

Cluster 15 interconnection request intake process training on LSE Commercial Interest scoring process

Today's Trainer:

Robert Emmert

Sr. Manager, Interconnection Resources

September 5, 2024

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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Agenda

- Review Load Serving Entity Transmission Plan Deliverability (TPD) and Energy Only (EO) capacity allotments for Cluster 15
- Overview of posted transmission constraints and available TPD
- Review requirements for opting-in
- Review LSE scoring process
- Training on use of Opt-In form and LSE Scoring form

Load Serving Entity TPD & EO capacity allotments for Cluster 15

Determine the TPD capacity to allocate to each Load Serving Entity (LSE) for use in the commercial interest scoring process

CAISO takes the aggregate available MW of TPD and EO capacity in each transmission zone and multiply it by a scaling factor of 0.5.



Next, CAISO allocates shares of TPD and EO capacity to each LSE based upon on their relative load ratio shares in the most recent coincident peak demand forecast from the California Energy Commission (CEC).

Note: LSEs are not required to allocate any or all of their allocated points, and the CAISO will not redistribute forgone or otherwise unused points to other LSEs or carry unused capacity over for use in a future cluster.

CAISO Cluster 15 TPD Allocations by Load Share for LSE Commercial Interest Selections

CAISO Cluster 15 TPD Allocations by Load Share for LSE Commercial Interest Selections based on: CEC 2025 Load Ratio Shares June 28, 2024	TPD Capacity	EO Capacity		
	21,900	7,269		
	Capacity to Allocate (50%)			
	10,950	3,634		
Load Serving Entity	TPD Allocation (MW)	EO Allocation (MW)		<div>Max Single TPD Project Capacity (MW)</div> <div>Max Single EO Project Capacity (MW)</div>

LSEs: Allocating Capacity Allotments to TPD & EO Projects



Load Serving Entities (LSEs)

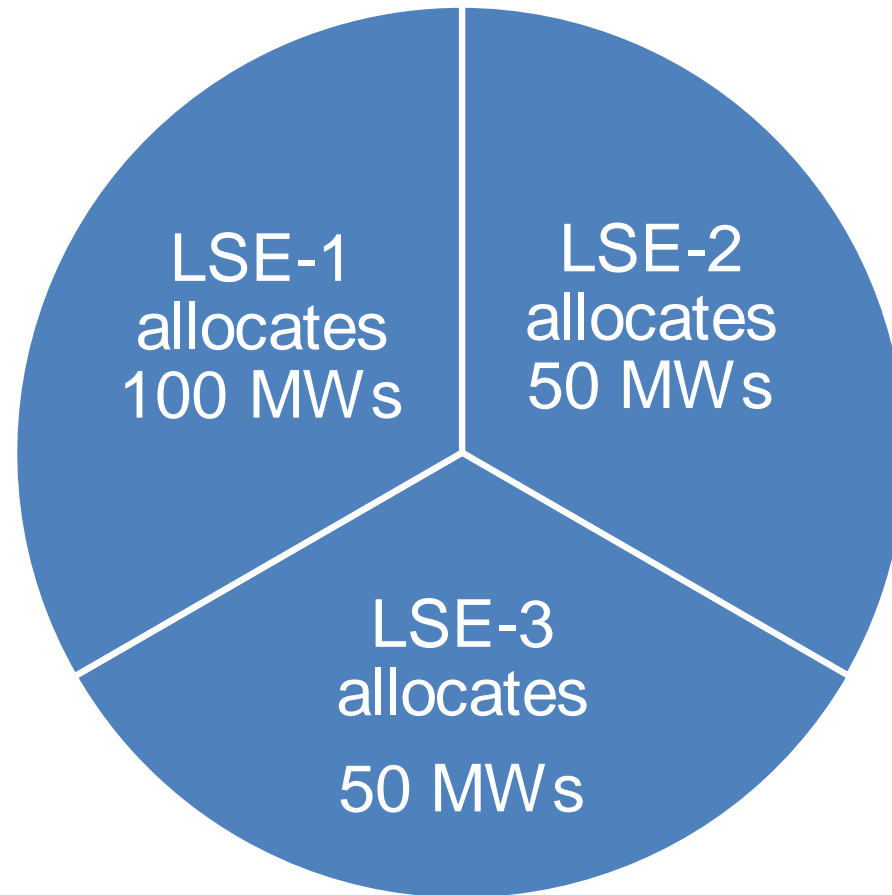
- Will allocate their capacity allotments to projects – up to the project's requested interconnection service capacity at the point of interconnection.
- Can allocate their capacity allotments to as many projects they have capacity for.
- Can do partial allocations to projects (an amount less than the project's requested interconnection service capacity at the point of interconnection).

Note: There is no limit to the number of projects an LSE can select. For instance, LSEs can give partial allocations to several projects.

LSE TPD Capacity Allotments Combination for Cluster 15

Within the TPD & EO allotment processes LSEs can work together to combine their allocations with other LSEs to give a project a full allocation.

Example: Three LSEs all allocate to the same 200 MW project to give that project 100 points



What Questions Do You Have?



Unmute yourself

or



Raise your hand

Overview of posted transmission constraints and available TPD

Binaya Shrestha
Manager, Regional Transmission - North

Requirements for LSEs to opt into the commercial interest scoring process

Requirements for Opting Into the Commercial Interest Scoring Process

To be eligible to participate in the allocation of commercial interest points to interconnection customers, an LSE must do the following by **October 1, 2024**:

1. Provide the CAISO written, electronic notice of intent to participate in the points allocation via the [LSE Commercial Interest Opt in Form](#). The notice must include:
 - a) the publicly accessible website used by LSE and
 - b) the contact information for the person or department conducting the points allocation for the LSE
2. Publish on the publicly accessible website:
 - a) the selection criteria or consideration factors for awarding points and
 - b) the contact information for the person or department conducting the points allocation for the LSE. Public websites requiring registration are permissible.

What Questions Do You Have?



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Raise your hand

LSE Scoring Process

Publish a List on the CAISO site of LSEs who Opted-In

By **October 8, 2024**, the CAISO will publish the contact information, website, and points allocation for each participating LSE and provide a list of LSEs who opted in a scoring template.

This information can be found under www.caiso.com > Generation and transmission > Interconnection request & study under the heading Commercial Interest

Cluster Application Window Requirements

For each cluster application window, an LSE:

- May allocate capacity to the greater of 3 interconnection requests from an Affiliate, or
- May allocate no more than 25% of its capacity to interconnection requests from an Affiliate

LSE scoring process

(from CAISO Tariff Appendix KK Section 3.5.4)

- CAISO will provide LSEs with a list of interconnection requests after the cluster application window closes on December 2, 2024.
 - LSEs submitting commercial interest points must do so by **December 23, 2024**.
 - Exceptions: Interconnection requests in merchant zones and non-reimbursement EO interconnection requests are not scored.
- After receipt of LSE's interconnection request scorings the CAISO will determine the projects' eligibility for the cluster study.

What Questions Do You Have?



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or



Raise your hand

Training on use of Opt In form and LSE Scoring form

Training on use of Opt-In form and LSE Scoring form

The **LSE Commercial Interest Opt in Form** is posted on the CAISO Interconnection request and study webpage under the Commercial interest section:

<https://www.caiso.com/generation-transmission/generation/generator-interconnection/interconnection-request-study>

Commercial Interest

To allocate commercial interest points to Interconnection Customers, a Load Serving Entity must do the following at least two months prior to the Cluster Application Window's opening: 1) Provide the CAISO written, electronic notice of intent to participate in the points allocation. The notice must include (a) the publicly accessible website used by the Load Serving Entity; and (b) the contact information for the person or department Not current tariff language This document includes pending language Pending Tariff Language conducting the points allocation for the Load Serving Entity. 2) Publish on the publicly accessible website (a) the selection criteria or consideration factors for awarding points; and (b) the contact information for the person or department conducting the points allocation for the Load Serving Entity. Public websites requiring registration are permissible. Within five (5) Business Days after the deadline for Load Serving Entities to provide their notices, the CAISO will publish on the CAISO Website the contact information, website, and points allocation for each participating Load Serving Entity.

Load Serving Entities submitting commercial interest points must do so no later than ten (10) days after the CAISO provides the list of Interconnection Requests.

Affidavits from non-Load Serving Entities must be executed by an authorized representative. The affidavit must attest the counterparty is supporting the Interconnection Request in support of corporate policy goals on sustainability; the capacity of the Interconnection Request aligns with its individual needs; the counterparty and its holding company, if any, is not affiliated with the Interconnection Customer or its holding company; and that the counterparty and its holding company and affiliates support this Interconnection Request only, and no other Interconnection Requests in this Cluster Application Window.

- [LSE Commercial Interest Opt in Form](#)  08/21/2024, 3:56 PM
- [NON-LSE Commercial Interest Form](#)  09/03/2024, 11:50 AM

Training on use of Opt-In form and LSE Scoring form

Once an LSE provides the CAISO with a valid Opt-In form:

1. CAISO will email the LSE Commercial Interest Point Allocation form to the LSE to complete.
2. LSE must submit completed form to the CAISO by the **December 23, 2024**, deadline

The ISO will combine any **LSE project points** with the **project's total points** from the project viability and system need components of the project's scoring form.

What Questions Do You Have?



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or



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Wrap Up

Resources

Interconnection request and study page

<https://www.caiso.com/generation-transmission/generation/generator-interconnection/interconnection-request-study>

LSE Commercial Interest Opt-In Form

<https://www.caiso.com/documents/lse-commercial-interest-opt-in-form.docx>

NON-LSE Commercial Interest Form

<https://www.caiso.com/documents/non-lse-commercial-interest-form.docx>

Related ISO Tariff

[Pending Tariff Appendix KK \(Sections 4.1.1.1 and 4.3.1\)](#)

2024 RESOURCE INTERCONNECTION STANDARDS FAIR



The objective of this educational forum is to provide stakeholders with an opportunity to learn more about the ISO's interconnection process and recent changes affecting Cluster 15. Attendees can participate in-person or virtually.

Date: Sept. 17, 2024, from 09:00 – 16:00 PPT

Location: California ISO, 250 Outcropping Way, Folsom, CA

Registration: <https://caiso.regfox.com/resource-interconnection-standards-fair-sep-17-2024>

If you plan to attend in-person, please register by end of day **Sept. 13, 2024**

Thank you for your participation!



For clarification on anything presented in this training, send an email to:
IRInfo@caiso.com

For any other questions or stakeholder specific questions or concerns, please
[submit a CIDI ticket](#) or [Contact Us](#) Submission.