

Initiatives		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						
	EIM Regional Issues Forum meetings	N/A	Recurring						
	Market Surveillance Committee meetings	B. Cooper	Recurring						
	Market Performance and Planning Forum meetings	J. Morris	Recurring						
	Business Practice Manual Change Management meetings	J. Payton	Recurring						
Policy	Bid Cost Recovery Enhancements (Formerly Two-Tier)	P. Servedio	Q4 2015				Suspended		TBD
	Commitment Cost and Default Energy Bid Enhancements	C. Colbert	Q4 2016	10-Jul-17	E2	Oct 2017	Nov 2017		2018
	Consolidated Energy Imbalance Market Initiatives	M. Pogue	Q2 2017		E1, E2 *	Oct 2017	Nov 2017		2018
	Contingency Modeling Enhancements	P. Servedio	Q4 2016	10-Jul-17			Nov 2017		TBD
	Energy Storage and Aggregated Distributed Energy Resource Phase 3	E. Kim	Q3 2017		E1, E2 *	TBD	TBD		TBD
	Frequency Response Phase 2	C.Colbert	Dec 2016				Jun 2018		TBD
	Flexible Resource Adequacy Criteria and Must-Run Obligation Phase 2	K. Meeusen	June 2015	10-Jul-17			Apr 2018		TBD
	Generator Contingency and Remedial Action Scheme Modeling	P. Servedio	Q2 2016	10-Jul-17	E1, E2 *	Aug 2017	Sep 2017		TBD
	2017 Expedited GIDAP Enhancements	J. Foster	Q3 2017				Dec 2017		TBD
	Temporary Shutdown of Resource Operations	K. Johnson	Q2 2017				Nov 2017		TBD
	CPM Risk-of-Retirement	K. Johnson	Q2 2017				Nov 2017		TBD
Review Transmission Access Charge Structure	L. Kristov	Q3 2017				TBD		TBD	
Regional Integration	Regional Integration and EIM Greenhouse Gas Compliance	D. Tretheway	Q3 2016		E1		TBD		
Recurring Initiatives	Flexible Capacity Needs Technical Study Process	C. Loutan	Recurring						
	Grid Management Charge/Budget Process	Gordon	Recurring				Jul 2017		
	2017 and 2021 Local Capacity Requirements	C. Micsa	Recurring						
	2018 and 2022 Local Capacity Requirements	C. Micsa	Recurring						
	Participating Transmission Owner Per-Unit Cost	R. Emmert/ M.Wu	Recurring						
	Annual Policy Initiatives Roadmap Process	B.Dean	Q3 2016				Dec 2017		N/A
	2016-2017 Transmission Planning Process	R. Sparks	Recurring				Mar 2017		N/A
	2017-2018 Transmission Planning Process	R. Sparks	Recurring						N/A
	2017 Tariff Clarifications Filing Process	K. Meeusen					N/A		
Western Regions Planning Coordination	G. DeShazo	Recurring				N/A			
	Legal Lead	Start				Tariff Filed			
Tariff	Aliso Canyon Gas-Electric Coordination Phase 3	C. Colbert	Q2 2017		E1, E2*	Jul 2017	Jul 2017		TBD
	Black Start and System Restoration Phase 2	S. Vaughan	May-16						Aug 2017
	Commitment Cost Enhancements Phase 3	D. Hou	TBD						TBD
	Competitive Solicitation Process Enhancements	S. Ruttly	May 2015						N/A
	Energy Storage and Distributed Energy Resources Phase 2	J. Powers	Q1 2016		E1, E2*	Jul 2017	Jul 2017		Jan 2018
	Generation Interconnection Driven Network Upgrades Cost Recovery	S. Ruttly	Q3 2016				Mar 2017		Apr 2017
	Reactive Power Requirements and Financial Compensation	C. Devon	May 2015				August 2016	Ruling: Pending	Oct 2016
	Reliability Services Phase 1b	K. Meeusen	Q1 2016					Posted 3rd revised tariff language - No additional SH engagement activities	Apr 2017
	Reliability Services Phase 2	E. Kim		23-Mar-15			Oct 2016	Posted 3rd revised tariff language - No additional SH engagement activities	Apr 2017
	Revised Settlement Statement & Dispute Timeline for T+35M	T. Huynh	Dec-15				Aug 2016	Ruling: Pending	Jan 2017

Release / Implementation		Deployment	Market Simulation Start - End		Activation	Project Manager
Independent 2017	Black Start and System Restoration Phase 2	12/1/17	N/A	N/A	May 2017	Adrian Chiosea
	CMRI Access Control Level Enhancement	9/6/17	8/28/17	9/5/17	Aug 2017	John Williams
	RIMS functional enhancements	2/1/18	N/A	N/A	Dec 2017	Marcelo DaCosta
	Support for Imperial Valley Phase Shifter	10/4/17	N/A	N/A	Nov 2017	Mohan Koya
Fall 2017 Release	Bidding Rules Enhancements - Part B	11/1/2017	9/6/2017	9/29/2017	Nov 2017	Jim Barber
	EIM 2017 Portland General Electric	10/1/2017	6/6/2017	7/6/2017	Oct 2017	Joanne Alai
	Gas Burn Report	11/1/2017	9/19/2017	9/29/2017	Nov 2017	Jim Barber
	RAAIM Production Defects	11/1/2017	9/11/2017	9/11/2017	Nov 2017	Scott Cha
	RM & EIM 2017 Enhancements	11/1/2017	9/19/2017	9/29/2017	Apr 2017	Ray Riley
	SIBR UI Upgrade	11/1/2017	9/19/2017	9/29/2017	Nov 2017	John Williams
Winter 2017	EIM Idaho Power Company	4/4/2018	12/1/2017	1/31/2018	Apr 2018	Joanne Alai
	EIM Powerex	4/4/2018	12/1/2017	1/31/2018	Apr 2018	Joanne Alai
	EIM Winter 2017 Enhancements	2/13/2018	12/1/2017	1/31/2018	Feb 2018	Deann MacDougall
	Energy storage and aggregated distributed energy resource, Phase 1C	2/13/2018	12/1/2017	1/31/2018	Feb 2018	Deann MacDougall
Spring 2018	Reliability Services 2017	2/13/2018	12/11/2017	1/25/2018	Apr 2018	Marci Stuckey
	Commitment cost enhancements phase 3	5/1/2018	2/27/2018	3/30/2018	May 2018	Marcelo DaCosta
	CPM Risk-of-Retirement	TBD	TBD	TBD	TBD	Adrian Chiosea
Fall 2018 Release (tentative)	EIM Greenhouse Gas Compliance	TBD	TBD	TBD	TBD	Ray Riley
	Energy storage and aggregated distributed energy resource, Phase 2	5/1/2018	3/1/2018	3/30/2018	May 2018	Mohan Koya
	ADS Replacement	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
	Aliso Canyon Gas-Electric Coordination Phase 3 (system changes)	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
Spring 2019	CIRA Technology Upgrade	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
	Commitment cost and Default Energy Bid Enhancements	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
	Consolidated Energy Imbalance Market Initiatives	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
	Contingency modeling enhancements	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
	Temporary Shutdown of Resource Operations	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
	EIM - Balancing Authority of Northern California (BANC)/SMUD	4/1/2019	12/1/2018	1/31/2019	Apr 2019	Janet Morris
	EIM - LADWP	4/1/2019	12/1/2018	1/31/2019	Apr 2019	Janet Morris
Fall 2019	EIM - Seattle City Light	4/1/2019	12/1/2018	1/31/2019	Apr 2019	Janet Morris
	Congestion Revenue Right auction efficiency	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Flexible resource adequacy criteria and must run obligation phase 2	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Frequency response phase 2	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Generator contingency/RAS modeling	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Real-Time Market Enhancements	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
Spring 2020	Regional Integration and EIM Greenhouse Gas Compliance	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Transmission Access Charge Billing Structure	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
Spring 2020	EIM - Salt River Project	4/1/2020	12/1/2019	1/31/2020	Apr 2020	Janet Morris

Changes 12/16/16

Regional Resource Adequacy - Extended comments deadline for draft regional framework proposal
Transmission Access Charge Options - Extended comments deadline for draft regional framework proposal

Changes 12/12/16

Removed: Capacity procurement mechanism replacement was activated on 11/1/16
Removed: Reliability Services Initiative (RSI) 1A and Commitment Cost Phase 2 completion was activated on 11/1/16
Removed: Flexible Ramping Product was activated on 11/1/16
Acceptable Use Policy - CMRI and ADS Client Replacement will be effective on 1/7/2017

Moved RIMS Enhancements, MRI-S Metering and Enhancements and PIRP System Application Decommissioning to Independent 2017
Updated status and dates for Independent 2017 projects
Added Reactive power requirements and financial compensation and Metering Rules Enhancements to Independent 2017
Updated market simulation dates (previously TBD) for Fall 2017 release
Updated proposed (tentative) projects in Fall 2018 release
Added EIM - Seattle City Light in Spring 2019
Moved regional initiative implementation to TBD

Changes 12/9/16

Regional Resource Adequacy - Updated policy schedule
Transmission Access Charge Options - Updated policy schedule
Stepped Constraint Parameters - Board date changed to TBD; see note

Changes 12/1/16

Metering Rules Enhancements - Updated tariff development schedule
Removed Self Schedules Bid Cost Recovery Allocation & Bid Floor Initiative- what is left currently on this initiative will be absorbed in the BCR Enhancements initiative

Changes 11/21/16

Regional Resource Adequacy - Updated policy schedule
Transmission Access Charge Options - Updated policy schedule
Flexible Resource Adequacy Criteria Must Offer Obligation - Phase 2 updated policy schedule

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