



TEXAS RE

Training Exercises

**Adam Ingram
Duquesne Light**

March 25, 2025

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Upcoming Texas RE Events



talk with
TEXASRE

April 1, 2025

IBR Work Plans
and Registration



talk with
TEXASRE

April 8, 2025

Trends for New
Registrants



talk with
TEXASRE

May 20, 2025

Summer Outlook



Upcoming Texas RE Events



April 23, 2025

Spring Standards,
Security, &
Reliability
Workshop



May 14, 2025

Q2 MRC, AGR&F, and
Board Meetings



July 16, 2025

Evolving Grid
Workshop



Upcoming ERO Enterprise Events

NERC

NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION



Date	Event
March 25-27	Physical Security Workshop (SERC)
March 25-27	Reliability & Security Workshop (WECC)
April 2	Application of IBR Practice Guide Workshop (SERC)
April 3	2025 Virtual RAM Conference (MRO)
April 8-10	System Operator Conference 1 (SERC)
April 10	GridEx VIII Preparation Webinar (MRO)



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Modern Day Exercises in the Energy Sector

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Safety Message

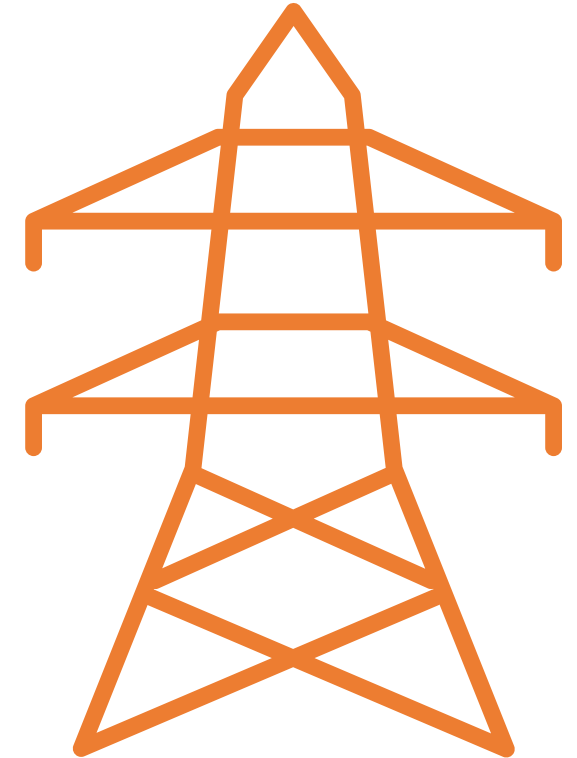
Test every six months, replace every 10 years



Overview and Today's Objective

My objective: I want you to take something away that will impact your organization and/or reshape your thinking on an industry 'standard'.

- Some of What We Will Talk About:
 - Resilience
 - Develop Bench Strength
 - Partnerships
 - Exercises
 - Leadership During Exercises
 - Team Building During Exercises
- This isn't a lecture as much as it is a discussion, please use the chat.
- Participation is strongly encouraged!



Bottom Line Up Front – Expectation Management



Bottom Line Up Front – Expectation Management



Where to Go Next

Bottom Line Up Front

- Read
- Start small—commit (really commit) to 3-5 tabletop exercises across the organization. Stay away from the world exploding, don't throw the entire kitchen sink at participants.
- Red team your greatest threats and hazards. If you do not have a developed Enterprise Risk Management or THIRA, red team to discover your greatest threats and hazards.
- Transformational leadership is not reserved for just executives or just Incident Commanders, but everyone.
- Understand that exercises must support the business.
- Don't be a 'no person.' Be the 'lets get to yes person.'
- SMART objectives are no longer enough for us in the energy sector.

Introduction





Start With the Basics

Level Set

- What challenges exist within the exercise environment today?
- What limitations do **you** have?
- Strategy defines the business, but is the 'resilience strategy' really defined?

The Why

- Exercises in the energy/electric sector are critical to maintaining safe, reliable power to customers around the world.
- We get plenty of repetitions without exercise, so why do it?



- The word 'resilience' over time—why is it increasing? Why is it a buzz word?

Resilience Background

- Resilience Theory, by Norman Garmezy (1991):
 - Made up from individual characteristics of the individual, close-knit relationship with the family, social support and structure outside immediate family.
- Other Scholarly Works on Resilience in Psychology
 - Luthar, S. S., Cicchetti, D., & Becker, B. (2000). The construct of resilience: a critical evaluation and guidelines for future work. *Child development*, 71(3), 543–562. <https://doi.org/10.1111/1467-8624.00164>
 - Zimmerman M. A. (2013). Resiliency theory: a strengths-based approach to research and practice for adolescent health. *Health education & behavior : the official publication of the Society for Public Health Education*, 40(4), 381–383. <https://doi.org/10.1177/1090198113493782>
 - Park, E. R., Luberto, C. M., Chad-Friedman, E., Traeger, L., Hall, D. L., Perez, G. K., Goshe, B., Vranceanu, A. M., Baim, M., Denninger MD PhD, J. W., Fricchione MD, G., Benson Md, H., & Lechner, S. C. (2021). A Comprehensive Resiliency Framework: Theoretical Model, Treatment, and Evaluation. *Global advances in health and medicine*, 10, 21649561211000306. <https://doi.org/10.1177/21649561211000306>

Philosophy of Integrated Resilience

- There are interdependencies everywhere, at every turn.
 - Water, Energy, Medical Services, Engineering, Transportation, Telecommunication, etc.
 - Finance, Asset Management, Capital Planning, Field Operations, Substations, Generation, Transmission, Distribution.
- Gone are the days of effective siloed responses (hint, hint, they were never effective).
- ICS, even a hybrid structure, does not equate to an integrated structure, and thus does not equate to resilience.
- Yes, or no? Exercises help achieve resilience, or rather they get you closer to organizational, integrated resilience.

Measurable Objectives, KPIs

- SMART objectives are no longer adequate.
- Time \neq Money; Time = Expense + Capital + Grid Optimization + Grants + People + Systems + Technology
- Definable Return on Investment and/or Return on Equity.
- Business Continuity frameworks, downtime logging, application disruptions.
- Number of activations and personnel involved.
- Average resolution time or total time in response, per incident/annual.
- Improvement planning items that are open (closed, in progress, time to close).



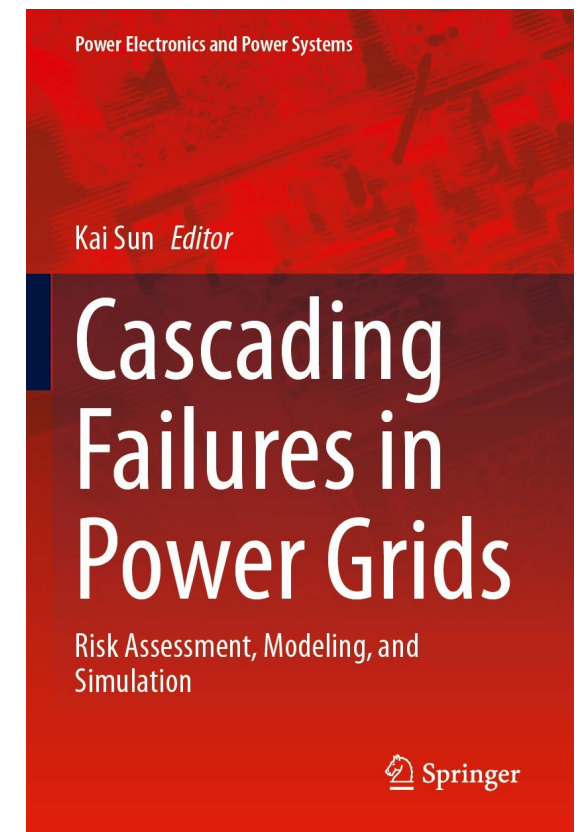
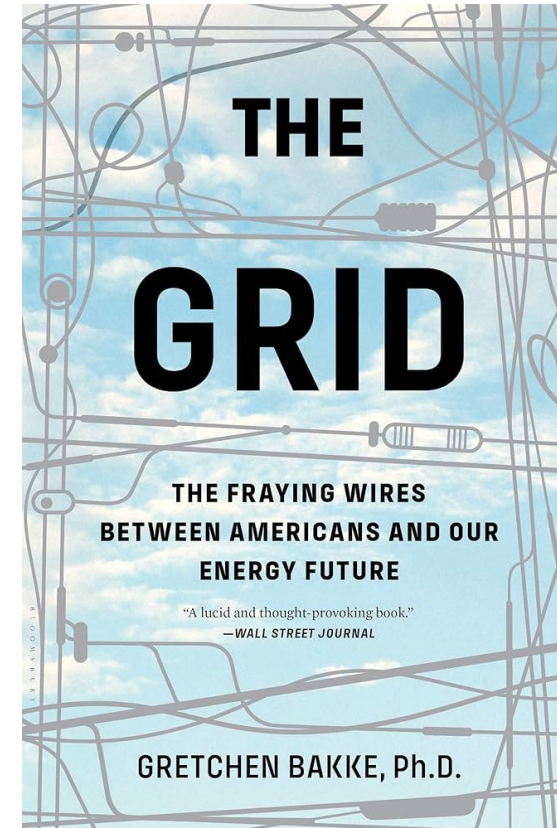
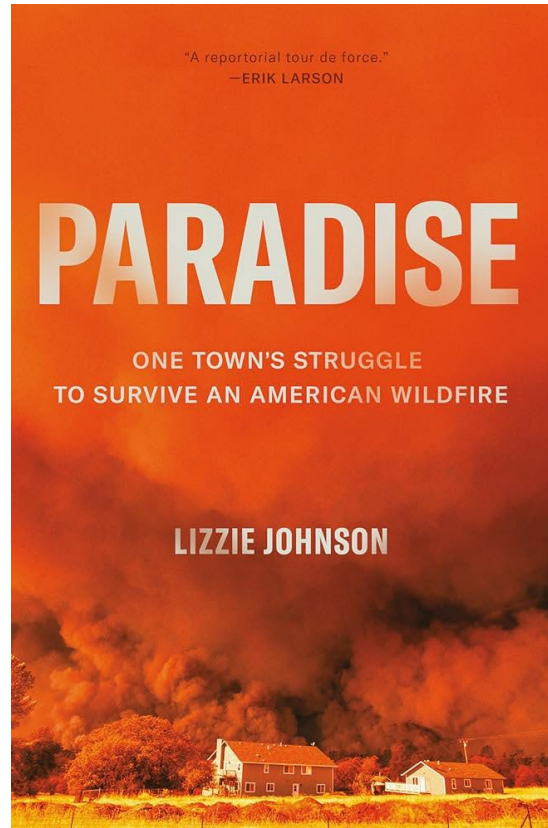
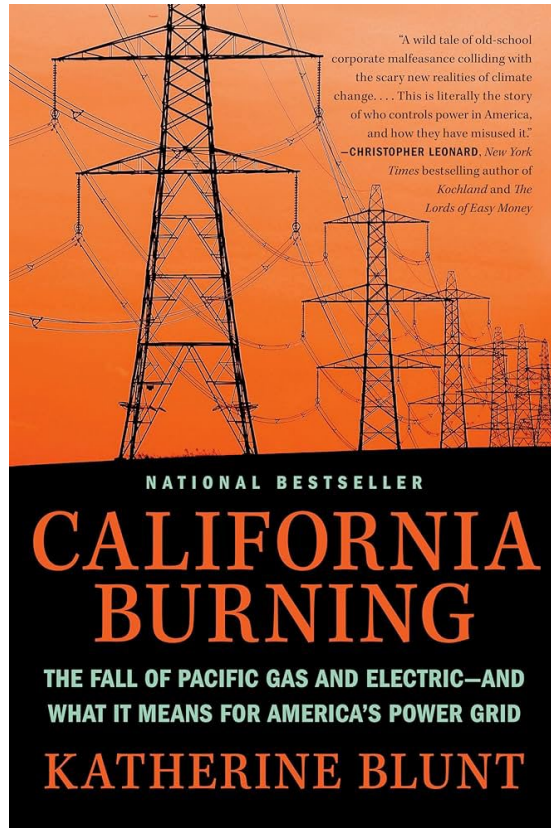
Adjustments in Thinking

Adjustment in Thinking

- Laying the foundation for what the grid is—do you understand the basics? Do you know more advanced aspects?
- How do you gauge your level of grid know how?
- When is the last time you and laid any electrical groundwork for non-engineers you work with/serve?
- What are you attempting to accomplish or provide?
- Wildfires destroy communities, but what led to the wildfire?
 - Broken transmission tower brackets that were 100 years old?
 - Strong wind knock down the conductors?
 - Someone attempting to start a fire?
 - Does it matter?

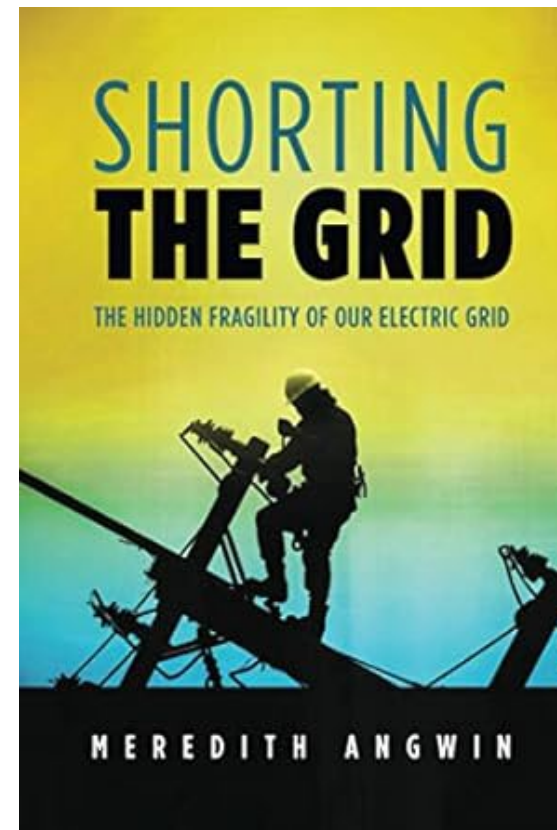
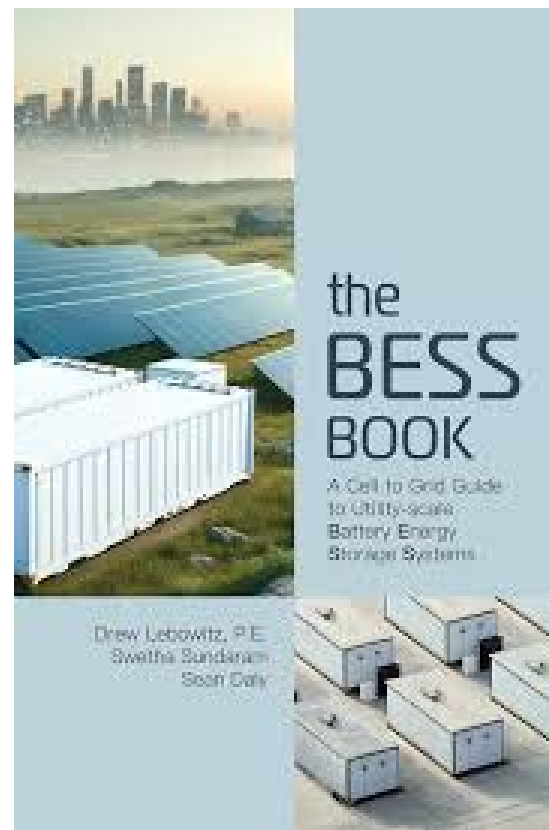
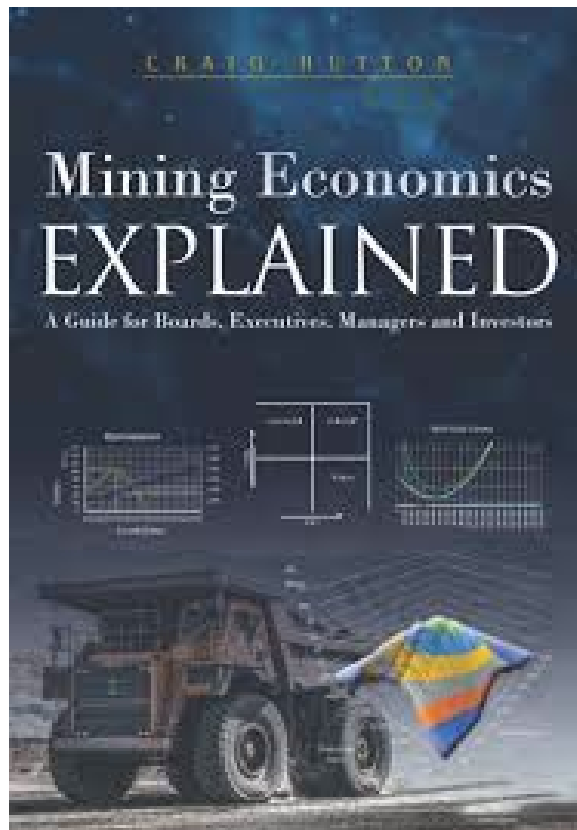
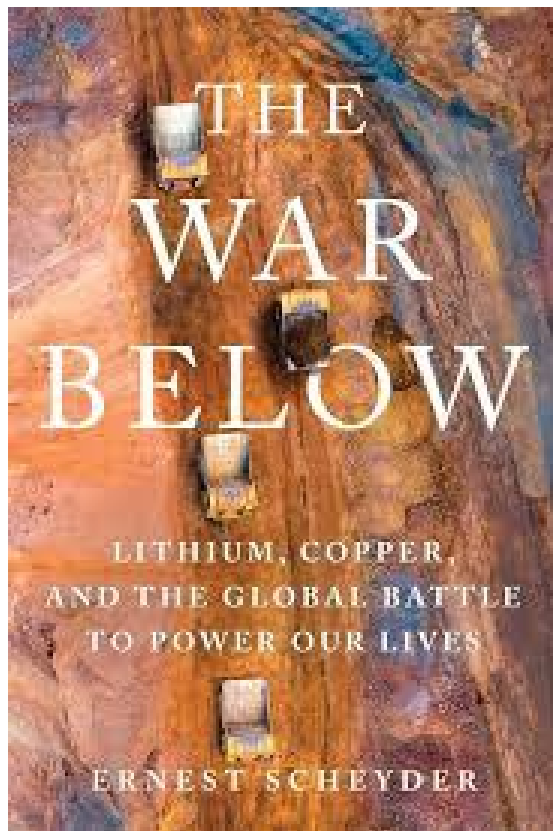
Recent Reads

“The book to read is not the one that thinks for you but the one which makes you think” -- Harper Lee



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Partnerships

Strategic Collaboration and Partnerships

- Interdependencies are everywhere- and not just in your business continuity, disaster recovery planning.
- You can't do this alone- we're in the technology connected 21st century world where information moves faster than your staff.
- Cross business exercises, private and public sector partnerships within exercises are paramount to overall safety and efficiencies.



<https://online.hbs.edu/blog/post/who-is-responsible-for-strategic-planning>

GridEx VI and GridEx VIII



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Group Exercise – Thinking Outside the Box

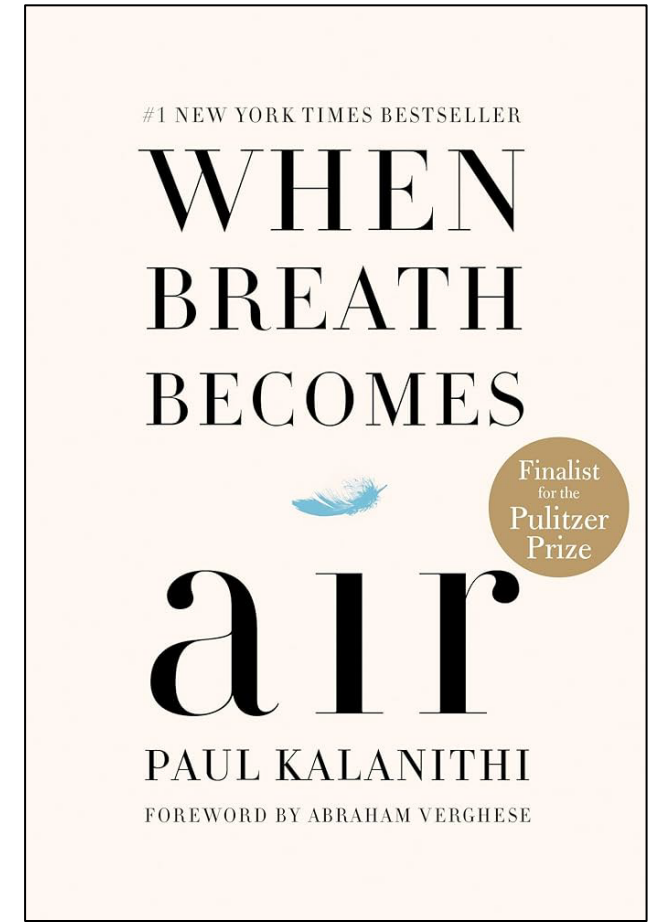
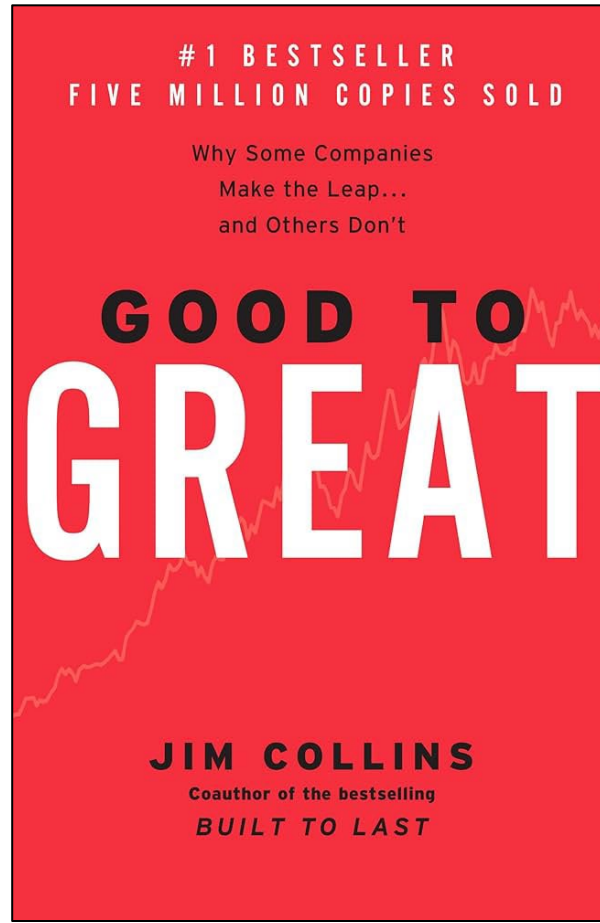
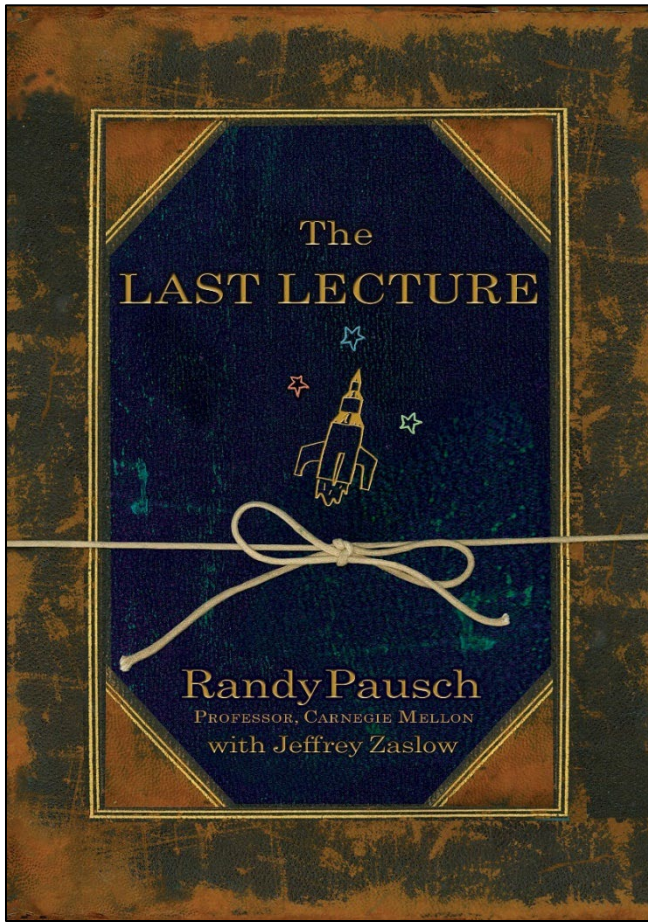
When aliens attack!

- Groups will build a bridge across the piers.
- Only spaghetti, marshmallows and cardboard may be used.
- Bridge must be wide and tall enough so a vehicle can drive across.
- Clearance under the bridge must allow vehicle to pass below.
- The bridge must be resilient and withstand strong winds, wave action, aliens, and concrete eating microbes.
- You may not use the internet to solve the problem.
- Additional instructions are in the packets at each table.
- You will need your table # to order at the warehouse.
- Warehouse A and B are located along the side of the room.

- The Incident Commander should open the packet and distribute the information sheets to the Section Chiefs. The IC has final authority over all decisions
- The Planning Section should IMMEDIATELY draw up the design
- The Finance Section will determine how to fund the building of the bridge
- The Operations Section can physically build the bridge
- The Logistics Section can move materials from the warehouse to the tables

Partnerships and Future Proofing

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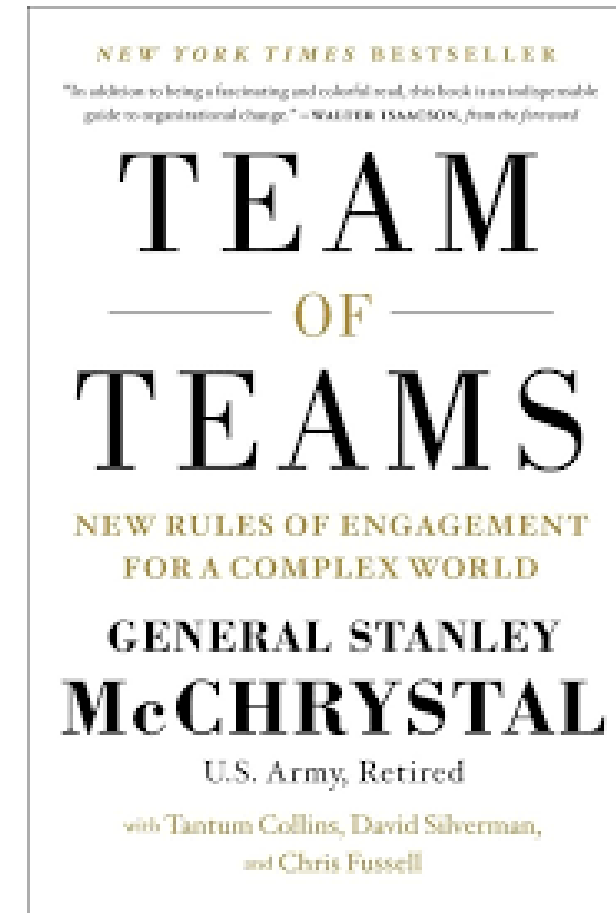
Leadership

Empirical Evidence on Leadership in Learning

- Bottom Line Up Front: Leaders that are engaged lead to better outcomes for everyone.
- Hallinger 2011: This paper aims to present a research-based model of leadership for learning. It argues that the field has made substantial progress over the past 40 years in identifying ways in which leadership contributes to learning and school improvement. Four specific dimensions of leading for learning are presented: **values and beliefs, leadership focus, contexts for leadership, and sharing leadership.**
- The paper finds that significant progress has been made in identifying the means by which leadership impacts on learning.
- Hallinger, P. (2011), "Leadership for learning: lessons from 40 years of empirical research", *Journal of Educational Administration*, Vol. 49 No. 2, pp. 125-142. <https://doi.org/10.1108/09578231111116699>

Leadership in Your Teams

- Drive organizational performance (including during responses and events).
- Driving performance can mean safer responses, more efficient responses, more fiscally responsible responses.
- Succession planning goes beyond day-to-day business functions—who is filling special assignment, incident roles?



Executive Leadership

- In a real-world incident—who makes the final decision?
 - Does authority match responsibility, and vice versa?
 - Do your senior and executive leaders participate in exercises?
 - Continuity of leadership, succession planning with exercises can get you farther than the regular board room around the horn.
-
- If executive leaders do not participate in exercises yet come in and make ‘executive’ decisions during a real-world event, they could be doing a disservice to your customers and response.
 - Don’t waste their time but get them engaged.



Where to Go Next

Where to Go Next, Again

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Questions?