



Legend	
Market Simulation	
CA ISO Holiday	
Deployment Week	



MAP Stage Environment Window

CCE3 September Full Market Testing	CCE3 September Full Market Testing (08/06-11/01)
ESDER Phase 2	ESDER Phase 2 (08/06-11/01)
Settlements Performance Improvements	Settlements Performance Improvements (08/06-11/01)
EIM - BANC-SMUD	EIM - BANC-SMUD (08/15-01/31)
ESDER Phase 2 - Market Sim	ESDER Phase 2 - Market Sim (08/20-09/28)
Settlements Performance Improvements - Market Sim	Settlements Performance Improvements - Market Sim (08/20-09/28)
CCE 3 Full Market Simulation Testing - Market Sim	CCE 3 Full Market Simulation Testing - Market Sim (08/20-10/5)
FNM Promotion 2018Q3	FNM Promotion 2018Q3 (08/27-08/27)
CRR Auction Efficiency 1A	CRR Auction Efficiency 1A (09/10-11/01)
EIM Enhancements 2018	EIM Enhancements 2018 (09/10-11/01)
Green House Gas Enhancements for EIM	Green House Gas Enhancements for EIM (09/10-11/01)
Generator Contingency and RAS Modeling	Generator Contingency and RAS Modeling (09/10-02/01)
CRR Auction Efficiency 1A - Market Sim	CRR Auction Efficiency 1A - Market Sim (09/17-10/12)
EIM Enhancements 2018 - Market Sim	EIM Enhancements 2018 - Market Sim (09/17-10/12)
Green House Gas Enhancements for EIM - Market Sim	Green House Gas Enhancements for EIM - Market Sim (09/17-10/12)
Generator Contingency and RAS Modeling - Market Sim	Generator Contingency and RAS Modeling - Market Sim (09/17-10/12)
CRR Auction Efficiency 1B	CRR Auction Efficiency 1B (11/02-12/28)
CRR Auction Efficiency 1B - Market Sim	CRR Auction Efficiency 1B - Market Sim (11/05-11/28)
EIM - BANC-SMUD - Market Sim	EIM - BANC-SMUD - Market Sim (12/03-01/30)
FNM Promotion 2018Q4	FNM Promotion 2018Q4 (12/11-12/12)

Production Environment Window

FNM Promotion 2018Q3	FNM Promotion 2018Q3 (08/21-08/21)
65% Transmission Capacity for CRR Allocation & Auction	65% Transmission Capacity for CRR Allocation & Auction (09/24-09/24)
ESDER Phase 2 - DRRS	ESDER Phase 2 - DRRS (10/01-10/01)
Settlements Performance Improvements	Settlements Performance Improvements (11/01-11/01)
EIM Enhancements 2018	EIM Enhancements 2018 (11/01-11/01)
CCE3 Activation in Production: Full Scope	CCE3 Activation in Production: Full Scope (11/01-11/01)
ESDER Phase 2 Production Deployment	ESDER Phase 2 Production Deployment (11/01-11/01)
CRR Auction Efficiency 1A	CRR Auction Efficiency 1A (11/01-11/01)
Green House Gas Enhancements for EIM	Green House Gas Enhancements for EIM (11/01-11/01)
Imbalance Conformance Enhancements	Imbalance Conformance Enhancements (11/20-11/20)
FNM Promotion 2018Q4	FNM Promotion 2018Q4 (11/27-11/29)
Settlement Provisions	Settlement Provisions (12/28-12/28)
Generator Contingency and RAS Modeling	Generator Contingency and RAS Modeling (02/01-02/01)
EIM - BANC-SMUD	EIM - BANC-SMUD (04/03-04/03)



For E1 - E4 category designations, * denotes category applies only to certain proposal elements

Calendar	Initiatives (Updated Weekly)	Initiative Lead	Start	Discuss at MSC	EIM Category (E1-E4)	Proposed EIM Governing Body Meeting	Proposed Board Meeting	Notes	Proposed Tariff Filing Date
Recurring Meetings	ISO Board of Governors meetings	N/A	Recurring						
	EIM Governing Body meetings	N/A	Recurring						
	Market Performance and Planning Forum meetings	J. Morris	Recurring						
Policy Development	Congestion Revenue Rights Auction Efficiency	P. Servadio	Q1 2018				TBD (Track 2)	Stakeholder process schedule currently under development	
	Day-Ahead Market Enhancements	M. Poage	Q1 2018		E4	Oct 2018	Nov 2018	Initiative scope: 15-min granularity	
	Excess Behind the Meter Production	G. Murtaugh	Q2 2018				TBD		
	Energy Storage and Aggregated Distributed Energy Resource Phase 3	E. Kim	Q3 2017	3-Aug-18	E2	Aug 2018	Sep 2018		
	Extend Day-Ahead Market Enhancements to EIM Entities	TBD	TBD					Stakeholder process schedule currently under development	
	Interconnection Process Enhancements 2018	D. Le Vine	Q1 2018				Sep 2018 (2nd of 3)		
	Inter tie Deviation Settlement	M. Poage	Q2 2018				Mar 2019		
	RA Enhancements (Track 1 and Track 2)	TBD	Q1 2018				TBD	Stakeholder process schedule currently under development	
	Reliability Coordinator Services Rate Design, Terms and Conditions	A. Gordon	Q1 2018				Jul 2018	Stakeholder process schedule currently under development	
	Reliability Must-Run and Capacity Procurement Mechanism Enhancements	K. Johnson	Q1 2018	3-Aug-18			Mar 2019		
	Transmission Access Charge Structure Enhancements	C. Devon	Q3 2017				Feb 2019		
	EIM Offer Rules	M. Poage	Q2 2018	3-Aug-18	TBD	TBD	TBD		
Storage as a Transmission Asset	K. Meeusen	Q2 2018	3-Aug-18			Nov 2018			
Recurring Initiatives	Flexible Capacity Needs Technical Study Process	C. Loutan	Recurring						
	Budget and Grid Management Charge Process	A. Gordon	Recurring				Dec 2018		
	2019 and 2023 Local Capacity Requirements	C. Mices	Recurring						
	Participating Transmission Owner Per-Unit Cost	R. Emmert/ M.Wu	Recurring						
	Annual Policy Initiatives Roadmap	B. Dean	Q3 2018			Nov 2018 (Briefing)	Dec 2018 (Briefing)		N/A
	2018-2019 Transmission Planning Process	R. Sparks	Recurring						N/A
	2017 Tariff Clarifications Filing Process	K. Meeusen	Recurring					N/A	
Western Regions Planning Coordination	G. DeShazo	Recurring					N/A		
Tariff Development	Legal Lead		Start				Filing Date		
	Commitment Costs and Default Energy Bid Enhancements	B. Dean	Q4 2016		E2		Mar 2018		
	Commitment Cost Enhancements Phase 3	B. Cooper	Q3 2015				Mar 2016		Q2 2018
	Congestion Revenue Rights Auction Efficiency (Track 1B)	P. Servadio	Feb 2018				Jun 2018	Targeting FERC approval by mid-June, to allow participants to prepare their annual outage reporting by July 1, in order to meet the 2019 CRR processes	Jul 2018
	Congestion Revenue Rights Auction Efficiency (Track 1A)	P. Servadio	Feb 2018				Mar 2018	Targeting FERC approval by mid-June, to allow participants to prepare their annual outage reporting by July 1, in order to meet the 2019 CRR processes	Jun 2018
	Contingency Modeling Enhancements	P. Servadio	Mar 2013				Dec 2017		2018
	Capacity Procurement Mechanism Risk of Retirement Enhancements	K. Johnson	Oct 2017				Nov 2017		Q1 2018
	Consolidated Energy Imbalance Market Initiatives	M. Pogue	Q2 2017		E1, E2*		Dec 2017		2018
	Dispatch Operating Target Tariff Clarification	D. Tretheway	Q1 2018				Aug 2017		2018
	Energy Storage and Distributed Energy Resources Phase 2	J. Bishara	Q1 2016		E1, E2*		Jul 2017		Jul 2018
	Generator Contingency and Remedial Action Scheme Modeling	P. Servadio	Q2 2016	10-Jul-17	E1, E2*		Sep 2017		TBD
	Proforma RMR Agreement	K. Johnson					Jul 2018		Aug 2018
	Imbalance Conformance Enhancements	M. Poage	Q4 2017		E1*		Aug 2018		TBD
	Resource Adequacy Availability Incentive Mechanism (RAAIM)	K. Meeusen	July 2017				Nov 2017		TBD
	Regional Integration and EIM Greenhouse Gas Compliance	D. Tretheway	Q3 2016		E1		Jul 2018		TBD



*For E1 - E4 category designations, * denotes category applies only to certain proposal elements*

Calendar	Initiatives	Initiative Lead	Start	Discuss at MSC	EIM Category (E1-E4)	Proposed EIM Governing Body Meeting	Proposed Board Meeting	Notes	Proposed Tariff Filing Date	Stakeholder Engagement Lead	BPMs Identified
Policy	Bid Cost Recovery Enhancements (Formerly Two-Tier Allocation)	P. Servedio	Q4 2015		E2		TBD	Subsequent activities on this initiative have not	TBD	Perez	
	Flexible Resource Adequacy Criteria and Must-Run Obligation Phase 2	K. Meeusen	Jun 2015				Nov 2018			Cross	
	Frequency Response Phase 2	C. Colbert	Dec 2016				TBD	Subsequent activities on this initiative have not	TBD	Perez	
	Self-Schedules Bid Cost Recovery Allocation and Bid Floor		Aug 2016				TBD	Subsequent activities on this initiative have not	TBD		
Regional Integration	Regional Resource Adequacy	C. Devon	Nov 2015				TBD	Subsequent activities on this initiative have not been planned or scheduled.	TBD	Osborne	
	Transmission Access Charge Options	L. Kristov	Oct 2015				TBD	Subsequent activities on this initiative have not been planned or scheduled.	TBD	Osborne	
Recurring Initiatives	N/A										
		Legal Lead	Start				Filing Date				
Tariff	N/A										

Calendar	Release / Implementation <i>(Updated Monthly)</i>	Deployment	Market Simulation Start - End		Activation	Project Manager
Independent 2018	Congestion Revenue Rights Auction Efficiency 1B	12/1/18	11/5/18	11/28/18	Dec 2018	LeAnn McLaughlin
	Imbalance Conformance Enhancements	11/1/18	TBD	TBD	Nov 2018	Deann MacDougall
Fall 2018	Commitment Cost Enhancements Phase 3	11/1/18	8/20/18	9/28/18	Nov 2018	Ray Riley
	Congestion Revenue Right Auction Efficiency 1A	11/1/18	9/17/18	10/15/18	Nov 2018	LeAnn McLaughlin
	EIM Greenhouse Gas Compliance	11/1/18	8/20/18	9/28/18	Nov 2018	Ray Riley
	EIM 2018 Enhancements	11/1/18	8/20/18	9/28/18	Nov 2018	Deann MacDougall
	Energy Storage and Aggregated Distributed Energy Resource, Phase 2	11/1/18	8/20/18	9/28/18	Nov 2018	Mohan Koya
	Settlements Performance Improvements	11/1/18	8/20/18	9/28/18	Nov 2018	Ayman Fattah
Spring 2019	EIM - Balancing Authority of Northern California (BANC)/SMUD	4/1/19	12/1/18	1/31/19	Apr 2019	Ayman Fattah
Independent 2019	Black Start and System Restoration Phase 2	6/1/19	N/A	N/A	Jun 2019	John Williams
	Generator Contingency and Remedial Action Scheme Modeling	TBD	8/20/18	9/28/18	TBD	LeAnn McLaughlin
	ADS Replacement	9/19/19	TBD	TBD	Sep 2019	John Williams
Fall 2019	Commitment Cost and Default Energy Bid Enhancements	10/1/19	TBD	TBD	Oct 2019	Ray Riley
	Contingency Modeling Enhancements	10/1/19	TBD	TBD	Oct 2019	LeAnn McLaughlin
	Day-Ahead Market Enhancements	10/1/19	TBD	TBD	Oct 2019	Adrian Chiosea
	Energy Storage and Aggregated Distributed Energy Resource, Phase 3	10/1/19	TBD	TBD	Oct 2019	Adrian Chiosea
	Flexible Resource Adequacy Criteria and Must Run Obligation Phase 2	10/1/19	TBD	TBD	Oct 2019	Adrian Chiosea
	Review of Transmission Access Charge Billing Structure	10/1/19	TBD	TBD	Oct 2019	Adrian Chiosea
	Variable Energy Resource Dispatch Operating Point (VER DOT)	10/1/19	TBD	TBD	Oct 2019	Adrian Chiosea
Spring 2020	EIM - LADWP	4/1/20	12/1/19	1/31/20	Apr 2020	Ayman Fattah
	EIM - Salt River Project	4/1/20	12/1/19	1/31/20	Apr 2020	Joanne Alai
	EIM - Seattle City Light	4/1/20	12/1/19	1/31/20	Apr 2020	Ayman Fattah
TBD	EIM Offer Rules	TBD	TBD	TBD	TBD	Adrian Chiosea
	Excess Behind the Meter Production	TBD	TBD	TBD	TBD	Adrian Chiosea
	Extend Day-Ahead Market Enhancements to EIM Entities	TBD	TBD	TBD	TBD	Adrian Chiosea
	Intertie Deviation Settlement	TBD	TBD	TBD	TBD	Adrian Chiosea
	RA Enhancements (Track 1 and Track 2)	TBD	TBD	TBD	TBD	Adrian Chiosea
	Review of Reliability Must Run and Capacity Procurement Mechanism	TBD	TBD	TBD	TBD	Adrian Chiosea
	Storage as a Transmission Facility	TBD	TBD	TBD	TBD	Adrian Chiosea



Changes 8/17/18

- Clarified Day-Ahead Market initiative scope (notes section) and updated timeline, EIM GB and Board dates
- Updated EIM GB and Board (both briefing) dates for the Annual Policy Initiatives Roadmap recurring process
- Updated tariff filing date for the Dispatch Operating Target Tariff Clarification initiative
- Updated timeline (next iteration posting) for the Excess BTM Production initiative

Changes 8/10/18

- Added new Interconnection Process Enhancements meeting (Sep)
- Updated timeline for the Excess BTM Production initiative
- Updated timeline for the Annual Policy Initiatives Roadmap process
- Updated timeline for the Intertie Deviation Settlement initiative
- Updated timeline for the Day-Ahead Market Enhancements initiative

Changes 8/1/2018

Policy Development Milestones

- Changed EIM GB and CAISO Board dates for the Day-Ahead Market Enhancements to TBD
- Added next meeting date for the Review Transmission Access Charge Structure initiative
- Added next web conference date for the ProForma RMR Agreement

Changes 7/27/18

Policy Development Milestones

- Updated the expected FERC filing date for the Imbalance Conformance Enhancements initiative
- Moved FRACMOO2 to the inactive initiatives section

Energy Storage and

- Updated schedule for 2019 Budget and GMC Process

Changes 7/20/18

Policy Development Milestones

- Added Market Surveillance Committee (MSC) dates for the ESDER3, Review of RMR and CPM, and Storage as a Transmission Asset

Changes 7/13/18

Policy Development Milestones

- Added proforma RMR agreement to the Tariff Development section
- Moved Regional Integration and EIM Greenhouse Gas Compliance to Tariff Development section; added
- Moved Imbalance Conformance Enhancements to Tariff Development section; added scheduled activities
- Deleted the 2018 Availability Assessment Hours Tariff Petition Waiver (no longer current)
- Updated the comments due date for the Review TAC initiative
- Updated the comments due date for the Storage as a Transmission Asset initiative
- Updated the posting date for the draft final proposal for the ESDER3 initiative

Implementation Milestones Updates

Moved GCARM project from Fall Release 2018 to Independent 2019, while the market simulation remains in 2018 Fall Release cycle

Moved Imbalance Conformance Enhancements Activation from Sep 2018 to Nov 2018

Removed Variable Energy Resource Dispatch Operating Point from Fall 2019

Changes 7/5/18

Policy Development Milestones

Updated Board dates for the Annual Policy Initiatives Roadmap Process

Deleted month of June from timeline

Implementation Milestones Updates

Updated market simulation window for CRR1B project

Updated market simulation window for CRR1A project

Changes 6/29/18

Policy Development Milestones

Added Congestion Revenue Rights Auction Efficiency, Track 1B to tariff development section

Remove CPM Risk of Retirement

Added Excess Behind the Meter Production (new initiative)

Changes 6/20/18

Policy Development Milestones

Removed Extended STUC initiative

Updated timeline for the ESDER Phase 3 initiative

Implementation Milestones Updates

Removed Extended STUC from Fall 2018

Changes 6/15/18

Policy Development Updates

Updated the Energy Storage and Distributed Energy Resources Phase 3 timeline

Updated the Storage as a Transmission Asset timeline

Changes 6/8/18

Policy Development Updates

Removed month of May from timeline

Updated the Review Transmission Access Charge Structure initiative Board date

Updated the Interconnection Process Enhancements Board date and July meeting

Changes 6/1/18

Policy Development Updates

- Updated the Storage as a Transmission Asset initiative timeline
- Updated the Congestion Revenue Rights Auction Efficiency timeline
- Updated the next paper date, as well as the EIM Category, for the Extended Short Term Unit Commitment
- Updated the EIM Category classification for the Dispatch Operating Target Tariff Clarifications initiative
- Updated the Day-Ahead Market Enhancements timeline

Implementation Milestones Updates

- Fall Release 2018 moved from Oct 1, 2018 to Nov 1, 2018
- CCDEBE and CME-T moved from Fall 2018 to Fall 2019
- Extended STUC added to Fall 2018
- CRR Auction Efficiency 1B added as an independent 2018
- ADS Replacement moved from independent 2018 to independent 2019
- CCE3 included in the Fall 2018 Release
- Black Start and System Restoration Phase 2 - moved to independent 2019
- SIBR WebSDK Upgrade removed from list as completed

Changes 5/18/18

Policy Development Updates

- Updated the Extended STUC timeline
- Updated the Review Transmission Access Charge EIM authority classification and EIM Governing Body date

Changes 5/11/18

Policy Development Updates

- Added the Extended Short Term Unit Commitment ('Extended STUC') initiative to timeline
- Updated the Congestion Revenue Rights Auction Efficiency timeline (Track 2 timeline is currently being
- Updated the Review Transmission Access Charge Structure initiative timeline
- Updated the Intertie Deviation Settlement initiative timeline (has been placed on temporary hold until July)
- Updated the EIM Offer Rules initiative timeline
- Updated the Commitment Costs and Default Energy Bids initiative timeline
- Updated the Storage as a Transmission Asset initiative timeline
- Updated the Energy Storage and Distributed Energy Resources Phase 3 initiative timeline
- Updated the Dispatch Operating Target Tariff Clarification tariff development timeline
- Updated the Regional Integration and EIM Greenhouse Gas Compliance initiative timeline

Changes 5/4/18

Implementation Milestones Updates:

- RIMS functional enhancements completed in April 2018 and removed.
- RAAIM Calculation Modifications completed on 5/1/18 and removed.
- RSI completed on 5/1/18 and removed.
- CPM Risk-of-Retirement removed due to FERC rejection.
- ADS Replacement moved from Fall 2018 to independent.

Added EIM 2018 Enhancements to Fall 2018 release.

Policy Development Updates

- Removed the month of April from timeline
- Updated schedule for Regional Integration and EIM GHG Compliance Initiative
- Updated schedule for Day-Ahead Market Enhancements Initiative
- Updated comments deadline for RC Rate Design, Terms and Conditions initiative
- Updated Board date for the FRACMOO2 initiative
- Updated Board date (to TBD) for the Review Transmission Access Charge Structure initiative

Changes 4/27/18

Policy & Tariff Development Updates

- Updated timeline for the Energy Storage and Distributed Energy Resources Phase 3 initiative
- Updated timeline for the Commitment Costs and Default Energy Bid Enhancements initiative
- Updated the Board date for the Regional Integration and EIM Greenhouse Gas Compliance initiative
- Updated the Storage as a Transmission Asset (May web conference date)
- Updated the Intertie Deviation Settlement initiative timeline (May web conference date)

Changes 4/20/18

Policy & Tariff Development Updates

- Updated the Day Ahead Market Enhancements initiative timeline (reflecting new Sep Board target date)
- Updated EIM Governing Body and Board dates for the Extend DAM Enhancements to EIM Entities initiative

Changes 4/13

Policy & Tariff Development Updates

- Corrected project lead information for the Commitment Costs and Default Energy Bid Enhancements and Commitment Cost
- Modified the EIM Category for the Day-Ahead Market Enhancements initiative
- Updated timeline for the Commitment Costs and Default Energy Bid Enhancements initiative (upcoming tariff)
- Updated timeline for the Intertie Deviation Settlement initiative (upcoming initiative)
- Updated timeline for the Review Transmission Access Charge Structure initiative
- Updated timeline for the Energy Storage and Distributed Energy Resources Phase 2 initiative (revised tariff)

Implementation Milestones Updates:

- Removed Winter 2017 release which activated on 4/4/18
- Moved CCE3 and RIMS Functional Enhancements from Spring 2018 release to Independent Projects
- Removed Aliso Canyon Gas-Electric Coordination Phase 3 from Fall 2018 release
- Added Congestion Revenue Right (CRR) Auction Efficiency (phased implementation) to Fall 2018 release
- Moved EIM-LADWP from Spring 2019 to Spring 2020
- Added to TBD: EIM Offer Rules, Storage as a Transmission Asset, RA Enhancements (Track 1 and Track 2)
- Updated dates for CCE3 project to reflect 6 month period between deployment and activation
- Other minor updates to align with RUG presentation dated 4/10/18.

Changes 4/6

Policy & Tariff Development Updates

- Removed month of March from timeline
- Updated May timeline for Track 1B timeline for the Congestion Revenue Rights Auction Efficiency initiative
- Updated straw proposal meeting date for the Storage as a Transmission Asset initiative
- Updated dates for Reliability Coordinator Rate Design, Terms and Conditions
- Updated April/May dates for FRACMOO 2

Changes 3/30

Policy & Tariff Development Updates

- Updated comments deadline for the Energy Storage and Distributed Energy Resources Phase 3 initiative
- Added timeline for the Storage as a Transmission Asset initiative Development)
- Moved the Dispatch Operating Target Clarification process to Tariff Section
- Add dates for paper, meeting and comments for generator contingency and remedial action scheme modeling
- Add April dates for clarification of tariff rules regarding following DOT
- Add dates for FRACMOO 2
- Update April dates for Flexible Capacity Needs Technical Study Process
- Add meeting dates in Sep and Nov for 2018-2019 transmission planning process
- Removed 2017-2018 transmission planning process
- Add comments date in April for 2019 and 2023 local capacity requirement

Changes 3/23

Policy & Tariff Development Updates

- Removed the 2017 Expedited GIDAP Enhancements initiative from the Tariff section (Implementation pending)
- Removed the Generator Interconnection Driven Network Upgrade Cost Recovery initiative from Tariff section
- Removed the Competitive Solicitation Process Enhancements initiative from Tariff section (initiative has been
- Removed the Revised Settlement Statement & Dispute Timeline for T+35M initiative (initiative has been
- Removed Reactive Power Requirements and Financial Compensation from Tariff section (Implementation
- Removed Reliability Services Phase 1B/2 from Tariff section (currently in Implementation phase)
- Removed the Aliso Canyon Gas-Electric Coordination Phase 3 initiative from Tariff section (currently in
- Moved Commitment Costs and Default Energy Bid Enhancements to Tariff section
- Updated timeline for the Commitment Cost Enhancements phase 3 initiative (Tariff filing pending)
- Updated timeline for the Intertie Deviation Settlement upcoming initiative
- Updated the timeline for the Congestion Revenue Rights Auction Efficiency initiative (moved Track 1A to Tariff
- Updated the proposed Tariff filing date for the Energy Storage and Distributed Energy Resources Phase 2
- Removed month of February from spreadsheet

Changes 3/16

Policy & Tariff Development Updates

- Updated timeline for the Reliability Coordinator Services Rate, Design, Terms and Conditions initiative
- Updated timeline (April meeting) for the Review Transmission Access Structure initiative

Updated EIM categorization for the Imbalance Conformance Enhancements initiative

Changes 3/9

Policy & Tariff Development Updates

Updated Market Surveillance Committee dates for the Congestion Revenue Rights Auction Efficiency and the Commitment Costs

Updated initiative name for Storage as Transmission Facility (now Storage as a Transmission Asset)

Changes 3/2

Policy & Tariff Development Updates

Updated timeline for Business Practice Manual Change Management meetings

Updated timeline for Market Performance and Planning Forum recurring bi-monthly meetings (tentative)

Updated timeline for Day-Ahead Market Enhancements initiative

Updated the Flexible Capacity Needs Technical Study Process April date(s)

Updated March meeting date for ESDER Phase 3

Removed 2018 and 2022 Local Capacity Requirement

Removed 2017 and 2021 Local Capacity Requirement

Updated the FRACMOO2 timeline with tentative meetings

Removed Black Start and System Restoration Phase 2 from spreadsheet (initiative has been completed)

Changes 2/23

Policy & Tariff Development Updates

Removed month of January

Updated the FRACMOO2 timeline (with the targeted 4/6/18 posting of next iteration)

Updated the Day-Ahead Market Enhancements timeline and targeted Board dates

Updated the Storage as a Transmission Facility initiative with the policy lead

Updated the annual Western Regional Planning Coordination timeline (reflecting upcoming comments due

Removed the Intertie Deviation Settlement current timeline (initiative in short delay and new schedule in

Implementation Milestones Updates:

Removed Frequency Response Phase 2 from Fall 2019 as inactive

Moved RAAIM Calculation Modifications, Reliability Services 2017, and RIMS functional enhancements from

Updated Congestion Revenue Right Auction Efficiency dates to reflect July 2019 rather than October 2019

Changes 2/16

Policy & Tariff Development Updates

Updated the Energy Storage and Distributed Energy Resources Phase 3 schedule (to reflect correct straw

Changes 2/8

Policy & Tariff Development Updates

- Updated the Flexible Resource Adequacy and Must Offer Obligations schedule
- Updated the Intertie Deviation Settlement schedule
- Updated the Congestion Revenue Rights Auction Efficiency schedule (to reflect latest proposal posting date)
- Updated Participating Transmission Owner Per Unit Cost Guides Schedule (recurring process update)

Implementation Milestones Updates:

- Removed OMS Generation Nature of Work Updates as complete
- Updated dates for Winter 2017 release projects (see RUG slides for more details)
- Updated Market Simulation dates for SIBR UI Upgrade
- Updated Market Simulation dates for Fall 2018 release

Changes 2/2

Policy & Tariff Development Updates

- Updated upcoming proposal publication date and associated meeting/comments dates for the Energy Storage and Distributed
- Updated schedule for the annual Flexible Capacity Technical Needs Assessment process
- Updated schedule for the Commitment Costs and Default Energy Bid Enhancements initiative
- Added schedule for new Day Ahead Market Enhancements initiative (issue paper phase)
- Updated schedule for Imbalance Conformance Initiative (draft final proposal phase)

Changes 1/26

Policy & Tariff Development Updates

- Updated schedule for the Regional Integration and EIM Greenhouse Gas Enhancements
- Updated schedule for the Review RMR and CPM Revisions initiative
- Rescheduled the ESDER3 Feb. 15 call to Feb. 21
- Updated the Intertie Deviation Settlement Apr. 12 meeting to Apr. 11
- Moved the Generator Contingency and Remedial Action Scheme Modeling initiative to the Tariff
- Updated the Flexible Capacity Technical Needs Assessment annual recurring initiative to show 1/15/18
- Updated the EIM Governing Body meetings timeline (added Nov date)
- Updated the Board of Governor's meetings timeline (removed Oct date as it is not a general session)
- Updated the Commitment Costs and Default Energy Bid Enhancements remaining schedule
- Updated the Imbalance Conformance Enhancements initiative schedule
- Updated the schedule for the Annual Policy Initiatives Roadmap recurring initiative

Changes 1/19

Policy & Tariff Development Updates

- Replaced RT Sufficiency initiative with EIM Offer Rules initiative, per the 2018 final Policy Initiatives Roadmap
- Remove 2016-2017 Transmission Planning Process
- Added 2018-2019 Transmission Planning Process
- Moved Contingency Modeling Enhancements to tariff section

Implementation Milestones Updates:

- Removed Independent 2017 and added Independent 2018
- Removed EIM 2017 Enhancements as completed
- Removed Support for Imperial Valley Phase Shifter as completed
- Moved SIBR UI Upgrade to Spring 2018 (from Independent 2017)

Moved EIM Greenhouse Gas Compliance to Fall 2018 from Spring 2018
Moved EIM - Seattle City Light to Spring 2020 (from Spring 2019)
Moved Generator contingency/RAS modeling to Fall 2018 from Fall 2019
Moved CPM Risk-of-Retirement from Spring 2018 to Fall 2018
Moved Energy storage and aggregated distributed energy resource, Phase 2 from Spring 2018 to Fall 2018
Moved ADS Replacement from Fall 2019 to Fall 2018
Added Enhanced Day-Ahead Market to Fall 2019
Removed Real-Time Market Enhancements from Fall 2019
Updated dates per 1/16/18 RUG slides
Updated Project Manager assignments
Added TBD section

Changes 1/12

Policy & Tariff Development Updates:

Added the Clarification of Tariff Rules Regarding Following DOT (one-off) initiative
Updated the Market Performance and Planning Forum (recurring meeting) timeline
Updated ISO Board of Governors (recurring meeting) timeline
Updated the EIM Governing Body (recurring meeting) timeline
Added the Review RMR and CPM Revisions initiative and current timeline
Added the RA Enhancements (Track 1 and Track 2) initiative
Added the RC Services initiative
Added the RT Resource Sufficiency initiative
Added the Storage as a Transmission Facility initiative
Added the DAM Enhancements for EIM Entities initiative
Added the DAM Enhancements initiative
Added the Intertie Deviation Settlement initiative and tentative timeline
Added the Interconnection Process Enhancements initiative and current timeline
Updated the Western Regional Planning Forum (recurring meeting) timeline
Updated the Congestion Revenue Rights Auction Efficiency timeline
Updated the Annual Policy Initiatives Roadmap Process (recurring initiative) timeline (updated Board meeting
Updated the Commitment Costs and Default Energy Bid Enhancements timeline

Changes 1/5

Policy & Tariff Development Updates:

Removed month of December from initiative timelines
Updated the Tariff filing date for the expedited GIDAP initiative
Updated the Commitment Costs and Default Energy Bids Enhancements initiative January comments deadline