



*In the Community to Serve®*

# CASCADE NATURAL GAS STAKEHOLDER ENGAGEMENT DESIGN DOCUMENT

## Abstract

This document contains the rational, assumptions, and explanation behind the Stakeholder Engagement process of Cascade's IRP Process

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## Introduction

Cascade welcomes input from technical experts and the interested public in developing its Integrated Resource Plan (IRP). Cascade seeks to employ best industry practices and recognizes external participation can add incremental improvements.

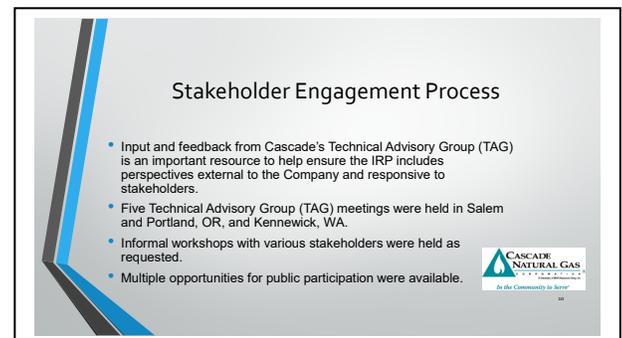
Cascade recognizes stakeholders have a multitude of projects before them. This Design Document is intended to assist in optimizing participation by interested parties to yield a solid IRP to the benefit of customers and the Company.

## Purpose

The goal of the IRP process is to produce a plan that addresses meeting long-term load giving consideration to the best combination of expected costs and associated risks and uncertainties for the utility and its customers. Cascade strongly believes this process is best accomplished with input from all stakeholders.

The purpose of this document is to align perspectives for maximizing the effectiveness, influence, and amount of contributions from stakeholders in an environment of robust workloads by all parties. The stakeholder engagement process is summarized in Box #1.

### **Box #1: From OPUC 5/15/18 Workshop**



## Principles

Cascade applies the following four principles throughout this Design Document and the overall IRP process.

- A quality stakeholder engagement process is an iterative activity that requires collaboration and commitment.

- Input from diverse perspectives improves the resulting IRP.
- Removing barriers to participation and communicating in clear language with solid data is critical.
- Transparency, and availability of Cascade staff for associated discussions, is central to the IRP process.

## Context

This Design Document is provided with the understanding that some organizations (e.g., Commission Staffs) may rotate its members through its various utility's IRP processes as well as onboard new Staff. Thus, beyond memorializing Cascade's commitments, this Document can be a primer for analyst-to-analyst mutual expectations.

Cascade's perspective is to capture the benefits of interested parties' knowledge by seeking to implement best-practices of stakeholder engagement, beyond this simply being a regulatory requirement.

## Mutual Expectations

The Company will commit to the following series of actions for an efficient process to enhance stakeholders' participation. In turn, Cascade hopes that participating stakeholders will agree to general expectations on their part. The following Cascade and Stakeholder commitments are intended to coordinate communication throughout the IRP process and lay out mutual expectations.

### Cascade Commitments

The following depicts Cascade's approach to "what the Company is trying to do and how it intends to do it."

1. The Company will provide reasonable accommodations for people with disabilities. Additionally, the Company will reasonably accommodate items such as requests for meeting locations, audio and visual capabilities, and other items requested by external stakeholders, including translation services upon advance request by meeting participants.
2. Publishing an annual schedule of meetings, for calendaring and coordination purposes, to be included in the workplan. Instructions for Google/Microsoft translate will be provided for all published documents (through a brief explanation, initially in Spanish)
3. Publish a brief section that lists the recommendations from the previous Commission IRP acknowledgement.
4. Providing meeting materials (agenda and PowerPoint) approximately 7 days in advance of meetings, including an itemization of key questions and issues to be addressed during the meetings. Stakeholders are welcome to suggest additional agenda items in advance of meetings. So as to let other Stakeholders know of suggested topics, the Company prefers to have such topics submitted three days prior to the scheduled meeting.

5. Responding to pre- or post-meeting communication going over information of interest to stakeholders.
6. Offering separate workshops (e.g., forecasting, SENDOUT®, DSM, as well as an industry overview and Cascade-specific planning approaches to those Stakeholders newer to resource planning) as requested in addition to pre-planned topical sessions outlined in the Work Plan.
7. Keeping a running list of action items from Technical Advisory Group (TAG) meetings that need to be further addressed if not directly related to the then-meeting topic or if more time is required to respond with the intent to follow-up with Stakeholders accordingly to assure responsiveness to any given issue.
8. Provide TAG minutes that include the action items from bullet #7 as well as any upcoming deadlines for feedback on the IRP.
9. Allowing for open, inclusive, and balanced participation and information sharing. Cascade's facilitation of meetings is contemplated to provide an agenda review at the beginning of each meeting (allowing for additions and modifications as appropriate) and seeking questions regarding additional clarity after each topic prior to moving to the next agenda item. Prior to adjournment, time will be provided for further discussion as well as availability of Cascade Staff for further discussion by phone or email.
10. Recognizing that some parties may not have the industry knowledge or the resources to devote to analyzing all aspects of the IRP and that their interest may be one of breadth. Cascade welcomes additional input, in this regard, through follow-up communications including either by individual contacts or a request for related workshops as stated in bullet 6, above.
11. Understanding TAG members can and should speak up if they need more information or if the time for discussion is too short and merits further discussion.
12. Responding to questions in a reasonable time period.
13. Noting when confidential information has been requested (or provided) and associated treatment.
14. Seeking perspectives on inputs and results of the components of the IRP particularly early in the process for inputs.
15. Present information in a clear and transparent manner.
16. During the course of a two-year planning cycle, material changes in policy direction (e.g., new legislation or regulations) may occur that can overtake assumptions made as recently as mid-process. Cascade will provide a best-efforts response for these "inflection points" either through meetings as envisioned by #5, 6, and 10, above; alternatively, if such policy direction occurs late in the two-year process, then understanding this would be included as Action Items for the next cycle.

### Cascade Requests of Stakeholders

1. Ask questions of the Company on technical and methodological aspects, preferably early in the process so that Cascade can effectively model and include desired assumptions or policy direction.
2. Be a point of contact within their organization to distribute information to peers or let Cascade know who should be on Cascades' direct distribution list.
3. Provide organizational positions, opinions, or perspectives to all stakeholders on various issues, while recognizing the following bullet point #4. (This is particularly relevant for

organizations that have different lead analysts assigned to different companies or who have relatively new Staff members participating in any given IRP process.)

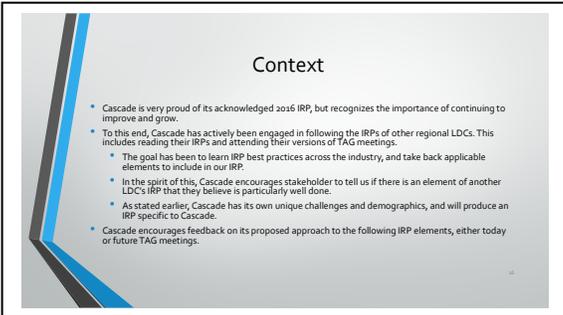
4. All should understand that some (e.g., Commission Staffs) organizational representatives cannot bind their organizations (i.e., Commissioners) but are making best efforts to provide relevant information even if only on an informal basis not necessarily representing an organizational position. This can be done in several ways, including a caveat at the beginning of a comment or by noting one is in a brainstorming mode (wherein one is free to conjecture without being held to that comment later)
5. Recognize relative informality of the meetings and ability to interject for clarification and understanding with the explicit facilitation of such by the meeting facilitator as she/he seeks participation throughout each meeting.
6. These requests of stakeholders are not to say, “speak now or forever hold your peace” or to put undue pressure on others’ timelines and workload; rather these are ways to maximize the effectiveness of the stakeholders’ comments, which optimizes the process. Again, comments received earlier in the process can better influence the final draft document.
7. When possible, provide feedback to meeting materials in advance of the meeting, to give Company representatives time to prepare information for an informed discussion. Cascade encourages Stakeholders to review the slides in advance and reply with questions and comments as well as any requested additional agenda item(s).
8. Review bullet points #5 and #8 of Cascade’s Commitments to ensure all action items are included and have been satisfactorily responded to by Cascade.

## Desired End-Result

A well-planned and executed stakeholder engagement process would have all technical and methodological issues examined in meetings prior to parties later providing comments on the final draft document. Focus by stakeholders on responding to the draft IRP can clarify or improve the final IRP. This is the proverbial win-win-win situation. Commission Staffs and interested parties would have full understanding of the Company’s data and analytical approaches. These studies can be refined through analyst-to-analyst discussions. Consideration of new approaches can be put to the forefront for current or future IRPs, based on budgets and benefit to customers. The Company benefits by gaining access to perspectives perhaps not otherwise known. Commission Staff and others may be aware of emerging policies and approaches given the breadth of their interactions with Commissioners and new issues. As Cascade strives to implement best planning practices, as depicted in Box #2, stakeholders can provide advice based on what they’ve seen in the industry.

The Company has and will continue to encourage stakeholder feedback, questions, and suggestions to assist Cascade in producing an IRP that meets the regulatory requirements and Cascade’s customers’ needs. Cascade prefers to receive feedback as early as possible in the process (e.g., in the course of its technical advisory group meetings or soon thereafter) so that the Company has a better opportunity to address questions or analyze/apply more stakeholder

### Box #2: From WUTC 6/18/18 Workshop



Context

- Cascade is very proud of its acknowledged 2016 IRP, but recognizes the importance of continuing to improve and grow.
- To this end, Cascade has actively been engaged in following the IRPs of other regional LDCs. This includes reading their IRPs and attending their versions of TAG meetings.
  - The goal has been to learn IRP best practices across the industry, and take back applicable elements to include in our IRP.
  - In the spirit of this, Cascade encourages stakeholder to tell us if there is an element of another LDC’s IRP that they believe is particularly well done.
  - As stated earlier, Cascade has its own unique challenges and demographics, and will produce an IRP specific to Cascade.
- Cascade encourages feedback on its proposed approach to the following IRP elements, either today or future TAG meetings.

suggestions. Cascade recognizes that all parties are extremely busy, but strongly believes that stakeholder participation is crucial from the outset.

The above recognizes that key analytical components of the IRP—such as the demand forecast—need to be “locked down” at least midway through the process so that resource integration can be addressed. Interested parties can best influence these components earlier, rather than later, in the process.

## Conclusion

While Cascade "owns" and is responsible for the IRP, the Company desires to have involvement from stakeholders to provide a diversity of perspectives. A best practices IRP is informed by perspectives, analyses and access to concerns and approaches that the Company may not have considered. Some stakeholders participate in multiple IRP processes and have a line-of-sight that may not be available to Cascade, despite the Company monitoring other utilities' IRPs and associated processes.

Cascade recognizes parties will submit sometimes-detailed comments at the conclusion of the stakeholder involvement process in advance of Commission acknowledgement. Cascade will make a “best effort” to respond to and incorporate significant changes in external policy or direction (i.e., legislation or other material guidance) that occurs within the two-year cycle. The Company’s hope is that the guidelines contained in this Document will allow stakeholders to demonstrate to the Commission their work in the final IRP while concurring with its conclusions given the parties’ influence and active participation.