Projected Stakeholder Initiatives Milestones

										Aug 2016					Sept 2016					Oct 2016	
	Initiatives	Initiative Lead	Start	Discuss at MSC	Proposed Board Meeting	Notes	Proposed Tariff Filing Date	Paper Published	Meeting/call	Comments Due	Training or Workshop	ISO Files Tariff Language	Paper Published	Meeting/call	Comments Due	Training or Workshop	ISO Files Tariff Language	Paper Published	Meeting/call	Comments Due	
ring ngs	ISO Board of Governors meeting Market surveillance committee meeting	B. Cooper	Recurring Recurring											16							1
Recuri Meeti	Market surveinance committee meeting Market performance and planning meetings	J. Morris	Recurring											10							+
~ 2	Business practice manual change management meetings	J. Payton	Recurring																		
	Bid cost recovery enhancements (formerly two-tier)	K. Wells	Q4 2015		Feb 2017		Approved by														4
	Commitment cost and Default Energy Bid Enhancements	K. Wells	Q2 2016	15-Jul-15	Mar 2016		Board in March		23	30				14	28						4
	Contingency modeling enhancements	P. Servedio			Aug 2016		TBD Approved by												3	17	+-
Ś	CRR clawback rule modifications	D. Tretheway	Apr-16		June 2016		Board in June			2											4_
tive	Energy storage and aggregated distributed energy resource, Phase 2 Frequency response phase 2	T. Flynn	Q1 2016 TBD		Oct 2016					2									11 & 27	20	+
nitia	Flexible resource adequacy criteria and must run obligation phase 2	K. Meeusen	June 2015		TBD																+
art	Generator contingency/RAS modeling		Q2 2016		Oct 2016																
Curre	Generation Interconnection Driven Network Upgrades Cost Recovery	S. Rutty	Q3 2016		Dec 2016			1	8	19			6	13	20			3	10	17	4
0	Load Serving Entity Definition Refinement Reactive power requirements and financial compensation	P. Servedio C. Devon	Q3 2016		Oct 2016 Aug 2016			15	23	4			12	21	2 and 30						+-
	Reliability services phase 2	E. Kim		Mar 23 2015	Aug 2016																
	Review Transmission Access Charge Wholesale Billing Determinant	L. Kristov	Q2 2016																		4
	Self Schedules Bid Cost Recovery Allocation & Bid Floor Stepped Constraint Parameters	K. Wells D. Tretheway	July 2016 Q2 2016		Oct 2016 Oct 2016	Schedule TBD		11	18	25 25											+-
_	Full Network Model Enhancements	TBD	TBD		TBD				10	20											+
Ition	Regional Integration Greenhouse Gas Compliance	D. Tretheway	Q3 2016		TBD	Start date shifted. New															
egra 'es	· · · ·					schedule in devel.															4_
ional Integration Initiatives	Metering Rules Enhancements	T. Flynn	Mar-16		Oct 2016					47	40										4
ona Init	Regional Resource Adequacy	C. Devon	Nov 2015		TBD					17	10										4_
Regi	Transitional Implementation Items	TBD	2017		TBD																4
-	Transmission Access Charge Options	L. Kristov	Oct 2015		August 2016					25	11										4
Ś	Flexible capacity needs technical study process	C. Loutan	Recurring		0.0010		-														4
tive	Grid management charge/Budget Process	Gordon C. Micsa	Recurring Recurring		Oct 2016															-	+
Initia	2017 & 2021 Local capacity requirements (LCR Study)		-																		+
- Bu	Participating transmission owner per unit cost	R. Emmert/ M.Wu	Recurring		N/A		N/A														4
auri	Stakeholder initiatives catalog 2015-2016 Transmission planning process	TBD R. Sparks	Q3 2016 Recurring		Mar 2016		N/A N/A														+
Rec	2016-2017 Transmission planning process	R. Sparks	Recurring				N/A														
	Western regions planning coordination	G. DeShazo	Recurring		N/A																4
	Bid Cost Recovery and Variable Energy Resource Settlements	Legal Lead A. McKenna	Start		Tariff Filed		May-16														-
	Bidding Rules Enhancements - Minimum Load Rerate	A. McKenna					Mar-16														+
	Commitment cost enhancements phase 3	K. Wells					TBD														
	Competitive solicitation process enhancements	S. Rutty	May 2015				N/A														4
#	Energy storage and aggregated distributed energy resource. Phase 1	T. Flynn	Q2 2015		Feb 2016		Jun-16														4
Tariff	Expanding metering and telemetry options phase 2	A. Ulmer				Approved by Board in	Mar-16														4
	Flexible Ramping Product	D. Tretheway A. McKenna	Apr-16			Feb 2016	Jun-16														4
	Local Market Power Mitigation Enhancements (2015)	C. Devon	May 2015				oun-ro			4											╋
	Reactive power requirements and financial compensation	K. Meeusen	Q1 2015				TBD			-											4
	Reliability services phase 1b Revised Settlement Statement & Dispute Timeline for T+35M	T. Huynh	TBD				TBD		16	9											+
	Release / Implementation	Deployment		imulation - End	Activation	Project Manager															
9	Capacity procurement mechanism replacement	11/1/2016	3/16/2016	7/29/2016	11/1/2016	Marcelo DaCosta		ł													
rt 201 se			3/10/2010	-		Warcelo Dacosta															
äē	Reliability Services Initiative (RSI) 1A and Commitment Cost Phase 2 completion	11/1/2016	3/16/2016	7/29/2016	11/1/2016	Marcelo DaCosta															
lepend Rele	Demand response registration enhancements	9/19/2016	8/8/2016	9/2/2016	9/19/2016	Mike Lucas															
Ind	RIMS functional enhancements	10/31/2016	TBD	TBD	10/31/2016	John Williams															
	Acceptable Use Policy - CMRI	TBD	8/22/16	9/23/16	10/1/2016	John Williams		1													
	BAL-003 Compliance / Frequency Response	TBD	8/22/16	9/23/16	10/1/2016	Jim Barber															
0	BCR modification and VER Settlement	TBD	8/22/16	9/23/16	10/1/2016	Brett Bruderer															
lease	EIM 2016 Arizona Public Services	TBD	7/5/16	7/29/16	10/1/2016	Joanne Alai															
6 Re	EIM 2016 Puget Sound Energy	TBD	7/5/16	7/29/16	10/1/2016	Joanne Alai															
1 201	EIM Year 1 Enhancements Phase 2	TBD	8/22/16	9/23/16	10/1/2016	Roxann Hall															
Fall	Elexible Ramping Product	TBD	8/15/16	9/23/16	10/1/2016	Jeremy Malekos															
	Energy Storage and Aggregated Distributed Energy Resource, Phase 1	TBD	8/22/16	9/23/16	10/1/2016	Jim Barber		-													
	OMAR Replacement Project	TBD	7/5/16	9/23/16	10/1/2016	Mike Lucas		-													
	PIRP System Application Decommissioning	TBD	8/22/16	9/23/16	10/1/2016	Brett Bruderer															
Independen t 2017	Local Market Power Mitigation Enhancements (2015) CRR clawback rule modifications	1/30/17 TBD	11/1/16 TBD	12/15/16 TBD	1/30/2017 TBD	Marcelo DaCosta Adrian Chiosea															
ø	Reliability Services Phase 1B	TBD	TBD	TBD	10/1/2017	Marci Stuckey		t													
lease	Bidding Rules Enhancements - Part B	TBD	TBD	TBD	10/1/2017	Marci Stuckey		1													
7 Rel	Commitment cost enhancements phase 3	TBD	TBD	TBD	10/1/2017	Marci Stuckey															
2017	ADS User Face Replacement	TBD	TBD	TBD	10/1/2017	Adrian Chiosea		-													
Fall	Metering Rules Enhancements EIM 2017 Portland General Electric	TBD	TBD TBD	TBD TBD	10/1/2017 10/1/2017	Adrian Chiosea		-													
Spring 2010	EIM Idaho Power Company		TBD			Jeremy Malekos		ł													
Spring 2018		4/1/2018		TBD	4/1/2018	Janet Morris		ł													
2018 ease	Stepped Constraint Parameters Regional Resource Adequacy	TBD	TBD TBD	TBD TBD	10/1/2018 10/1/2018	Adrian Chiosea Adrian Chiosea															
Fall 20 Relea	Bid cost recovery enhancements (formerly two-tier)	TBD	TBD	TBD	10/1/2018	Adrian Chiosea															
u u	Transmission Access Charge Options	TBD	TBD	TBD	10/1/2018	Adrian Chiosea		1													
	Additional Data Transparency Enhancements (OASIS API changes)	TBD	TBD	TBD	TBD	Adrian Chiosea															
BD	Reliability Services Phase 2	TBD	TBD	TBD	TBD	Adrian Chiosea		-													
-	Contingency modeling enhancements Post Implementation OMS Enhancements	TBD TBD	TBD TBD	TBD TBD	TBD TBD	Adrian Chiosea Mike Lucas		1													
		100	160	100	180	MINE LUCIS		J													



Training or	ISO Files Tariff
Workshop	Language
	-

Changes 8/11/2016

Updated market simulation start and end dates for several Fall 2016 release projects Moved Metering Rules enhancements from Fall 2018 release to Fall 2017 release Moved Stepped Constraint Parameters from Fall 2017 release to Fall 2018 release Moved Reliability Services Phase 2 implementation to TBD Added CRR clawback rule modifications to Independent 2017 Moved Contingency Modeling Enhancements implementation to TBD

Changes 8/9/2016

Add new intitiative - Load Serving Entity Definition Refinement Transmission Access Charge Options - Updated policy schedule (comments deadline)

Changes 7/27/2016

Added new initiative - Generation Interconnection Low Voltage Network Upgrades Cost Recover Transmission Access Charge Options - Updated policy schedule Regional Resource Adequacy - Updated policy schedule Revised Settlement Statement and Dispute Timeline for T+35 - updated tariff development Added new initiative - Self Schedules BCR Allocation and Bid Floor

Changes 7/13/2016

Commitment Cost Enhancements Phase 3 - Updated schedule (comments deadline) Regional Resource Adequacy - Updated schedule (comments deadline) Updated Reactive Power MSC Next Meeting

Changes 7/5/2016

Flexible Resource Adequacy Criteria Must Offer Obligation (FRACMOO) Schedule update