



CALIFORNIA ISO

# **Market Redesign and Technology Upgrade Program (MRTU) Status Report**

Operations Committee Meeting

**General Session**

December 15 & 16, 2005



## MRTU Executive Summary

- Organizational Changes and Results
  - Project Visibility and Control
  - Schedule
  - Budget
  
- Program Update
  - First release of IFM/RTN work stream entered SAT
  - First release of SIBR work stream in SAT
  - First release of CRR work stream in SAT
  - Siemens delivery of all work streams continue to lag behind schedule
  - Several other project milestones are behind schedule
  - SaMC project currently being reviewed
  - PMO to confirm MRTU scope, schedule, and budget, based on SaMC and SOA decisions



# MRTU Project Tracking

MRTU Project Tracking Towards Integration Test					
Project	Pre-PMO Integration Target Date	Post-PMO Integration Target Date	Flag	Schedule Trend	Comments
Delivery of IFM	1/1/2006	5/31/2006	R	↓	- V0 SAT expected to complete on 1/16/06 - V0SP1 SAT expected to complete on 3/31/06 - Current IFM completion date will delay Integration Test start date
Delivery of SIBR	1/1/2006	3/27/2006	R	↓	- Downward schedule trend - C1/C2 SAT 90% complete - Currently C3 SAT completion date will delay R2 Integration Test start date - SIBR C4 timeline unknown
Delivery of SaMC	1/1/2006	5/24/2006	R	↓	
Delivery of MFRD	1/1/2006	1/30/2006	R	→	- Current MFRD completion date will delay R1 Integration Test start date
Delivery of CRR	1/1/2006	3/1/2006	Y	→	- Part of R2 Integration Test
Delivery of all Legacy Apps	1/1/2006	5/17/2006	Y	→	- Certain Legacy projects are at risk of falling behind schedule - Unknown scope and expectations around CAP
Delivery of PTR	1/1/2006	4/15/2006	Y	→	
Delivery of Portal	1/1/2006	4/30/2006	G	→	
Delivery of Integration Services	1/1/2006	5/31/2006	R		- Current MRTU integration approach is under review
Completion of Integration Test	4/28/2006	8/30/2006	Y	→	- Many applications are at risk to delay the start of Integration Testing
Completion of End to End Testing	6/30/2006	11/30/2006	Y	→	
Completion of Market Simulation	1/1/2007	4/30/2007	Y	→	- Original Market Simulation period scheduled for only 3 months
Training	2/28/2007	2/28/2007	G	→	
Communication	2/28/2007	2/28/2007	G	→	

## Key MRTU Risks

Risk	Mitigation Strategies
<b>SaMC</b> <ul style="list-style-type: none"> <li>• Base product performance and delivery uncertain</li> </ul>	<ul style="list-style-type: none"> <li>▪ MRTU SaMC project team to be reconstituted</li> <li>▪ PMO to perform audit of current SaMC project</li> </ul>
<b>Siemens delivery (IFM/SIBR)</b> <ul style="list-style-type: none"> <li>• Vendor 5 weeks behind schedule</li> </ul>	<ul style="list-style-type: none"> <li>• Full time on-site vendor manager to be installed</li> <li>• Obtain delivery commitment from Siemens corporate management</li> </ul>
<b>Application Interfaces</b> <ul style="list-style-type: none"> <li>• Significant delay in integration design and development</li> <li>• New Approach to system integration for ISO and Vendors</li> <li>• Significant integration schedule risk</li> </ul>	<ul style="list-style-type: none"> <li>• Utilize more traditional and proven integration approach.</li> </ul>
<b>State Estimator Project</b> <ul style="list-style-type: none"> <li>• Scope not prioritized</li> </ul>	<ul style="list-style-type: none"> <li>• Refine scope with proper priorities</li> <li>• Network Applications Manager recently hired</li> </ul>
<b>Open Scope/Policy items</b> <ul style="list-style-type: none"> <li>• Several open design items</li> </ul>	<ul style="list-style-type: none"> <li>• PMO currently reviewing all open design items</li> <li>• Installed rigorous scope management process</li> <li>• Need to set expectations with Market Participants</li> </ul>



## MRTU Program Schedule

- PMO has developed a comprehensive Program Schedule
- A pre-Summer 2007 Release is achievable with mitigation, February 2007 is not
- PMO closely monitoring schedule risks
- Outstanding Scope – Schedule Impact Undetermined, Budget Impact – best estimate \$5 M to 10M
- PMO will keep BOG and Stakeholders informed
- Publication of revised go-live date pending