

# Memorandum

**To:** ISO Board of Governors  
**From:** Karen Edson, Vice President, Policy and Client Services  
**Date:** May 21, 2014  
**Re:** **Business practice manual change management activities update**

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***This memorandum does not require Board action.***

This memorandum is a regular report required by the Federal Energy Regulatory Commission to inform the ISO Board of Governors on the status of the business practice manual change requests submitted by stakeholders and the California Independent System Operator Corporation.

The ISO inaugurated the public change management process for business practice manuals (BPMs) on April 1, 2009. Both the ISO and stakeholders use the same electronic system and process to submit and track proposed changes to the BPMs. The process includes stakeholder review, ISO approval or rejection, and a possible appeal to the BPM Appeals Committee, which is comprised of three ISO officers.

As of May 8, 2014, thirty proposed revision requests (PRRs) were active in the BPM change management system and were all ISO submitted. These thirty active PRRs impact the following BPMs:

- Candidate CRR Holder Registration (1 request)
- Direct Telemetry (3 requests)
- Distributed Generation for Deliverability (1 request)
- Generator Interconnection Procedures (1 request)
- Generator Interconnection and Deliverability Allocation Procedures (1 request)
- Metering (1 request)
- Market Instruments (5 requests)
- Market Operations (5 requests)
- Queue Management (2 requests)
- Reliability Requirements (1 request)
- Scheduling Coordinator Certification and Termination (1 request)
- Settlements and Billing (8 requests)

## **PROCESS OVERVIEW**

The ISO held two monthly BPM change management stakeholder meetings on March 25, 2014, where twenty-one stakeholders participated, and on April 22, 2014, where ten stakeholders participated. Based on stakeholder comments during the meeting, and on the types of comments entered into the BPM change management electronic system, it appears that stakeholders are generally satisfied with the process.

## **BPM CHANGE MANAGEMENT REPORT**

In compliance with the tariff reporting requirements, attachment 1 of this report:

- States the total number of active PRRs submitted by stakeholders and by the ISO;
- Depicts the active PRRs in various steps along the PRR lifecycle, as of May 8, 2014;
- Reflects that twenty-four PRRs were in final decision status for the period March 1, 2014 through May 8, 2014; and
- Includes PRRs currently under stakeholder appeal, the stakeholder positions on rejected PRRs, and the reasons for rejection.

The following is additional relevant information:

- Two PRRs are under stakeholder appeal.
- Three PRRs were submitted into the electronic system by the ISO on an emergency basis.

A PRR report summarizing the content of each active PRR in the BPM change management system as of May 8, 2014, is included as attachment 2.