



Western Region Mutual Assistance Group <sup>SM</sup>

# WRMAG

## OPERATING PROCEDURES

### OCTOBER 2016

*Version 3*

## TABLE OF CONTENTS

<b>WESTERN REGION MUTUAL ASSISTANCE GROUP</b>	<b>I</b>
<b>OPERATING PROCEDURES</b>	<b>I</b>
<b>INTRODUCTION</b>	<b>3</b>
<b>1 WRMAG-EC ACTIVATION AND MOBILIZATION</b>	<b>4</b>
1.1 WRMAG-EC ACTIVATION CRITERIA .....	4
1.2 WRMAG-EC ACTIVATION STEPS.....	4
<b>2 WRMAG JOINT CONFERENCE CALL PROCEDURES</b>	<b>5</b>
2.1 WRMAG JOINT CONFERENCE CALL PARTICIPATION .....	5
2.2 WRMAG JOINT CONFERENCE CALL INITIATION .....	6
<b>3 WRMAG-EC DEMOBILIZATION/DEACTIVATION</b>	<b>7</b>
<b>4 WRMAG AFTER ACTION REVIEW AND PROCESS IMPROVEMENT</b>	<b>7</b>
<b>5 APPENDICES</b>	<b>8</b>
5.1 APPENDIX A – NRE RESOURCE ALLOCATION TOOL/RAMP-UP.....	9
5.2 APPENDIX B – JOINT CONFERENCE CALL AGENDA .....	10
5.3 APPENDIX C – MUTUAL ASSISTANCE CHECKLIST .....	11

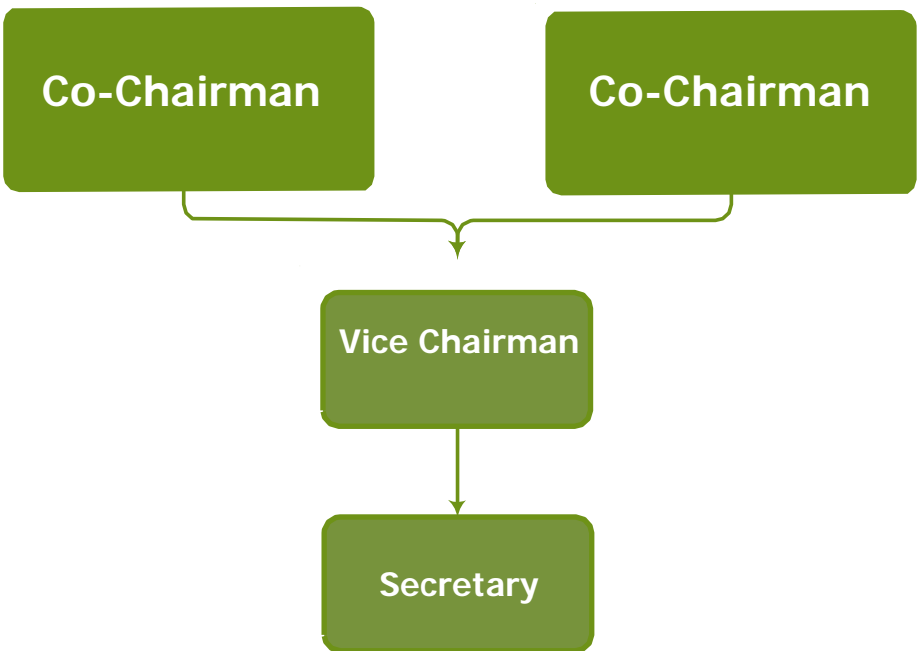
# Introduction

As directed by the Executive Committee of the Western Region Mutual Assistance Group (WRMAG-EC), the procedures developed herein are designed to provide guidance when interruption of electric service requires mutual assistance to be provided or requested in support of restoration of electric service when it cannot be restored in a safe and timely manner by the affected company or companies alone.

The approach taken recognizes the significant difference between work performed under normal circumstance and emergency restoration conditions. At any given time, each member utility may require and supply emergency assistance. Therefore, members have reached an understanding and will adhere to the formal contractual arrangements outlined in the Western Region Mutual Assistance Agreement (WRMAA).

The WRMAG-EC, in concert with its membership, will have responsibility for maintenance and revision of the Western Region Mutual Assistance Group Operating Procedures. Final acceptance of this document, including any future amendments, must be approved by three-quarters ( $\frac{3}{4}$ ) of the appointed and serving members of the WRMAG-EC and its participating members, each operating member company having one (1) vote in attendance at the WEI Mutual Assistance fall conference held annually

## WRMAG Executive Committee



## 1 WRMAG-EC Activation and Mobilization

Parties to the Western Region Mutual Assistance Agreement (WRMAA) may request assistance from any or all agreement participants. The primary path for requesting mutual assistance is outlined in the agreement and the activation of the WRMAG-EC may occur organically through criteria set forth herein or at the behest of WRMAA participants or WRMAG members.

### 1.1 WRMAG-EC Activation Criteria

Activation of the WRMAG-EC should meet the following criteria based on the actual/forecasted event and scope of work.

- The event is expected to or has impacted two or more western region utilities that will require mutual assistance support
- The resource requirements are greater than the western region utility-to-utility coordination can offer or that of any other state or regional association such as the California Utilities Emergency Association (CUEA)
- A National Response Event (NRE) has been activated and the WRMAG is required to participate in the resource allocation process in coordination with the National Mutual Assistance Resource Team (NMART) under the NRE framework (See [Appendix A – NRE Resource Allocation Tool/RAMP-Up](#))
- At the discretion of the WRMAG Co-Chairs

### 1.2 WRMAG-EC Activation

Activation Triggers of the WRMAG:

- A requesting utility may contact the WRMAG Co-Chairman to discuss the need for a WRMAG-EC activation.
- Western Energy Institute will host a Joint Conference Call with the requesting utility and the WRMAG Co-Chairman to discuss the requesting utility's request.
- The WRMAG Co-Chairman will either:
  1. Decide to activate the WRMAG-EC
  2. Decide not to activate the WRMAG-EC
  3. Reassess depending on resource needs

Activation Steps of the WRMAG Co-Chairman:

- Maintain situational awareness and stay well-informed of incidents of potential significance, and may communicate to the WRMAG membership at his or her discretion.
- Inform the balance of the WRMAG-EC team members and Western Energy Institute of the activation.
- Work with the Western Energy Institute to notify member utilities, as well as state and national consortiums (California Utilities Emergency Association and Edison Electric Institute), of the activation.

- Work with the Western Energy Institute to set up conference calls, as needed, to support activation and coordination efforts.
- Establish contact with the NMART during an NRE activation to ensure equitable and systematic allocation of resources (See [Appendix A – NRE Resource Allocation Tool/RAMP-Up](#) to report and track resources).
- Establish cadence and operational period timeframes for conference calls, operational briefings, and updates.

## **2 WRMAG Joint Conference Call Procedures**

Joint conference calls among the WRMAG-EC and member utilities are established to discuss effective coordination and mobilization of resources during major storms and other emergency events. These conference calls are intended to provide a platform to efficiently identify and allocate resources needed by impacted utilities.

### **2.1 WRMAG Joint Conference Call Participation**

Because emergency events tend to expand and impact more than one utility over time, members are encouraged to use the Joint Conference Call which:

- Provides members with the opportunity to understand the entire scope of the emergency, including the number of companies expecting to be impacted and the potential damage to each.
- Allows members to discuss and evaluate weather forecasts from different sources.
- Results in the most efficient, effective and equitable allocation of available resources while mitigating the financial risk associated with early mobilization of resources.

The following protocols should be adhered to while participating in or conducting a Joint Conference Call:

- Members understand and agree that participation on Joint Conference Calls is restricted to employees of member companies of the WRMAG, unless by invitation by the WRMAG-EC and mutually agreed.
- Members understand that conversations between member utilities during Joint Conference Calls may be confidential and proprietary. Therefore, with the exception of general deployment data / information, members agree not to share or release any information shared between member utilities during Joint Conference Calls unless mutually agreed.

## 2.2 WRMAG Joint Conference Call Initiation

Typically, the member that expects to be impacted first by an event will request the Joint Conference Call. Members agree to request a Joint Conference Call anytime they experience or are threatened by an event so significant that they anticipate needing resources beyond the capabilities of their neighboring (adjacent) utilities to restore their system. (See [Appendix B – Joint Conference Call Agenda](#) and [Appendix C – Mutual Assistance Checklist](#))

- During normal business hours, the requesting member will notify the WRMAG Co-Chairman to request a Joint Conference Call to discuss projected or real-time response.
- The WRMAG Co-Chairman or Western Energy Institute support delegate will contact all WRMAG members via e-mail, providing conference call information and confirm all members' participation.
- The WRMAG Secretary or Western Energy Institute delegate will serve as the call moderator who will: (See Appendix A – Joint Conference Call Agenda)
  - ☐ Call roll of member companies
  - ☐ Ask impacted utility(s) to present:
    - ✓ The weather forecast for the impacted utility(s) service territory
    - ✓ An estimate of predicted or existing impact / damages
    - ✓ Type of work to be performed such as distribution, transmission, vegetation removal, damage assessments, etc., and associated working conditions
    - ✓ Projected / required number of resources
  - ☐ Identify needs in other areas such as IT, safety, administrative, etc.
  - ☐ Ask non-impacted utility(s) to present:
    - ✓ Condition of service territory
    - ✓ Projected / available number of resources
  - ☐ Will lead discussion, when appropriate, regarding:
    - ✓ Staging areas to be used by assisting companies
    - ✓ Transportation concerns, such as evacuation orders, fuel availability, DOT exemptions, etc.
    - ✓ Availability of non-member resources (contractors) that may be available to assist impacted members
    - ✓ Identifying any emergency or disaster declarations (i.e., gubernatorial, presidential, etc.) that would support response efforts
  - ☐ Keep the call on track and minimize length of call whenever possible
  - ☐ Coordinate future Joint Conference Calls
- After every call, WRMAG Secretary or Western Energy Institute delegate will send out an e-mail providing a summary of the conference call discussion.

### **3 WRMAG-EC Demobilization/Deactivation**

Once coordination of Joint Conference Calls have concluded, coordination of mutual assistance engagement has been handed off with confidence to the requesting and responding utility(s), and ancillary support and needs have been satisfied, the WRMAG Co- Chairman will announce the demobilization / deactivation of the WRMAG-EC.

As part of the demobilization process, the WRMAG Secretary or Western Energy Institute delegate will compile all key documentation related to the mutual assistance engagement and ensure latest versions are archived to records repository.

### **4 WRMAG After Action Review and Process Improvement**

Subsequent to each WRMAG-EC activation, the WRMAG Co-Chairman will call for an after action review to be conducted with the key participants in the mutual assistance response engagement. The purpose of this review is to assess the response and identify any practices to sustain as well as potential improvement opportunities.

The after action review will be facilitate by the WRMAG Vice Chair with support from the Secretary and Western Energy Institute representative to record any resulting action items to be assigned as agreed upon by WRMAG-EC Executive Committee and member utility participants for assignment and completion timeline. AAR results will be made available for review either by email or at a conference to strengthen the WRMAG processes.

The WRMAG Secretary or Western Energy Institute delegate has the responsibility for tracking the completion of action items and ensuring distribution and posting of any resulting reports.

## **5 Appendices**

- 5.1 Appendix A – NRE Resource Allocation Tool/RAMP-Up**
- 5.2 Appendix B – Joint Conference Call Agenda**
- 5.3 Appendix C – Mutual Assistance Checklist**



## 5.1 Appendix A – NRE Resource Allocation Tool/RAMP-Up

NOTIFICATIONS

MENU

EXPORT TO EXCEL

EXPORT TO PDF

PRINT

*EVENT NAME ^	*EVENT START DATE/TIME	*EVENT TYPE	*TIME ZONE	*STORM / EMERGENCY TYPE	EVENT DESCRIPTION	*STORM / EMERGENCY NAME	*REQUESTED BY RMAGs	*REQ
2016_August18_other_TEST TEST TEST_NAMAG	08/18/2016 12:16 EST	RMAG	Eastern	other	TEST TEST TEST	TEST TEST TEST	NAMAG	Nator
2016_August24_Hurricane_Invest 99 (Hermine)_SEE	08/24/2016 20:06 EST	RMAG	Eastern	Hurricane	Tropical Disturbance	Invest 99 (Hermine)	SEE	Florida
2016_October14_Wind_Pacific Northwest Storm_WRMAG	10/14/2016 16:31 PAC	RMAG	Pacific	Wind	Wind-Rain Storm	Pacific Northwest Storm	WRMAG	Pacific Electri
2016_October3_Hurricane_Hurricane Matthew_SEE	10/03/2016 21:37 EST	RMAG	Eastern	Hurricane	Hurricane	Hurricane Matthew	SEE	Florida
2016_October6_Hurricane_Matthew_NAMAG	10/06/2016 11:47 EST	RMAG	Eastern	Hurricane	Hurricane	Matthew	NAMAG	Nator
2016_September12_other_emtest_DRILLMAG	09/12/2016 13:41 EST	RMAG	Eastern	other	emtest	emtest	DRILLMAG	Macro
2016_September22_other_Test_DRILLMAG	09/22/2016 21:52 EST	RMAG	Eastern	other	Email Test	Test	DRILLMAG	Macro

## 5.2 Appendix B – Joint Conference Call Agenda

JOINT CONFERENCE CALL AGENDA					
Facilitators:	WRMAG Secretary / WEI Delegate		Date:		Time:
Attendees					
Topic			Responsible		
Welcome and Roll Call			WRMAG Secretary / WEI Delegate		
Provide the following: <ul style="list-style-type: none"><li>Weather Forecast An estimate of predicted or existing impact / damages</li><li>Type of work to be performed such as distribution, transmission, vegetation removal, damage assessments, etc., and associated working conditions</li><li>Identify needs in other areas such as IT, safety, administrative, etc.</li><li>Projected / required number of resources</li></ul>			Impacted Utility Authorized Representative		
Provide the following: <ul style="list-style-type: none"><li>Condition of service territory</li><li>Projected / available number of resources</li></ul>			Non-impacted Utility Authorized Representative		
Roundtable / Miscellaneous: <ul style="list-style-type: none"><li>Staging areas to be used by assisting companies</li><li>Transportation concerns, such as evacuation orders, fuel availability, DOT exemptions, etc.</li><li>Availability of non-member resources that may be available to assist impacted members</li></ul>			WRMAG Secretary / WEI Delegate		
Next Joint Conference Call			WRMAG Secretary / WEI Delegate		

### 5.3 Appendix C – Mutual Assistance Checklist

# MUTUAL ASSISTANCE CHECKLIST

## INFORMATION FROM REQUESTING UTILITY

Date \_\_\_\_\_ Time \_\_\_\_\_

Recorded by: \_\_\_\_\_

Name

Title

Utility

Call Back Number

Cell Phone

Email

Requested by: \_\_\_\_\_

Name

Title

Utility

Call Back Number

Cell Phone

Email

Brief description of event (i.e., rain/wind/heat/fire storm, etc., in what area(s) of territory): \_\_\_\_\_

How many crews are needed? \_\_\_\_\_ 2-man crew(s) \_\_\_\_\_ 3-man crew(s) \_\_\_\_\_ 4-man crew(s) \_\_\_\_\_ 5-man crew(s)  
 \_\_\_\_\_ Transmission crew(s) \_\_\_\_\_ Washer crew(s) Work Hours (16 x 8)? \_\_\_\_\_

Are vehicles needed? ☐ Yes ☐ No 4-wheel drive required? ☐ Yes ☐ No Should they provide their own mechanics? ☐ Yes ☐ No

Type(s) of vehicles needed: ☐ Digger/Derrick ☐ Bucket ☐ Trailers ☐ Other? \_\_\_\_\_

Description of work: \_\_\_\_\_

Description of terrain where the work will take place: \_\_\_\_\_

Crews should plan on arriving no later than: \_\_\_\_\_

Duration of engagement / commitment will be approximately how long? \_\_\_\_\_

Where is the crew staging area? \_\_\_\_\_

What type of tools should the crew bring? \_\_\_\_\_

What type of clothing should the crew bring? \_\_\_\_\_

What materials, if any, should be requested? (i.e., poles, wire, etc.) \_\_\_\_\_

Weather forecast? \_\_\_\_\_

Who will be arranging lodging? (requesting utility typically handles) \_\_\_\_\_ ☐ 1 man or ☐ 2 men / room

Who will be arranging travel, if required? (i.e., ground transport from the airport) \_\_\_\_\_

Who will be the Mutual Assistance Manager coordinating with the responding utility?

Name

Office Location

Cell Phone

Office Phone

Email