BPM Change Management Meeting

Isabella Nicosia
BPM Change Management Process Administrator
BPM_CM@caiso.com

October 27, 2020

The information contained in these materials is provided for general information only and does not constitute legal or regulatory advice. The ultimate responsibility for complying with the ISO FERC Tariff and other applicable laws, rules or regulations lies with you. In no event shall the ISO or its employees be liable to you or anyone else for any decision made or action taken in reliance on the information in these materials.
# Agenda – BPM Change Management Meeting

**October 27, 2020**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction / Meeting Overview</strong></td>
<td>Isabella Nicosia</td>
</tr>
<tr>
<td><strong>Discussion of active proposed changes:</strong></td>
<td></td>
</tr>
<tr>
<td>Generator Management BPM</td>
<td>Debi Le Vine</td>
</tr>
<tr>
<td>Generator Interconnection and Deliverability Allocation Procedures BPM</td>
<td>Phelim Tavares</td>
</tr>
<tr>
<td>Demand Response BPM</td>
<td>Pia Sok</td>
</tr>
<tr>
<td>Market Instruments BPM</td>
<td>Jamal Batakji</td>
</tr>
<tr>
<td>Energy Imbalance Market BPM</td>
<td>Jamal Batakji</td>
</tr>
<tr>
<td>Market Operations BPM</td>
<td>Jamal Batakji</td>
</tr>
<tr>
<td>Reliability Coordinator Services BPM</td>
<td>Abdul Mohammed-Ali</td>
</tr>
<tr>
<td>Reliability Requirements BPM</td>
<td>Abdul Mohammed-Ali</td>
</tr>
<tr>
<td><strong>Wrap-Up and Next Steps</strong></td>
<td>Isabella Nicosia</td>
</tr>
</tbody>
</table>

---

BPM Change Management Process
916-608-5829 [BPM_CM@caiso.com](mailto:BPM_CM@caiso.com)
• Business Practice Manuals
  - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
  - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.  
    - *Policy changes submitted though the PRR process will be referred to the policy initiative road map process.*
  - Each subject area in a BPM is based on enabling language in the ISO tariff.
    - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*
Generator Management BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1287</td>
<td>Updates to generator interconnection process due to hybrid initiative and process changes</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1287 – Updates to generator interconnection process due to hybrid initiative and process changes

- Reason for revision
  - Hybrid and generator deliverability initiatives and process changes.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - October 20, 2020
- Next step:
  - Post recommendation
## Generator Interconnections and Deliverability Allocation Procedures BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1284</td>
<td>Determining refundable amount of interconnection financial security for withdrawn projects and implementing off-peak deliverability status</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1284 – Determining refundable amount of interconnection financial security for withdrawn projects and implementing off-peak deliverability status

• Reason for revision
  – Clarifying language related to interconnection financial security (IFS) and implementing off-peak deliverability status

• Initial comments:
  – SDG&E; submitted 10/20/2020

• Initial comment period expired:
  – October 20, 2020

• Next step:
  – Post recommendation
## Demand Response BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1283</td>
<td>Update to section 5.7, and correction to Appendix B for ESDER 3B</td>
<td>Initial</td>
</tr>
</tbody>
</table>


PRR 1283 – Update to section 5.7, and correction to Appendix B for ESDER 3B

• Reason for revision
  – Add additional ISO tariff section reference to section 5.7, and correction to Appendix B, for PDR_LSR Consumption (CON) resource ID under "LOAD" measurement type for ESDER 3B.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – October 20, 2020

• Next step:
  – Post recommendation
## Market Instruments BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1281</td>
<td>Energy imbalance market enhancements 2020</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1281 – Energy imbalance market enhancements 2020

• Reason for revision
  – Changes and enhancements are related to user display, new reports for added market transparency based on feedback from market participants in the Energy Imbalance Market

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – October 20, 2020

• Next step:
  – Post final decision
## Energy Imbalance Market BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1279</td>
<td>Clarification for greenhouse gas allocation for the energy imbalance market</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1279 – Clarification for greenhouse gas allocation for the energy imbalance market

• Reason for revision
  – To further clarify how the market processes Greenhouse Gas (GHG) Allocation when there is a market disruption.
  – Effective date: upon completion of the PRR process

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – October 20, 2020

• Next step:
  – Post final decision
## Market Operations BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1282</td>
<td>Scheduling of export resources in real time market</td>
<td>Initial</td>
</tr>
<tr>
<td>1278</td>
<td>Non-generator resource update</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1282 – Scheduling of export resources in real time market

• Reason for revision
  – These changes are to improve the scheduling of resources in the Residual Unit Commitment (RUC) and real-time process based on expected priorities for exports.
  – This PRR goes into effect on September 5, 2020.

• Initial comments:
  – PG&E; submitted 10/20/2020
  – CPUC; submitted 10/20/2020
  – IID; submitted 10/20/2020
  – SMUD; submitted 10/20/2020

• Initial comment period expired:
  – October 20, 2020

• Next step:
  – Post recommendation
PRR 1278 – Non-generator resource update

• Reason for revision
  – The ISO has implemented several improvements to the Non-Generator Resource (NGR) Model in the day-ahead and real-time market. The PRR document provides detailed information regarding the changes applied to the market model.
    – Effective Date: 8/27/2020

• Recommendation comments:
  – CESA; submitted 10/20/2020
  – LS Power; submitted 10/20/2020

• Recommendation comment period expired:
  – October 20, 2020

• Next step:
  – Post final decision
### Reliability Coordinator Services BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1286</td>
<td>Updates to settlements timeline and overall cleanup and formatting</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1286 – Updates to settlements timeline and overall cleanup and formatting

• Reason for revision
  – Updates for the settlements timeline and overall cleanup and formatting.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – October 20, 2020

• Next step:
  – Post recommendation
### Reliability Requirements BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1285</td>
<td>Reliability must run credits for legacy reliability must run contracts</td>
<td>Initial</td>
</tr>
<tr>
<td>1280</td>
<td>Local regulatory authority resource adequacy adjustments</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1285 – Reliability must run credits for legacy reliability must run contracts

• Reason for revision
  – Setting the process for allocating RMR credits for resources under legacy RMR contracts.

• Initial comments:
  – PG&E; submitted 10/20/2020

• Initial comment period expired:
  – October 20, 2020

• Next step:
  – Post recommendation
PRR 1280 – Local regulatory authority resource adequacy adjustments

- Reason for revision
  - Process for local regulatory authority resource adequacy (LRA RA) adjustments (credits) submission and when/how they can be applied

- Recommendation comments:
  - SDG&E; submitted 10/20/2020
  - CalCCA; submitted 10/20/2020
  - SCE; submitted 10/20/2020
  - CLECA; submitted 10/20/2020
  - NCPA; submitted 10/20/2020
  - PG&E; submitted 10/20/2020
  - CPUC; submitted 10/20/2020

- Recommendation comment period expired:
  - October 20, 2020

- Next step:
  - Post final decision
Next BPM PRR Review Monthly Meeting: 
November 17, 2020 @ 11 a.m.

BPM change management 
process questions:
Isabella Nicosia
916-608-5829
BPM_CM@caiso.com