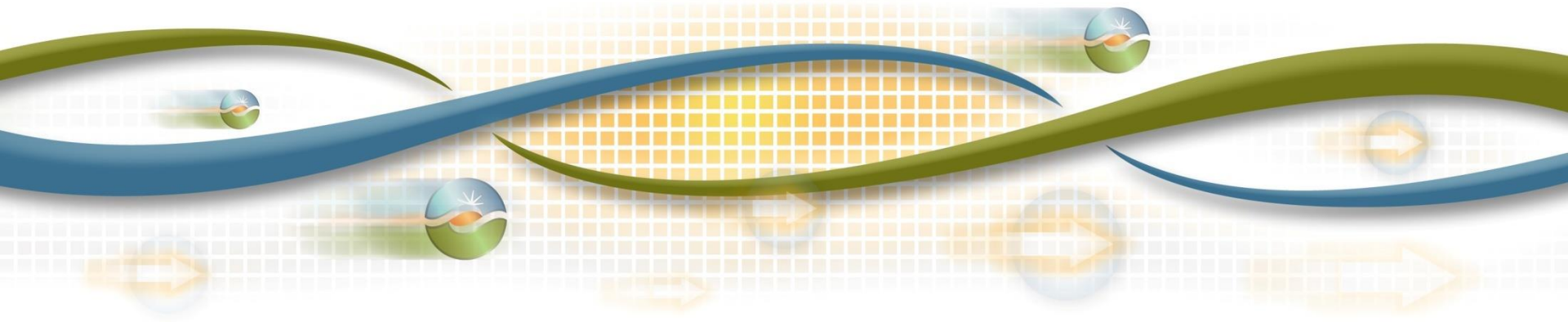# Regional Integration Update
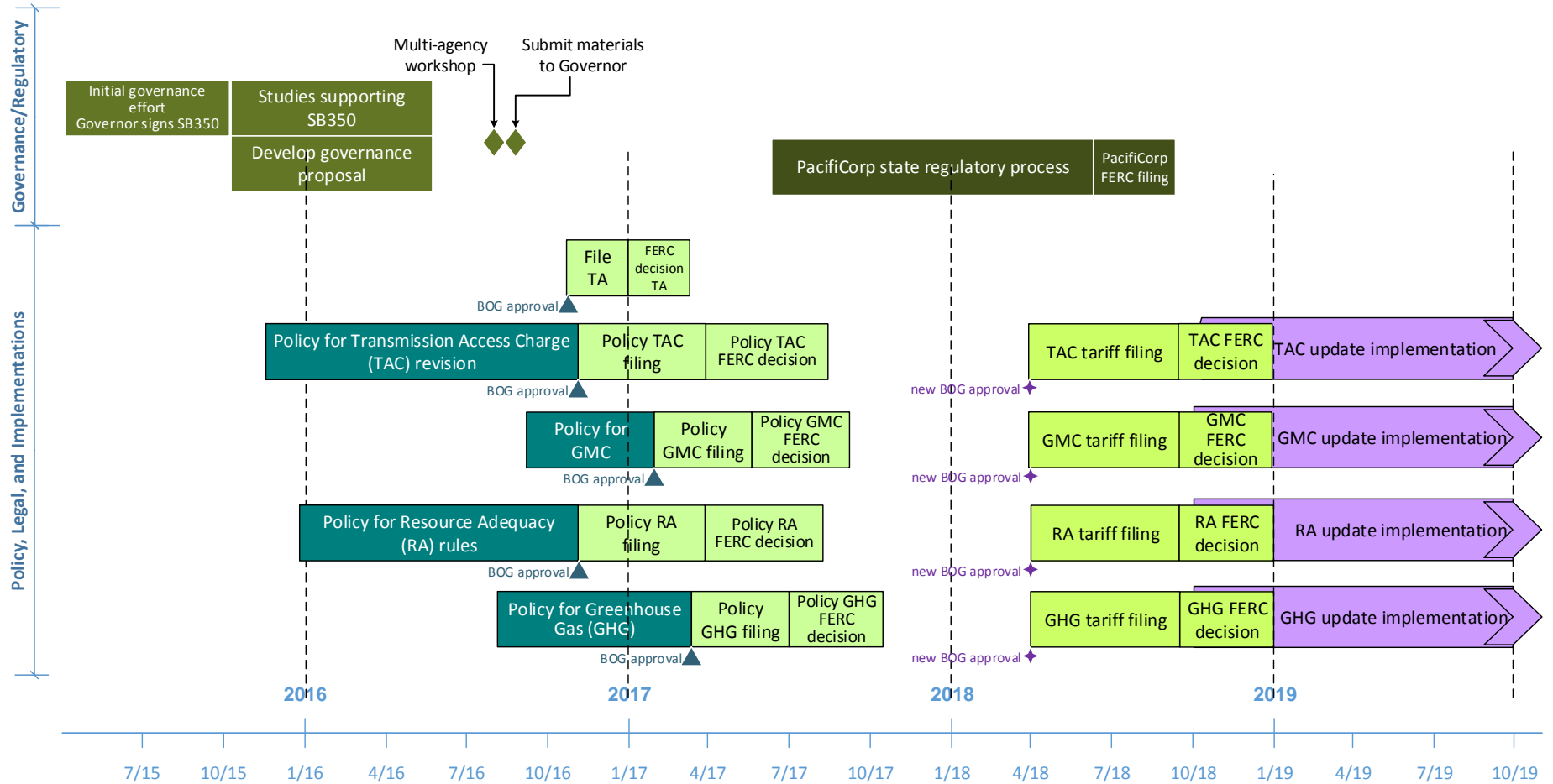
August 16, 2016
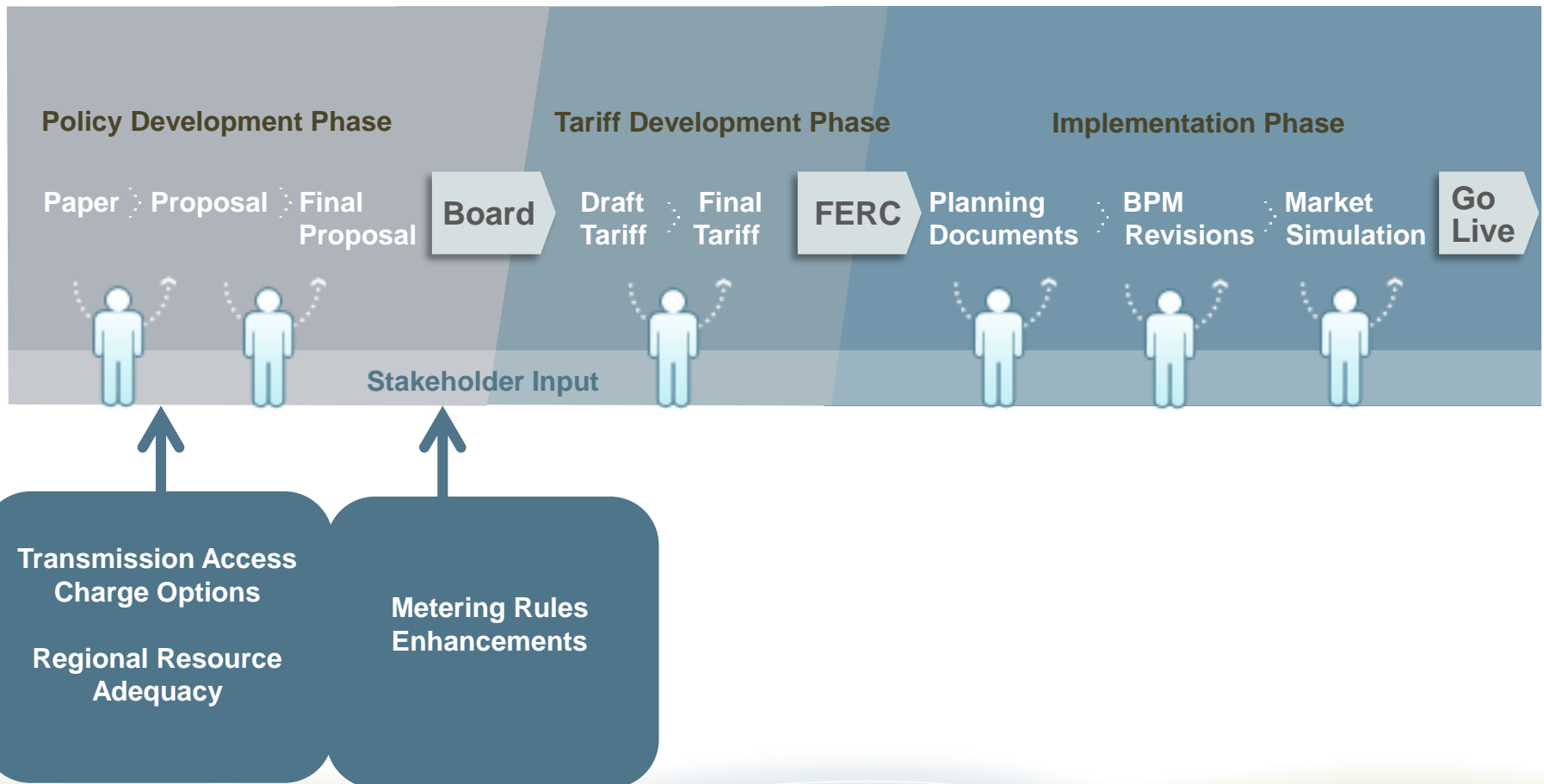
Agenda

Topics	Presenter
Timeline - regional integration activities	Virginia Thompson
Stakeholder initiatives update	Virginia Thompson
SB350 studies update	Debi Le Vine
SB350 governance activities update	Virginia Thompson
Online Resources	Julia Payton
Questions	

California ISO

PacifiCorp Integration Schedule

ISO Stakeholder Engagement Process

This diagram represents the typical process, often phases will run in parallel.

Policy Development Phase

Paper · Proposal · Final Proposal

Board

Tariff Development Phase

Draft Tariff · Final Tariff

FERC

Implementation Phase

Planning Documents · BPM Revisions · Market Simulation

Go Live

Stakeholder Input

Transmission Access Charge Options

Regional Resource Adequacy

Metering Rules Enhancements

California ISO

Current Stakeholder Initiatives - Regional

Transmission Access Charge Options

This initiative considers whether the existing revenue recovery mechanisms would be appropriate should a transmission owner with a load service territory join the ISO as a participating transmission owner. This initiative began with an issue paper in late October 2015.

Upcoming activities:

The schedule has been extended

- August 25 – stakeholder comments are due. Template available

- September – the ISO will publish next proposal

http://www.caiso.com/informed/Pages/StakeholderProcesses/TransmissionAccessChargeOptions.aspx

Note: These dates are tentative until confirmed by a market notice

California ISO

Current Stakeholder Initiatives – Regional

Regional Resource Adequacy

This initiative evaluates whether the existing resource adequacy tariff provisions are appropriate for use in a regional ISO balancing authority area that encompasses multiple states. This initiative began with an issue paper in early December 2015.

Upcoming activities:

The schedule has been extended

- August 24 – stakeholder comments are due. Template available

  This comment period was extended via market notice 8/16/16

- September - the ISO will publish next proposal

http://www.caiso.com/informed/Pages/StakeholderProcesses/RegionalResourceAdequacy.aspx

Note: These dates are tentative until confirmed by a market notice

California ISO

Current Stakeholder Initiatives – Regional

Metering Rules Enhancements

This initiative will review existing metering requirements and propose possible revisions to accommodate the growth in renewables, energy storage and distributed energy resources; technology advancements, developer interest in new and complex metering configurations; expansion of regional markets through the energy imbalance market; and, the potential integration of other balancing authority areas into the ISO balancing authority area.

Upcoming activities:

The ISO is targeting approval from the ISO Board of Governors in August 2016

- **Deferred –** deferred to a future Board of Governors Meeting

http://www.caiso.com/informed/Pages/StakeholderProcesses/MeteringRulesEnhancements.aspx

Note: These dates are tentative until confirmed by a market notice

Upcoming Stakeholder Initiatives (Tentative dates)

Greenhouse Gas Compliance

This initiative will review potential changes to the existing EIM approach for tracking GHG compliance obligations needed to support an expanded ISO balancing authority area that encompasses states outside of California

Targeted to start in Q3 2016

Grid Management Charge

This initiative will review potential changes for a transitional approach to the Grid Management Charge for new entities joining the ISO BA

Targeted to start in Q3 2016

Note: These dates are tentative until confirmed by a market notice.

SB350 update on upcoming activities

Study Work:

Data and information related to the Senate Bill 350 studies are available directly on the Regional Energy Market webpage:

- Responses to stakeholder questions (additional questions about the studies and assumptions) are also now available for all without request access for public data
- Confidential data used in the studies remains subject to confidentiality restrictions; stakeholders are required to execute a non-disclosure agreement with the ISO before accessing confidential data

Upcoming activities:

- The ISO is reviewing comments from July 26 workshop
- Assembling package of information to send study to the Governor

Submit comments at: https://efiling.energy.ca.gov/Ecomment/Ecomment.aspx?docketnumber=16-RGO-01

California ISO

SB350 governance modifications

Governance Work:

Governor Brown (CA) sent two letters on August 8 highlighting his support of the work and progress made and working toward a legislative proposal in January 2017

- Letter to CA leadership
- Letter to PAC states governors

Upcoming activities:

- The ISO is reviewing comments from July 26 workshop
- Assessing next steps for work on refining governance principles

For more information and audio recordings visit the CEC website at:
http://www.energy.ca.gov/sb350/regional_grid/documents/index.html

California ISO

ISO 2016 Stakeholder Symposium

Each year, the California ISO Stakeholder Symposium brings together a unique mix of policy makers, electric industry leaders, stakeholders, regulators, environmentalists and other interested groups to enable stakeholders and policymakers to collaborate on important matters that are transforming the electric industry.

- September 7-8

- Sacramento Convention Center, Sacramento, California

- Agenda:
  http://www.caiso.com/Documents/2016StakeholderSymposiumAgenda.pdf

- Guest registration required:
  http://www.caiso.com/informed/Pages/MeetingsEvents/StakeholderSymposium/Default.aspx

* This event has sold out every year. Only a few spaces left for 2016. Please register ASAP if you plan to attend.

Online Resources

Regional Integration Resources on the ISO Website:
www.caiso.com

Regional energy market webpage
http://www.caiso.com/informed/Pages/RegionalEnergyMarket/BenefitsofaRegionalEnergyMarket.aspx

Stakeholder processes webpage
http://www.caiso.com/informed/Pages/StakeholderProcesses/Default.aspx

Stakeholder initiative milestone document
http://www.caiso.com/Documents/StakeholderInitiativeMilestones.pdf

ISO public calendar
http://www.caiso.com/Pages/Calendar.aspx?IsDlg=true

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California ISO

Contacts

Please send questions and topic suggestions to
Regionalintegration@caiso.com

Join us for the next regional integration update on September 6, 2016. (See calendar on ISO's website for web conference details.)