



**First step:**  
 Proposer evaluates technology's value for ISO (markets and operations) and capability to perform pilot.

**Application**  
 Proposer completes the *ISO Pilot Proposal Evaluation Request Questionnaire* formalizing request for pilot consideration.

**Submission**  
 Completed form and soft copies of supporting documentation emailed to [smartgridpilots@caiso.com](mailto:smartgridpilots@caiso.com).

**ISO Review**  
 Checked for completeness and relevance to advancing strategic goals.

Modifications may be requested or pilot deemed incomplete or invalid.

**Value Assessment**  
 Proposal evaluated based on established criteria including:

- Support required
- Timeframe and funding
- Opportunities and benefits for markets/policies and participants
- Objective, approach and measurement of success
- Technology innovativeness, dependability, pertinence
- Feasibility

**Impact Assessment**  
 Impacts in supporting the pilot will initially be assessed.

**Objective Matrix Developed**  
 Proposer/ISO collaborate in developing pilots' objective matrix including timing and success measurements.

**Acceptance Letter**  
 Proposer receives acceptance letter from ISO outlining terms and conditions to be met for pilot execution.

**Pilot Planning**  
 Project management planning phase includes detailed impact assessment and final go/no-go project decision.

**Pilot execution**  
 Collaboratively work on project tasks to perform pilot objectives.

**Analysis**  
 Perform and prepare analysis and report findings.

Note: proposal can be exited from process during any phase.