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2	California ISO	
1		

Dec 2016

Nov 2016

Training or ISO Files Tariff
Workshop Language

	Initiatives	Initiative Lead	Start	Discuss at MSC	EIM Governing Body Review	Proposed Board Meeting	Notes	Proposed Tariff Filing Date	Paper Published	Meeting/call	Comments Due
Recurring Meetings	ISO Board of Governors meeting Market surveillance committee meeting	B. Cooper	Recurring Recurring								
eeti	Market performance and planning meetings	J. Morris	Recurring								
2	Business practice manual change management meetings	J. Payton	Recurring								
	Aliso Canyon Gas-Electric Coordination Phase 2	C.Colbert	Sept 2016	9/19/2016		Oct-16	Special Bd Mtg	14-Oct			
	Bid cost recovery enhancements (formerly two-tier)	K. Wells	Q4 2015			Feb 2017					
	Commitment cost and Default Energy Bid Enhancements	C. Colbert	Q4 2016			Jul 2017					6
	Contingency modeling enhancements	P. Servedio				Mid 2017		TBD			
Initiatives	CRR clawback rule modifications	D. Tretheway	Apr-16			June 2016		Approved by Board in June			
	Energy storage and aggregated distributed energy resource, Phase 2	T. Flynn	Q1 2016			Oct 2016					
Ē	Frequency response phase 2		Oct 2016			Nov 2017			4	11	20
ent	Flexible resource adequacy criteria and must run obligation phase 2 Full Network Model Enhancements	K. Meeusen TBD	June 2015 TBD			TBD TBD					
Current	Generator contingency/RAS modeling	160	Q2 2016			Mid 2017					
0	Generation Interconnection Driven Network Upgrades Cost Recovery	S. Rutty	Q3 2016			Dec 2016			3	10	17
	Load Serving Entity Definition Refinement	P. Servedio	Q3 2016			Oct 2016					5
	Reliability services phase 2 Review Transmission Access Charge Wholesale Billing Determinant (CLOSED)	E. Kim L. Kristov	Q2 2016	Mar 23 2015		Oct 2016	Initiative closed				
	Self Schedules Bid Cost Recovery Allocation & Bid Floor	K. Wells	July 2016			Oct 2016	initiative closed				
	Stepped Constraint Parameters	D. Tretheway	Q2 2016			Oct 2016	Schedule TBD				
	Regional Integration California Greenhouse Gas Compliance	D. Tretheway	Q3 2016			Feb 2017					27
tion											
egra	Metering Rules Enhancements	T. Flynn	Mar-16			Dec 2016	3rd revised straw				
Regional Integration	Regional Resource Adequacy	C. Devon	Nov 2015			TBD	proposal - Posting late Sept 2016			6	27
ona	Transitional Implementation Items	TBD	2017			TBD	Сері 2010				
egic	·						2nd revised straw				
œ	Transmission Access Charge Options	L. Kristov	Oct 2015			Briefing Aug 2016	proposal - Posting late			7	28
se	Flexible capacity needs technical study process	C. Loutan	Recurring				Sept 2016				
se,	Grid management charge/Budget Process	Gordon	Recurring			Oct 2016					6
iat iat	2017 & 2021 Local capacity requirements (LCR Study)	C. Micsa	Recurring							31	14
ᆵ	Participating transmission owner per unit cost	R. Emmert/ M.Wu	Recurring								
Recurring Initiatives	Stakeholder initiatives catalog	B.Dean	Q3 2016			Jan 2017		N/A	19	25	
ä	2015-2016 Transmission planning process	R. Sparks	Recurring			Mar 2016		N/A			
ŭ.	2016-2017 Transmission planning process	R. Sparks	Recurring					N/A			6
	Western regions planning coordination	G. DeShazo	Recurring			N/A					
	Aliso Canyon Gas-Electric Coordination Phase 2	Legal Lead  A. McKenna	Start 16-Oct			Tariff Filed 3-Oct		14-Oct	30	6	5
	Bid Cost Recovery and Variable Energy Resource Settlements	A. McKenna	10-001			3-001		May-16	30	-	3
	Bidding Rules Enhancements - Minimum Load Rerate	A. McKenna						10/17 to 10/21			
	Commitment cost enhancements phase 3	K. Wells						TBD			
	Competitive solicitation process enhancements	S. Rutty	May 2015					N/A			
<b>=</b>	Energy storage and aggregated distributed energy resource, Phase 1	T. Flynn	Q2 2015			Feb 2016		Jun-16			
Tariff	Expanding metering and telemetry options phase 2	A. Ulmer						Mar-16			
	Local Market Power Mitigation Enhancements (2015)	A. McKenna	Apr-16					Jun-16			
	Reactive power requirements and financial compensation	C. Devon	May 2015			August 2016		Oct-16			
	Reliability services phase 1b	K. Meeusen	Q1 2016					TBD			
	Revised Settlement Statement & Dispute Timeline for T+35M	T. Huynh	Dec-15			Aug 2016		Oct-16			
Release / Implementation		Deployment		Simulation		Activation	Project Manager				
- 0	<u> </u>			- End			, ,				
ase	Capacity procurement mechanism replacement	11/1/2016	3/16/2016	8/26/2016		11/1/2016	Marcelo DaCosta				
Rek	Reliability Services Initiative (RSI) 1A and Commitment Cost Phase 2 completion	11/1/2016	3/16/2016	8/26/2016		11/1/2016	Marcelo DaCosta				
Independent 2016 Release	Demand response registration enhancements	9/19/2016	8/8/2016	9/23/2016		9/19/2016	Mike Lucas				
- 70	RIMS functional enhancements	10/31/2016	TBD	TBD		10/31/2016	John Williams				
	Acceptable Use Policy - CMRI	9/28/2016	8/22/16	9/23/16		10/1/2016	John Williams				
	BAL-003 Compliance / Frequency Response	9/28/2016	8/22/16	9/23/16		10/1/2016	Jim Barber				
Se	BCR modification and VER Settlement	9/28/2016	8/22/16	9/23/16		10/1/2016	Brett Bruderer				
2016 Release	EIM 2016 Arizona Public Services	9/28/2016	7/5/16	7/29/16		10/1/2016	Joanne Alai				
	EIM 2016 Puget Sound Energy	9/28/2016	7/5/16	7/29/16		10/1/2016	Joanne Alai				
	EIM Year 1 Enhancements Phase 2	9/28/2016	8/22/16	9/23/16		10/1/2016	Roxann Hall				
E E	Flexible Ramping Product	9/28/2016	8/15/16	9/23/16		10/1/2016	Jeremy Malekos				
	Energy Storage and Aggregated Distributed Energy Resource, Phase 1	9/28/2016	8/22/16	9/23/16		10/1/2016	Jim Barber				
	OMAR Replacement Project	9/28/2016	7/5/16	9/23/16		10/1/2016	Mike Lucas				
	PIRP System Application Decommissioning	9/28/2016	8/22/16	9/23/16		10/1/2016	Brett Bruderer				
depend-en 2017	t Local Market Power Mitigation Enhancements (2015) CRR clawback rule modifications	1/30/17 TBD	11/4/16 TBD	12/20/16 TBD		1/30/2017 TBD	Marcelo DaCosta  Adrian Chiosea				
	Reliability Services Phase 1B	TBD	TBD	TBD		10/1/2017	Marci Stuckey				
Release	Bidding Rules Enhancements - Part B	TBD	TBD	TBD		10/1/2017	Marci Stuckey				
8	Commitment cost enhancements phase 3	TBD	TBD	TBD		10/1/2017	Marci Stuckey				
2017	ADS User Interface Replacement	TBD	TBD	TBD		10/1/2017	Adrian Chiosea				
Fall 2	Metering Rules Enhancements  FIN 2017 Particular Connectification	TBD	TBD	TBD		10/1/2017	Adrian Chiosea				
	EIM 2017 Portland General Electric	TBD	TBD	TBD		10/1/2017	Jeremy Malekos				
ease lease	1	4/1/2018	TBD	TBD		4/1/2018	Janet Morris				
	Stepped Constraint Parameters  Periodal Parameters Adaguery	TBD TBD	TBD TBD	TBD TBD		10/1/2018	Adrian Chiosea Adrian Chiosea				
elea	Regional Resource Adequacy Bid cost recovery enhancements (formerly two-tier)	TBD	TBD	TBD		10/1/2018	Adrian Chiosea  Adrian Chiosea				
Refe	Transmission Access Charge Options	TBD	TBD	TBD		10/1/2018	Adrian Chiosea				
	Additional Data Transparency Enhancements (OASIS API changes)	TBD	TBD	TBD		TBD	Adrian Chiosea				
	Delich little Condens Dhann C	TBD	TBD	TBD		TBD	Adrian Chiosea		I		
TBD	Reliability Services Phase 2 Contingency modeling enhancements	TBD	TBD	TBD		TBD	Adrian Chiosea		1		

### Changes 10/14/16

MSC - Added next meeting date Aliso Tariff filing date updated

#### Changes 10/7/16

Regional Integration - CA Greenhouse Gas Compliance - Updated policy schedule

Transmission Access Charge Options - Updated policy schedule

Regional Resource Adequacy - Updated policy schedule

Contingency Modeling Enhancements - next paper and call are to be determined (targeting late Oct)

Generator Contingency and RAS Modeling - moved to December board mtg.

# Changes 9/27/16

Review Transmission Access Charge Billing Determinant - Initiative has been closed Flexible Ramping Product - Deleted from Tariff section; it is currently in the implementation phase mer

### **Changes 9/9/16**

Regional Integration - CA Greenhouse Gas Compliance - Update policy schedule Transmission Access Charge Options - Updated policy schedule Reliability Services Initiative Phase 2 - Updated policy schedule ESDER Phase 2 - Updated Schedule

## **Changes 9/1/16**

Updated Stakeholder Catalog Schedule

Updated MSC Meeting date

Updated Commitment Cost Default Energy Bid Enhancements Schedule

Regional Integration - CA Greenhouse Gas Compliance - Update policy schedule

Transmission Access Charge Options - Updated policy schedule

Regional Resource Adequacy - Updated policy schedule

Updates to market simulation end dates for Fall 2016 release projects

Contingency Modeling Enhancements schedule is TBD