

**Western Governors' Association
Siting Task Force Meeting**

**Warwick Hotel: Millennium Ballroom
Denver, CO
October 1 – 2, 2012**

MEETING SUMMARY

SUMMARY OF KEY NEXT STEPS	
Examples of MOU language between Local, State, Tribal, and Federal Entities	<p>Goal: Provide tools for developing government MOUs efficiently and effectively at the launch of transmission projects. If appropriate, tools may be incorporated into Federal Toolkit.</p> <p>Who: WGA, Review Team (Pam Eaton, Laurie Woodall, Jack Haenichen), and WGA consultant.</p> <p>What:</p> <ul style="list-style-type: none">▪ Consultant identifies good examples of MOUs to post in online file cabinet, including federal-to-state, state-to-state, state-to-local, and state-to-tribe MOUs. Perhaps identify specific language on the following key components, including: clear roles and responsibilities, timeline and drivers, alternative dispute resolution process, transparency, and single point of contact. Summarizing key steps in the process to develop MOUs—who, key topics, etc.• Consultant conducts a handful of interviews with players who have recently signed MOUs to see if more is needed than posting examples.• <i>If determined to be helpful</i>, consultant drafts template for topic-specific interstate transmission MOU process and document structure.• Review Team considers draft and reports back to full Task Force.
Designing a process and list of documents needed in the federal/state pre-application phase.	<p>Goal: Develop a list of documents and a process appropriate for using in the pre-application phase. If appropriate, may be incorporated into the Federal Toolkit.</p> <p>Who: WGA, Review Team (Rod Fisher, Todd Cornett, Carl Zichella, Angie Grooms, Jack Haenichen), and WGA consultant.</p> <p>What:</p> <ul style="list-style-type: none">▪ Consultant reviews current lists of documents required for transmission and other similar projects (e.g., Oregon's list, FERC requirements, and others).▪ Consultant conducts interviews as appropriate, including of County representatives.

	<ul style="list-style-type: none"> ▪ Consultant draft proposed list and process for Review Team consideration. ▪ Review Team reports back to Task Force.
State Permitting Roadmaps	<p>Goal: Consider developing a Western States Roadmap that documents the current process for siting interstate transmission projects while recognizing different states have different siting and permitting requirements. Government entities and developers could use roadmap to identify critical path in transmission process. Task Force could use roadmap to determine where the overall process needs revamping or harmonization of common analyses. A Western Roadmap could be merged into federal roadmap to provide a comprehensive approach. The Western Roadmap would be useful for siting interstate transmission lines by both helping coordinate analysis with the federal entities, but also between states and local communities.</p> <p>Who: WGA, Review team (Rod Fisher, Tom Stoops, Larry Keith, Dave Warren, Christopher Worley), and WGA consultant.</p> <p>What:</p> <ul style="list-style-type: none"> • Consultant determines what states already have roadmaps and review currently available ones (e.g., WI, TX, Excel's MN, WY, federal, and NM preemptive permitting process. • Consultant review Great Lakes Offshore Wind MOU as a possible example of how a Western States Roadmap might be developed. • Work with CEQ to determine process for documenting a federal roadmap so that individual states in the west and Federal system could be merged, if appropriate. • Consultant recommends to Review Team the steps, cost and ease of use for developing a Western roadmap, including process for annual update. • Review Team reports back to Task Force.
Landscape Planning Tools	<p>Goal: Ensure that newly available landscape planning tools are used and institutionalized, as appropriate. Identify additional information to include that can enhance the siting process to maximize information to developers and regulators.</p> <p>Who: WGA and Working Team (Carl Zichella, Madeleine West, Bob Deibel, Laura Morton)</p> <p>What:</p> <ul style="list-style-type: none"> ▪ Working Group to discuss state/federal coordination and rollout of EDTF and CHAT. ▪ WGA to track on other landscape planning tools and propose briefings to Task Force, as appropriate.
Development of Online File Cabinet	<p>Goal: Develop a single place online where those involved with transmission line siting can get examples of key documents and</p>

	<p>links to key sites. Initially, the WGA website would host the file cabinet. Overtime, this information may be merged into a federal website hosted by CEQ or some other part of the federal government. Purpose of the online file cabinet would be to improve coordination, expedite the planning process, and organize materials to help solve problems.</p> <p>Who: WGA, Review team (Olivia (in Jack Haenichen's office), Jeremy Lewis, Christopher Worley), and WGA consultant.</p> <p>What:</p> <ul style="list-style-type: none"> ▪ Consultant collects key documents, handbooks, trainings, and videos from WGA, CEQ, Task Force members and others. ▪ Consultant summarizes content and proposes organizational method for Review Team's consideration. System should be able to merge with potential federal system. Proposal should include mechanism for updating regularly. ▪ Consultant analyzes information and roadmaps (from above step) to identify major gaps and delays in the process. ▪ Report back to Task Force.
WGA Workshops	<p>Goal: WGA hold workshops aimed at solving problems. Topics are likely to be those identified by the gaps above and/or those needed for specific audiences.</p> <p>Who: WGA and the facilitator.</p> <p>What:</p> <ul style="list-style-type: none"> ▪ Develop workshops list for the Task Force to consider under the following categories: <ul style="list-style-type: none"> ○ Case studies to illustrate what approaches are working well or poorly. ○ Videos to educate the public and country officials; ○ New tools that are available ▪ Jack Haenichen to research whether EPRI offers an electricity transmission 101 workshop. ▪ John Shepard to provide a video overview on the need for interstate transmission.
ROW Workshop	Currently looking at January 14-15, 2013 in Arizona as possible dates.
Next Task Force Meeting	<p>Next Task Force meeting will occur during the first quarter of 2013, after the Winter WGA meeting.</p> <p>WGA will consider additional members, dependent on the agenda, to possibly include: BPA, WAPA, FERC, DOE EIA, Tribal representatives Tracy LeBeau/DOE Office of Indian Energy Policy and Programs or Byron Wertz/WECC), and Associations of County and local governments.</p>

	<p>Key topics to be address at next meeting:</p> <ul style="list-style-type: none"> • WGA/Consultant report on existing MOU language. • WGA/Consultant report on key components necessary for inclusion a single federal/state pre-application template. • WGA/Consultant report on state permitting roadmap survey. <p>WGA/Consultant report on online file cabinet.</p> <ul style="list-style-type: none"> ▪ Clarifying procedures of WGA Task Force
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Overview

On October 1 and 2, 2012, the Western Governors' Association (WGA) held the first meeting of their Transmission Siting Task Force. The mission of the Task Force is four-fold:

1. Establishing an information exchange process to promote best practices by holding forums on hot topics and establishing an online clearinghouse of sample documents.
2. Developing and implementing collaborative policy tools and templates.
3. Engaging the leadership of the Governors and other senior stakeholders to bring high-level attention to siting holdups and conflicts, through letter writing and lobbying.
4. Building productive relationships amongst the stakeholders to help solve line-specific challenges more quickly.

A list of attendees at the Denver meeting can be found in Attachment A of this document. The purpose of the meeting was to refine and launch a number of specific efforts. Key agenda topics included:

- I. Role of Task Force, Linda Davis, WGA;
- II. Federal Government Update, Laura Morton, Council on Environmental Quality (CEQ);
- III. Federal Toolkit
- IV. MOU Documents between local, state, tribal, and federal entities
- V. List for the pre-application process
- VI. State Permitting Roadmaps
- VII. Landscape Planning Tools
 - a. Crucial Habitat Assessment Tool (CHAT), Madeleine West, WGA
 - b. Environmental Data Task Force (EDTF), Carl Zichella, Natural Resources Defense Council (NRDC)
- VIII. Sage Grouse Update, Madeleine West, WGA
- IX. WGA Information Exchange
 - a. Online file cabinet
 - b. Workshops and Trainings

A copy of the complete agenda and all meeting presentations and handouts can be found at: http://www.westgov.org/component/joomdoc/doc_download/1630-state-siting-task-force-briefing-oct-2012. A list of key documents and links noted during the meeting can be found in Attachment B of this document.

Below is a summary of the meeting. It is not meant to be a verbatim transcript of the meeting, but rather an overview of the discussion as heard by the facilitators.

DAY 1 – October 1, 2012

I. Role of Task Force

Linda Davis of WGA presented on the role of the task force and its proposed approach, timeline, products and membership. [Presentation](#)

In May 2012, the Governors established the WGA Task Force after reviewing broad recommendations and actions to improve transmission siting and permitting. Consultants and a working group meeting in April of 2012 developed this document, which can be found at:

http://www.westgov.org/component/joomdoc/doc_download/1605-siting-report-2012. The

Governors priority topics for the Task Force are to:

- Develop measurable products to improve the transmission siting process and make it more predictable for permittees.
- Improve communication to the public on why transmission is needed and what goes into the process
- Streamline and improve interagency and state/federal coordination
- Institutionalize permitting templates for multi-jurisdictional infrastructure
- Decrease disparity between states and permitting authorities processes and increase process efficiencies
- The focus of this meeting is to develop a core group of advisors to discuss and advance those topics.
- A key role of the Task Force is to provide policy suggestions to the Governors. The Governors has expressed that they would like to support the policy recommendations that the Task Force makes in order to improve the transmission siting process.

Discussion

- The Task Force will emphasize using currently available information and examples and participants supported not “reinventing the wheel.”
- The Task Force discussed what other participants should be present. Depending on the efforts of the Task Force, the following were suggested: Bonneville Power Administration (BPA), Western Area Power Administration (WAPA), Federal Energy Regulatory Commission (FERC), tribal entities, and county representatives. It was noted that FERC should only be engaged for very specific topics or to ask Laura Morton to solicit FERC input. For tribal suggestions, WGA should contact Tracy LeBeau of DOE’s Office of Indian Energy Policy or Byron Wertz of Western Electricity Coordinating Council (WECC). The National Association of County/RC feedback), DOE Energy Information Administration (EIA) (coordinate with Tracy LeBeau/DOE Office of Indian Energy Policy and Programs or Byron Wertz/WECC), tribal representatives and counties/local governments. To identify appropriate county officials, contact the national association groups for local government.
- It was noted that the WGA is developing a 10-year energy plan for the Governors to include transmission. It will be ready by June 2013. Governors would like to provide leadership and identify specific policy actions and targets in the plan.
- The Task Force emphasized that it needs to develop policy instruments that the Governors can advocate for together and that promote bipartisanship and collaboration across states.
- It was suggested that the Task Force first take on more easily accepted policy solutions.
- The Facilitator noted that the group should develop general procedures and rules for how it wants to function, particularly regarding the relationship of individual governors to this Task

Force. Until these roles are developed, the Task Force was asked to abide by a “no surprises” agreement to keep other Task Force members apprised and involved.

Next Steps for the Role of the Task Force

- WGA to reach out to other potential Task Force members:
 - BPA
 - WAPA
 - FERC
 - DOE EIA
 - Tribal representatives
 - Counties/local governments

II. Federal Government Update

Laura Morton of CEQ presented on the progress being made by the Interagency Rapid Response Team for Transmission (RRTT). The Federal Plan is available at:

http://permits.performance.gov/sites/all/themes/permits2/files/federal_plan.pdf

- The White House is driving the Federal Plan and associated stakeholder outreach. The Rapid Response Transmission Team (RRTT) process is moving forward. Agencies are each developing action plans that mirror the overall plan. The implementation plan is scheduled for launch in November 2012.
- The Federal Plan contains important steps for improving efficiency, such as best practices, interagency agreements, streamlining permit applications and agency collaboration.
- The RRTT came out of the nine-agency transmission siting MOU. Seven pilot projects were selected, five of which are in the West. The RRTT is working to move the pilot projects through although some are moving more slowly due to tribal and other land issues beside the permitting process. The Midwest and Eastern lines are farther along.
- Laura indicated that they are working on internal (non-public) lessons learned documents for each project and have been giving progress reports to Agency Secretaries.
- A particular RRTT goal is to determine an interagency resolution mechanism for potential disputes. It was emphasized that upfront coordination and communication helps avoid problems.

Discussion

- The Interstate Compact Commission (out of Council of State Governments -CSG) has developed near-final draft legislation for agency coordination on multi-jurisdiction/state transmission lines. This example of collaboration could facilitate the Task Force process.
- State interests mentioned that it would be most helpful to know what other state-specific documents and state contacts are needed. Further, they noted that simultaneous and regular communication from the applicants to state and federal leads and/or cooperating agencies is needed.
- It was noted that proactively reviewing potential corridors would enable all parties to quickly react to potential development.
- It was mentioned that states could potentially identify 368 corridors across private lands and begin to address landowner needs.

- The seven pilot projects' lead agencies don't have specific "project execution plans" but still develop coordination plans (more detailed than MOUs) that could provide examples of interagency coordination.
- It was noted that it is important for agency staff to all have the same training and understand the process. DOE holds trainings for staff. Applicants would like to be able to rely on an experienced agency team and expressed the need for agencies to create career opportunities for staff to stay with transmission siting.
- It was suggested that the Task Force review projects listed in the WECC project portal based on RRTT criteria to select projects that could benefit from streamlined processes. Also, FERC Order 1000 considers state system needs and policy goals and involves states and stakeholders. It helps identify projects that are ready for this collaboration.
- The FERC re-licensing process or gas line permitting processes are examples of multi-jurisdictional permitting. It was noted that the FERC process is 5 to 6 years long and the Task Force should seek ways to quicken the transmission siting timeline and streamline agency coordination.
- WA has a pre-application process for interstate projects, as well as an MOU with Bonneville Power Administration.

III. Federal Plan Toolkit

The Task Force discussed the potential components of a Federal Plan Toolkit. An [excerpt from Federal Plan on Application Toolkit](#)

- The RRTT has been tasked with developing an application toolkit. Laura asked the Task Force to indicate useful information that the toolkit could contain. The Task Force provided "votes" on what it should contain:
 - Examples and suggestions for developing strong applications: **3 votes**
 - Tools for planning stakeholder outreach and engagement: **12 votes**
 - Definitions of what is needed for an application to be "complete" for each agency required to make a permit/review decision: **6 vote**
 - Identification of tribal, state, and local governments roles (*information on coordination, efficiency, understanding of roles and authorities, planning-stage dialogue opportunities, when to engage tribes and local governments*): **13 votes**
 - Estimated permit decision and review timelines (*deadlines, milestones and accountability for all parties*): **10 votes**
 - Applicant trainings, webinars, or meetings: **1 vote**
 - Identification and initial assessment of the resource areas potentially impacted: **10 votes**
 - Project specific best management practices and upfront avoidance, minimization and mitigation measures such as project siting information and guidance **7 votes**
 - Description of application process, from first notice to final decision **6 votes**

Next Steps for Federal Plan Toolkit

- The co-chairs of the RRTT will deliver a plan and schedule for launching the transmission toolkit by November 30, 2012. Laura Morton will continue to work with WGA and the Task Force to determine and develop its content.

IV. MOU Template between Local, State, Tribal, and Federal Entities

The Task Force discussed whether it might be useful for the group to oversee the development of a Memorandum of Understanding (MOU) template. MOUs are commonly signed between various state, federal, tribal, and local agencies when a transmission siting effort is launched.

- An MOU template could expedite the initial steps in a siting process and also encourage best practices in communicating, without mandating a specific approach.
- Others noted that some of the federal agencies (such as BLM) already have a MOU template available and that developing a single template that covers all possible federal, state, tribal, and local government configurations might be challenging.
- Task Force members suggested that sections or paragraphs be made available to ‘cut and paste’ into appropriate format.
- The Task Force noted important components of an MOU that may help encourage best practices, such as:
 - Roles and responsibilities, expectations, agency authority, schedule and timeline, decision makers/accountability structure, communication structure
 - Lead and cooperating agencies
 - An alternative dispute resolution (ADR) mechanism
- The Task Force noted that any MOU template would apply to project-specific interstate (not intrastate) transmission projects.
- The Task Force noted a number of process steps that should be clarified before the drafting for a project specific MOU begins, such as:
 - What is the purpose of the MOU?
 - Who from the state would have the authority to sign the MOU? Who are the cooperating agencies? What are the consequences of not abiding by the MOU?
 - What role does the applicant play in the MOU?

MOU Examples available online:

- *Cascade Crossing MOU:* <http://transmission.bpa.gov/planproj/PGEMOUNo.pdf>
- *Nine-agency MOU:* <http://www.ferc.gov/legal/maj-ord-reg/mou/mou-transmission-siting.pdf>
- *Bureau of Land Management Cooperating Agency MOU:*
http://www.blm.gov/pgdata/etc/medialib/blm/wo/Planning_and_Renewable_Resources/NEPS.Par.93.370.File.dat/BLM_DeskGuide_CA_Relationships.pdf
- *MOU development handout:*

Next Steps for MOU Template between Local, State, Tribal, and Federal Entities

Goal: Provide tools for developing government MOUs efficiently and effectively at the launch of transmission projects. If appropriate, tools may be incorporated into Federal Toolkit.

Who: WGA, Review Team (Pam Eaton, Laurie Woodall, Jack Haenichen), and WGA consultant.

What:

- Consultant identifies good examples of MOUs to post in online file cabinet, including federal-to-state, state-to-state, state-to-local, and state-to-tribe MOUs. Perhaps identify specific language on the following key components, including: clear roles and responsibilities, timeline and drivers, alternative dispute resolution process, transparency, and single point of contact. Summarizing key steps in the process to develop MOUs—who, key topics, etc.

- Consultant conducts a handful of interviews with players who have recently signed MOUs to see if more is needed than posting examples. Questions might include: Does the MOU improve the communication process, even if it is not really enforceable? Would another tool work better?
- *If determined to be helpful*, consultant drafts template sections addressing key components that can be added or subtracted for project-specific interstate transmission MOU process and document structure.
- Review Team considers draft and reports back to full Task Force.

V. **Developing a Federal/State Pre-application List and Process**

The Task Force discussed the idea of developing a list of documents needed during the pre-application process. Developers and government agencies could sit down at the beginning of a project and discuss which documents on the list should be submitted to ensure that the project has the best chance of succeeding and moving along a rapid timeline.

- It was noted that the list should serve as a guide for applicants and agencies, promoting collaboration and transparency.
- The Task Force agreed that a pre-application list would be useful, but noted a number of related issues that need discussing, including:
 - Consideration of cost versus usefulness when determining the level of detail needed regarding each item on the list. For example, should the developer submit general information that there are bald eagle nesting along x miles of a proposed route or provide precise information of where each nest is located?
 - Articulating the proposed process by which the list will be used. Some expressed concern that the full list might become mandatory unless how it is to be used is clearly stated.
 - Gathering input from industry, government (federal, state, tribal, and local), and non-governmental organizations (NGOs) on what the list should contain.
 - Background explanation on how the list can be used to expedite the process.
- It was noted that the list might contain:
 - Information regarding the cost recovery component;
 - The level of detail needed with alternate routes prior to NEPA scoping;
 - Available GIS layers;
 - Coordination expectations;
 - Accountability measures;
 - Local government, state and federal roles;
 - A feedback mechanism, including a process that enables applicants to work with the lead agency to submit documents for “unofficial” review and preliminary feedback; and
 - A project execution plan.
- The concept of incorporating a 30-percent/60 percent/90 percent design at different phases was discussed (e.g., “stream crossing” approach), allowing applicants to move forward with siting during different stages of the planning process.
- Review the FERC and Oregon processes as possible models for consideration.

Examples of pre-application lists available online, include:

SF 299: <http://www.gsa.gov/portal/forms/download/117318>,

OR Hydroelectric Application Review Team: <http://www.oregonlaws.org/ors/543A.400>

Next Steps for Single Federal/State Pre-application Template

Goal: Develop a list of documents and a process appropriate for using in the pre-application phase. If appropriate, may be incorporated into the Federal Toolkit.

Who: WGA, Review Team (Rod Fisher, Bob Deibel, Todd Cornett, Carl Zichella, Angie Grooms, Jack Haenichen), and WGA consultant.

What:

- Consultant reviews current lists of documents required for transmission and other similar projects (e.g., Oregon's list, FERC requirements, and others).
- Consultant conducts interviews as appropriate, including of County representatives.
- Consultant draft proposed list and process for Review Team consideration.

DAY 2 – October 2, 2012

VI. State Permitting Roadmaps

Larry Keith (Tetrattech) presented a case study on "Wyoming's Roadmap to Permitting." The group discussed whether developing such a roadmap for all Western states may be of use. The Wyoming document is available at: <http://wyia.org/documents/reports/mapping-the-transmission-process-in-wyoming-by-tetrattech>. The presentation can be found at: [Presentation](#). (Warning: This is a large document.) The Renewable Energy Coordination Committee in Wyoming is a mix of state and federal agencies. They wanted to participate in RRTT but first consider their own regulations.

- The Wyoming document is not intended to be a roadmap to expedite the process, but rather a guide for stakeholders to understand how to get a transmission line permitted in Wyoming.
- Wyoming did not have a document that compiled all rules and regulations for transmission siting (even though it has projects in the permitting process) so the process of mapping the rules and regulations allowed the state to improve on processes and identify when state, locals and feds could work together for efficiency. While no immediate process improvements were identified, the documentation of roles made people think about what their job description and the overall process. The overall exercise in documenting the process has helped identify potential areas for improvement.
- Larry recommended communication and consultation early and often for successful siting.
- The document was funded by a Department of Energy (DOE) grant through the Wyoming Business Council. Someone familiar with federal, state and local processes developed it over 90 days. It's intended to be updated on a regular basis.
- Wyoming has received positive reviews on the document and it is being used as a community learning tool and model for similar state efforts. The document is a catalyst for other states with RRTT pilot projects to follow suite and understand their transmission siting rules and regulations.
- Wyoming is about to publish a guide to wind development in the state.

Discussion

- The Task Force discussed potentially developing an overall federal and Western state permitting roadmap. Besides being a useful resource for all involved in the current siting process, it may be helpful for improving the future process by: identifying the critical path for permitting (i.e., steps that must be done in a certain order and by a certain time), noting

places where it may be possible to combine steps, and suggesting areas where new laws/policy may be needed to improve the process.

- As every state's process is different, it would be difficult for WGA to use one model that's helpful for every state. It was indicated that the states should each understand their own processes first.
- It was noted that a process chart outlining the critical path from the developmental side and estimated review times would be useful. It was also noted that it would help to know in advance if agencies would accept environmental documents prepared for cooperating agencies.
- The Wyoming tool is not intended to suggest process changes but allow developers and state siting authorities to consider overlapping agency timelines and review schedules in order to promote and negotiate process efficiencies, prevent uncertainties, and synch different agency milestones.
- Laura Morton indicated that the federal government considers this tool to be valuable. They are planning to model other tools after the Wyoming document (e.g. renewable energy development, for which DOE Energy Efficiency and Renewable Energy (EERE) funding has been allocated).
- Oregon is analyzing its own process to identify ways to make it more efficient. The state should have a similar document to share in 6 to 8 months.
- It was noted that it would be difficult to document county-level decision processes and encourage local jurisdictions to adopt similar permitting models. Colorado State Bill 45 tried to promote consensus on how to consolidate control between counties and state but local counties preferred to maintain autonomous authority. To avoid considering new transmission lines, some counties may prefer not to have clear rules for permitting.
- The Task Force discussed the difference between transmission siting and other facility siting. Transmission siting processes require broader permitting processes than localized energy generation facilities. It was noted that at this stage, states are receiving so many new transmission siting applications that there can be pressure from government offices and developers to expedite the process. The document helps map out every step to make all facility siting processes more efficient.
- A roadmap is valuable in providing consistency, transparency and accountability. It also is important in identifying critical path points in the decision making process, in efforts to keep the overall process moving forward.
- The Great Lakes Consortium road mapping initiative resulted in an MOU that is a good example. Lakes are owned by the states and the roadmap identifies different state environmental review processes to accelerate wind development:
http://www1.eere.energy.gov/wind/pdfs/great_lakes_offshore_wind_energy_consortium_mou.pdf

Next Steps for State Permitting Roadmaps

Goal: Consider developing a Western States Roadmap that documents the current process for siting interstate transmission projects. Government entities and developers could use roadmap to identify critical path in transmission process. Task Force could use roadmap to determine where the overall process needs revamping. A Western Roadmap could be merged into a federal roadmap to provide a comprehensive approach.

Who: WGA, Review team (Rod Fisher, Tom Stoops, Larry Keith, Bob Deibel, Dave Warren, Christopher Worley), and WGA consultant.

What:

- Consultant determines what states already have roadmaps and review currently available ones (e.g., Wisconsin, Texas, TX, Excel's Minnesota, Wyoming, and New Mexico's preemptive permitting process.
- Consultant review Great Lakes Offshore Wind MOU as a possible example of how a Western States Roadmap might be developed.
- Work with CEQ to determine process for documenting a federal roadmap so that a Western and Federal system could be merged, if appropriate.
- Consultant recommends to Review Team the steps, cost and ease of use for developing a Western roadmap, including process for annual update.
- Review Team reports back to Task Force.

VII. Landscape Planning Tools – Examples of Available Tools

Madeleine West (WGA) presented the Crucial Habitat Assessment Tool (CHAT). The presentation can be found at this link: [Presentation](#).

- The CHAT is a proactive approach to coordinating wildlife and energy needs in light of future energy development.
- Existing state tools show relative ranking of biological priority, which helps make efficient conservation decisions at the data collection/route alternative level.
- The West-Wide CHAT tool will be regional across all western states and will be made public by December 2013. Development of a regional tool allows for regional consistency in planning interstate projects. It's crucial for priority levels and definitions to be consistent across states.
- So far, DOE has funded this process through the WGA. States are committed to the process and looking for Task Force support in implementing the tool.
- States need to invest in capacity building to implement the tool. WGA is working with agencies to hire experts (e.g. GIS specialists) who can provide training and support.

Discussion

- In 2009, WGA signed an MOU with DOE, Department of Interior, (DOI), and US Department of Agriculture (USDA) to bridge data gaps between various agencies. Out of this MOU, DOE funded the CHAT project and WGA is working with federal land management agencies to implement the MOU. Government agencies are increasing their involvement now that state-specific data has been collected.
- The BLM issued an Instruction Memorandum for agencies to use CHAT information, which can be found at: http://www.blm.gov/wo/st/en/info/newsroom/2012/january/NR_01_13_2012.html.
- The Task Force expressed that the CHAT is valuable because it creates a seamless and consistent data set. The Task Force is interested in knowing how they could support CHAT development and implementation, especially as part of the 'identification and initial assessment of resource areas potentially impacted' section of the Federal Toolkit.

- It is hoped that CHATs will be used in other types of planning. The CHAT can be downloaded and other data sources or non-wildlife layers needed to make planning decisions can be overlaid.
- It was noted that Oregon is beginning a landscape planning effort and that the state wishes to integrate that process with the CHAT process.
- Wyoming's WISDOM tool will overlay existing infrastructure and resources. When its geospatial tool is being developed, Wyoming will hire a consultant to build a GIS mapping foundation that houses data. Wyoming will reach out to the Task Force at that time for advice on functionality, transparency and types of data layers to include.
- There is a qualitative assessment behind the determination of where an offsite mitigation framework could be developed. States are testing different qualitative models and will reach consensus on an approach by the end of 2012.
- WGA decided early on not to include tribal land information unless tribes volunteered the data. The data could eventually be filled in.
- The Task Force discussed the meaning of the word "crucial," as it is often not used in a consistent manner across agencies. Madeleine West indicated that the group defined "crucial" from a biological standpoint.

Carl Zichella (NRDC) presented the Environmental Data Task Force (EDTF) role in the Regional Transmission Expansion Planning Effort. The presentation can be found at this link: [Presentation](#).

- The EDTF is developing a tool to perform risk assessment analysis for using existing corridors for joint state energy procurement. The EDTF is seeking standards of usability and credibility of analysis to improve and expedite permitting and siting. The delineated corridors are non-specific "crayon lines."
- The EDTF is trying to create transparent data protocols and catalogues of data sets, as well as create an associated stakeholder vetting process.
- The existing landscape planning tools are valuable to educate stakeholders about tradeoffs of energy development and considering the broader context of siting.

Discussion

- It was noted that the Colorado Public Utilities Commission (PUC) looks to stakeholder parties to review policy guidelines, as the Colorado PUC can only consider tools that have been fully vetted.
- It was expressed that this process is valuable for long-term planning on how to manage various natural resources in light of infrastructure development pressures. These tools to assist with energy development and generation will be noted in the WGA 10-year regional plan.
- From a utility perspective, Idaho Power indicated that they are gathering data to develop the tool but are not yet using it in project planning. Xcel Energy is piloting the EDTF tool internally at this time. Duke Energy is gathering shape file and layers to overlay route plans.
- Some noted that landscape-planning processes need to move beyond inventorying existing data to applying the data to planning. The landscape tools need to be institutionalized so that state and federal regulators use the same processes.
- It was stated that EDTF's charter is to work with WECC, so its outputs are not always applicable to states. States should develop their own similar process based on the regional example although the regional landscape-planning step complements state planning. It was

indicated that stakeholders developing regional tools need to link with state agencies and the WGA is determining how to mesh landscape-planning tools with state permitting processes.

- It was noted that although it is important to consider historical resource data, it is sensitive and cannot always be displayed on maps. Cultural data is not yet included in the EDTF outputs.
- Some stressed that these type of tools need to remain tools and not become regulatory tools. Others expressed concern that some of the data and definitions may be inconsistently applied and result in poor decision-making.
- The Task Force discussed a potential workshop on landscape tools and agreed that instead of a workshop presenting available tools, an applied workshop on using and applying landscape-level data to better understand the tools or prepare a deliverable would be useful.
- DOE will be doing a technical training for federal agencies and staff on both the CHAT and EDTF tools and promoting better information sharing.
- The Task Force expressed the need for federal buy-in in to order streamline the landscape planning tools. Bob Deibel offered to help facilitate connecting WGA and the Siting Task Force with appropriate federal contacts who can commit to the EDTF process. Laura Morton indicated that better information sharing between agencies is a priority.

Next Steps for Landscape Planning Tools:

Goal: Ensure that newly available landscape planning tools are used and institutionalized, as appropriate. Work with various stakeholders to create tools that are credible and useful.

Who: WGA and Working Team (Carl Zichella, Madeleine West, Bob Deibel, Laura Morton)

What:

- Working Group to discuss state/federal coordination and rollout of EDTF and CHAT. WGA to track on other landscape planning tools and propose briefings to Task Force, as appropriate.

VIII. Sage Grouse Update

Madeleine West (WGA) provided an update on the WGA's activities related to the Sage Grouse. The presentation can be found at this link: [Presentation](#).

- The Sage Grouse Task Force identifies sage grouse habitat distribution in the West.
- The Task Force works to improve state understanding of the US Fish & Wildlife objectives, improve state input into the Bureau of Land Management/US Fish & Wildlife Resource Management Plan objectives, maintain state management of species and encourage collaboration between states.
- The WGA Sage Grouse process is fast moving and might create a model for state and federal agency collaboration.

Discussion

- There are similar sage grouse conservation efforts underway and the WGA Siting Task Force would like WGA to inventory the breadth of regulatory and conservation plans.
- Some noted that it is generally agreed upon by scientists that there are impacts to ground nesting sage grouse that reduce reproduction and create population impacts. Although there are differing opinions regarding the causes of those impacts, the Sage Grouse Task Force

decided to move forward in conservation objectives in mitigation actions to prevent a listing in 2015 and prevent further population impacts.

IX. Federal Rulemaking

Linda Davis summarized comments received on the DOE Proposed Rulemaking for regulation implementing section 216(h) qualifying projects. A copy of the full rule can be found at: <http://energy.gov/sites/prod/files/Notice%20of%20Proposed%20Rulemaking%20216%28%29.pdf>

- The Notice of Proposed Rulemaking was published in December 2011 and comments were received until February 2012. The proposed rule would amend DOE regulations for coordination of interstate electric transmission facilities pursuant to Section 216(h) of the Federal Power Act. The rule would require permitting entities to inform DOE of requests for authorization, establish a process for applicants of federal authorizations for non-qualifying projects to request DOE assistance, assign a federal lead agency to compile a single environmental review document, and establish intermediate and final deadlines for the review of federal authorization decisions.
- Linda Davis provided a summary of comments on the Notice of Proposed Rulemaking.
- The Task Force noted that stakeholder outreach and explaining the purpose and need of the project is integral to project success.
- The nine-agency federal MOU gives direction on the rule's intentions. Laura Morton iterated that the goal is federal coordination, but with a hope to bring tribal and state entities on board.
- Linda Davis encouraged the Task Force to review the Sonoran Memo (in [handout](#) available online) for ideas on collaboration.
- WGA will notify the Task Force when the rule is published. The Task Force will decide at that time whether to issue comments as a WGA Task Force.

X. WGA 'Information Exchange' Discussion

The Task Force discussed the idea of an Online File Cabinet of key documents and resources needed for siting, an online SWAT team for addressing issues, and hosting various workshops and webinars. Handouts for this section can be found at this link: [Handouts](#).

- There are many existing informative documents and examples that could help educate permittees and Task Force members. Linda Davis asked for feedback from the Task Force on how to store and share this information (e.g. wiki page, SharePoint, blog posts, etc.) as well as what the best method is for Task Force members to solicit information.
- Information gathered will be housed on the WGA Task Force site at first and may be incorporated into a federal site at a later time.
- The goal of the file cabinet is to share information that would:
 - Improve overall coordination;
 - Reduce inefficiencies;
 - Expedite permitting processes; and
 - Reduce barriers to permitting.
- The following considerations/questions were discussed:
 - Who is the audience?

- What is the file cabinet's clear mission statement?
- How should information be categorized?
- What are the criteria for setting up an information exchange?
- How do you link to other sites?
- Long-term, would this information be housed on WGA's website or would there be a separate information clearinghouse?
- The Task Force brainstormed valuable information to store:
 - Existing process/roadmap information;
 - Examples of stakeholder outreach (newsletters, fact sheets, templates for stakeholder involvement);
 - Links to agency project sites;
 - Data tools;
 - Environmental review document samples;
 - Documents in both PDF and MS Word formats;
 - MOUs;
 - State/agency contacts;
 - Information on what a good preliminary siting looks like; and
 - Information needed for NGO review.
- There should also be a process in place to ease information sharing and use of the file cabinet. It was indicated that it will only be as useful as it is used and updated.
- The file cabinet should inform a gaps analysis to help the WGA influence policy issues that cause siting delays.

Next Steps Regarding the Online File Cabinet

Goal: Develop a single place online where those involved with transmission line siting can get examples of key documents and links to key sites. Initially, the WGA website would host the file cabinet. Overtime, this information may be merged into a federal website hosted by CEQ or some other part of the federal government. Purpose of the online file cabinet would be to improve coordination, expedite the planning process, and organize materials to help solve problems.

Who: WGA, Review team (Olivia (in Jack Haenichen's office), Jeremy Lewis, Christopher Worley), and WGA consultant.

What:

- Consultant collects key documents, handbooks, trainings, and videos from WGA, CEQ, Task Force members and others.
- Consultant summarizes content and proposes organizational method for Review Team's consideration. System should be able to merge with potential federal system. Proposal should include mechanism for updating regularly.
- Consultant analyzes information and roadmaps (from above step) to identify major gaps and delays in the process.
Report back to Task Force.

Online SWAT Team

The Task Force discussed whether an online "SWAT team" to blog about and share information would be helpful and a good use of resources. The Task Force agreed that there is a need for

information sharing, but that Task Force members are more likely to contact each other individually for information, or pose questions at Task Force meetings.

Workshop, Webinars and Training

- The Task Force discussed the need for ongoing workshops about transmission permitting and siting.
- It was noted that the Task Force time is best utilized discussing ways to improve permitting efficiencies, proactively identify problems and discuss policy solutions. Workshops should be used sparingly to mobilize and engage stakeholder groups (e.g. state and federal agencies).
- Potentially useful workshops would be:
 - High-level workshop tailored to experienced stakeholders
 - Identifying corridors and opportunities before permitting
 - Transmission 101 for local governments/county associations/local opinion leaders/county commissioners (video format?)
 - Case studies (what worked and why)
- It was noted that there are many existing workshops and resources available from:
 - WECC (two-day workshop)
 - FERC (on FERC Order 1000 and other topics)
 - Edison Electric Institute (EEI)
 - TransmissionHub
 - Argonne National Lab
 - Occupational Safety and Health Administration (OSHA)
 - Western Resource Advocates document on transmission lines:
http://www.westernresourceadvocates.org/media/pdf/SmartLines_Final.pdf
 - Sonoran Institute Transmission Resources library:
<http://sonoraninstitute.org/powerline/powerline-resources.html#TransRes>

Next Steps for Workshops/Webinars/Trainings

Goal: WGA hold workshops aimed at solving problems. Topics are likely to be those identified by the gaps above and/or those needed for specific audiences.

Who: WGA and the facilitator.

What:

- Develop workshops list for the Task Force to consider under the following categories:
 - Case studies to illustrate what approaches are working well or poorly.
 - Videos to educate the public and country officials;
 - New tools that are available
- Jack Haenichen to research whether Electronic Power Research Institute (EPRI) offers an electricity transmission 101 workshop.
- John Shepard to provide a video overview on the need for interstate transmission.
- Headwaters Economics and the Sonoran Institute are looking to present a workshop on Right-of-Way issues. The likely meeting dates are January 14 and 15 in Arizona.

ATTACHMENT A

ATTENDEES AT THE OCTOBER 1-2, 2012 WGA TASK FORCE MEETING

PARTICIPANTS		
Mark	Anderson	WA Department of Commerce State Energy Office
Jeffrey	Barrett	Utah Office of Energy Development
Paul	Caldara	Colorado Public Utilities Commission
Todd	Cornett	Oregon Department of Energy
Stacey	Crowley	Nevada Office of Energy (Phone)
Linda	Davis	WGA
Robert	Deibel	US Forest Service
Doug	Dockter	Idaho Power Company
Loyd	Drain	Wyoming Infrastructure Authority
Pam	Eaton	The Wilderness Society
Rod	Fisher	PacifiCorp/Rocky Mountain Power
Judy	Grau	CA Energy Commission (Phone)
Angie	Grooms	Duke Energy
Julia	Haggerty	Headwaters Economics (Phone)
Jack	Haenichen	AZ Governor's Office of Energy Policy
Keary	Hallack	Xcel Energy (Day 2)
Rich	Halvey	Western Governors' Association
Larry	Keith	Tetra Tech
Bill	Killam	URS (Day 2)
Jeremy	Lewis	Western Resource Advocates
Rich	Lindsey	CSG-west
Dan	Lloyd	MT Dept. of Commerce, Energy Promotion and Develop.
John	Lupo	Xcel Energy
Laura	Morton	Council on Environmental Quality
Kristi	Parker Celico	Kearns & West
John	Shepard	Sonoran Institute (Phone)
Tom	Stoops	TetraTech
Dave	Warren	Washington PUD Association
Madeleine	West	Western Governors' Association
Laurie	Woodall	URS Corporation
Christopher	Worley	Colorado Energy Office
Carl	Zichella	NRDC

ATTACHMENT B

KEY DOCUMENTS AND LINKS NOTED DURING THE MEETING

- Bureau of Land Management Cooperating Agency MOU: http://www.blm.gov/pgdata/etc/medialib/blm/wo/Planning_and_Renewable_Resources/NEP_S.Par.93370.File.dat/BLM_DeskGuide_CA_Relationships.pdf
- Bureau of Land Management Instruction Memorandum for agencies to use CHAT information: http://www.blm.gov/wo/st/en/info/newsroom/2012/january/NR_01_13_2012.html
- Cascade Crossing MOU: <http://transmission.bpa.gov/planproj/PGEMOUnNo.pdf>
- Edison Electric Institute State Generation and Transmission Siting Directory: http://www.eei.org/ourissues/ElectricityTransmission/Documents/State_Generation_Transmission_Siting_Directory.pdf
- Fact sheet on FERC Order 1000: <http://www.ferc.gov/media/news-releases/2011/2011-3/07-21-11-E-6-factsheet.pdf>
- Federal Plan: http://permits.performance.gov/sites/all/themes/permits2/files/federal_plan.pdf
- Great Lakes Consortium Roadmapping Initiative: http://www1.eere.energy.gov/wind/pdfs/great_lakes_offshore_wind_energy_consortium_mou.pdf
- Holland & Hart Transmission Siting in the Western United States: Overview and Recommendations Prepared as Information to the Western Interstate Energy Board: http://www.dora.state.co.us/puc/projects/TransmissionSiting/SB11-45/SitingDocuments/TransmissionSitingWesternUS_forWIEB08-2009.pdf
- National Renewable Energy Laboratory Geothermal Energy Resource Library: http://www.nrel.gov/learning/ep_geo_elec_production.html
- Nine-agency MOU: <http://www.ferc.gov/legal/maj-ord-reg/mou/mou-transmission-siting.pdf>
- Oregon Hydroelectric Application Review Team Duties: <http://www.oregonlaws.org/ors/543A.400>
- SF 299: <http://www.gsa.gov/portal/forms/download/117318>
- Sonoran Institute Transmission Resources library: <http://sonoraninstitute.org/powerline/powerline-resources.html#TransRes>
- Western Resource Advocates document on transmission lines: http://www.westernresourceadvocates.org/media/pdf/SmartLines_Final.pdf
- Wyoming's Roadmap to Permitting: <http://wyia.org/documents/reports/mapping-the-transmission-process-in-wyoming-by-tetrattech>