Ca	lifori	nia	ISO
	Shapin	g a Rene	wed Future

						May 2015					June 2015				July 2015					Aug 2015					
	Initiatives	Initiative Lead	Start	Discuss at MSC	Proposed Board Meeting	Paper Published	Comments Due	Meeting	Training or Workshop	ISO Files Tariff Language	Paper Published	Comments Due	Meeting	Training or Workshop	5+BJ:CD	Paper Published	Comments Due	Meeting	Training or Workshop	ISO Files Tariff Language	Paper Published	Comments Due	Meeting	Training or Workshop	
	ISO Board of Governors meeting		Recurring					14-15					30					16-17							
	Market surveillance committee meeting Market performance and planning meetings	B. Cooper J. Morris	Recurring Recurring					18 20	-				8					21				-			-
	Business practice manual change management meetings	J. Payton	Recurring					26					23					28					25		
	Ancillary services substitution (MRTU release 2)	C. Bentley	Q3																						
	Bid cost recovery and variable energy resource settlements	D. Hou	April 2015		July 2015	20			8			10													
	Bidding rules enhancements	D. Hou	April 2015		Dec 2015		13				19		26				10				11		18		
	FERC Order 809 (Bidding rules enhancements)	D. Hou	April 2015				6 & 27	15												23					
	Commitment cost enhancements phase 3	D. Hou	Q1		Sept 2015		0027									9	30	16			20		27		
	Competitive solicitation process enhancements	T. Flynn	May 2015		Nov 2015	28						19	4			3	30	10			20		21		
	Contingency modeling enhancements	D. Hou	may 2010		Sept 2015								-												
"	EIM enhancements phase 2	D. Tretheway	Q2		Sept 2015			4																	
ives	EIM governance	S. Crowley			Sept 2015	21		28				11									18				
Initia	Energy storage and aggregated demand response energy	T.Flynn	Q2		July 2015																				
n n	Exceptional dispatch decrimental settlement	D. Hou	Q3																						
old	Expanding metering and telemetry options phase 2	T. Flynn	Oct 2014		July 2015																				
keh	Extended look ahead for real time optimization	C.Bentley	Q4																						
Stak	Flexible Ramping Product	C.Bentley	April 2015		Sept 2015						3	17	10			22		29				5			
	Frequency response requirements	D. Hou	15-Jul		TBD																				
	Integrated day ahead market/ real-time unit commitment multi hour constraints	C.Bentley	May 2015		2016																				
	Interconnection process enhancements	D.LeVine	Q1		Sept 2015	11		18			26	1					23	9							
	Marginal loss surplus allocation	D. Tretheway	Q1		Nov 2015																				
	Peak reliability coordinator funding	D.Walsh	May-15																						
	Reactive power requirements and financial compensation	C. Bentley	May 2015		Nov 2015		6	21				5													
	Reliability services phase 2	K. Meeusen	May 2015		Q2 -16																				
	Stepped transmission constaint	D. Tretheway	Q2 or Q3																						
	Grid management charge/Budget Process	Epstein/Gordon	Recurring									25	18												
ģ	Congestion Revenue Rights	J. McClain	Recurring																						
ative	2016 & 2020 Local capacity requirements (LCR Study)	C. Micsa	Recurring																						
niti:	Participating transmission owner per unit cost	R. Emmert/M.Wu	Recurring																						
ing	Stakeholder initiatives catalog	TBD	Q3 for 2016																						
cur	Transmission Access Charge	D. Walsh	Recurring																						
æ	2014-2015 Transmission planning process	R. Sparks	Recurring		Mar 2015																				
	2015-2016 Transmission planning process	R. Sparks G. DeShazo	Recurring		Mar 2016																				
	Western regions planning coordination Canacity programmer machanism conference	C. Bentley	Recurring		Feb 2015					15															
	Capacity procurement mechanism replacement		Release TBD Deployed Fall																						
	Commitment cost enhancements phase 2	D. Hou	2015		Mar 2015					21															
ŧ	EIM year 1 enhancements phase 1	John Anders			Mar 2015	12	19	4 and 26		29															
<u>a</u>	Peak reliability coordinator funding	D.Walsh	May-15				40																		
	Pricing enhancements	A. McKenna				8	19	21		04					8										
	Reliability services phase 1a Reliability services phase 1b	C. Bentley C. Bentley	Q3							21															
	Release / Implementation	Deployment	Market Sir Start -		Activation																				
	Commitment cost enhancements phase 2	Oct-15	Juit																						
0	EIM year 1 enhancements	Oct-15																							
9	EIM 2015 (NV Energy)	Oct-15																							
LC LC	Internet Explorer 11 migration	Oct-15																							
64	PIRP decommissioning	Oct-15																							
Œ.	Pricing enhancements	Oct-15																							
	Capacity procurement mechanism replacement	Jan-16			Mar-16																				
Early 2016 Release	Demand response registration enhancements	Jan-16			Mar-15																				
Notease	Reliability services	Jan-16			Mar-16																				
Q	BAL-003 Compliance																								
leas	Contingency modeling enhancements																								
6 Rel	EIM 2016																								
2016	Flexible Ramping Product																								
Fall	OMAR replacement project																								
	RIMS functional enhancements																								
	Aggregated pumps and pump storage																								
	ADS UI replacement																								
	Ancillary services substitution																								
F	Bid cost recovery for unit over multiple days																								
×	Frequency response procurement Cost allocation overall market review																								
Relea	Cost allocation overall market review Marninal loss surplus allocation																								
	Marginal loss surplus allocation Multi day unit commitment																								
	Multi day unit commitment Reliability must-run pump load																								
	Two tier real-time uplift																								
Technology Roadmap	Enterprise model management																								
	External technology roadman	Enterprise Model																							
	External technology roadmap	Management																							

CAISO/CSSA/JPayton Date updated: 5/7/2015

Changes on 5/1/15

Reliability services phase 1 under tariff is separated in phase 1a and 1b. 1b is targeted for Q3 tariff.

Reactive Power targeted for November 2015 BOG decision

Release Items added - Fall 2015: Commitment cost enhancements phase 2; Internet Explorer 11 migration; PIRP D Removed from Fall 2015 Release: RIMS functional enhancements - it is under Fall 2016 Release.

Added a date to Reactive Power (comments due).

Added FERC Order 809 to Bidding rules enhancements. This is a topic that requires immediate attention from stal Added dates to the 2016 Budget and GMC stakeholder initiative

Changes on 4/7/15

Load Granularity Refinements not going to Board Including initiative under Tariff process

Changes on 3/30/15

Frequency Response policy start July; no Board meeting date yet

Renewable integration market and product review bid cost recovery refinements = name change to "Bid cost reco Expanding metering and telemetry Board targeted for July 2015

Interconnection process enhancements Board targeted for September 2015

2015-2016 transmission planning started Feb 2015, Board March 2016

Removed Enabling demand response - registration api deployed on 3/25/15.

Removed Outage management system replacement - deployed on 2/26/15

Removed Many-to-Many substitution (SCP availability calculations) - deployed on 2/26/15

Removed Spring 2015 maintenace release - completed.

Removed Flexible Ramping Product - Phase 1. The FRP will be implementated in Fall 2016 and there will not be ar Part of the Commitment Cost Enhancements Phase 2 will be implemented in the Fall 2015 release. Remainder of Added Contingency Modeling Enhancements Implementation to Fall 2016 Release

Added EIM 2016 Implementation to Fall 2016 Release

Changes on 3/12/15

Contingency Modeling Board meeting moved to Sept 2015

Changes on 3/3/15

Enabling Demand deployment date moved from 2/24/15 to 3/10/15.

Removed Many-to-Many Substitution / App Consolidation from Spring 2015 Release - to be determined

Moved ADS UI replacement from Fall 2105 to TBD

Moved OMAR Replacement Project and RIMS Functional Enhancements from Fall 2015 to Fall 2016

Removed Contingency Modeling Enhancements Implementation from Fall 2015 - to be determined

Changed Flexible Ramping Product - placeholder to Phase 1 in Fall 2015 release

Added Commitment Costs Phase 2 implementation to Fall 2015 release

Added Commitment Costs Phase 3 to the Policy section

Changed timeline for Competitive Solicitation Process Enhancements

Changed timeline for Durable Flexible Capacity Product Studies

Changed timeline for Reliability Services Phase 2

Added timeline for Interconnection Process Enhancements

Changes on 2/13/15

Removed Expanding Meter and Telemetry Options from 2015 Fall Release

Moved Capacity Procurement Mechanism from Policy to Tariff (MRTU Release 2), Durable Flexible Capacity Product Studies, Energy Storage and Aggregated DER, Exceptional Dispatch Decrimental Settlement, Frequency Response Requirements, Integrated DA Market, Marginal Loss Surplus Allocation, Reactive Power & Voltage Control Requirements for Asynchronous Resources, Step

Changes on 2/1/15

proposal to the Board.

phase 1 being implemented in fall 2015.

Moved Flexible Ramping Product from March 2015 Board decision to May 2015 Board decision

Removed Flexible Resource Adequacy Criteria and Must Offer Obligation as the implementation is complete.

Removed Commitment Costs Enhancements as the implementation is complete.

DRS api renamed to Enabling Demand Response and implementation date moved to 2/24/15.

Removed Pay for Performance Review and Enhancement as the implementation is complete.

Moved Many-to-Many Substitution (SCP Availability Calculations) and Outage Management System Replacement de Moved Capacity Procurement Mechanism Replacement and Reliability Services implementation to Early 2016

Moved BAL-003 Compliance implementation to Fall 2016 based on effective date

Removed Subset of Hours (replaced by Reliability Services)

Removed Web Service Standardization from the ADS UI Replacement project

Changes on 1/1/15

Moved Pay for Performance Review and Enhancements from Policy Section to Independent Releases. Deployment Removed Natural Gas Pipeline Penalty Recovery as the policy initiative is complete.

Moved Pricing Enhancements from Policy Section to Fall 2015 Release (although implementation will be phased)

Moved Commitment Costs Enhancements deployment date into January 2015 (pending FERC order)

Removed Energy Storage Interconnection as the policy initiative is complete.

Moved Interconnection Process Enhancements 2015 from recurring initiatives to policy initiatives.