

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 meeting		Recurring						
	Market surveillance committee meeting	B. Cooper	Recurring						
	Market performance and planning meetings	J. Morris	Recurring						
	Business practice manual change management meetings	J. Payton	Recurring						
Policy	Aliso Canyon Gas-Electric Coordination Phase 3	C. Colbert	Q2 2017		E1, 2 *	Jul 2017	Jul 2017		
	Bid cost recovery enhancements (formerly two-tier)	P. Servedio	Q4 2015				Suspended		
	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	Oct 2017	Nov 2017		2018
	Contingency modeling enhancements	P. Servedio	Q4 2016				Sep 2017		TBD
	Energy storage and aggregated distributed energy resource, Phase 2	Jill Powers	Q1 2016		E1, 2 *	Jul 2017	Jul 2017		
	Energy storage and aggregated distributed energy resource, Phase 3	E. Kim	Q3 2017		E1, 2 *	TBD	TBD		
	Frequency response phase 2	C.Colbert	Dec 2016				Jun 2018		
	Flexible resource adequacy criteria and must run obligation phase 2	K. Meeusen	June 2015	10-Jul-17			Apr 2018		
	Generator Contingency and Remedial Action Scheme modeling	P. Servedio	Q2 2016	10-Jul-17	E1	Aug 2017	Sep 2017		
	Temporary Shutdown of Resource Operations	K. Johnson	Q2 2017				Nov 2017		
	CPM Risk-of-Retirement	K. Johnson	Q2 2017				Nov 2017		
Review Transmission Access Charge Structure	L. Kristov	Q3 2017				TBD			
Regional Integration	Regional Integration and EIM Greenhouse Gas Compliance	D. Tretheway	Q3 2016		E1		TBD		
	Regional Resource Adequacy	C. Devon	Nov 2015				TBD	Subsequent activities on this initiative have not been planned or	
	Transmission Access Charge Options	L. Kristov	Oct 2015				TBD	Subsequent activities on this initiative have not been planned or	
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. Emmer/ M.Wu	Recurring						
	Policy Initiatives Roadmap	B.Dean	Q3 2016				Dec 2017		N/A
	2016-2017 Transmission planning process	R. Sparks	Recurring				March 2017		N/A
	2017-2018 Transmission Planning Process	R. Sparks	Recurring						
2017 Tariff Clarifications Filing Process	K. Meeusen					N/A			
Western regions planning coordination	G. DeShazo	Recurring				N/A			
Tariff	Legal Lead	Legal Lead	Start				Tariff Filed		
	Black Start and System Restoration Phase 2	S. Vaughan	May-16						
	Commitment cost enhancements phase 3	D. Hou	TBD						TBD
	Competitive solicitation process enhancements	S. Ruttly	May 2015						N/A
	Generation Interconnection Driven Network Upgrades Cost Recovery	S. Ruttly	Q3 2016				Mar 2017		Apr-17
	Reactive power requirements and financial compensation	C. Devon	May 2015				August 2016	Ruling:Pending	Oct-16
	Reliability services phase 1b	K. Meeusen	Q1 2016						Apr-17
	Reliability services phase 2	E. Kim		Mar 23 2015			Oct 2016		Apr-17
Revised Settlement Statement & Dispute Timeline for T+35M	T. Huynh	Dec-15				Aug 2016	Ruling:Pending	Jan-17	

Release / Implementation		Deployment	Market Simulation Start - End		Activation	Project Manager
Independent 2017	Aliso Canyon Gas-Electric Coordination Phase 3	TBD	TBD	TBD	TBD	Adrian Chiosea
	Black Start and System Restoration Phase 2	12/1/17	N/A	N/A	May 2017	Adrian Chiosea
	RIMS functional enhancements	12/14/17	N/A	N/A	Dec 2017	Marcelo DaCosta
Fall 2017 Release	Bidding Rules Enhancements - Part B	11/1/2017	9/6/2017	9/29/2017	Nov 2017	Jim Barber
	Commitment cost enhancements phase 3	11/1/2017	9/6/2017	9/29/2017	Nov 2017	Marcelo DaCosta
	EIM 2017 Portland General Electric	10/1/2017	6/6/2017	7/6/2017	Oct 2017	Joanne Alai
	Gas Burn Report	11/1/2017	N/A	N/A	Nov 2017	Jim Barber
	RAAIM Implementation Update	11/1/2017	N/A	N/A	Jan 2018	Adrian Chiosea
	RM & EIM 2017 Enhancements	11/1/2017	9/6/2017	9/29/2017	Nov 2017	Ray Riley
	SIBR UI Upgrade	11/1/2017	9/18/2017	9/29/2017	Nov 2017	John Williams
Spring 2018	CPM Risk-of-Retirement	TBD	TBD	TBD	TBD	Adrian Chiosea
	DRS Replacement	TBD	TBD	TBD	Apr 2018	Adrian Chiosea
	EIM Idaho Power Company	4/4/2018	12/1/2017	1/31/2018	Apr 2018	Joanne Alai
	EIM Greenhouse Gas Compliance	TBD	TBD	TBD	TBD	Adrian Chiosea
	EIM Powerex	4/4/2018	12/1/2017	1/31/2018	Apr 2018	Joanne Alai
	EIM Winter 2017 Enhancements	4/4/2018	12/1/2017	1/31/2018	Apr 2018	Joanne Alai
	Energy storage and aggregated distributed energy resource, Phase 2	TBD	TBD	TBD	TBD	Adrian Chiosea
	Reliability Services 2017	2/13/2018	12/19/2017	1/25/2018	Apr 2018	Marci Stuckey
Fall 2018 Release (tentative)	Temporary Suspension of Resource Operations	TBD	TBD	TBD	TBD	Adrian Chiosea
	ADS Replacement	10/1/2018	TBD	TBD	Oct 2018	Adrian Chiosea
	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
Spring 2019	Flexible resource adequacy criteria and must run obligation phase 2	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
	Frequency response phase 2	10/1/2019	TBD	TBS	Oct 2019	Adrian Chiosea
	Generator contingency/RAS modeling	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
Spring 2020	EIM - Salt River Project	4/1/2020	12/1/2019	1/31/2020	Apr 2020	Janet Morris

Changes 7/14
Annual Policy Initiatives Roadmap recurring initiative - updated schedule

Changes 7/10
Energy Storage and Distributed Energy Resources Phase 2 - updated EM category
Grid Management Charge recurring initiative MSC data added

Changes 7/5
Moved Temporary Suspension of Resource Operations (no system changes expected) from Fall 2018 to Spring 2018
Moved Capacity Procurement Mechanism - risk of retirement (no system changes expected) from Fall 2018 to Spring 2018
Moved Energy Storage and DER Phase 2 Initial from Fall 2018 to Spring 2018 to align with the DRG replacement
Added EM greenhouse gas compliance for Spring 2018
removed Creation of new TAC area for metropolitan water district of southern California - completed

Changes 6/29
Updated stakeholder initiative catalog to "policy initiatives roadmap" and updated Board date
Removed BlackStart and System Restoration Phase 2 from policy development section (included in Tariff section)
Corrected Board date for Contingency Modeling Enhancements initiative
Updated Generator Contingency and Remedial Action Scheme Modeling with updated EM category
Updated Aliso Canyon Gas-Electric Coordination Phase 1 with updated EM category

Changes 6/22
Regional Interconnection and EM Greenhouse Gas Compliance - updated policy schedule
Consolidated EM Initiatives - Updated policy schedule
Pricing Enhancements - Initiative completed, deleted from milestone document

Changes 6/21
Updated template (removed Accl)

Changes 6/20/2017
MR Settlements Implementation complete on 6/21/17. Removed from report.
Administrative Pricing Policy Updates completed on 5/2/17. Removed from report.
Forecasting & Data Transparency Improvements (PMP System Application Decommissioning) completed on 6/20/17. Removed from report.
Added EM: Powers Implementation in Spring 2018
Added EM: LADWP implementation in Spring 2018
Added EM: Winter 2017 Enhancements to Spring 2018
Moved Reliability Services 2017 from Fall 2017 to Spring 2018
Added NADAM Implementation Updates for Fall 2017 Release
DRG Replacement moved from TBD to Spring 2018

Added Temporary Suspension of Resource Operations, CRN Risk of Retirement, and Consolidated Energy Imbalance Market Initiatives to Fall 2018 release
Moved other TBD initiatives to Fall 2019
Updated market simulation details for Fall 2017 release

Changes 6/9/17
New Initiative - Consolidated Energy Imbalance Market Initiatives (initial)

Changes 6/8/2017
Updated Commitment Cost and Default Energy Bid Enhancements initiative proposed EM Governance Body date
Updated Generator Contingency and Remedial Action Scheme Modeling initiative proposed Board date

Changes 6/6/2017
Load Service Entity Definition Refinement - Initiative (closed): removed from milestone document
Added Aliso Canyon Gas-Electric Coordination Phase 1
Added incentives for TRD and CRN risk-of-retirement

Changes 6/2/2017
Reliability Services Phase 2 - Updated schedule (part)
Review TAC Structure - Updated schedule (initial)
Updated (clarified) leads for Energy Storage and Distributed Energy Resources, Phase 2 and Phase 3

Changes 5/25/2017
Added the new MSC meeting date.
Updated the Commitment Costs and Default Energy Bid Enhancements Schedule

Changes 5/18/2017
Corrected start date error (Q3 2016 to Q3 2017) for Energy Storage and Distributed Energy Resources Phase 3 Initiative

Changes 5/11/2017
Updated lead change for Energy Storage and Distributed Energy Resources Phase 2 Initiative

Changes 5/4/2017
Added workbooks to the Black Start and System Restoration Phase 2 Initiative
Added two dates for the 2018 Budget and Grid Management Charge initiative

Changes 5/2/2017
Series 2017 dissolved and activated on 5/2/17 and removed from report.

Changes 4/27/2017
Moved Series 2017 release and Administrative Pricing Policy Updates deactivation date from 4/28/17 to 5/2/17
Updated Energy Storage and Distributed Energy Resources Phase 2 schedule for June
Added EM - DRG Work Product to Series 2017 release
Removed Expanding metering and telemetry options phase 2 from tariff section as it is complete
Updated the Commitment Costs and Default Energy Bid Enhancements Schedule
Added Black Start and System Restoration Phase 2 Tariff

Changes 4/21/2017
Updated Temporary Suspension of Resource Operations schedule through Oct 2017
Updated CRN risk-of-retirement schedule through Oct 2017

Changes 4/11/2017
Energy Storage and Distributed Energy Resources Phase 1 - Removed from document; it was implemented in Fall 2016
Updated Generator Interconnection Driven Network Upgrade Cost Recovery initiative Tariff filing date for April 2017
Updated Commitment Costs and Default Energy Bid Enhancements schedule for comments and next working group in May

Changes 4/4/2017
Updated comments due date for Flexible Capacity Needs Technical Studies recurring initiative
Updated schedule for Energy Storage and Distributed Energy Resources Phase 2 Initiative
Added Black Start and System Restoration Phase 2 as an independent 2017 project.
Removed Metering Enhancements as it is completed on 4/30/17.
Removed Accessible Use Policy - CRN as it is completed on 4/3/17.
Added DRG UC updates to Fall 2017 Release
Removed Bid cost recovery enhancements formula two-part from Fall 2018 Release per policy status
Added CRN Technology Corridor for 2018 Release (increased from 80 to 100 percent)
Moved Energy Storage and Distributed Energy Resources Phase 2 from TBD to Fall 2018 Release per policy
Moved Frequency Response Phase 2 from Fall 2018 Release to TBD per policy
Moved Generator contingency/RAS module from Fall 2018 Release to TBD per policy
Removed Stacked Constraint Parameters TBD per policy
Review Transmission Access Charge Structure - Added to Policy section. Note: Stakeholder process will start mid-year 2017.

Changes 4/7/2017
Regional and EM CA DRG Compliance - Updated policy schedule
Updated schedule for the Flexible Capacity Technical Study Process initiative
Moved Generator Interconnection Driven Network Upgrade Cost Recovery Initiative to Tariff section
Removed outdated schedule for the Flexible Capacity Technical Study Process initiative

Changes 3/13/17
Updated MSC schedule for May 5 meeting
Updated Flexible Capacity Needs Technical Study Process schedule (moved paper posting from April 6 to March 31)

Changes 3/24/17
Frequency Response Phase 2 - Updated schedule and removed working group for March 24.
Generator Contingency and Remedial Action Scheme Modeling - Updated schedule (comments due date)
Metering Rule Enhancements - Removed from policy tariff sections; it's now in implementation phase
CRN Cleavback Modifications - Removed from tariff section; it's now in implementation phase

Changes 3/17/17
Updated the schedule for Generator Contingency and Remedial Action Scheme Modeling initiative
Updated the schedule for Generator Interconnection Driven Network Upgrade Cost Recovery initiative
Updated the schedule for Energy Storage and Distributed Energy Resources Initiative
Updated the schedule for the Flexible Capacity Technical Study Process initiative
Added new initiative (Creation of a New TAC Area for Metropolitan Water District of California) and updated the schedule
Updated the schedule for the Frequency Response Phase 2 Initiative
Updated the schedule for Commitment Costs and Default Energy Bid Enhancements initiative

Changes 3/9/17
Staged Constraint Parameters - Initiative has been closed; CG will continue with stakeholders to further consider a more comprehensive review of penalty prices used in the CG market under the initiative, which is needed in conjunction with Federal Energy Regulatory Commission Order No. 811 that increases the energy bid cap
Energy Storage and Distributed Energy Resources Phase 2 - Updated schedule for next proposal, comments due date and meeting
2017-18 Transmission Planning Process - Inserted link to CISO's initiative webpage

Changes 3/2/17
Metering Rule Enhancements - Updated tariff filing date
Generator Contingency & Remedial Action Scheme - Updated schedule for proposal
Contingency Modeling Enhancements - Updated schedule for proposals, BOG date
Flexible Resource Access & Heat Offer Optimization Phase 2 - Updated schedule for proposal, BOG date
Energy Storage & Advanced Distributed Energy Resource - Updated initiative lead and schedule, enclosed BOG date
Reliability Services Phase 1 - Updated Tariff filing date
Staged Constraint Parameters - Updated schedule for upcoming meetings, proposals
CRN Cleavback Rule Modifications - Updated schedule PERC notice
Frequency Response Phase 2 - Updated BOG date

Changes 1/28/17
Added EM - Inclusive Authority of Northern California (IANCI) for Series 2018
Reactive power requirements and financial compensation effectiveness on 3.6.16 schedule PERC approval.
Update NRS 5 Metering Enhancements market simulation and activation dates.
Added Gas Run Report to Fall 2017 Release
Updated activation date for Administrative Pricing Policy Updates to 4/1/17
Several other minor updates made in initiative dates to match 3/28/17 BOG dates

Changes 1/24/17
Staged Constraint Parameters - Added schedule for next proposal
Black Start and System Restoration Phase - Added comments deadline for recent proposal

Changes 2/15/17
Reliability Services - Updated tariff schedule (phase 1b and 2 will be filed together)
Added comments deadline for Frequency Response Phase 2
Added next MEC meeting date
PFD Per Unit Cost Guides - Updated comments deadline date
2017 Tariff Clarification Filing Process - New schedule added (miscellaneous changes to in advance of broader filing)

Changes 1/2/17
Updated EM categories and enclosed meeting dates based on Feb 2017 policy outlook briefing

Changes 1/26/17
Generator Interconnection Driven Network Upgrade Cost Recovery - updated policy schedule

Changes 1/26/17
Staged Constraint Parameters - Updated schedule (initial)
Participative Transmission Charge Per Unit Cost Guides - Updated schedule (Recurring Initiative)
CRN Cleavback Rule Modification - Added note to indicate tariff filing

Changes 1/23/17
Black Start and System Restoration Phase - updated policy schedule

Changes 1/20/17
Generator Interconnection Driven Network Upgrade Cost Recovery - updated policy schedule

Changes 1/17/17
Removed ADS Client Replacement (completed)
Added Spring 2017 Release with ending 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 ESRD Phase 2 and Staged Transmission Constraints from Fall 2018 to TBD for implementation

Changes 1/9/17
Staged Constraint Parameters - New stakeholder schedule (initial development)

Changes 1/6/17
Updated the Black Start schedule