lead an effort to create a series of white papers relating to DER topics over the next year.
- 5. Discussion Groups** – The website will host discussion groups to allow policy makers to have conversations on key issues.
- 6. Library** – Key DOE, NARUC, NERC or other papers relevant for policy makers. Not seeking to find every paper, attempting to highlight industry leading efforts to support policy decision and implementation.



1. Bi-Monthly Report

- The Bi-Monthly Report will have three primary sections:
 - Current News and New Developments
 - Key Issue Analysis
 - Tracker Tips and Highlights
- Each of these reports will be posted to the FERC2222.org website.
- The first two reports will be a little different as we launch this effort:
 - The September Report (<https://t.ly/2eY3w>) is an overview of this initiative.
 - The November Report will provide an over of FERC Order 2222 and activities since it was released in September 2020. The Key Issue covered in this report will be Data Access and Privacy.



2. Bi-Monthly Webinar

- The Bi-Monthly Webinar will:
 - Provide a summary of the previous month's report
 - Update any current events since that report
 - Provide a discussion forum for the Key Issue covered in the previous report
- Again, the first two webinars will be slightly different as we launch.
 - This November 19th webinar, <https://t.ly/fKrS3>, will present an overview of the initiative and be seeking to find a key point of contact in each state and ISO to coordinate with going forward
 - The December 12th webinar will provide an overview of the previous month report and discuss the key issue presented but a major portion will be focused on presenting the new FERC2222.org website and showing people how to navigate the content
- Each of these webinars and recordings will be posted to the FERC2222.org website.



3. FERC2222.org Website Releases

November 2024

Focus on Policy Tracker Content

- Policy Tracker
 - Database
 - Search
 - Filter, Tags, etc.
- Library
 - DOE
 - NARUC
 - NERC
 - Reports and White Papers
- Contact Us
 - Outreach to engage to get current info and website feedback

January 2025

Focus on Discussion Groups

- Discussion Groups
 - Key Issues + General (11)
 - Additional by Request
 - ISO, State, etc.
 - Login Required
 - User Management
 - User Experience



3. Policy Tracker on Website

- Key Objectives:
 - Assist State Commissioners, Commission Staff, Stakeholders and the general public to keep abreast of DER issues, with a focus on FERC Order 2222 and DER Policy implementation
 - Facilitate collaboration among state regulators and stakeholders
- Searchable by FERC/NERC, RTO/ISO, State and Key Issue
- To be updated at least monthly, with help from EnerKnol search tools + crowdsourcing



4. White Papers

1. FERC Order 2222 is an Opportunity, Not a Burden
2. State-Level FERC Order 2222 Implementation Issues
3. FERC Order 2222 Coordination Requirements
4. Additional white papers will be announced going forward
5. Will be available in website Library



5. Discussion Groups

- Discussion groups will be released in the second version of the website in January 2025
- Users must register and be verified to participate in specific discussion groups
- There will be 11 discussion groups, one to cover each of the key issues and one “General” group for topics not related to key issues
- Policy makers may request additional groups for specific topics or larger functional groups, for example, the MISO states could form a discussion group to share MISO related discussions

These forums will not be curated/managed and are designed to allow free form, but secure, discussion for policy makers and are not public. If there is inappropriate content posted, please CONTACT US and we will review. Your participation can be revoked if posting inappropriate content.



5. Key Issues (and Discussion Groups)

- Data Access and Privacy
- Governance
- Metering and Telemetry
- Interconnection
- Aggregation Registration and Review
- Dual Registration/Double Counting
- Communications and Control for DERs
- Communications between EDCs, Aggregators, and RTOs/ISOs
- Coordination
- Cost and Investment Recovery
- General/Other



6. Library

- Goal to provide curated list of the ‘most relevant’ or ‘best practices’ type of papers that can support DER policy development and implementation. This effort will not be to collect every known paper but a curated list for policy makers.
- Initial Focus will be for DOE, NARUC and NERC content.
- Contact Us form will be available on the website to recommend content to be added to library



Summary

- FERC2222.org is live – check it out
- Per next slide, please reach out to Suzanne Bertin and let us know who we should coordinate with on your DER team(s)
- Be on the lookout for DOE’s addendum for the VPP liftoff report
- Be on the lookout for NERC’s white paper
 - Reducing Impacts on Bulk Power System Variability and Uncertainty**
 - DER Data Collection, Storage, and Sharing with DER Aggregators SPIDERWG White Paper
- Both will be posted to FERC2222.org website
- Webinar December 12th – Go to FERC2222.org to register
- Bi-Monthly reports and updates – Go to FERC2222.org and register to receive updates as they become available going forward
- Discussion Groups ‘coming soon’ in the January release of the FERC2222.org but you can register to participate in these groups now at FERC2222.org



We Need Your Help!

Tracking a wide range of key policy issues related to DER integration across the U.S. will be no small task. To that end, state commissions and RTOs/ISOs are invited and encouraged to assist Collaborative Utility Solutions in crowdsourcing information to be included in the Policy Tracker. The value the Policy Tracker can provide will be largely dependent on policy makers sharing information with CUS each month proactively. Specifically, CUS welcomes the opportunity to periodically meet with Commissioners or key staff members at state utility commissions and RTOs/ISOs to hear from you regarding your FERC Order 2222 and DER implementation activities, key dockets, rulemakings, or other proceedings.

Please email **Suzanne Bertin** (suzanne.bertin@cusln.org) with any updates for your states or organizations that you would like to have included in the Policy Tracker, or to arrange a meeting to discuss your state's or organization's implementation policy.