



ADMINISTRATIVE RULES OF MONTANA



38.5.2023 PLANNING PROCESS

- (1) A utility shall designate and engage with an advisory committee according to 69-3-1208, MCA. The utility shall meet with the advisory committee on a regular basis as it prepares resource plans. Utilities shall open meetings with the advisory committee to the public whenever possible, but may close meetings or portions of meetings when proprietary information is discussed or when necessary to enable the committee to provide a more complete review, evaluation, or recommendation. A utility shall engage with the committee before deciding to close a meeting to the public.
- (2) In addition to the advisory committee, a utility shall engage stakeholders and the public during the process of preparing a resource plan. A utility must publicly notice engagement events at least 14 days in advance and provide meeting materials in advance to the greatest extent possible. A utility shall present to stakeholders in a transparent, understandable manner the results of completed steps in the planning process and plans for subsequent steps and shall provide an opportunity to comment on or request items to be addressed in a plan. A utility may combine meetings with the public, stakeholders, and the advisory committee.
- (3) A utility shall engage a broad cross-section of its customers (based on demographic, geographic, and service classification characteristics), including representatives of customer segments with low, moderate, and fixed incomes and highly impacted communities, on issues related to future service and resources that may be of interest to non-experts.
- (4) At the start of each planning cycle, a utility shall engage with the advisory committee and stakeholders to develop a work plan and timeline, including the frequency of meetings with the advisory committee, for completing the assessments and preparing plan contents required in ARM 38.5.2022. The work plan must include a structured process for submission of written inquiries and comments to the utility during the planning process and written responses by the utility. The work plan shall also address procedures for access by the advisory committee to the utility's planning model during the planning process.
- (5) A utility shall publish a draft of its resource plan at least 70 days before filing the resource plan with the Commission and accept comments on the draft resource plan for at least 55 days.
- (6) A utility shall file a resource plan every three years.

Authorizing statute(s): 69-3-1204, MCA

Implementing statute(s): 69-3-1204, 69-3-1205, 69-3-1208, MCA

History: NEW, 2023 MAR p. 21, Eff. 1/14/23.