BPM Change Management Process Enhancements 2026

January 28, 2026

Today's Trainer

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Director, Customer Readiness

This training will begin at 10:00am

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Revised 01/26/2026

Housekeeping

REMAIN MUTED
Keep yourself muted to minimize background noise

ASKING QUESTIONS
Unmute to ask verbal questions or write in the chat pod

RAISING HAND
Raise your hand using WebEx interactivity tools

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Our Meeting Agenda

Today we will cover...

- A brief overview of the BPM Change Management process and the BPM that governs it
- A review of the updates made to the BPM Change Management BPM and what they mean for you
- An example illustrating the use of the new "Pending Project Implementation" PRR status
- A walkthrough of the new Impact Analysis form
- A summary of the steps completed to adopt and implement these changes

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What is a Business Practice Manual (BPM)?

- **Business Practice Manuals (BPMs)** provide detailed implementation guidance of requirements listed in the CAISO Tariff

- BPMs describe **how CAISO business processes are carried out**, from market operations to settlements, planning, and stakeholder engagement

- **A Proposed Revision Request (PRR)** is the formal mechanism used to request a change, clarification, or update to a BPM
  - PRRs move through a **structured lifecycle** that includes submission, stakeholder review, recommendations, and final decisions before changes are implemented

What is the BPM for BPM Change Management?

- The **BPM for BPM Change Management** defines the formal process used to propose, review, and approve changes to all CAISO BPMs

- It establishes roles, timelines, stakeholder engagement requirements, and decision-making steps to ensure changes are **transparent, consistent, and well-vetted**

- This BPM is periodically (although not often) updated to reflect process improvements or clarifications
  - The changes we review today represent new enhancements/clarifications to the process

Overview of Changes and Enhancements

These changes focus on:

- Introducing a new PRR status: **Pending Project Implementation**
- Strengthening **Impact Analysis requirements**
- Clarifying **who can submit PRRs**
- Improving **timing clarity and flexibility**
- Increasing **transparency of a PRR status and lifecycle**
- Removing **obsolete or no-longer-applicable requirements**

New Pending Project Implementation PRR Status

What Changed:

- Added a new PRR status:
  - **"Pending Project Implementation" status**
- Allows PRRs to "pause" in the PRR process to align with related system or project implementation dates

Why This Matters:

- Enables project or initiative-related PRRs to be submitted earlier, rather than wait for the standard two-month cycle before a project implementation date
- Improves stakeholder experience during commenting periods

Current Project PRR Status Example

PRR Submitted
(February 25th)

Market Sim Starts
(March 15th)

2nd BPM Commenting Period/Meeting
(April 20th)

Training Conducted
(February 28th)

1st BPM Commenting Period/Meeting
(March 20th)

**Project Implementation/ PRR Effective Date** (May 1st)
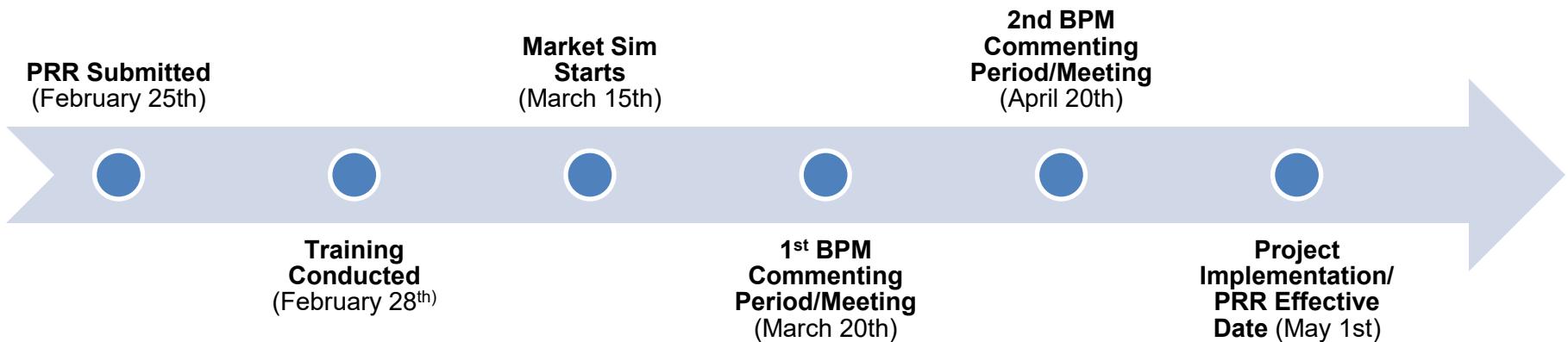
Impact

- PRR review and discussion occur **during Market Simulation**
- Review of BPM changes **may not be included in training**
- If additional stakeholder discussion is needed, the **effective date may be after project implementation** (emergency PRR)

Why This Is a Problem

- The PRR process could overlap with critical testing and readiness activities
- Reduces time for meaningful feedback, alignment, and training

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Pending Project Implementation Status Example

PRR Submitted
(December 16th)

PRR in Pending Project Implementation Status (February)

PRR in Pending Project Implementation Status (March)

2nd BPM Commenting Period/Meeting
(April 20th)

1st BPM Commenting Period/Meeting
(January 20th)

Training Conducted
(February 28th)

Market Sim Starts
(March 15th)

Project Implementation/ PRR Effective Date (May 1st)
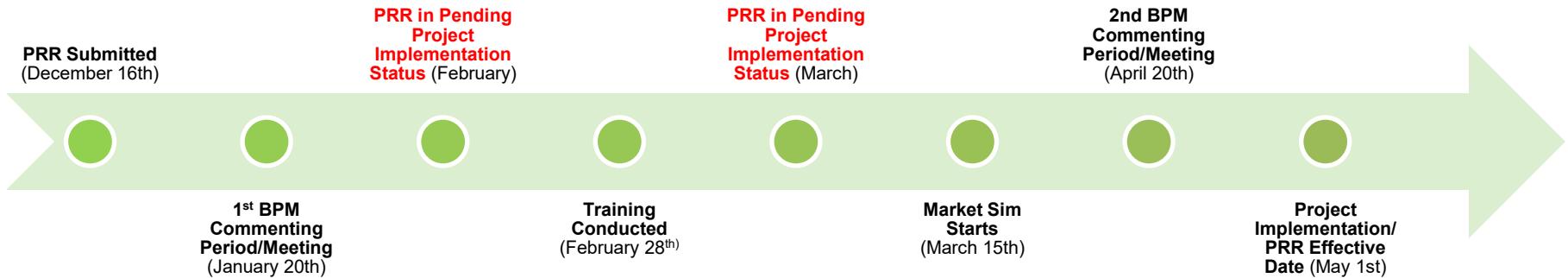
What This Does

- Allows PRRs to be **submitted earlier in the project lifecycle**, well ahead of Market Simulation

- Enables the PRR to **pause** after initial review while project timelines are finalized

- Provides time to **complete PRR stakeholder review, discussion, and training** *before* Market Simulation begins

- Encourages BPM changes to become effective on the **same date** as project implementation

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New Pending Project Implementation PRR Status

Other Important Things to Note:

- Use of the "Pending Project Implementation" status is **optional**
  - It will not be required to be used for project-related PRRs but provides additional flexibility in timing PRR submissions

- PRRs in this status will continue to be included in monthly BPM Change Management meetings
  - While these meetings do not constitute an official commenting period, stakeholders may ask questions and seek clarification on the PRR

- PRR submitters will attend BPM Change Management meetings while their PRRs are in "Pending Project Implementation" status to answer emerging questions

What Questions Do You Have?

Unmute yourself   <u>or</u>   Raise your hand

Enhanced Impact Analysis Requirements

What Changed:

- Expanded and clarified required Impact Analysis content, including:
  - Type of change and overall impact level assessment
  - External customer impacts
  - Internal CAISO impacts
  - Proposed support measures for implementation (if applicable)
  - Possible risks or challenges
- Clarifies when CAISO must perform or update an Impact Analysis

Why This Matters:

- Ensures easier visibility into customer, system, and operational impacts
- Helps you determine if you may be impacted by this change

New Impact Analysis Walkthrough

What Questions Do You Have?

Unmute yourself   or   Raise your hand

Clarification of PRR Submission Authority

What Changed:

- Added **CAISO BPM Owners/Coordinators** as authorized PRR submitters

- Clarifies that PRRs are not limited only to Market Participants and CAISO management

Why This Matters:

- Enables more direct ownership and accountability for BPM maintenance

- Reduces administrative bottlenecks for BPM updates

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PRR Timing & Category Alignment

What Changed:

- Updated **Category A PRR timing** to reflect standard BPM Change Management cadence

- Clarifies expectations for when Category A PRRs may be implemented

- Removes outdated or inconsistent timing language

Why This Matters:

- Aligns process language with how PRRs are currently reviewed and implemented

- Improves predictability for stakeholders tracking PRR timelines

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PRR Status Definitions

What Changed:

- A new section was added to the BPM to clearly define PRR statuses used throughout the PRR lifecycle

- Status definitions now align with how PRRs are tracked, communicated, and displayed on the PRR webpage

Why This Matters:

- Helps submitters and stakeholders better understand timing, next steps, and expectations

- Reduces confusion by using consistent, clearly defined status terminology across BPMs, meetings, systems

Removal of Obsolete Requirements

What Changed:

- Removed references to:
  - Two-business-day Market Notice requirement
  - FERC reporting requirements that are no longer applicable
- Streamlined process language to reflect current governance and reporting practices

Why This Matters:

- Eliminates confusion caused by outdated requirements
- Aligns BPM language with current regulatory and operational reality

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Stakeholder Comments on Changes

PRR Submission

• Proposed changes to the BPM for BPM Change Management were formally submitted through the PRR process in late September

Stakeholder Review

• The proposed changes were reviewed during regularly scheduled BPM Change Management meetings in **October** and **November**

• No stakeholder comments were submitted during the public comment periods

Board Approval

• Because this BPM governs the BPM Change Management process itself, the proposed changes were presented to the Board of Governors for approval in December

  – The Board of Governors approved the changes on December 18, 2025.

What Questions Do You Have?

Unmute yourself   or   Raise your hand

Reference Links

BPM Website:
https://www.caiso.com/legal-regulatory/business-practice-manuals

BPM Change Management BPM:
https://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=BPM%20Change%20Management

BPM Tool: https://bpmcm.caiso.com/Pages/default.aspx

BPM Meeting Monthly Agendas, Presentations, and Recordings:
https://www.caiso.com/meetings-events/topics/business-practice-manual-bpm-change-management

December Board of Governors:
- Presentation: https://www.caiso.com/documents/decision-on-business-practice-manual-for-bpm-change-management-presentation-dec-2025.pdf
- Memo: https://www.caiso.com/documents/decision-on-business-practice-manual-for-bpm-change-management-memo-dec-2025.pdf
- Motion: https://www.caiso.com/documents/decision-on-business-practice-manual-for-bpm-change-management-motion-dec-2025.pdf
- Video: https://youtu.be/qbq5k5EDwpE

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Thank you for your participation!
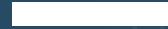
For clarification or questions on anything presented in this training, send an email to:
CustomerReadiness@caiso.com or bpm_cm@caiso.com

For other questions or stakeholder specific questions or concerns use one of these methods:
- Submit a CIDI ticket
- Contact your Scheduling Coordinator
- Use the "Contact us" page on caiso.com to submit questions

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