

1/6/2014 Master Stakeholder Engagement Plan

Release	Phase	Initiative	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14
Policy Initiatives	Policy	<a href="#">Administrative Pricing Rules</a>																						
	Policy	<a href="#">Bid Cost Recovery Refinements for Multi-Stage Generation Resources</a>																						
	Policy	<a href="#">Black Start and System Restoration Phase 2</a>																						
	Policy	<a href="#">Contingency Modeling Enhancements</a>																						
	Policy	<a href="#">Energy Imbalance Market - Governance</a>																						
	Policy	<a href="#">Expanding Metering and Telemetry Options</a>																						
	Policy	<a href="#">Flexible Ramping Product</a>																						
	Policy	<a href="#">Flexible Resource Adequacy Criteria and Must Offer Obligation</a>																						
	Policy	<a href="#">Full Network Model Expansion</a>																						
	Policy	<a href="#">Interconnection Process Enhancements</a>																						
	Policy	<a href="#">Load Aggregation Point Granularity</a>																						
	Policy	<a href="#">Intermittent Resource Transitional Protective Measure</a>																						
	Policy	<a href="#">Outage Management System Replacement</a>																						
	Policy	<a href="#">Multi-Year Reliability Framework</a>																						
	Policy	<a href="#">Competitive Transmission Improvements</a>																						
	Policy	<a href="#">GIDAP Reassessment Process</a>																						
Policy	Voluntary Preferred Resource Auction																							
Policy	Reliability Auction Services																							
Recurring Initiatives	Recurring	<a href="#">2014 Local Capacity Requirements (LCR Study)</a>																						
	Recurring	<a href="#">GMC / Budget Process</a>																						
	Recurring	<a href="#">Stakeholder Initiatives Catalog Process</a>																						
	Recurring	<a href="#">PTO Per Unit Cost</a>																						
	Recurring	<a href="#">Transmission Planning Process</a>																						
Spring 2014	Implementation	<a href="#">FERC Order 764 Market Changes</a>																						
	Implementation	<a href="#">PIRP Protective Measures</a>																						
	Implementation	<a href="#">Post-Emergency Bid Cost Recovery Filing Review</a>																						
	Implementation	<a href="#">Renewable Integration Market &amp; Product Review - Phase 1</a>																						
	Implementation	<a href="#">Mandatory MSG</a>																						
	Implementation	<a href="#">Bid Cost Recovery (BCR) Mitigation Measures</a>																						
	Implementation	<a href="#">Contingency Modeling Enhancements</a>																						
	Implementation	<a href="#">Revisions to Price Correction Requirements</a>																						
Fall 2014	Implementation	<a href="#">Energy Imbalance Market</a>																						
	Implementation	<a href="#">Full Network Model Expansion</a>																						
	Implementation	<a href="#">Flexible Resource Adequacy Criteria and Must Offer Obligation</a>																						
	Implementation	<a href="#">Circular Scheduling</a>																						
	Implementation	<a href="#">Many-to-Many Substitution</a>																						
TBD	Policy	Aggregated Pumps and Pump Storage																						
	Policy	AS Substitution																						
	Policy	Bid Cost Recovery for Unit over Multiple Days																						
	Policy	Capacity Market Conceptual Design																						
	Policy	Cost Allocation Overall Market Review																						
	Policy	<a href="#">Marginal Loss Surplus Allocation</a>																						
	Policy	Multi Day Unit Commitment																						
	Policy	<a href="#">Reliability Must-Run Pump Load</a>																						
	Policy	Standard Capacity Product Phase 3																						
	Policy	Two Tier Real-Time Up/plit																						
	Implementation	<a href="#">DRS api</a>																						
	Implementation	<a href="#">ADS UI replacements</a>																						
	Policy	<a href="#">Commitment Costs Refinements 2012</a>																						
	Technology Roadmap	Planning	Enterprise Model Management																					
Planning		<a href="#">External Technology Roadmap</a>																						

Legend	
	Start Stakeholder Process
	Present to Board - Decision
	Market Sim - MAP Stage
	Deployment Date
	Effective Date, if different

**Changes on 5/1/13**

Moved start icon on Capacity Market Conceptual Design initiative to June 2013 under Policy section

Moved Board decision icon on Flexible RA Capacity and Must Offer Obligation to December 2013 under Policy section

Added Revision of Price Corrections Scope initiative to Policy section; Board decision September 2013

Removed Deliverability for Distributed Generation FERC Compliance from Policy section; compliance filing filed 4/15/13

Moved activation of FERC Order 755 Pay for Performance from May 1, 2013 to June 1, 2013 and extended market simulation

LMPM Phase 2 and Exceptional Dispatch Mitigation in Real Time activation occurred on 5/1/13

Multi-Stage Generator Modeling Enhancements Phase 3 activation occurred on 5/1/13

Price Inconsistency Market Enhancements activation occurred on 5/1/13

Replacement Requirements for Scheduled Generation Outages Phase 2 (automation) moved from Spring 2013 release to Fall 2013 release

**Changes on 6/4/13**

Deleted FERC Order 1000 - Interregional Requirements from Policy section; approved by Board, pending FERC response

Added Board briefing icon in July on FERC Order 764 Market Changes under Policy section - briefing on PIRP protective measures

Changed name of Revision of Price Corrections Scope to Revision to Price Correction Requirements under Policy section

Moved Load Aggregation Point Granularity start icon to June 2013 under Policy section

Moved Capacity Market Conceptual Design initiative from Policy to TBD section

Added Full Network Model Expansion initiative to Policy section; Board decision November 2013

Moved Access and Identity Management implementation from Spring 2013 to Fall 2013

Removed Spring 2013 Release (completed)

RIMS Generation deployment date is to be determined

Removed Export of AS from TBD list

Added PIRP Logic Change to Fall 2013 Release

**Changes on 7/1/13**

Draft DR Roadmap posted

Added Multi-Year Reliability Framework as new policy initiative

Circular Scheduling implementation moved from Fall 2013 release to Spring 2014 release (tariff is effective as of 2/1/2013 with interim solution)

Added FERC Order 764 to Spring 2014 release

Added Energy Imbalance Market to Fall 2014 release

Changed Fall 2013 Release date to 11/1/2013

Changed dates for independent efforts with Fall 2013 Release

**Changes on 8/1/13**

Moved Outage Management System Phase 3 from TBD to Fall 2014 release  
Moved Reliability Demand Response Product from Technology Roadmap to Spring 2014 release  
Changed Board decision date of Contingency Modeling Enhancements from September 2013 to November 2013

Changed Board decision date of Full Network Model Expansion from November 2013 to December 2013  
Added FERC Order 755 report and CMRI CRN report to Fall 2013 release  
Added DRS api for Registration (tentative) for December 2013  
Added GMT (tentative) for December 2013  
Added ADS UI replacement as part of FERC Order 764 in Spring 2014 release  
Added Full Network Model Expansion implementation to Fall 2014 release  
Added Flexible Resource Adequacy Criteria and Must Offer Obligation implementation to Fall 2014 release (effective date is 1/1/2015)  
Added PIRP Protective Measures as a policy initiative starting in August 2013  
Moved start of Load Granularity Refinements initiative to August 2013  
Indicated start of Stakeholder Initiative Catalog to start in September 2013  
Added Reliability Service Auction as a policy initiative starting in September 2013

**Changes on 9/4/13**

Changed Board decision date of Contingency Modeling Enhancements from November 2013 to December 2013

Deferred the following projects from Fall 2013 to Spring 2014: Post-Emergency Bid Cost Recovery Filing Review, Renewable Integration Market & Product Review - Phase 1, Mandatory MSG, Bid Cost Recovery (BCR) Mitigation Measures, and DRS api  
Added second drop for Replacement Requirements for Scheduled Generation Outages Phase 2 (automation) in December 2013  
Removed PIRP Logic Change project, which is cancelled  
Added Contingency Modeling Enhancements implementation to Spring 2014 release  
Removed December Board decision for Administrative Pricing Rules; revised Board decision date pending.  
Removed Dynamic Transfers as a separate implementation project as all requirements are addressed in the FERC 764 project implementation

**Changes on 10/1/13**

Added Outage Management System Replacement as policy initiative  
Moved Revisions to Price Corrections Process from Policy to Spring 2014 Release  
Moved PIRP Protective Measures from Policy to Spring 2014 Release  
Moved Circular Scheduling from Spring 2014 Release to Fall 2014 Release  
Access and Identity Management deployment and activation delayed from August 2013 to October 2013  
Flexible Resource Adequacy Criteria and Must Offer Obligation Board decision moved from December 2013 to February 2014

Added November 2013 Board decision for additional topics (1 & 2) of Interconnection Process Enhancements for queue management  
Added Reliability Auction Services policy initiative starting in November 2013  
Removed Demand Response Roadmap (draft posted in June 2013 and final to be posted in October; but not a policy initiative)  
Added Bid Cost Recovery Refinements for Multi-Stage Generation Resources to start in Jan 2014  
Indicated that Expanding Metering and Telemetry Options will have a Board briefing in December 2013 and then will proceed to second phase

#### **Changes on 11/1/13**

Moved DRS api from Spring 2014 release to TBD  
Added Many-to-Many Substitution to Fall 2014 release  
Deferred AIM Release 1 deployment  
Moved Contingency Modeling Enhancements Board decision from December 2013 to February 2014  
Moved Outage Management System Replacement Board decision from December 2013 to February 2014  
Added EIM Governance with Board decision in December 2013  
Moved start of Bid Cost Recovery Refinements for Multi-Stage Generation Resources policy from January 2014 to February 2014  
Resuming Administrative Pricing Rule policy initiative in January 2014 with Board decision in June 2014  
For Interconnection Process Enhancements, added third Board decision in March 2014

#### **Changes on 12/1/13**

Moved Full Network Model Expansion Board decision from December 2013 to February 2014  
Fall 2013 Release deployed: Commitment Costs 2012, AS Buy Back, FERC Order 755 report and CMRI CRN report; remaining projects are independent projects to be deployed by year-end  
Added Commitment Costs 2012 to TBD (NOX, OFO scope still outstanding)  
Move ADS UI replacement to TBD  
Contingency Modeling Enhancements deployment date is TBD  
Added Voluntary Preferred Resource Auction policy targeted to start in December 2013  
Moved Reliability Auction Services policy start to January 2014  
Two Tier Real-Time Uplift - will address after finalizing flexible ramping product cost allocation  
Bid cost recovery for units running over multiple operating days -  
Will address in conjunction with also considering bid cost recovery netted over shorter periods

Multi-hour Constraints in the Residual Unit Commitment Process -  
Will address as part of considering integrated IFM/RUC in Flexible Ramping Product initiative

Ancillary Services Substitution -  
Will assess need for initiative based on results of stakeholder initiative catalog process

Default load aggregation point disaggregation -  
FERC filing in 2014 Q1 to remove requirement

Added Competitive Transmission Improvements with Board decision in December 2013

**Changes on 1/6/14**

Removed Access and Identity Management (deployed in December 2013)

Removed Replacement Requirements for Scheduled Generation Outages Phase 2 (deployed in December 2013)

Removed RIMS Generation (deployed in December 2013)

Removed GMT (deployed in December 2013)

Moved Contingency Modeling Enhancements Board decision from February 2014 to May 2014 (tentative - the policy initiative schedule is under review)

Moved Flexible Resource Adequacy Criteria and Must Offer Obligation Board decision from February 2014 to March 2014

Corrected Administrative Pricing Rules Board decision date from June 2014 to May 2014

Added GIDAP Reassessment Process as policy initiative with Board decision in May 2014