

Projected Stakeholder Initiatives Milestones



Calendar	Initiatives (Updated Weekly)	Initiative / Process 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	N/A	Recurring						
	EIM Governing Body	N/A	Recurring						
	Market Performance and Planning Forum	J. Morris	Recurring						
Policy Development	Capacity Procurement Mechanism Soft-Offer Cap	G. Murtaugh	Q3 2019				Q1 2020	Assessing next steps based on RA direction	
	Day-Ahead Market Enhancements	M. Poage	Q1 2019	19-Aug-19	E2	2021	2021	Next step: Publish straw proposal in Jan 2020	
	Energy Storage and Distributed Energy Resource Phase 4	E. Kim	Q1 2019	19-Aug-19	E2	Q3 2020	Q3 2020		
	Extend Day-Ahead Market Enhancements to EIM Entities	D. Tretheway	Q1 2020		E1	2021	2021		
	Generation Deliverability Assessment	R. Sparks	Q2 2019				Nov 2019		
	Hybrid Resources	C. Devon	Q3 2019	19-Aug-19	E2		Q2 2020	Targeting full implementation by Fall 2021	
	FERC Order 831 Import Bid Cost Verification	P. Servedio	Q2 2019		E2	Spring 2020	Spring 2020		
	Local Capacity Technical Study Criteria Update	C. Micsa	Q2 2019				Nov 2019		
	Market Settlement Timeline	P. Servedio	Q2 2019		E2	Oct 2019	Nov 2019		
	Price Performance Analysis	G. Bautista	Q2 2019	11-Oct-19			TBD		
	Resource Adequacy Enhancements	C. Devon	Q4 2018				May/June 2020		
Transmission Access Charge Structure Enhancements	C. Devon	Q3 2017			Q4 2020	Feb 2020	On hold to ensure coordination and alignment with EDAM		
System Market Power Mitigation	P. Servedio	Q1 2019	11-Oct-19	E2	Dec 2019 (Briefing)	Nov 2019 (briefing)			
Recurring Processes / Initiatives	Customer Partnership Group series	N/A	Recurring				N/A		
	Variable Operations and Maintenance Cost Definitions	G. Bautista	Q4 2019		E2	TBD	TBD		TBD
	Flexible Capacity Needs Technical Study Process	C. Loutan	Recurring				N/A		
	Budget and Grid Management Charge Process	A. Gordon	Recurring				Dec 2018	2019 process completed, 2020 process in progress	
	Local Capacity Requirements	C. Micsa	Recurring				N/A	2020 process completed, 2021 process in progress	
	Participating Transmission Owner Per-Unit Cost	R. Emmert/ M.Wu	Recurring				N/A		
	Annual Policy Initiatives Roadmap	B. Dean	Q3 2016			Dec 2019 (Briefing)	Dec 2019 (Briefing)		N/A
	2018-2019 Transmission Planning Process	R. Sparks	Recurring				Mar 2019		N/A
	2019-2020 Transmission Planning Process	R. Sparks	Recurring				Q2 2020		N/A
	2017 Tariff Clarifications Filing Process	K. Meeusen	Recurring				N/A		
Western Regions Planning Coordination	G. DeShazo	Recurring				N/A	hosted in Jan 2019		
		Legal Lead	Start						
Tariff Development	Amendment to ISO Section 20	J. Spomer	May 2019				Q3 2019		TBD
	Aliso Canyon Gas-Electric Coordination Phase 5	B. Dean	Q3 2019		E2		TBD		
	Commitment Costs and Default Energy Bid Enhancements	B. Dean	Q4 2016		E2		Mar 2018		30-Aug-19
	Contingency Modeling Enhancements	P. Servedio	Mar 2013				Dec 2017	Tariff development timeline currently TBD	TBD
	Excess Behind the Meter Production	G. Murtaugh	Q2 2018				May 2019	Tariff development timeline currently TBD	
	Effective Flexible Capacity Ratings Process Clarification	A. Motley	May 2019				N/A		Q4 2019
	Energy Storage and Aggregated Distributed Energy Resource Phase 3	E. Kim	Q3 2017		E2	Aug 2018	Sep 2018		3-Sep-19
	Local Market Power Mitigation Enhancements	B. Dean	Q3 2018		E1, E2 *	Mar 2019	Mar 2019	Pending FERC ruling	2-Jul
	Real-Time Market Neutrality Settlement	D. Tretheway	Q2 2019		E1	Jun 2019	Jul 2019	pending FERC ruling	30-Jul
	Reliability Must-Run and Capacity Procurement Mechanism Enhancements	G. Murtaugh	Q1 2018				Mar 2019	RMR filed	?
Intertie Deviation Settlement	M. Poage	Q2 2018		E2	Jan 2019	Feb 2019		TBD	

* For E1 - E4 category designations, * denotes category applies only to certain proposal elements

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Policy Development	Bid Cost Recovery Enhancements (Formerly Two-Tier Allocation)	P. Servedio	Q4 2015		E2		TBD	Subsequent activities on this initiative have	TBD
	Flexible Resource Adequacy Criteria and Must-Run Obligation Phase 2	K. Meeusen	Jun 2015				Nov 2018		
	Frequency Response Phase 2	C.Colbert	Dec 2016				TBD	Subsequent activities on this initiative have	TBD
	Storage as a Transmission Asset	K. Meeusen	Q2 2018				Q3 2019	Deferred to 2020 for storage dispatch policy resolution in ESDER 4	TBD
	Self-Schedules Bid Cost Recovery Allocation and Bid Floor		Aug 2016				TBD	Subsequent activities on this initiative have	TBD
Regional Integration	Regional Resource Adequacy	C. Devon	Nov 2015				TBD	Subsequent activities on this initiative have not been planned or scheduled.	TBD
	Transmission Access Charge Options	L. Kristov	Oct 2015				TBD	Subsequent activities on this initiative have not been planned or scheduled.	TBD
Recurring Initiatives	N/A								
		Legal Lead	Start				Filing Date		
Tariff Development	N/A								

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Calendar	Release / Implementation <i>(Updated Monthly)</i>	Deployment	Market Simulation Start - End		Activation	Project Manager
Fall 2019	Commitment Costs and Default Energy Bid Enhancements Phase 1	11/13/19	9/3/19	10/11/19	Nov 2019	Ray Riley
	Energy Storage and Aggregated Distributed Energy Resource, Phase 3A	11/13/19	9/3/19	10/11/19	Nov 2019	Mohan Koya
	Reliability Must Run and Capacity Procurement Mechanism Enhancements	11/13/19	9/3/19	10/11/19	Jan 2020	LeAnn McLaughlin
	Local Market Power Mitigation Enhancements	11/13/19	9/3/19	10/11/19	Nov 2019	Ray Riley
	EIM Enhancements 2019	11/13/19	9/3/19	10/11/19	Nov 2019	Ayman Fattah
	FERC Order 841 – Energy Storage Resources	11/13/19	9/3/19	10/11/19	Nov 2019	David Luk
	Real-Time Market Neutrality Settlement	11/13/19	9/3/19	10/11/19	Aug 2019	LeAnn McLaughlin
Independent 2020	ADS Replacement	TBD	TBD	TBD	TBD	John Williams
Spring 2020	EIM - Salt River Project	4/1/20	12/1/19	1/31/20	Apr 2020	Joanne Alai
	EIM - Seattle City Light	4/1/20	12/1/19	1/31/20	Apr 2020	Ayman Fattah
Fall 2020	Commitment Costs and Default Energy Bid Enhancements Phase 2	10/1/20	TBD	TBD	Oct 2020	Ray Riley
	Import Bid Cost Verification	10/1/20	TBD	TBD	Oct 2020	Ray Riley
	Contingency Modeling Enhancements - Transmission	10/1/20	TBD	TBD	Oct 2020	Mohan Koya
	Energy Storage and Aggregated Distributed Energy Resource, Phase 3B	10/1/20	TBD	TBD	Oct 2020	Mohan Koya
	Dispatch Operating Target Tariff Clarifications	10/1/20	TBD	TBD	Oct 2020	John Williams
	Intertie Deviation Settlement	10/1/20	TBD	TBD	Oct 2020	LeAnn McLaughlin
	Capacity Procurement Mechanism Soft Offer Cap	10/2/20	TBD	TBD	Oct 2020	Adrian Chiosea
	Excess Behind the Meter Production	10/1/20	TBD	TBD	Oct 2020	Adrian Chiosea
Spring 2021	EIM - Public Service Company of New Mexico	4/1/21	12/1/20	1/31/21	Apr 2021	Ayman Fattah
	EIM - Northwestern Energy	4/1/21	12/1/20	1/31/21	Apr 2021	Ayman Fattah
	EIM - LADWP	4/1/21	12/1/20	1/31/21	Apr 2021	Joanne Alai
	EIM - Turlock Irrigation District	4/1/21	12/1/20	1/31/21	Apr 2021	Joanne Alai
Fall 2021	DAME - Flexible Ramping Product	TBD	TBD	TBD	TBD	Adrian Chiosea
	RA Enhancements	TBD	TBD	TBD	TBD	Adrian Chiosea
	Energy Storage and Aggregated Distributed Energy Resource Phase 4	TBD	TBD	TBD	TBD	Adrian Chiosea
	Market Settlement Timeline Transformation	TBD	TBD	TBD	TBD	Adrian Chiosea
	Transmission Access Charge Structure Enhancements	TBD	TBD	TBD	TBD	Adrian Chiosea
Spring 2022	EIM - Avista	4/1/22	12/1/21	1/31/22	Apr 2022	Adrian Chiosea
	EIM - Tucson Electric Power	4/1/22	12/1/21	1/31/22	Apr 2022	Adrian Chiosea
TBD	Extend Day-Ahead Market Enhancements to EIM Entities	TBD	TBD	TBD	TBD	Adrian Chiosea