

# Memorandum

**To:** ISO Board of Governors

**From:** Karen Edson, Vice President, Policy and Client Services

**Date:** January 31, 2013

**Re:** **Business Practice Manual Change Management Activities Update**

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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 January 17, 2013, nine proposed revision requests (PRRs) were active in the BPM change management system - eight were submitted by the ISO and one was submitted by a stakeholder. These nine active PRRs impact the following BPMs:

- Market Instruments (1 request)
- Market Operations (4 requests)
- Direct Telemetry (1 request)
- Congestion Revenue Rights (1 request)
- Settlements and Billing (1 request)
- Managing Full Network Model (1 request)

## **PROCESS OVERVIEW**

The ISO held a monthly BPM change management stakeholder meeting on December 18, 2012, and fifteen stakeholders participated in the meeting. Based on stakeholder comments during the meeting, and on 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 active PRRs as of January 17, 2013, is included as Attachment 1. In compliance with the tariff reporting requirements, the report:

- States the total number of active PRRs submitted by stakeholders and by the ISO;
- Depicts the active PRRs in various steps along the PRR lifecycle, as of January 17, 2013;
- Reflects those PRRs upon which Management has posted its final decision for the period November 27, 2012 through January 17, 2013; 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.
- One PRR was submitted into the electronic system by the ISO on an emergency basis.

A PRR report summarizing the content of each PRR in the BPM change management system as of January 17, 2013, is included as Attachment 2.