



WESTERN  
TRANSMISSION  
EXPANSION  
COALITION

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PROJECT CHARTER  
AND REGIONAL  
PARTNERS  
ENGAGEMENT PLAN

*Development of a West-  
Wide Transmission Study*

MAY 2024

2024



# WestTEC

POWERED BY WPP

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PROJECT CHARTER AND  
REGIONAL PARTNERS  
ENGAGEMENT PLAN

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# T A B L E O F C O N T E N T S



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01  
I N T R O D U C T I O N

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02  
C O M M I T T E E S T R U C T U R E ,  
G O V E R N A N C E &  
R E G I O N A L P A R T N E R  
E N G A G E M E N T P L A N

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A P P E N D I X A

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A P P E N D I X B

# 01 Introduction

The following is the Western Transmission Expansion Coalition (WestTEC) Project Charter and Regional Partners Engagement Plan (WestTEC Charter). The WestTEC Charter may be amended periodically to reflect updates and developments and will include a study plan, when completed, (Appendix A), which is intended to guide the execution of the study work envisioned in this charter.

The Western Transmission Expansion Coalition (WestTEC) West-Wide Transmission Study Project (the Project) represents an unprecedented partnership between diverse sectors of the energy industry, States, and Tribes. WestTEC will address interregional and interstate transmission needs spanning the Western interconnection, including the collective footprint of the existing three regional planning organizations for the West (NorthernGrid, the California Independent System Operator, and WestConnect) as well as interties with Canadian Provinces. A conceptual footprint for the Project is shown below in Figure 1-1.



WestTEC is being jointly facilitated by the Northwest Power Pool d/b/a Western Power Pool (“Western Power Pool” or “WPP”)<sup>1</sup> in partnership with the Western Electricity Coordinating Council (“WECC”)<sup>2</sup> and is an industry-led effort which is supported by a thoughtful committee-based governance consisting of representatives from a broad array of regional partner and stakeholder interests and from the entire West.

Working with independent consultant Energy Strategies, WestTEC will produce an actionable transmission study based on transmission portfolios that enhance Western reliability while also considering economic efficiencies and state policy goals. The objective of the work is to conduct integrated planning analysis across the Western Interconnection to produce near-term (10-year) and long-term (20-year) transmission portfolios. The effort is unique in that it is a voluntary planning effort that focuses on identifying interregional and interstate transmission expansion solutions that are based on an assessment of the consolidated and coordinated needs of Western utilities. In doing so, WestTEC responds to a widely recognized concern that current transmission planning frameworks in the West do not result in the identification of sufficient transmission solutions to support the needs of the future grid and that interregional transmission planning can be strengthened. WestTEC is not meant to replace existing transmission processes, such as local, regional, or interregional transmission planning as required by orders of the Federal Energy Regulatory Commission (FERC), although it is hoped that WestTEC could complement those efforts.

The Project developed from an initial Concept Paper that was published in October 2023<sup>3</sup> which articulated some key themes. These themes have evolved and reflect the spirit and the intent behind how the Project will be executed:

- **Different:** There is a clear call to action for the industry to approach interregional transmission planning in a manner very different than what is done today; WestTEC will employ meaningful engagement with regional partners and analysis by an independent consulting firm to apply a holistic look at the needs of the broad Western interconnection, with the goal of producing a West-wide forward looking 10-year and 20-year transmission study.
- **Inclusive:** There is a recognition that the Project structure must be inclusive and ensure that a broad set of perspectives is considered so that decision-makers, policymakers, regional partners, and regulators will have confidence in the results and recommendations; WestTEC’s committee-based governance structure and commitment to public engagement provides ample opportunity for inclusivity.
- **Expedient:** There is broad consensus that the industry must act expeditiously by leveraging existing tools, capabilities, and work products, including complementing other regional efforts, but to also

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<sup>1</sup> The Western Power Pool (WPP) is a 501(c)(6) non-profit corporation which has a long history helping its power utility members achieve maximum benefits from coordinated planning and operations, including the operation of a long-standing contingency reserve sharing program, operation of a frequency response sharing program, provision of the Western Resource Adequacy Program (WRAP), and provision of regional transmission planning services including facilitation of the NorthernGrid Regional Planning Organization.

<sup>2</sup> The Western Electricity Coordinating Council (WECC) is a Utah non-profit corporation which has been delegated authority from the North American Electric Reliability Corporation (NERC) and has been approved by the Federal Energy Regulatory Commission (FERC) to be the Regional Entity for and to assure the electric reliability of the Bulk Power System in the geographic area known as the Western Interconnection.

<sup>3</sup> [https://www.westernpowerpool.org/private-media/documents/Western\\_Transmission\\_Planning\\_Concept\\_Paper\\_October\\_2023.pdf](https://www.westernpowerpool.org/private-media/documents/Western_Transmission_Planning_Concept_Paper_October_2023.pdf)

nimbly use new capabilities and partnerships where possible. WestTEC is working hard to make connections with partners and allies in this regard, some of which is demonstrated through committee representation and some through WestTEC's continued commitment to find these opportunities as the Project advances.

- **Transparency:** It will be important throughout Project execution to ensure that regional partners understand the status of the Project and have opportunities to provide meaningful input; WestTEC is confident that its careful approach to inclusive committee structure coupled with opportunities for broader public engagement will engender trust.

## 1.1 GOALS AND OBJECTIVES

The Project contemplates the production of an actionable transmission plan to resolve grid capability, reliability, and resiliency challenges by meeting the following goals and objectives:

- **An Actionable Transmission Study:** Development of transmission portfolios that address interregional and interstate needs over a 10-year and 20-year timeframe will be of use to many Western interested parties, including planning processes, transmission development activity by third parties, engagement with communities, and to those needing top-down benefit perspectives to support grid investment. The development of the study is intended to be a repeatable process and service these needs. To enable these outcomes and to help clarify expectations, an actionable transmission study is defined as:
  1. Being derived by a transparent process with methods and assumptions that are credible, prudent and broadly supported by regional partners/stakeholders.
  2. Including detailed technical descriptions of transmission solutions.
  3. Defining drivers and dependencies for a given solution or portfolio.
  4. Providing estimates for costs, benefits and preliminary routing.
  5. Identifies alternatives considered.
- **Reliability:** Ensure the footprint has sufficient transmission capacity identified and a study developed that meets NERC compliance, enables operational flexibility, and is implementable with a high degree of confidence.
- **Commercial/Economic Efficiency:** Ensure the footprint has sufficient transmission capacity to meet future energy needs, while also reducing congestion and considering planning reserve margins required to maintain reliable operations.
- **Improve Affordability and Reliability:** Enable investment savings by unlocking benefits associated with a coordinated transmission portfolio, which provides for diversity in demand and supply across the footprint, and better utilization of transmission infrastructure using a robust and dependable analytical approach.
- **Improved Visibility and Coordination:** The study will establish visibility into the combined capabilities and requirements of the study footprint. This will enable interested partners to make informed transmission planning and engineering solution decisions using collaboratively established best practice approaches, so that transmission needs are met in the most reliable, efficient, and economical way. This will also include analysis on a portfolio basis of the interplay between and aggregate value of various potential transmission solutions.
- **Supports Future Cost Allocation Decisions:** The study would include regional-level information about transmission benefits that could be used as a starting point to support cost allocation discussions for projects that might be built.

- **Fair and Unbiased:** A study that is fair and unbiased across resource types, business models, and to all regional partners and stakeholders, and which includes recommendations that are acceptable within current and evolving regulations and requirements of each applicable federal, state, and local jurisdiction.

## 1.2 SCOPE

The scope of the work is to conduct planning analysis across the Western Interconnection to produce transmission portfolios that will be used to develop a 10-year and 20-year actionable transmission study. The work will estimate transmission portfolio costs and benefits, including enhanced reliability, improved economic efficiency and savings in achieving policy goals, among others. In addition, WestTEC expects the work to result in improved interregional transmission planning and project identification for the West.

The Project excludes from its scope detailed cost allocation outputs, and any recommendations related to transmission construction, siting, and permitting; however, WestTEC acknowledges that these stages of transmission development can be significant barriers to delivery of transmission solutions. The actionable transmission study contemplated by the Project would provide high-level benefit estimates and possible metrics that would support entities wishing to pursue building a project to determine supportable cost allocation.

While this effort is focused on the production of an initial transmission study based on a series of transmission portfolios, WestTEC envisions that the process could evolve into a durable, long-term function, including periodic updates and refreshed analysis.

## 1.3 TECHNICAL APPROACH FOR ANALYSIS

The Project will be guided by a study plan (Appendix A) and will be supported by independent consultant vendor services from Energy Strategies and a team of subcontractors that will provide comprehensive modeling analysis, utilizing analytical software capable of producing feasible future resource scenarios (capacity expansion modeling), conducting economic studies analysis (production cost modeling), and evaluating reliability and physical power flows on the system (AC power flow modeling) that meets NERC Reliability Standards.

The analysis will include two analytical time frames anticipated to take approximately 12 months each, as shown in Figure 1-2. Phase 1 work is expected to be focused on nearer-term feasible transmission solutions over a 10-year time frame (2025-2035) and Phase 2 work will be focused on longer-term solutions over a 20-year time frame (2025-2045). A key milestone of the Phase 1 work is the development of a detailed study plan that will serve as a guide for the remainder of Phase 1 and Phase 2 work. This study plan, once complete, will provide additional details around the outputs of each phase of work.

The study plan is anticipated to take up to five months (March – August 2024) and includes work to be performed by Energy Strategies and the WPP, in consultation with WECC, WestTEC Assessment Technical Taskforce (WATT), Steering Committee, Regional Engagement Committee (REC), the public, and engagement with any groups contemplated by this Project Charter. This phase of work will involve multiple iterations of a draft study plan. The deliverables of this phase include a detailed 2-year study plan document including sections that address: study goals/purpose, detailed description of study methodology, reference case model selection and documentation (e.g., base case selection), data sources

for 10- and 20-year studies – identification of source of inputs for transmission, loads, generation, etc., data sources for capacity expansion modeling (e.g., method, topology, purpose), and scenario themes and functions.

## 1.4 PROJECT SCHEDULE

Figure 1-2 below is a visual of the high-level project schedule including the phases of work described above. As shown below, the draft study plan is expected to be completed by the end of August 2024. Feedback will be critical in the development of the draft study plan, and an iterative approach is contemplated within the WestTEC Committees. In addition, WestTEC will provide an opportunity in Phase 1 for public comments on the draft study plan in the July time frame. Additional public comment opportunities are expected in Phase 2, as well as quarterly webinars throughout the project schedule. Upon completion of the study plan, it will be included in the WestTEC Charter as Appendix A.



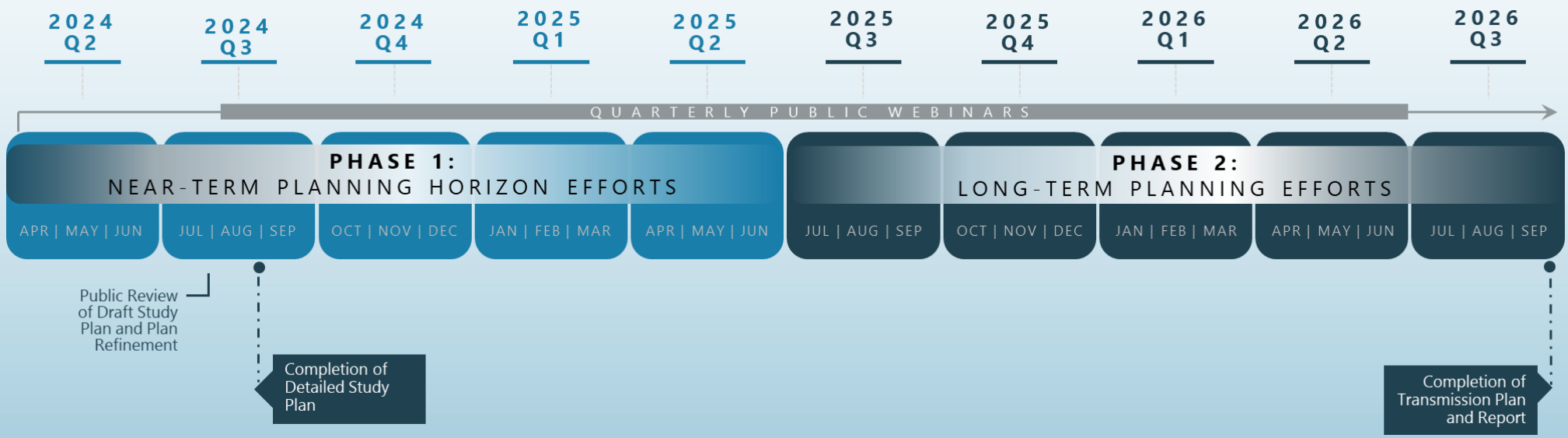


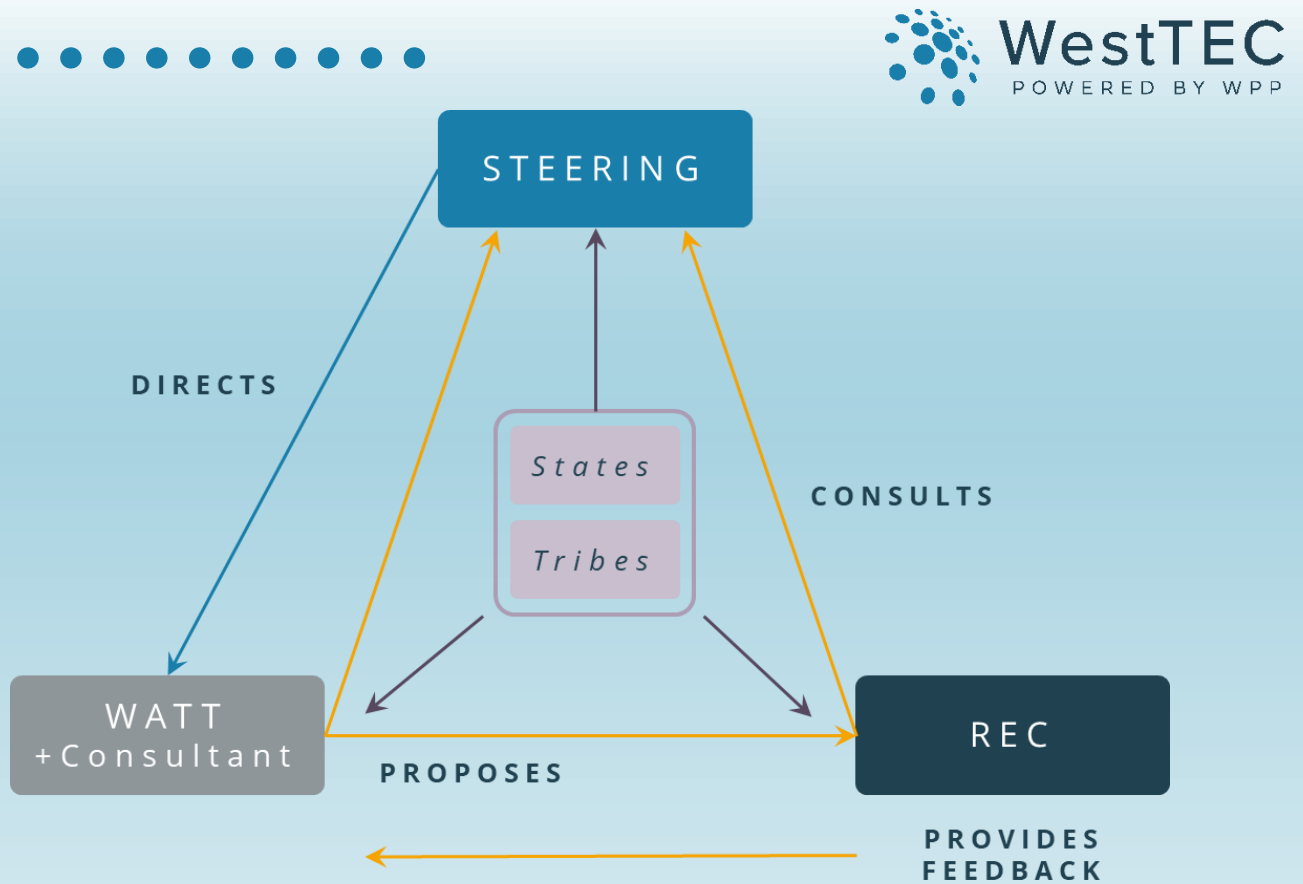
FIGURE 1-2. WESTTEC PROJECT SCHEDULE

## 1.5 DATA SOURCES AND MANAGEMENT

The development of an actionable transmission study will require the collection of data from utility participants, some of which will be subject to confidentiality provisions. The WestTEC effort will address data needs, management and confidentiality requirements through a data task force comprised of Steering, WATT and REC members. The task force will produce a data source and data management plan, which will be attached as Appendix B once complete. The WECC Anchor Data Set will be used to establish the primary foundation for the study.

## 02 Committee Structure, Governance and Regional Partner Engagement Plan

West-wide coordination and collaboration is at the heart of the WestTEC effort, and robust engagement across the impacted region and across all sectors is required to achieve the overall objectives and goals of WestTEC. WestTEC recognizes and embraces that its regional partner engagement structure must be inclusive and ensure that a broad set of perspectives is considered so that decision-makers, policymakers, regional partners, and regulators will have confidence in the results and recommendations. As described below, the WestTEC project execution will include frequent communication with regional partners, including, but not limited to, Tribes, State regulators and representatives, policy makers, and other interested parties. The complete list of committee and taskforce representatives with committee charters and updated member lists are posted on the WPP website [here](#).<sup>4</sup> Figure 2-1 illustrates the organization and relationship of essential committees and other participation opportunities, which are discussed in more detail below:



**FIGURE 2-1. WESTTEC GOVERNANCE**

<sup>4</sup> Committee Charters, Participant Rosters and other information for each committee can be found on each committee homepage here: [REC](#), [WATT](#) and [Steering](#).

## 2.1 STEERING COMMITTEE

The WestTEC effort will be organized into a Steering Committee comprised of senior and executive leadership from diverse entities committed to the study effort. The Steering Committee is responsible for resolving and making major decisions to structure the transmission plan and for providing its direction and guidance to the WATT. While the Steering Committee will make decisions informing the transmission plan, it also carries the responsibility to collaborate with other committees organized to support the effort. The Steering Committee will work with the WATT, the REC, and interested parties from the public on major elements of the study approach, including identification of renewable energy zones, resource expansion, electrification and load data, and scenario development. In addition, the Steering Committee includes a liaison representing State regulators named by the Committee on Regional Electric Power Cooperation's Transmission Collaborative (CREPC-TC). The Steering Committee, through the Communication and Stakeholder Engagement Subcommittee, comprised of both Steering and Regional Engagement Committee (REC) participants, is responsible for promoting public engagement by creating meaningful opportunities to both share information developed by WestTEC with the public and to provide input opportunities to the public throughout the transmission plan development process. The timing and details of the opportunities are described in Section 2.6 Public Engagement and Communications. The Steering Committee's voting methodology provides one vote per entity to ensure balanced governance. The Steering Committee meetings will be closed; however, all Steering Committee members are invited to REC meetings and through this connection will provide transparency between Steering, REC and the public.

## 2.2 REGIONAL ENGAGEMENT COMMITTEE

The REC is the primary regional partner body responsible for reviewing proposals, scopes of work for technical studies, draft study results, etc., and for providing feedback and making recommendations to the Steering Committee. The REC is comprised of sector-based membership representing consumer owned utilities, independent power producers, independent transmission companies, public interest organizations, Tribes, and ratepayer advocates. As representatives of their sectors, REC members are encouraged to dialogue with and bring in the perspectives of others in their sectors in their engagement on WestTEC. REC will also participate in the Communication and Regional Partner Engagement Subcommittee and assist in public engagement with WestTEC efforts. Members of the Steering Committee and WATT leadership are also invited and encouraged to attend REC meetings to ensure continuity and flow of information and communication between committees. REC meetings will be noticed and open to the public to ensure transparency around project developments. In addition, there will be specific public comment opportunities available at each REC meeting. REC will also be open to all Steering Committee members as well as WATT co-chairs to ensure transparency and efficient communication between committees.

## 2.3 TECHNICAL TASK FORCE - WATT

The WATT is responsible for developing and proposing the study scope and approach for the transmission study. The WATT is the main point of contact for collaboration with the independent consultant, Energy Strategies. The WATT is comprised of technical staff of Steering Committee members, the Independent Consultant, independent transmission developers, and other technical experts. In addition, the WATT includes a liaison representing State regulators named by the CREPC-TC. Meetings of WATT will be closed, with WATT leadership attending REC meetings and Steering Committee meetings to provide updates on technical study work. The WATT will take direction from the Steering Committee, which shall in turn

consult with and collaborate with the REC and the broader public. The WATT shall operate with all necessary data protection procedures and agreements in place.

## 2.4 ENGAGEMENT WITH STATES

States will advise the WestTEC process through liaisons between the CREPC-TC and the WestTEC Steering and WATT committees. The CREPC-TC is an informal working group of CREPC designed to focus on regional transmission issues. The CREPC-TC provides a standing space for CREPC members and staff (in 11 Western states and two Canadian Provinces) to collaborate on transmission coordination and development in the West through sharing viewpoints and information from the diversity of Western states and provinces. State Liaisons to WestTEC's Steering and WATT committees will keep the CREPC-TC informed of committee discussions and gather feedback from the states and provinces to help inform WestTEC decisions. The Liaisons will work closely with WestTEC leaders to coordinate any meetings with the CREPC-TC and WestTEC experts to discuss issues that may require state input. To the extent that perspectives within the CREPC-TC diverge, the Liaisons will strive to present the range of perspectives to WestTEC. In the event that WestTEC needs definitive resolution, the issue will be elevated to CREPC for guidance by the co-chairs after consultation with CREPC members.

## 2.5 ENGAGEMENT WITH TRIBES

WestTEC recognizes and appreciates the importance and significance of including Tribes at every stage of the consideration of transmission solutions. For this reason, the WestTEC provides multiple engagement opportunities for Tribes, including having Tribal representatives on both the Steering Committee and the REC, and if requested WestTEC will engage separately with a Tribes group comprised of any representatives identified by Tribes.

## 2.6 PUBLIC ENGAGEMENT AND COMMUNICATIONS

West-wide coordination and collaboration is at heart of the WestTEC effort and robust engagement across the impacted region and across all sectors is required to achieve the overall objectives and goals of WestTEC. In addition to the committee structure described above, WestTEC seeks to provide robust and inclusive engagement with the broader public. WestTEC will achieve this by holding regular public webinars (on an approximately quarterly basis) throughout the WestTEC project. The webinars will provide interested parties from the public with project updates and feedback opportunities. In addition, there will be written public comment opportunities at key junctures within the project, the first of which will seek public comments on the draft study plan in July 2024.

The Steering Committee through the Communication and Regional Partner Engagement Subcommittee will be responsible for processing public comments and conveying them to the WATT and Steering Committees and determining if/when there may be another opportunity for public comments later in the project schedule.

In addition to public webinars and public comment opportunities, WestTEC, through WPP and the Communication and Regional Partner Engagement Subcommittee will provide periodic communications to the public, including but not limited to, communications through press releases, updates through the WestTEC email distribution list and media and website communication materials. The core structure above may be supplemented by additional advisory input from interested parties, including through periodic public forums or workshops that share updates, decision points, and opportunities for comment.

Website: <https://www.westernpowerpool.org/about/programs/western-transmission-expansion-coalition>

Please direct any questions or to add anyone interested in being added to the WestTEC distribution list to Admin WestTEC [Admin-WestTEC@westernpowerpool.org](mailto:Admin-WestTEC@westernpowerpool.org)

# APPENDIX A

# APPENDIX B