



# Manual 19 - Attachment B: Load Forecast Adjustment Guidelines Changes

Planning Committee

October 3, 2023

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Resource Adequacy Planning

- Manual 19: Load Forecasting and Analysis

Cover to cover review

Attachment B: Load Forecast Adjustment Guidelines

Attachment A: Load Drop Estimate Guidelines  
Attachment C: Residential Non-Interval Metered Guidelines  
Attachment D: Peak Shaving Adjustment Plan and Performance Rating

- The Load Adjustment section was added during Revision 26 (11/01/2014)
  - Added to provide guidelines for load forecast adjustments and examples.
- Recently the types, number, and magnitude of load adjustment requests PJM has been receiving are more significant so updates to M19: Attachment B will provide additional clarity.

## PROBLEM / OPPORTUNITY STATEMENT

PJM is updating language in Attachment B in the Load Forecasting and Analysis Manual, M19. PJM uses the guidelines in M19 Attachment B to coordinate the process for large load adjustment requests from Electric Distribution Companies and how they are then incorporated into the annual load forecast. Attachment B was first added in late 2014. In recent years, the number and magnitude of requests have increased and have become increasingly consequential in gauging future load growth. This is an opportunity to provide more clarity to the timeline and expectations for involved parties.

### ***Key Work Activities and Scope***

1. Review PJM Manuals
  - a. Manual 19: Load Forecasting and Analysis – Attachment B: Load Forecast Adjustment Guidelines

### ***Expected Deliverables***

1. Revised PJM Manuals
  - a. Manual 19: Load Forecasting and Analysis – Attachment B: Load Forecast Adjustment Guidelines

### ***Decision-Making Method***

Quick Fix

### ***Stakeholder Group Assignment***

Planning Committee

- Earlier review with LAS in September/October to provide PJM and stakeholders more time to review potential load adjustments.
- PJM is requesting more granular (hourly) data along with a 15 year forecast of load adjustment.
  - Any confidential data will not be shared externally
- Any adjustment that is reflected in the Load Forecast will require a public document describing method and forecast from the EDC/LSE. This public document will be posted with the load report materials.

The intention of these guidelines is to ensure that any adjustments made to PJM's load forecast model are properly identified, estimated, and reviewed prior to incorporation into the forecast. ~~In the below section, shift will refer to the total load change and adjustment will refer to the amount above/below the current load.~~

Removed sentence as it added more confusion and shift/adjustment are not defined terms.

## Issue Identification

- PJM annually solicits information from its member Electric Distribution Companies (EDC) and/or Load Serving Entities (LSE) for large load shifts (either positive or negative and located in their territory) which are known to the EDC and/or LSE but may be unknown to PJM. PJM will send the request in mid-July with responses expected in time for any proposed adjustments to be reviewed with the Load Analysis Subcommittee in September/October. Industry groups and/or large end-use customers who anticipate large load adjustments should engage with their EDC and be transparent with as much information (historical and forecast) as possible.

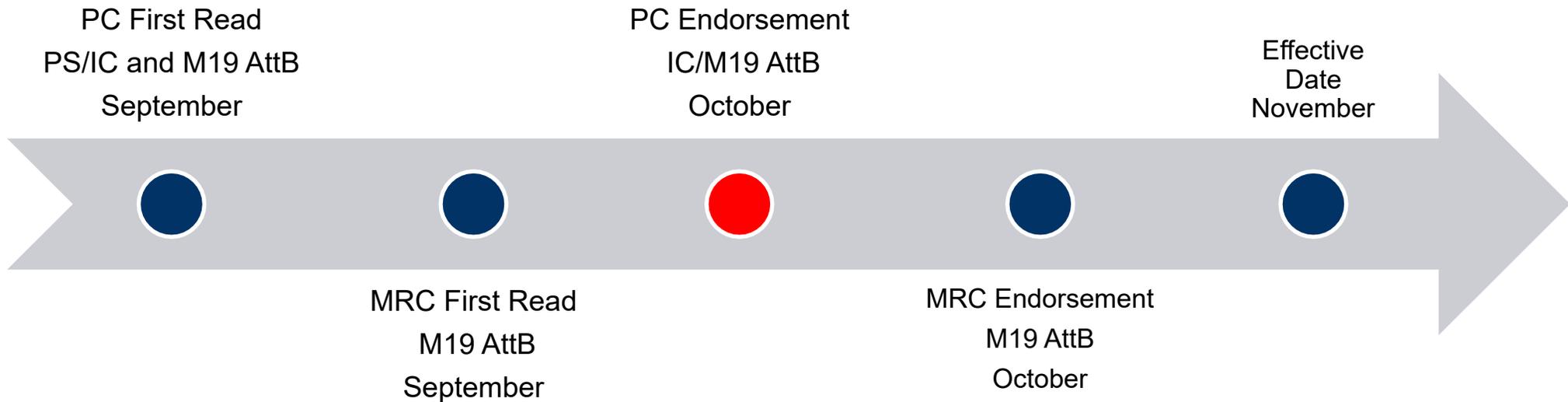
Added highlighted words to clearly state requestor is requesting load in their territory.

**Issue Verification** – verify that identified issue is real and significant, using the following methods:

- Determine if the load change has been publically acknowledged through the media, press release, regulatory process, etc.
- Verify that requesting EDC and/or LSE has or will adjusted its own financial/planning forecast. When appropriate the requesting EDC and/or LSE should provide PJM, on a confidential basis, with the certainty backed by a Letter of Agreement and/or Electric Service Agreement (LOA/ESA).

Added highlighted words to note confidential data shared with PJM will be kept strictly confidential.

- At today's meeting:
  - Seeking approval of Issue Charge
  - Seeking endorsement of Manual 19 Attachment B language redlines



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**Manual 19 - Attachment B: Load Forecast  
Adjustment Guidelines Changes**



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