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. <u>Independent Evaluator (IE) DIDF Request for Offers (RFO) /SOC Report</u> -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. <u>Annual Partnership Pilot Evaluation Report</u> 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.
- 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 vear 1	Year 1 SOC pilot projects launch.

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

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

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 May	 Early April: Stakeholder comments on DIDF and Pilot reforms due: April 4 Mid-April: Reply comments due: April 18 Late April: Energy Division recommendations to ALJ ALJ DIDF and Pilot Reform 	
	Ruling	
June		
July	IOU CNA (DDOR filed	
August Sontombor/Octobor	IOU GNA/DDOR filed	Stakeholder vetting of IOU
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.

No launch or post-launch evaluation activities in 2021.

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.

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

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		Partnership Pilot based on the IE
		and IOU Partnership Pilot Annual
		Evaluation Report, stakeholder
		comments, and ED analysis.
May	ALJ Ruling on DIDF, Pilot	ALJ ruling on reforms to the DIDF,
	Reform and SOC Midstream	updates to the Partnership Pilot, and
	Evaluation	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	IOUs file Tier 2 Advice Letters for
	Letters due	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 begins for Year 3 pilot
	Procurement launched	projects.
	January 15: IOU Year 2	IOUs provide all Year 2 Partnership
	Partnership Pilot data due	Pilot data to IE and Energy Division.
February	<u>1. February 1: All available</u>	IOUs provide all Year 2 Partnership
	IOU Year 2 Partnership	Pilot data to IE and Energy Division.
	<u>Pilot data due</u>	IOUs provide Midstream Partnership
	1. <u>2.</u> February 25:	Pilot Evaluation Report to Energy
	Remaining IOU Year 2	Division, IE, and service list (within 30
	Partnership Pilot data	days of data due date)
	dueIOU Midstream	
	Partnership Pilot	
	Evaluation Report due	
March	1. IE Midstream	<u>1. IE provides Midstream</u>
	Partnership Pilot	Partnership Pilot Evaluation
	Evaluation Report	Report to Energy Division and

dueMarch 15: IOUservice list (within 60 days of receiving IOU data)[OUs provide Midstream Partnership Pilot Evaluation Reports due2. March 25: IE Midstream Partnership Pilot Evaluation Reports dueprovide Midstream Partnership Pilot Evaluation Reports due4. April1. Early April: Stakeholder DIDF, Pilot Reform, and Partnership Pilot midstream evaluation comments due1. Stakeholders submit comments on IE and IOU Midstream Partnership Pilot midstream evaluation comments due1. Stakeholders submit comments on IE and IOU Midstream Partnership Pilot Evaluation reports as well as DIDF and Pilot reforms.3. Late April: Energy Division Recommendation to ALJ Recommendation to ALJ3. Energy Division provides recomments, and FD analysis.MayALJ Ruling on DIDF reforms and Partnership Pilot Midstream Evaluation whether to initiate procurement for Year 4 and 5 of the Partnership Pilot as well as DIDF and Pilot sed on IE and IOU Midstream Partnership Pilot Evaluation Reports, stakeholder comments, and FD analysis.MayALJ Ruling on DIDF reforms and Partnership Pilot Midstream EvaluationAdministrative Law Judge rules on whether to initiate procurement for Year 4 and 5 of Partnership Pilot as well as DIDF and Pilot reforms.June JulyJune JulyJune September/OctoberDPAG activityStakeholder vetting of IOU GNA/DDOR and proposed projects. Subject to May 2024 ALJ ruling.NovemberNovember 15: Tier 2 Advice Letters dueSubject to May 2024 ALJ ruling.			
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NovemberNovember 15: Tier 2 AdviceIOUs file Tier 2 Advice Letters for			GNA/DDOR and proposed projects.
			Subject to May 2024 ALJ ruling.
Letters dueapproval to launch year 4 Partnership	November	November 15: Tier 2 Advice	IOUs file Tier 2 Advice Letters for
		Letters due	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.