



BPM Change Management Meeting

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Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- Meeting is structured to stimulate honest dialogue and engage different perspectives.
- Please keep comments professional and respectful.

New instructions for raising your hand to ask a question

- If you are connected to audio through your computer or used the “call me” option, select the raise hand icon  above the chat window located on bottom right corner of the screen. **Note:** #2 only works if you dialed into the meeting.
- Please remember to state your name and affiliation before making your comment.
- If you need technical assistance during the meeting, please send a chat to the event producer.

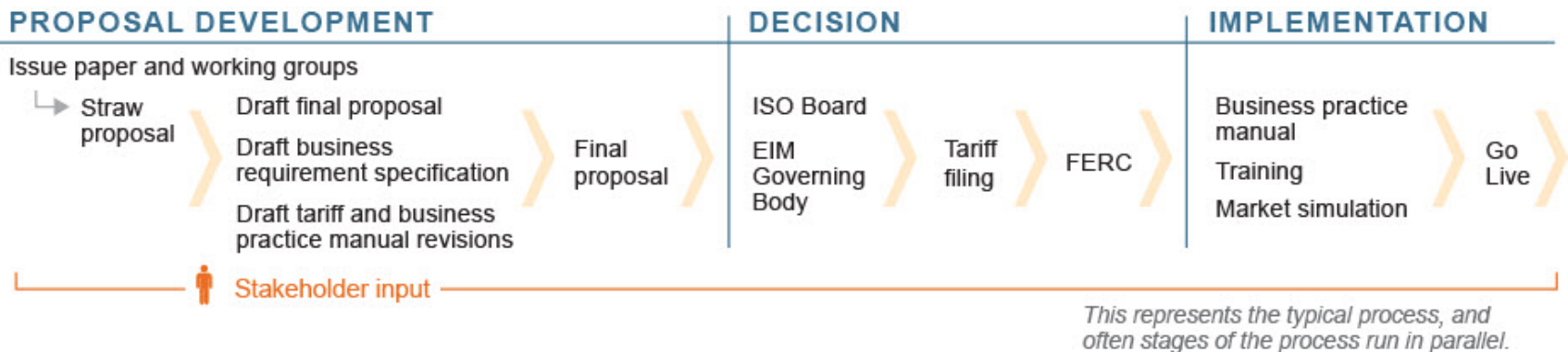
Agenda – BPM Change Management Meeting

November 16, 2021

Topic	Presenter
Introduction / Meeting Overview	Radha Madrigal
Discussion of active proposed changes: Market Operations BPM Market Instruments BPM Candidate CRR Holder Registration BPM Credit Management and Market Clearing	Michael Martin Michael Martin Radha Madrigal Christina Billing
Wrap-Up and Next Steps	Radha Madrigal

BPM Change Management Process
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California ISO Stakeholder Initiative Process



- 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 through 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.*

Market Operations BPM

PRR	PRR Title	Stage
1404	Market operations BPM edits related to energy storage and distributed energy resources phase 4 cleanup	Initial
1403	Treatment of expected energy for non-participating energy imbalance market resources	Initial

PRR 1404 – Market operations BPM edits related to energy storage and distributed energy resources phase 4 cleanup

- Reason for revision
 - Clean-up edits related to ESDER4 initiative that was implemented few months ago. The scope of the edits are as follows: 1. Edits to remove multiple instances of the same information for ease of revision control. 2. Miscellaneous clean-up edits that were identified after the initial PRRs for ESDER4 were posted. 3. Additional information and examples of EOH SOC management.
- Initial comments: None
- Initial comment period expired: February 15, 2022
- Next step: Post Recommendation

PRR 1403 – Treatment of expected energy for non-participating energy imbalance market resources

- Reason for revision
 - Changes to the treatment of expected energy for non-participating EIM resources, as the current language reflects the implementation per the original EIM program. The revised language reflects a change made in the EIM year 1 project implementation.
- Initial comments: None
- Initial comment period expired: February 15, 2022
- Next step: Post Recommendation

Market Instruments BPM

PRR	PRR Title	Stage
1405	Market instruments BPM edits related to energy storage and distributed energy resources phase 4 cleanup	Initial
1402	Updates to after-market cost recovery and reference level calculator change requests for Extremely Long Start resources	Initial

PRR 1405 – Market instruments BPM edits related to energy storage and distributed energy resources phase 4 cleanup

- Reason for revision
 - Clean-up edits related to ESDER4 initiative that was implemented few months ago. The scope of the edits are as follow: Revising language to remove the criteria of a resource’s ultimate parent company being a net buyer from the “safe harbor” mitigation exemption for small storage resources (under 5 MW).
- Initial comments: None
- Initial comment period expired: February 15, 2022
- Next step: Post Recommendation

PRR 1402 – Updates to after-market cost recovery and reference level calculator change requests for Extremely Long Start resources

- Reason for revision
 - Updates Attachment O to clarify aspects of the after-market cost recovery process and reference level change requests for Extremely Long Start resources. Also includes numerous minor editorial changes.
- Initial comments: None
- Initial comment period expired: February 15, 2022
- Next step: Post Recommendation

Credit Management and Market Clearing BPM

PRR	PRR Title	Stage
1400	Revisions to section 8.4.1 related to market participants leaving the market or incurring substantial activity level changes	Recommendation

PRR 1400 – Revisions to section 8.4.1 related to market participants leaving the market or incurring substantial activity level changes

- Reason for revision
 - Adding clarifying language to support current documentation for Market Participants Leaving the Market or Incurring Substantial Activity Level Changes. Effective at the end of the PRR process.
- Recommendation Comments: None
- Recommendation comment period expired: February 15, 2022
- Next step: Post Final Decision

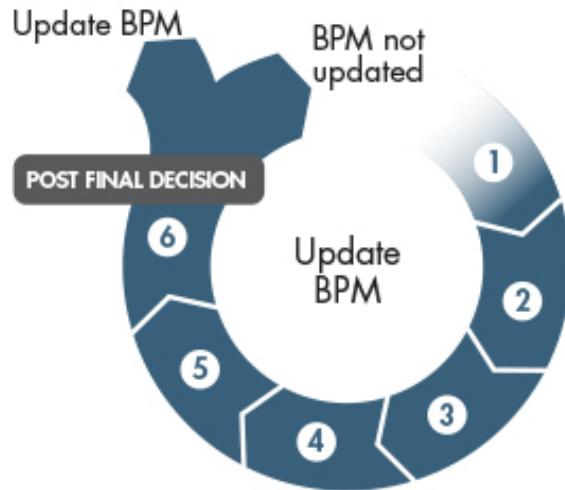
Candidate CRR Holder Registration BPM

PRR	PRR Title	Stage
1401	Additional information for CRR holders terminating agreements	Recommendation

PRR 1401 – Additional information for CRR holders terminating agreements

- Reason for revision
 - Adding clarifying language for CRR holders subject to load migration wishing to terminate their CRR Holder Entity Agreement.
- Recommendation Comments: None
- Recommendation comment period expired: February 15, 2022
- Next step: Post Final Decision

Next BPM PRR Review Monthly Meeting: March 22, 2022 @ 11 a.m.



- 1 SUBMIT PRR**
Proposed Revision Request (PRR) submitted to the ISO
- 2 COMMENTS PERIOD**
Upon ISO acceptance, PRR becomes public and 10-business day comment period starts
- 3 STAKEHOLDER MEETING**
PRR details and comments reviewed and discussed
- 4 RECOMMENDATION**
ISO recommendation issued on PRR
- 5 COMMENTS ON RECOMMENDATION**
10-business day comment period open on recommendation
- 6 STAKEHOLDER MEETING ON RECOMMENDATION**
PRR recommendation and comments reviewed

BPM change management
process questions:

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