Projected Stakeholder Initiatives Milestones

												Jan 201	7				Feb 2017	7				Mar 201	17		
						Proposed																			
	Initiatives	Initiative Lead	Start	Discuss at MSC	EIM Category (E1-	EIM Governing	Proposed Board	Notes	Proposed Tariff	Publish Paper	Meeting/call	Comments Due	Training or	ISO Files Tariff	Publish Pape	Meeting/call	Comments Due	Training or Workshop	ISO Files Tariff	Publish Paper	Meeting/cal I	Comments Due	Training or Workshop	ISO Files Tariff	
				WIGC	E4)	Body Meeting	Meeting		Filing Date	Paper			Workshop	Language				workshop	Language	Paper			workshop	Language	
ه ق	ISO Board of Governors meeting		Recurring			weeting																			
ting	Market surveillance committee meeting	B. Cooper	Recurring																						
Recurring Meetings	Market performance and planning meetings	J. Morris	Recurring																						
<u> </u>	Business practice manual change management meetings	J. Payton P. Servedio	Recurring Q4 2015				Mar 2017																		
	Bid cost recovery enhancements (formerly two-tier) Black Start	S. Vaughan	Q4 2015 Q4 2016				May 2017			17	24				28		7				7	21			
	Commitment cost and Default Energy Bid Enhancements	C. Colbert	Q4 2016	Nov 18 2016			Jul 2017		2018		24				20						,	21			
		P. Servedio	Q4 2010	1407 18 2010			May 2017		TBD			9													
	Contingency modeling enhancements Energy storage and aggregated distributed energy resource, Phase 2	T. Flynn	Q1 2016				Oct 2016		160			3													
	Frequency response phase 2	C.Colbert	Dec 2016				Sept 2017					9													
	Flexible resource adequacy criteria and must run obligation phase 2	K. Meeusen	June 2015				TBD					3													
	Generator contingency/RAS modeling	It. meeusen	Q2 2016				July 2017																		
	Generation Interconnection Driven Network Upgrades Cost Recovery	S. Rutty	Q3 2016				Dec 2016																		
	Load Serving Entity Definition Refinement	P. Servedio	Q3 2016				Oct 2016																		
	Reliability services phase 2	E. Kim		Mar 23 2015			Oct 2016																		
	Stepped Constraint Parameters	D. Tretheway	Q2 2016				TBD								1	7	21			9	16	28			
E	Regional Integration and EIM Greenhouse Gas Compliance	D. Tretheway	Q3 2016				TBD	New schedule TBD																	
Jrati	Metering Rules Enhancements	T. Flynn	Mar-16				Dec 2016								-										
nteç								Subsequent activities																	
al l	Regional Resource Adequacy	C. Devon	Nov 2015				TBD	on this initiative has not yet been planned or				11													
gior								Subsequent activities																	
Reç	Transmission Access Charge Options	L. Kristov	Oct 2015				TBD	on this initiative has not yet been planned or				11													
	Flexible capacity needs technical study process	C. Loutan	Recurring					· · · · ·																	
es	Grid management charge/Budget Process	Gordon	Recurring				Oct 2016																		
ativ	2017 & 2021 Local capacity requirements (LCR Study)	C. Micsa	Recurring																						
Initi	Participating transmission owner per unit cost	R. Emmert/ M.Wu	Recurring																						
ing		B.Dean	Q3 2016				Feb 2017		N/A			9			-										
nr	Stakeholder initiatives catalog 2016-2017 Transmission planning process	R. Sparks	Recurring				Feb 2017		N/A N/A			9			-										
Re	2017-2018 Transmission Planning Process	R. Sparks	Recurring						N/A																
	Western regions planning coordination	G. DeShazo	Recurring				N/A																		
		Legal Lead	Start				Tariff Filed																		
	Aliso Canyon Gas-Electric Coordination Phase 2	A. McKenna	16-Oct				3-Oct	Order requested 11/28/16	14-Oct																
	Bidding Rules Enhancements - Minimum Load Rerate	A. McKenna							10/17 to 10/21																
	Commitment cost enhancements phase 3	D. Hou							TBD																
	Competitive solicitation process enhancements	S. Rutty	May 2015						N/A																
	CRR clawback rule modifications	D. Tretheway	Nov 2015				June 2016		TBD																
Ξ.	Energy storage and aggregated distributed energy resource, Phase 1	T. Flynn	Q2 2015				Feb 2016		Jun-16																
Tariff	Expanding metering and telemetry options phase 2	A. Ulmer							Mar-16																
	Metering Rules Enhancements	T. Flynn	Mar-16				Dec 2016																		
	Pricing Enhancements	Mannheim							Nov-16																
	Reactive power requirements and financial compensation	C. Devon	May 2015				August 2016	Ruling:Pending	Oct-16																
	Reliability services phase 1b	K. Meeusen	Q1 2016						TBD																
	Revised Settlement Statement & Dispute Timeline for T+35M	T. Huynh	Dec-15				Aug 2016		TBD																
	Release / Implementation	Deployment		Simulation			Activation	Project Manager												I					
			Start	- End				i rojoot managor																	
ent	MRI-Settlements Enhancements	Phase 1: 2/1/17 Phase 2: 3/8/17	2/1/17	3/8/17			Phase 1: 2/1/17 Phase 2: 3/8/17	Mike Lucas																	
epende 2017	Postilo pour regularmente a d'Anna istance d'		N1/A	N// 6				Adrian Chinese																	
Jepe 20	Reactive power requirements and financial compensation	3/6/17	N/A	N/A			3/6/2017	Adrian Chiosea																	
Inde	Administrative Pricing Policy Updates	2/1/17 TBD	N/A TBD	N/A TBD			2/1/2017 TBD	Adrian Chiosea																	
	RIMS functional enhancements Acceptable Use Policy - CMRI	4/1/2017	8/23/2016	9/23/2016			4/1/2017	Marcelo DaCosta John Williams																	
Spring 2017 Release	Local Market Power Mitigation Enhancements (2015)	4/1/2017	1/31/2017	2/16/2017			4/1/2017	Marcelo DaCosta																	
ng 2	CRR clawback rule modifications	4/1/2017	N/A	N/A			4/1/2017	Joanne Alai																	
Spri Re	Metering Rules Enhancements	4/1/2017	N/A	N/A			4/1/2017	Jeremy Malekos																	
	PIRP System Application Decommissioning	4/1/2017	3/2/2017	3/20/2017			4/1/2017	Marci Stuckey																	
ase	Bidding Rules Enhancements - Part B Commitment cost enhancements phase 3	11/1/2017 11/1/2017	8/8/2017 8/8/2017	9/8/2017 9/8/2017			11/1/2017 11/1/2017	Jim Barber Marcelo DaCosta																	
Rele	EIM 2017 Enhancements	11/1/2017	8/8/2017	9/8/2017			10/1/2017	Joanne Alai																	
2017	EIM 2017 Portland General Electric	10/1/2017	6/29/2017	7/31/2017			11/1/2017	Jeremy Malekos																	
III 20	Reliability Services Phase 1B	11/1/2017	8/8/2017	9/8/2017			11/1/2017	Marci Stuckey																	
Fall	Reliability Services Phase 2	11/1/2017	8/8/2017	9/8/2017			11/1/2017	Marci Stuckey																	
Spring 2018	EIM Idaho Power Company	4/1/2018	TBD	TBD			4/1/2018	Joanne Alai																	
ø	ADS Replacement	10/1/2018	TBD	TBD			10/1/2018	Adrian Chiosea																	
leas	Bid cost recovery enhancements (formerly two-tier)	10/1/2018	TBD	TBD			10/1/2018	Adrian Chiosea																	
s Re ative	Commitment cost and Default Energy Bid Enhancements Contingency modeling enhancements	10/1/2018 10/1/2018	TBD TBD	TBD TBD			10/1/2018 10/1/2018	Adrian Chiosea																	
2018 enta	Contingency modeling enhancements Flexible resource adequacy criteria and must run obligation phase 2	10/1/2018	TBD	TBD			10/1/2018	Adrian Chiosea Adrian Chiosea																	
Fall 2018 Relea (tentative)	Frequency response phase 2	10/1/2018	TBD	TBD			10/1/2018	Adrian Chiosea																	
Ľ	Generator contingency/RAS modeling	10/1/2018	TBD	TBD			10/1/2018	Adrian Chiosea																	
Spring 2019	EIM - Seattle City Light	4/1/2019	TBD	TBD			4/1/2019	Janet Morris																	
2019	Additional Data Transparency Enhancements (OASIS API changes)	TBD	TBD	TBD			TBD	Adrian Chiosea																	
	Energy storage and aggregated distributed energy resource, Phase 2	TBD	TBD	TBD			TBD	Adrian Chiosea																	
TBD	Regional Integration and EIM Greenhouse Gas Compliance	TBD	TBD	TBD			TBD	Adrian Chiosea																	
F	Regional Resource Adequacy	TBD	TBD	TBD			TBD	Adrian Chiosea																	
	Stepped Constraint Parameters	TBD	TBD	TBD			TBD	Adrian Chiosea																	
	Transmission Access Charge Options	TBD	TBD	TBD			TBD	Adrian Chiosea		L															



Changes 1/17/17

Removed ADS Client Replacement (completed)

Added Spring 2017 Release with existing projects with a target deployment date of 4/1/17 Updated the Fall 2017 Release date of 10/1/17 to be 11/1/17 and rescheduled market simulation dates Moved ESDER Phase 2 and Stepped Transmission Constraints from Fall 2018 to TBD for implementation

Changes 1/9/17

Stepped Constraint Parameters - New stakeholder schedule (policy development)

Changes 1/6/17

Updated the Black Start schedule

Changes 12/22/16

Regional Integration and EIM Greenhouse Gas Compliance - Issuance date of next proposal TBD Transitional Implementation Items (Regional Integration) - Removed

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