

2026 MT Integrated Resource Plan Work Plan

Introduction:

Integrated Least-Cost Resource Planning and Acquisition is a continuous, adaptive, and systematic process that optimizes energy resource planning and procurement by: managing risk and uncertainty, integrating demand-side, distribution-side, and supply-side resources to minimize the long-term total cost of service, evaluating alternative resources using a broad range of attributes to determine cost-effectiveness, engaging stakeholders and the public throughout the planning process, and maintaining transparency and clarity for stakeholders, the public, and regulatory authorities.

Key Components of Integrated Least-Cost Resource Planning and Acquisition:

- Load Forecasting
- Existing Portfolio
- Candidate Resources
- Resource Adequacy
- Price Forecasting
- Market Interactions
- Transmission
- Regulatory Framework
- Risk

This Work Plan serves as a guide for completing the assessments and preparing plan contents required in ARM 38.5.2022. NorthWestern's process for developing the 2026 Integrated Resource Plan (IRP) is similar to its process for the 2023 IRP process except that NorthWestern has separated the Electric Technical Advisory Committee (ETAC) from broader stakeholder engagement as well as updates to our presence on our website, as described below. By having both the Stakeholder Working Group (SWG) and ETAC, NorthWestern Energy ensures that the IRP process is both technically robust and reflective of the broader public interest. In addition, NorthWestern will publish a complete Draft IRP no later than December 30, 2025, and receive public comments before filing the final IRP no later than April 30, 2026.

ETAC is an advisory body established by NorthWestern Energy to provide input and recommendations on various issues related to the electricity system as part of the development of the IRP process. ETAC membership was selected to balance the interests and expertise from consumer advocacy groups, government agencies, business concerns, and academia in areas such as residential affordability (including low-income), economic development, environmental quality, regional power and transmission markets, consumer interests, and regulatory oversight. Specifically, ETAC is comprised of 6-8 entities who are able to serve in an advisory role based on their experience. The primary goal of ETAC is to function as technical advisors through discussion, education, and collaboration on matters related to Integrated Least-Cost Resource Planning and Acquisition.

ETAC members will be granted access to PowerSIMM, the modeling software utilized for Northwestern's resource planning, via login credentials to help better understand and provide constructive feedback. By involving a wide range of stakeholders, ETAC helps NorthWestern Energy make more informed decisions that reflect the needs and priorities of its customers and the communities it serves.

The SWG is a working group developed to serve as a platform for a broad range of perspectives to inform the development of the IRP that align with the best interests of NorthWestern Energy's customers and stakeholders. The mission of the SWG is to facilitate open dialogue around NorthWestern Energy's IRP, providing opportunities to share diverse opinions on the planning process, analysis, and contents. The SWG is distinct from ETAC. While ETAC provides technical expertise and recommendations on issues related to the electric system, SWG offers a broader range of perspectives, including those from non-technical backgrounds. The SWG focuses on ensuring transparency, inclusiveness, and a comprehensive understanding of how IRP decisions affect different segments of the population. To ensure effective collaboration, the SWG is limited to a maximum of 20 members, representing various sectors. This cap ensures that the group remains small enough to facilitate in-depth discussions while being large enough to represent diverse viewpoints. NorthWestern Energy will utilize an application for interested individuals and select SWG members based on criteria including diversity of perspectives, relevant expertise, commitment to the process, geographic representation, and stakeholder impact. The selection process aims to ensure a comprehensive and representative group that can contribute meaningfully to the IRP development.

Furthermore, to address comments received in the last planning cycle NorthWestern Energy has made updates to our website in an effort to help support effective communication and collaboration with our stakeholders and the public. These key improvements, as described below, aim to enhance its robustness and functionality. Key improvements include:

- A dedicated Feedback Form has been implemented to facilitate structured input from users, enabling the collection of targeted insights to inform continuous improvement
- All relevant ETAC meeting materials are now readily accessible through the IRP Library section of our website, promoting transparency and fostering informed participation
- Easier access to the MT Electric Supply Planning page by placing it under the About Us tab on the website

Workplan:

Phase 1: Data Collection and Stakeholder Identification

Timeline: January 2023 – April 2025

Objective:

Define the Scope of the Integrated Resource Plan, identify stakeholders and gather necessary data.

Tasks:

1. Data Collection and Analysis
2. Establish Planning Assumptions
3. Stakeholder Identification and Engagement

Key Milestones

- Identify Electric Technical Advisory Committee members: December 2023
- Identify Stakeholder Working Group Members: April 2025
- Establish Planning Assumptions: April 2025

Phase 2: Electric Technical Advisory Committee and Stakeholder Working Group

Timeline: December 2023 – March 2025

Objective:

Engage

Tasks:

1. Establish Electric Technical Advisory Committee
2. Establish Stakeholder Working Group
3. Provide PowerSIMM Access to ETAC members

Key Milestones

- Establish Electric Technical Advisory Committee and Stakeholder Working Group: May 2025

2026 MT - ETAC & SWG Meeting Schedule (Tentative – Subject to Change)

Meeting	Date	Time	Topics
1	December 5, 2023	0930-1130	<ul style="list-style-type: none">• Introductions• Overview• Expectations
2	March 27, 2024	0930-1130	<ul style="list-style-type: none">• IRP Workplan Development• ETAC Timeline• Stakeholder Engagement Plan• PowerSimm Modeling and ETAC
3	June 27, 2024	0930-1200	<ul style="list-style-type: none">• Review Final IRP Workplan• Stakeholder Engagement #1 Discussion• Modeling scenarios
4	September 18, 2024	0930-1200	<ul style="list-style-type: none">• PowerSimm Education

			<ul style="list-style-type: none"> • Price Forecasting
5	December 18, 2024	0930-1200	<ul style="list-style-type: none"> • Modeling Inputs <ul style="list-style-type: none"> ○ Load Forecasting ○ New Resource Cost Modeling • Modeling Scenarios • PowerSimm Access
6	March 26, 2025	0930-1230	<ul style="list-style-type: none"> • Stakeholder Working Group • Updated IRP Work Plan • WECC – Resource Adequacy Discussion • New Resource Cost Modeling • Modeling Scenarios • PowerSimm
**	June 9, 2025	0900-1600	<ul style="list-style-type: none"> • Introductions • What is an IRP? • Scenarios and Sensitivities • Candidate Resources • Activity • Load Forecasting • DSM • Transmission Overview • Western Resource Adequacy Program • 2023 IRP feedback from stakeholders • 2026 IRP Workplan Review
7	June 25, 2025	0930-1230	<ul style="list-style-type: none"> • Stakeholder Working Group • Form Energy • PowerSimm Login • Website Updates • Costs Discussion • Updates
**	July 2025	0900-1600	<ul style="list-style-type: none"> • TBD
8	September 3, 2025	0930-1230	<ul style="list-style-type: none"> • Review of final modeling outputs • Draft Plan Check-In
***	September 10, 2025	TBD	<ul style="list-style-type: none"> • PRESENTATION ONLY • Review of final modeling outputs • Review Draft Plan

9	December 17, 2025	0930-1230	<ul style="list-style-type: none"> • Presentation of Final Draft IRP
***	December 18, 2025		<ul style="list-style-type: none"> • PRESENTATION ONLY • Presentation of Final Draft IRP
*	March 20, 2026	N/A	MT IRP 2026 Filing with MPSC

* Denotes the Date for Anticipated 2026 MT IRP filing with Montana Public Service Commission

** Denotes Stakeholder Working Group

*** Denotes Public Webinar

Phase 3: Demand Forecasting and Resource Assessment

Timeline: December 2024– June 2025

Objective:

Assess future energy demand, evaluate existing portfolio, and potential candidate resources.

Tasks:

1. Load Forecasting including DSM Programs
2. Perform generation resource assessments
3. Evaluate demand response potential.

Key Milestones

- Load Forecasting and Resource Assessment: April 2025
- Scenario Development: April 2025

Phase 4: Candidate Resource Development and PowerSIMM Modeling

Timeline: December 2024 – December 2025

Objective:

Develop and complete capacity expansion and production cost modeling using PowerSIMM.

Tasks:

1. Define candidate resources and acquire costs
2. Develop scenarios and sensitivities
 - a. Incorporate transmission considerations
 - b. Quantify environmental externalities
3. Update PowerSIMM model
4. Perform scenario modeling

Key Milestones

- Establish Candidate Resources: April 2025
- Preliminary Modeling Complete: September 2025
- Final Modeling Complete: December 2025

Phase 5: Stakeholder Consultation and Feedback

Timeline: June 2025 – March 2026

Objective:

Engage stakeholders to review and refine the IRP deliverables.

Tasks:

1. Engage internal and external stakeholders for feedback
2. Document comments and responses
3. Review feedback and make adjustments as necessary

Key Milestones

- Internal and External Stakeholder Reviews: October 2025
- Engage Public for Feedback: October 2025

Phase 6: Reporting and Final Recommendations

Timeline: June 2025 – April 2026

Objective:

Finalize the IRP and present recommendations.

Tasks:

1. Prepare final report, clearly detailing compliance with regulatory and statutory requirements
2. Submit for internal review and approval
3. File with MPSC

Key Milestones

- Draft Plan Complete: September 2025
- Final Plan Complete: December 2025
- Internal and External Stakeholder Reviews: December 2025
- Open period for Public Comment: January 2026
- File MT 2026 Integrated Resource Plan with Montana Public Service Commission: March 2026

Comment Tracker Overview and Process

Purpose

To ensure clear and consistent communication between stakeholders and the NorthWestern during the planning process.

1. Submission Process

1.1 Accepted Formats

ETAC, Stakeholders, and the Public may submit written inquiries and comments via:

- **Online Form** (preferred method):
 - IRP Feedback Form posted on NorthWestern's Montana electric supply planning website (link below)
 - <https://www.northwesternenergy.com/about-us/gas-electric/montana-electric-supply-planning/feedback-form-electric-supply-meeting>
 - Each submission should include:
 - Name and affiliation
 - Contact information
 - Specific question or comment
 - Reference to category (e.g., Planning Process, Forecast, Markets, Transmission, Modeling Inputs, Candidate Resources, Cost Analysis, etc.)
 - Indication if a response is requested
- **Email:**
 - Preferred for ETAC and Stakeholder Comments Only
 - Email: nweetac@northwestern.com

1.2 Submission Timeframes:

- Written comments and inquiries may be submitted at any point prior to the formal draft IRP release.
- For formal comment periods (e.g., post-draft IRP release), submissions must be received by the posted deadline to be considered for the record.
- Inquiries submitted outside of formal comment windows may be responded to at the utility's discretion or addressed in future stakeholder engagement sessions.

2. Utility Response Process

2.1 Acknowledgement in Comment Tracker

NorthWestern will upload comment tracker prior to each ETAC session.

2.2 Response Timeline

- Responses will be provided by the next ETAC session unless specific questions reference inputs, costs, or other items that have yet to be refined. If this is the case, questions will be answered after the appropriate input and final decisions are made.

2.3 Responses

- Along with the comments, responses will be posted publicly on NorthWestern's website.

3. Recordkeeping and Transparency

- All comments formally submitted will be tracked and responded to in the comment tracker. This will become an appendix to the IRP.

4. Confidential Information

- If a question involves confidential or proprietary information, a response indicating this is confidential will be provide