



California ISO

Policy Catalog and Roadmap Process Updates

October 24, 2023

Market Strategy and Governance


New pre-registration process to join meetings

- Pre-registration is required for all future stakeholder meetings in order to receive a link to join the meeting.
- A recent update to WebEx disabled the ability to view the list of meeting attendees.
- The new pre-registration process will allow us to provide the list of meeting attendees to stakeholders during the call.

Housekeeping reminders

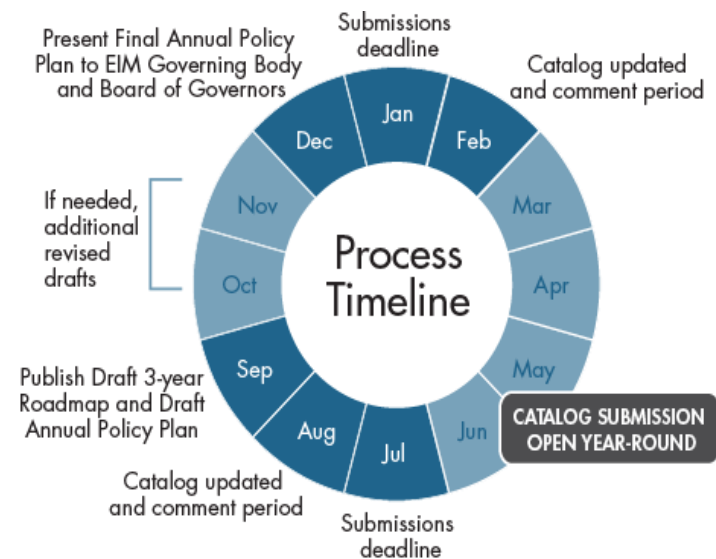
- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- Meeting is structured to stimulate dialogue and engage different perspectives.
- Please keep comments professional and respectful.
- Please try and be brief and refrain from repeating what has already been said so that we can manage the time efficiently.

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  located on the top right above the chat window. **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.
- You may also send your question via chat to either to all panelists.

Current Catalog and Roadmap Process

- **Catalog:** Stakeholders submissions accepted on a rolling basis; Catalog is updated and published twice per year
- **Roadmap:** updated annually in the fall for the following three calendar years



There are opportunities to improve internal coordination and external engagement

- **Internal planning is now focused on prioritization**
 - With suggestions for around 60 policy initiatives, the Catalog is unwieldy as an internal planning document
 - Policy Roadmap should be coordinated with ISO Strategic Goals, Strategic Planning, Enterprise Roadmap, budget, and resources
- **We want our policy efforts to reflect the shared priorities of our stakeholders**
 - Catalog feels like a laundry list; Stakeholders perceive Policy Roadmap as largely final

Goals for new Catalog and Roadmap

- **Meaningfully engage external stakeholders**
 - Integrate priorities from stakeholders, including RIF Roundtable
- **Transparent**
 - Clear methods to identify & prioritize proposals
 - Fair access to ISO for all stakeholders
- **Aligned with internal planning processes**
 - Strategic goals, strategic and enterprise roadmaps
- **Focused scope**
 - Initiatives connect with ISO strategic goals, ISO capacity, and SH priorities
- **Incorporate urgent requests**
 - Allow for unexpected initiatives, scope changes, and timeline extensions

Two-pronged approach to improving the Catalog and Roadmap process

- **Meaningful engagement with external stakeholders**
 - Establish new catalog of potential discretionary initiatives each year from which to prioritize
 - Integrate priorities from stakeholders into new Catalog effort
 - Integrate input from RIF Roundtable
- **Aligned with internal planning processes**
 - Strategic goals
 - Strategic Roadmap
 - Enterprise roadmap

Annual Catalog process

- Starts with annual level-setting workshop in January to provide the framework for prioritization based on Strategic Goals
- Stakeholders and ISO together develop annual catalog of potential discretionary initiatives for the upcoming 3-year Roadmap
 - Potential initiatives should be (re)submitted for the fresh prioritization effort to ensure they reflect current stakeholder needs, and are supportive of the ISO Strategic Goals
 - ISO seeks feedback on the fate of the existing, cumulative catalog – retire it, establish a working group to go through all initiatives, keep it as an additional product, change format to a matrix...
 - The goal of the new annual catalog will be to hone a “short list” of discretionary initiatives from which the Roadmap will be developed

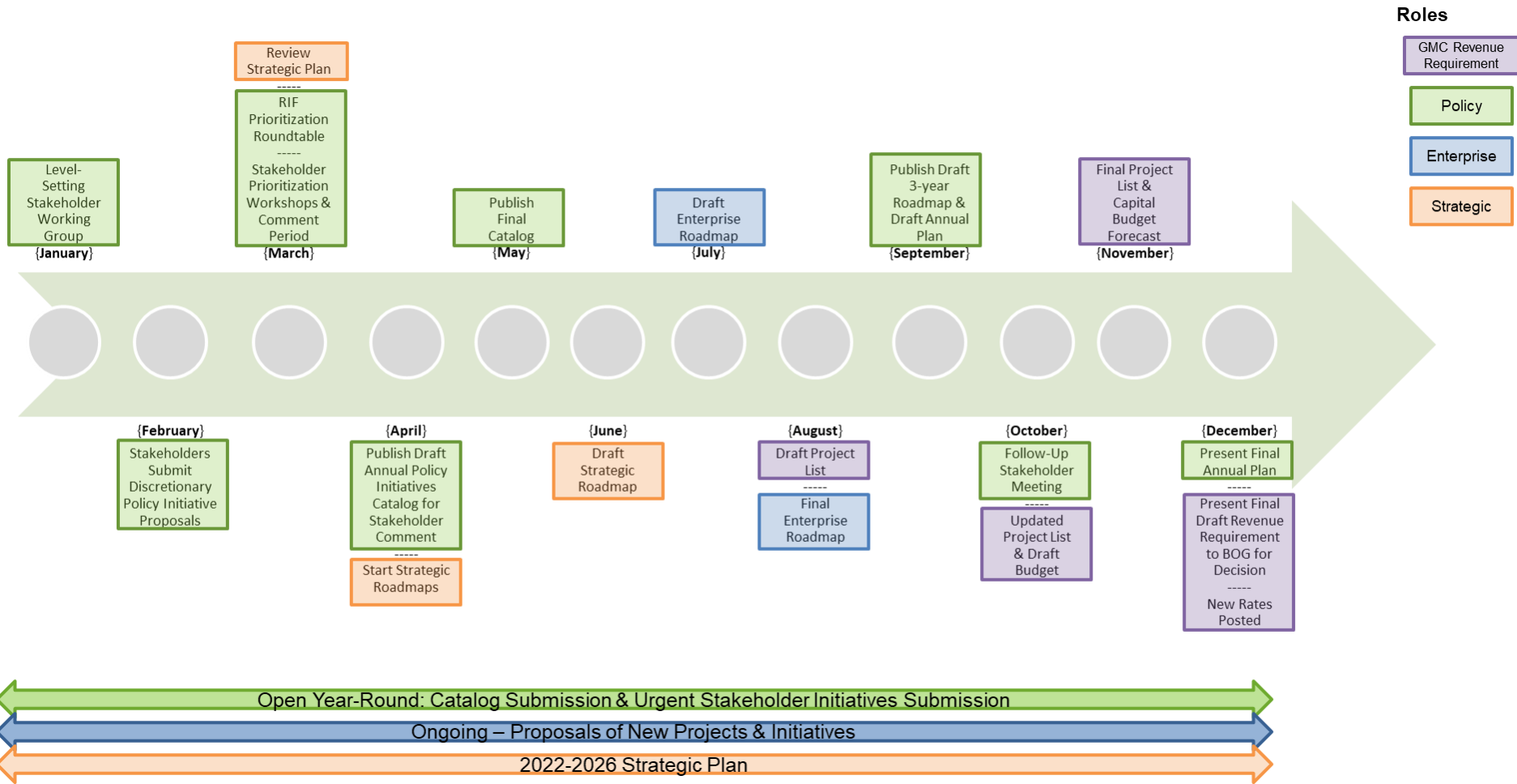
Stakeholders will have multiple touchpoints for input in the prioritization of policy initiatives

- **January** – ISO holds level-setting stakeholder workshop
- **February** – Stakeholders submit potential discretionary initiatives
- **March** – Regional Issues Forum holds prioritization roundtable, ISO hosts stakeholder prioritization workshops
- **April** – ISO publishes draft Catalog for stakeholder comment
- **May** – ISO publishes final Annual Catalog
- **September** – ISO publishes draft Roadmap for stakeholder comment
- **December** – Present final Roadmap to ISO Board and WEIM Governing Body

Policy Catalog and Roadmaps should be integrated with other internal planning processes.

- **Strategic goals** inform stakeholders of our vision for all our efforts and what comes into policy catalog process.
- Policy catalog and stakeholder input generally feeds into, as appropriate, our internal **strategic roadmap**.
- Internal **enterprise roadmap and budget and resource limitations** inform policy roadmap.

Timing & process alignment



Next Steps

- **October-November 2023:** Stakeholder meeting(s) to discuss new process, and get input and feedback
- **January 2024:** Kickoff annual new process with level-setting workshop
- **February 2024:** Annual catalog submissions followed by workshops to discuss submissions and prioritization

Next Steps

- If you have any questions please contact isostakeholderaffairs@caiso.com



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October 10, 2023

Leadership, Markets, Operations, Transmission

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By Danielle Osborn Mills Principal, Infrastructure Policy Development

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