

Memorandum

To: ISO Board of Governors
From: Joanne Serina, Director, Customer Service and Stakeholder Affairs
Date: March 14, 2018
Re: **Business practice manual change management report**

This memorandum does not require Board action.

Management, as required by the Federal Energy Regulatory Commission, provides this report to inform the ISO Board of Governors on the status of the business practice manual change requests submitted by stakeholders and the California Independent System Operator Corporation.

The ISO inaugurated the public change management process for business practice manuals (BPMs) on April 1, 2009. Both the ISO and stakeholders use the same electronic system and process to submit and track proposed changes to the BPMs. The process includes stakeholder review, ISO approval or rejection, and a possible appeal to the BPM Appeals Committee, which is comprised of three ISO officers.

As of February 28, 2018, seventeen proposed revision requests (PRRs) were active in the BPM change management system. All PRRs were submitted by the ISO. These seventeen active PRRs affect the following BPMs:

- Energy Imbalance Market (2 requests)
- Managing Full Network Model (1 request)
- Market Instruments (2 requests)
- Market Operations (1 request)
- Outage Management (1 request)
- Reliability Requirements (1 request)
- Settlements and Billing (9 requests)

PROCESS OVERVIEW

The ISO held two monthly BPM change management stakeholder meetings since the submittal of the previous Board report. There was a stakeholder meeting on January 23, 2018, in which thirty stakeholders participated and a meeting on February 27, 2017, in which twenty-five stakeholders participated. Based on stakeholder comments during these

meetings, and comments entered into the BPM change management electronic system, it appears that stakeholders are generally satisfied with the process.

BPM CHANGE MANAGEMENT REPORT

In compliance with the tariff reporting requirements, attachment 1 of this report:

- States the total number of active PRRs submitted by stakeholders and by the ISO;
- Depicts the active PRRs in various steps along the PRR lifecycle, as of February 28, 2018;
- Reflects that two PRRs were in final decision status within the period November 17, 2017 through February 28, 2018; and
- Includes PRRs currently under stakeholder appeal, the stakeholder positions on rejected PRRs, and the reasons for rejection.

The following is additional relevant information:

- There are no PRRs currently under stakeholder appeal.
- There were no rejected PRRs.
- There were six active PRRs submitted into the electronic system by the ISO on an emergency basis.

A PRR report summarizing the content of each active PRR in the BPM change management system as of February 28, 2018 is included as attachment 2.