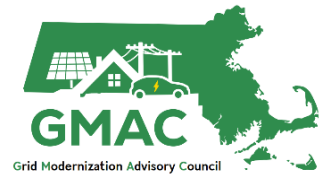


GMAC MEETING BACKGROUND:

CURRENT EDC REPORTING PRACTICES



MARCH 2025

CURRENT MASSACHUSETTS REPORTS

All electric utilities file several reports to provide information to regulators and stakeholders on utility activities, performance, programs, and plans. Regulators may provide templates or specific reporting requirements to ensure that reports meet the needs of the intended audience. In Massachusetts, Electric Distribution Companies (EDCs) file reports with the Department of Public Utilities. They also file reports to federal regulators such as the Federal Energy Regulatory Commission and the Securities and Exchange Commission (not summarized here).

ENERGY EFFICIENCY

Every three years, EDCs submit energy efficiency three-year plans. The Energy Efficiency Advisory Council (EEAC) reviews the draft plans and provides recommendations that the EDCs incorporate before submitting the plans to the Department. The three-year plans include details on program implementation and projected costs and benefits.

EDCs report on energy efficiency program implementation progress in retrospective annual and term reports (submitted on June 1 and August 1, respectively) which include tables summarizing benefits, costs, savings, and cost effectiveness. The reports provide narrative explanations for significant variances between planned and actual costs, savings and benefits. Additionally, EDCs submit quarterly data reports to the EEAC, which include updates on program implementation, savings and evaluation. Energy efficiency plans, reports, and data are available on the [EEAC website](#).

ENERGY EFFICIENCY SURCHARGE (EES) FILINGS

- ❖ The EDCs also submit annual EES filings to collect EE program funds
- ❖ Filings include revenue and cost projections, an explanation of updates from prior projections, and a bill impact analysis.

2023 Plan Year Reports (D.P.U 24-65): [Eversource](#) | [National Grid](#) | [Unitil](#)

ELECTRIC VEHICLE INFRASTRUCTURE AND RATES

The EDCs file retrospective annual reports on May 15th of each year on the progress of their electric vehicle programs. The reports provide a summary of program status including barriers identified, lessons learned, explanations for variances between planned and actual performance. Additionally, the EDCs provide updated data on implementation, performance, and equity metrics and provide updates on stakeholder engagement activities.

2023 Annual Reports: [Eversource](#) (D.P.U. 24-42) | [National Grid](#) (D.P.U. 24-64) | [Unitil](#) (D.P.U 24-54)

ANNUAL PERFORMANCE BASED REVENUE ADJUSTMENT (PBRA)

EDCs submit annual PBRA filings as part of their Performance-Based Ratemaking Plans. These filings include prospective adjustments to base rates, a description of planning and capital budgeting processes, a description of PBRA calculation and formula, bill impact calculations, and other information,

such as a forecast of the capital expenditures to be placed in service. The EDCs also file Annual Performance Reports on their performance metrics as part of their PBRA filings.

Annual Performance Reports: [Eversource \(D.P.U 24-137\)](#) | [Unitil \(25-25\)](#) | [National Grid \(24-68\)](#)

GRID MODERNIZATION

EDCs report on Grid Modernization Plan and Advanced Metering Infrastructure (AMI) Investment Plan implementation progress in annual Grid Modernization reports. The reports are filed on July 1 and include a summary of capital additions and spending in each year of the term and a projection for future years. Additionally, the EDCs provide by investment category: a description of work completed, lessons learned, explanations for deviations in actual versus planned spending, a description of benefits and improvements and updated projections. The grid mod plans, annual and term reports, reported data, and third-party evaluation reports are available on the [DPU website](#).

ANNUAL REPORT TEMPLATE

- ❖ The EDCs annual grid modernization reports follow the [Department-established narrative outline](#) and data reporting template
- ❖ The Department issued an initial proposed outline and revised the outline based on stakeholder input

2023 Annual Reports: [\(D.P.U 24-40\)](#) [National Grid](#) | [Unitil](#) | [Eversource](#)

DER INTERCONNECTION

EDCs provide hosting capacity maps and monthly interconnection timeline data reports. Links to maps and interconnection data are available on the Mass.gov page [Utility Interconnection in Massachusetts](#). EDCs file annual distributed generation interconnection Timeline Enforcement Metric (TEM) reports by March 31 each year documenting the EDCs performance under the Standards for Interconnection of Distributed Generation tariff. Additionally, the Department directed the EDCs to convene a six-month stakeholder process for the establishment of a long-term system planning framework and to provide an interim and final status report summarizing areas of consensus and disagreement.

2023 TEM Reports: [Eversource \(D.P.U. 24-46\)](#) | [National Grid \(24-34\)](#) | [Unitil \(24-44\)](#)

ANNUAL RELIABILITY REPORTS (ARRS)

EDCs file ARRs annually on March 31. Reports cover a ten-year span starting with the year of publication. ARRs provide information on a wide span of reliability-related topics including historical and forecasted peak demand, planned major projects, vegetation management, among others. Some data is publicly available while other data is redacted due to its designation as critical energy infrastructure information. Data from the reports are available via the [D.P.U. file room](#). The EDCs also file annual resiliency reports with their ARRs.

2024 ARRs: [Eversource \(D.P.U. 24-ARR-02\)](#) | [National Grid \(24-ARR-01\)](#) | [Unitil \(24-ARR-04\)](#)

2024 Resiliency Reports: [National Grid](#) | [Unitil](#)

SERVICE QUALITY REPORTS

EDCs file annual service quality reports on March 1 comparing their performance during the past year with established service quality guidelines. The reports contain historical reliability, customer satisfaction, and safety data by year and monthly data for the past year. The EDCs provide a list of circuits with poor reliability along with the reason for poor performance and a plan for improvement.

2024 Service Quality Reports: [Eversource \(25-SQ-13\)](#) | [National Grid \(25-SQ-11\)](#) | [Unitil \(25-SQ-10\)](#)

From D.P.U. – Annual Report Attachment A

2022-2025 Grid Modernization Annual Report Outline/Table of Contents

I. Introduction

- A. Progress Toward Grid Modernization Objectives
- B. Summary of Grid Modernization Deployment (actual v. planned)
- C. Summary of Spending (actual v. planned)

II. Program Implementation Overview

- A. Organizational changes to support program implementation
- B. Cost and performance tracking measures adopted
- C. Project approval process and how it is separate from standard capital investments

III. Implementation by Investment Category

- A. System Level Narrative for Each Investment Category (including, where applicable, Feeder Level Narrative)
 - a. Description of work completed
 - b. Lessons learned/challenges and successes
 - c. Actual v. planned implementation and spending, with explanations for deviation and rationale
 - d. Performance on implementation/deployment
 - e. Description of benefits realized as the result of implementation
 - f. Description of capability improvement by capability/status category
 - g. Key milestones
 - h. Updated Projections for remainder of the four-year term

IV. Performance Metrics

- A. Description and Update on Each Performance Metric
- B. Lessons Learned/Challenges and Successes

V. Evaluation Consultant Recommendations

- A. Assessment of the evaluation consultant's recommendations during both the 2018-2021 term (for continuing investments) and the 2022-2025 term
- B. Explanation of whether and how the company considered each recommendation during 2022-2025 investment plan development and implementation
- C. Implementation status of each recommendation

VI. Company-Specific Reporting – NSTAR Electric

- A. Advanced Inverters
 - a. Description of work completed
 - b. Lessons learned/challenges and successes (including how the experience gained assists operation of customer-owned DER equipment)
 - c. Actual v. planned implementation and spending, with explanations for deviation and rationale
 - d. Performance on implementation/deployment
 - e. Description of benefits realized as the result of implementation
 - f. Key milestones
 - g. Updated projection for the rest of the four-year term
- B. Power Quality Monitoring
 - a. Detailed description of the technology implementation
 - b. Information regarding data collection and analysis from the technology
 - c. Description of benefits realized as the result of implementation (including an analysis of the effectiveness of the technology in identifying the cause of the power quality issues of the C&I customers associated with the substation where the technology has been deployed)
 - d. Description of any actions taken to resolve the power quality issues the technology is deployed to detect
 - e. Lessons learned/challenges and successes
 - f. Actual v. planned implementation and spending, with explanations for deviation and rationale
 - g. Performance on implementation/deployment
 - h. Key milestones
 - i. Updated projection for the rest of the four-year term
- C. Substation Automation (Relays)
 - a. Description of feeder revisions or substitutions
 - b. For each revision or substitution, explanation that it meets the requirements of grid modernization preauthorization, maximizes customer benefits, and is not a business-as-usual investment

VII. Company-Specific Reporting (Customer-Facing Investments) - Unitil

- A. Description of work completed
- B. Lessons learned/challenges and successes
- C. Actual v. planned implementation and spending, with explanations for deviation and rationale
- D. Performance on implementation/deployment
- E. Description of benefits realized as the result of implementation
- F. Key milestones
- G. Updated projection for the rest of the four-year term

USEFUL EXAMPLES OF INTEGRATED DISTRIBUTION SYSTEM PLANNING IN OTHER STATES

ILLINOIS

Illinois investor-owned utilities (IOUs) file Integrated Grid Plans every four years that cover a 5-year planning horizon, with current plans spanning 2024-2027. The plans are reviewed alongside the IOUs Multi-Year Rate Plans to allow for holistic evaluation of distribution system expenditures' alignment with state goals.

- The Integrated Grid Plans include historic and planned grid spending, grid performance by location, and available hosting capacity.
- The IOUs file their first annual reports on April 1, 2025, which will be consolidated with the utilities' Rate Plan Reports.
- The annual reports must include information on outcomes associated with the activities in the Grid Plan.
- The IOUs will also report impacts of investments on low-income and environmental justice communities

Docket links: [ComEd \(22-0486/24-0181\)](#) | [Ameren \(22-0487/24-0238\)](#)

MINNESOTA

Minnesota electric utilities file an Integrated Distribution Plan (IDP) every two years and file an annual update of baseline financial data and non-wires alternatives analyses every alternative year. The annual update report includes:

- Five years actual historical costs and five years projected distribution costs in eight categories
- Narrative of primary expenditure drivers – historical and projected
- A discussion of all projects in the filing year and next 5 years that cost >2\$M
- A non-wires alternative analysis on how alternatives compare in terms of viability, price, and long-term value.

[2023 Xcel Energy Annual Update of IDP](#) | [Xcel Energy 2023 IDP](#)

CALIFORNIA

California is currently undergoing a distribution planning process in the proceeding [“Rulemaking to Modernize the Electric Grid for a High Distributed Energy Resources Future”](#) (R21-06-017). In a 2024 [Proposed Decision to Improve Utility Planning](#), the California Public Utilities Commission (CPUC) included several directives related to distribution plan reporting. Utilities must:

- Include in Annual Distribution Project Reports additional details regarding ongoing and (once available) completed distribution capacity projects, including costs.
- Report how distribution investment projects have been prioritized for execution.
- Report on the data sources for pending loads and retrospectively evaluate the accuracy of their pending load forecasts (e.g., how many pending loads became actual energization requests).
- Evaluate and track equity metrics.

