



UMS Group Inc. SOS: Detailed Reliability Scoring



COMPANY

A US eastern IOU serving over 2.5 million customers, focusing this process on their Electric Distribution Planning and Reliability groups.



BACKGROUND & BUSINESS CHALLENGE

A long-time Spend Optimization Suite user engaged UMS Group to implement the updated SOS web application focused on their Electric Distribution business, specifically within the Distribution Planning and Reliability groups. With a newly developed business strategy, UMS Group worked with the company to translate this strategy into elements that would impact their spending decisions and, therefore, investment selection. Part of the engagement was also guiding the group through the necessary change management in order for the updated application to be a success.



"I wanted to share with you how much I love the streamlined archive process... Saves so much time and effort double checking and validating on my end!"

**- SOS Administrator/
Business Performance and Grid Planning**



APPROACH

Early on, it was identified that minimizing user input and driving consistency across user entries would be key to not only providing accurate, useful investment information/scoring but would also be key to driving acceptance of the application across the business. In an effort to facilitate both of the key objectives, UMS Group worked with the company to design and implement an automated reliability data upload feature. This upload features allowed the company to load circuit data, outage information, etc. into the background of the application which drove automatic historical calculations based on selected Regions, Districts and Circuits to provide guidance in terms of reliability impacts of a particular investment. In addition, this feature also allows for the ability to calculate reliability trends to assist users in estimating Risk of Deferral impacts, again driving accuracy and consistency across responses.

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RESULTS

Through utilization of the Spend Optimization Suite application, the company was able to drive more consistent and accurate investment evaluation while being able to reduce the amount of effort and time to develop a budget plan for the upcoming year.

Ongoing, they continually update the application to keep it current with the evolving business environment and priorities, and enhance their scoring algorithms to incorporate better data and more detailed views of historical and expected performance to improve their decision making.



HIGHLIGHT: MANDATORY REDUCTION

The company started the process with high levels (~80%) of projects classified as mandatory, leaving little in the budget for discretionary spending. This process, with tight definitions and a focused review process on classifications, drove the mandatory down significantly to below 40%.



HIGHLIGHT: RELIABILITY SCORING

As noted in the Approach section, the company wanted to incorporate historical outage data from their Outage Management System (OMS) into their reliability scoring, so UMS Group developed new scoring pages to utilize 5 years of OMS data. This provides project scorers with the historical data for their impacted circuits and outage cause codes right on the scoring pages, and allows them to adjust estimates, saving time and driving improved scoring consistency. They subsequently added additional historical data to better compare their performance to target, helping to increase focus on poorer performing circuits.

Auto-filtered lists to easily select circuits

Automatic calculation of number of customers based on selected circuits for user reference

Automatic determination of "worst-performing circuit" impact based on admin-designated number of x top worst performers

Auto-population of historical outages on selected circuits for selected cause codes as well as a trended increase value

	Historical Circuit CI	Estimated Recurring Interruptions Impacted by Project	Estimated CI Eliminated by Project	CI Eliminated by Project
Line Mal/Equip Failure	1,113	100%	1,113	1,113
Overhead	23	100%	23	23
Planned	43	100%	43	43
Total	1,179	1,179	1,179	1,179

	Historical Circuit CI	Estimated Recurring Interruptions	Copy CI Eliminated	Estimated Increase (Based on 5-yr Trend)	Eliminated in CI
Line Mal/Equip Failure	1,113	1,113	1,113	63	63
Overhead	23	23	23	9	9
Planned	43	43	43	72	72
Total	1,179	1,179	1,179	155	155

Total CI Given Deferred: 1,314