



# Memorandum

**To:** ISO Board of Governors  
**From:** Karen Edson, Vice President, Policy and Client Services  
**Date:** February 3, 2010  
**Re:** **Report on BPM Change Management Activities**

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*This memorandum does not require Board action.*

## EXECUTIVE SUMMARY

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 (BPM) change requests submitted by stakeholders and the California Independent System Operator Corporation.

The ISO inaugurated the public change management process for business practice manuals 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 January 12, 2010, 31 proposed revision requests (PRRs) were active in the BPM change management system, 100% of which were submitted by the ISO. These 31 active PRRs impact the following BPMs:

26	Settlements and Billing
1	Market Operations
1	Market Instruments
3	Congestion Revenue Rights

No BPM decisions are under stakeholder appeal.

## **PROCESS OVERVIEW**

The ISO held the monthly BPM change management stakeholder meeting on December 18, 2009. The meeting, which was conducted by conference call, included 10 stakeholders. Based on the nature of that meeting, and upon the types of comments entered into the BPM change management electronic system, it appears that stakeholders are generally satisfied with the process, as well as with the progress made on the active PRRs. No significant concerns are currently pending on the active PRRs.

## **BPM CHANGE MANAGEMENT REPORT**

The current *Board Update: BPM Change Management Process* report, which includes all the active PRRs as of January 12, 2010, is included as Attachment 1. In compliance with the tariff Board reporting requirements, the report:

- Summarizes the total number of active PRRs submitted by stakeholders and by the ISO;
- Depicts the number of active PRRs in various steps along the PRR lifecycle, as of January 12, 2010;
- Reflects those PRRs upon which Management has posted its final decision for the period November 21, 2009 through January 12, 2010; and
- Includes PRRs currently under stakeholder appeal, the stakeholder positions on rejected PRRs, and the reasons for rejection.

The following is additional relevant information:

- No PRRs are under appeal.
- Twenty-three of the active PRRs were submitted into the electronic system by the ISO on an emergency basis and all of those PRRs related to the Settlements and Billing BPM.
- A PRR report as of January 13, 2010 is included as Attachment 2. This report summarizes PRRs added to the BPM change management system since the December Board meeting.