

Attachment B

Standard Offer Contract and Partnership Pilot Evaluation Timeline¹

Illustrative based on Resolution prescribed milestones – various lengths of Partnership Pilot subscription periods could alter the schedule. Energy Division will publish an updated schedule each year with evaluation activities. This timeline refines the Distribution Planning Advisory Group (DPAG) schedule adopted in the R.14-08-013, June 21, 2021, Distribution Investment Deferral Framework (DIDF) Reform Ruling.²

List of Evaluation Reports and Documents:

Standard Offer Contract (SOC) Pilot

1. **Independent Evaluator (IE) DIDF Request for Offers (RFO) /SOC Report** - This report is the same as identified in the May 11, 2020, Ruling³ under the Independent Evaluator scope of work but with the addition of the SOC. The IE will complete a report on each investor-owned utility (IOU) analyzing RFO and SOC process, compliance, outcomes, and any other aspects of the IE scope of work and as directed by Energy Division. The IE will also provide recommendations for future RFO and SOC improvements. The 2023 report will provide recommendations of whether SOC projects should be launched in year 3 of the pilot based on data from years 1 and 2.

Partnership Pilot

1. **Annual Partnership Pilot Evaluation Report** – Annual report containing data, analysis, and recommendations for improvement to the Partnership Pilot based on **evaluation and survey questions**. IOUs and IE each provide a report.
2. **Midstream Partnership Pilot Evaluation Report** – Report based on data from years 1-3 to recommend if Partnership Pilot projects should be initiated in years 4 and 5. IOUs and IE each provide a report.

¹ With advance notice to the service list, activities and dates may be altered by Energy Division based on comments received during DPAG or as needed.

² R.14-08-013, June 21, 2021. “Administrative Law Judge’s Ruling on Recommended Reforms for the Distribution Investment Deferral Framework Process” p. 10-12.

³ R.14-08-013 - May 11, 2020, Ruling, Appendix C, Page 3.

Anticipated Administrative Law Judge (ALJ) Rulings:

1. May 2022 – Annual DIDF Reform and Updates to SOC/Partnership Pilot.
2. May 2023 – Annual DIDF Reform, Updates to SOC/Partnership Pilot, whether to launch third year of SOC.
3. May 2024 – Annual DIDF Reform, Updates to SOC⁴/Partnership Pilot, whether to launch fourth and fifth years of Partnership Pilot.
4. May 2024 – Annual DIDF Reform, Updates to SOC/Partnership Pilot.⁵
5. May 2025 – Annual DIDF Reform, Updates to SOC/Partnership Pilot.⁶

Standard Offer Contract Pilot Evaluation Timeline

Year 1 (2021)	Activity	Description
September	September 15: RFO/SOC launch year 1	Year 1 SOC pilot projects launch.

Year 2 (2022)	Activity	Description
January		
February	1. Feb 14: IE DIDF RFO/SOC Report due	1. IE provide DIDF RFO/SOC Report to Energy Division and service list.
March		
April	1. Early April: Stakeholder comments on DIDF and Pilot reforms due: April 4 2. Mid-April: Reply comments due: April 18 3. Late April: Energy Division recommendations to ALJ	1. Stakeholders submit comments on potential improvements to the Year 2 SOC pilot based on IE DIDF RFO/SOC report and Annual IOU SOC Report. 2. Stakeholders submit reply comments 3. Energy Division provides recommendations to ALJ on potential improvements to the

⁴ If SOC is still operating.

⁵ If SOC and/or Partnership Pilot are still operating.

⁶ If SOC and/or Partnership Pilot are still operating.

		Year 2 SOC pilot based on IE DIDF RFO/SOC report, Annual IOU SOC report, stakeholder comments, and ED analysis.
May	May: ALJ DIDF and Pilot Reform Ruling	ALJ ruling on reforms to the DIDF and updates to the SOC for year 2 of the SOC pilot.
June		
July		
August	IOU Grid Needs Assessment/Distribution Deferral Opportunity Report (GNA/DDOR) filed	
September	September 15: RFO/SOC launch	Year 2 SOC pilot projects launch.
September/October	DPAG activity	Stakeholder vetting of IOU GNA/DDOR and proposed projects.
November		
December		

Year 3 (2023)	Activity	Description
January		
February	IE DIDF RFO/SOC Report	IE provide IE DIDF RFO/SOC Report to Energy Division and service list. Report recommends if projects should be launched in year 3 of the SOC pilot based on data from years 1 and 2.
March		
April	<ol style="list-style-type: none"> 1. Early April: Stakeholder comments on DIDF and Pilot reform and SOC Midstream Evaluation due 2. Mid-April: Reply comments due 	<ol style="list-style-type: none"> 1. Stakeholders provide comments on IE DIDF RFO/SOC Report. 2. Stakeholders submit reply comments 3. Energy Division provides recommendation to ALJ on whether to initiate project launch

	3. Late April: Energy Division recommendations to ALJ	for year 3 of the SOC pilot based on IE and IOU reports and data, stakeholder comments, and ED analysis.
May	May: ALJ Ruling on DIDF and Pilot Reform and SOC Midstream Evaluation	Administrative Law Judge rules whether to initiate project launch for year 3 of the SOC pilot and any reforms to the DIDF process and Partnership Pilot.
June		
July		
August	IOU GNA/DDOR filed	
September	September 15: SOC launch (TBD)	Year 3 SOC pilot projects launch subject to May 2023 ALJ ruling.

SOC: Year 3 (2023) If the SOC continues into year 3, the above activities will repeat and a final SOC evaluation will occur. The California Public Utilities Commission will determine in proceeding R.21-06-017 whether to make the SOC an ongoing part of the annual DIDF cycle.

Partnership Pilot Evaluation Timeline

No launch or post-launch evaluation activities in 2021.

Year 1 (2022)	Activity	Description
January	January 15: Year 1 Procurement launch	Procurement Phase ⁷ (Phase 1) begins for Year 1 pilot projects on January 15. (or within 30 days of Tier 2 Advice Letter approval if approval is after December 15, 2021)
February		
March		
April	1. Early April: Stakeholder comments on DIDF and Pilot reforms due: April 4 2. Mid-April: Reply comments due: April 18 3. Late April: Energy Division recommendations to ALJ	
May	ALJ DIDF and Pilot Reform Ruling	
June		
July		
August	IOU GNA/DDOR filed	
September/October	DPAG activity	Stakeholder vetting of IOU GNA/DDOR and proposed projects.
November	November 15: Tier 2 Advice Letters due	IOUs file Tier 2 Advice Letters for approval to launch year 2 Partnership Pilot projects.

⁷ Phase 1 “Procurement” - occurs when the contracts have executed, or the IOU has terminated procurement and begun deployment of the contingency solution for each project. This evaluation phase measures whether sufficient DERs were efficiently and effectively procured to meet the need. Phase 1 begins with the subscription period launch in January of each year. Phase 2 “Performance and Reliability” - occurs after contract execution to ensure the aggregators dispatch the DER to meet the grid needs and ensure system reliability. This evaluation phase measures whether the DER performed according to its contractual obligations and whether the grid was reliably maintained without service interruption due to the DERs. Phase 2 lasts for as long as DER provider contracts are executed and renewed on an annual basis. IOUs will provide all available Phase 1 and 2 data to IEs and the Energy Division in January.

December	Aggregator survey conducted	Designated third-parties conduct aggregator surveys with data to be used in the annual evaluation reports.
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Year 2 (2023)	Activity	Description
January	January 15: Year 2 Procurement launch January 15: IOU Year 1 Partnership Pilot data due	Procurement begins for Year 2 pilot projects IOUs provide all Year 1 Partnership Pilot data to IE and Energy Division.
February	1. <u>February 1: All available IOU Year 1 Partnership Pilot data due</u> 2. <u>February 25: Remaining IOU Year 1 Partnership Pilot data due</u> IOU Year 1 Annual Partnership Pilot Evaluation Report due	<u>IOUs provide all Year 1 Partnership Pilot data to IE and Energy Division.</u> IOUs share Annual Partnership Pilot Evaluation Report with Energy Division, IE, and service list (within 30 days of data due date)
March	1. IE Year 1 <u>March 15: IOU Annual Partnership Pilot Evaluation Reports due</u> 2. <u>March 25: IE Annual Partnership Pilot Evaluation Reports due</u>	1. <u>IOUs provide Annual Partnership Pilot Evaluation Report to Energy Division, IE, and service list</u> 2. IE provides <u>Annual Partnership Pilot Evaluation Report to Energy Division for approval to issue it to the service list (within 60 days of receiving IOU data).</u>
April	1. Early April: Stakeholder comments on DIDF and Pilot reform due 2. Mid-April: Reply comments due 3. Late April: Energy Division recommendations to ALJ	1. Stakeholders submit comments on potential improvements to the Partnership Pilot based on IE and IOU Annual Partnership Pilot Evaluation Reports along with DIDF reform and SOC midstream evaluation recommendations. 2. Stakeholders submit reply comments 3. Energy Division provides recommendation to ALJ on potential improvements to the

		Partnership Pilot based on the IE and IOU Partnership Pilot Annual Evaluation Report, stakeholder comments, and ED analysis.
May	ALJ Ruling on DIDE, Pilot Reform and SOC Midstream Evaluation	ALJ ruling on reforms to the DIDE, updates to the Partnership Pilot, and SOC Midstream evaluation.
June		
July		
August	IOU GNA/DDOR filed	
September-October	DPAG activity	Stakeholder vetting of IOU GNA/DDOR and proposed projects.
November	November 15: Tier 2 Advice Letters due	IOUs file Tier 2 Advice Letters for approval to launch year 3 Partnership Pilot projects.
December	Aggregator survey conducted	Designated third-parties conduct aggregator surveys with data to be used in the annual and midstream evaluation reports.

Year 3 (2024)	Activity	Description
January	January 15: Year 3 Procurement launched January 15: IOU Year 2 Partnership Pilot data due	Procurement begins for Year 3 pilot projects. IOUs provide all Year 2 Partnership Pilot data to IE and Energy Division.
February	<u>1. February 1: All available IOU Year 2 Partnership Pilot data due</u> 1.2. February 25: Remaining IOU Year 2 Partnership Pilot data due IOU Midstream Partnership Pilot Evaluation Report due	<u>IOUs provide all Year 2 Partnership Pilot data to IE and Energy Division.</u> IOUs provide Midstream Partnership Pilot Evaluation Report to Energy Division, IE, and service list (within 30 days of data due date)
March	1. IE Midstream Partnership Pilot Evaluation Report	<u>1. IE provides Midstream Partnership Pilot Evaluation Report to Energy Division and</u>

	<p>due <u>March 15: IOU Midstream Partnership Pilot Evaluation Reports due</u></p> <p>2. <u>March 25: IE Midstream Partnership Pilot Evaluation Reports due</u></p>	<p>service list (within 60 days of receiving IOU data) <u>IOUs provide Midstream Partnership Pilot Evaluation Report to Energy Division, IE, and service list</u></p> <p>4.2. <u>IE provides Midstream Partnership Pilot Evaluation Report to Energy Division for approval to issue it to the service list</u></p>
April	<p>1. Early April: Stakeholder DIDF, Pilot Reform, and Partnership Pilot midstream evaluation comments due</p> <p>2. Mid-April: Reply comments due</p> <p>3. Late April: Energy Division Recommendation to ALJ</p>	<p>1. Stakeholders submit comments on IE and IOU Midstream Partnership Pilot Evaluation Reports as well as DIDF and Pilot reforms.</p> <p>2. Stakeholders submit reply comments.</p> <p>3. Energy Division provides recommendation to ALJ on whether to initiate procurement for Year 4 and 5 of the Partnership Pilot based on IE and IOU Midstream Partnership Pilot Evaluation Reports, stakeholder comments, and ED analysis.</p>
May	ALJ Ruling on DIDF reforms and Partnership Pilot Midstream Evaluation	Administrative Law Judge rules on whether to initiate procurement for Year 4 and 5 of Partnership Pilot as well as DIDF and Pilot reforms.
June		
July		
August	IOU GNA/DDOR filed	Subject to May 2024 ALJ ruling.
September/October	DPAG activity	Stakeholder vetting of IOU GNA/DDOR and proposed projects. Subject to May 2024 ALJ ruling.
November	November 15: Tier 2 Advice Letters due	IOUs file Tier 2 Advice Letters for approval to launch year 4 Partnership

		Pilot projects subject to May 2024 ALJ ruling.
December	Aggregator survey conducted	Designated third-parties conduct aggregator surveys with data to be used in the annual evaluation reports. Subject to May 2024 ALJ ruling.

Partnership Pilot: Year 4 (2025) and Year (2026) will be implemented subject the outcomes of the May 2024 ALJ ruling.