

# Memorandum

**To:** ISO Board of Governors  
**From:** Karen Edson, Vice President, Policy and Client Services  
**Date:** July 6, 2011  
**Re:** **Informational 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 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 June 19, 2011, 16 proposed revision requests (PRRs) were active in the BPM change management system, of which, all 16 were submitted by the ISO. These 16 active PRRs impact the following BPMs:

- 2 Market Operations
- 3 Metering
- 3 Reliability Requirements
- 7 Settlements and Billing
- 1 Transmission Planning Process

No BPM decisions are under stakeholder appeal.

## PROCESS OVERVIEW

The ISO held monthly BPM change management stakeholder meetings on April 26 and May 24, 2011. There were 7 and 14 stakeholders on the conference calls, respectively. Based on the nature of the meetings, 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.

## **BPM CHANGE MANAGEMENT REPORT**

The current *Board Update: BPM Change Management Process* report, which includes all the active PRRs as of June 19, 2011, is included as Attachment 1. In compliance with the tariff 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 June 19, 2011;
- Reflects those PRRs upon which Management has posted its final decision for the period April 25, 2011 through June 19, 2011; 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 stakeholder appeal.
- There was one PRR submitted into the electronic system by the ISO on an emergency basis on the Reliability Requirements BPM.
- A PRR report summarizing the PRRs in the BPM change management system as of June 19, 2011, is included as Attachment 2.