



# Stakeholder Engagement & Customer Experience

Case Study for CAISO Legal Forum

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April 10, 2025

## Stakeholder Engagement

Stakeholders represent energy markets across the western interconnect, and their input is essential to the ISO. Their representation ranges from, for example; transmission, market rules, policy initiatives, current on-going issues, settlements, and resource adequacy.

*FERC has issued several orders emphasizing the importance of stakeholder engagement, see, e.g., Wholesale Competition in Regions with Organized Electric Markets, Order No. 719, 125 FERC ¶ 61,071 (2008).*

# Engagement Opportunities

## California ISO Engagement Guide

### Emergency alerts and notification emails

#### **Emergency alerts**

Find out when operating reserves or transmission capacity limitations threaten our ability to safely and reliably operate the grid

<https://www.caiso.com/subscriptions/subscription-emergency>

#### **Daily Briefing**

A daily email summarizing the day's notices for meetings, changes, and initiatives

#### **News releases**

Latest on the ISO, Board of Governors decisions, developments in energy industry

#### **Energy Matters**

Stay informed of developments in energy that will impact our communities

<https://www.caiso.com/subscriptions/subscription-general>

### Board of Governors

#### *Monthly*

The California ISO Board of Governors shapes policies, approves grid planning and market design changes, and reviews and approves the annual ISO budget

<https://www.caiso.com/about/governance-committees>



### BPM Change Management PRR Review Meeting

#### *Monthly*

Monthly review of Proposed Review Request (PRR) changes to the Business Practice Manuals

<https://www.caiso.com/meetings-events/topics/business-practice-manual-bpm-change-management>



### Market Performance and Planning Forum

#### *Quarterly*

Quarterly forum that engages stakeholders in review of market performance issues and in high level dialogue on release planning, implementation and new market enhancements

<https://www.caiso.com/meetings-events/topics/market-performance-and-planning-forum>



#### Legend

-  Leadership
-  Market
-  Operations
-  Policy
-  Regulatory
-  Technical

# Engagement Opportunities

## Market Simulation Forum

*Ongoing*

A Market Simulation provides participants an opportunity to test their systems and procedures in advance of the market implementation and facilitates an effective market operations dress rehearsal and helps expedite a smooth production launch

<https://www.caiso.com/meetings-events/topics/market-simulation-meeting>



## Market Surveillance Committee Meeting

*Every 2 months*

The Market Surveillance Committee is an independent body of highly skilled industry experts that provides comments, critiques and recommendations about the ISO market monitoring process (as described in the tariff) and a variety of market issues to the ISO Chief Executive Officer and Board of Governors

<https://www.caiso.com/meetings-events/topics/market-surveillance-committee>



## Market Update

*Every 2 weeks*

Biweekly call covering updates on the weekly market performance reports, weekly price correction reports and the status of action items from previous calls

<https://www.caiso.com/meetings-events/topics/market-update>



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# Engagement Opportunities

## Policy Process and Commenting Tool *Ongoing*



Stakeholder input is essential to ISO planning processes. Similar to policy development, the ISO is committed to providing ample opportunities for stakeholders

<https://stakeholdercenter.caiso.com/RecurringStakeholderProcesses>

## Release User Group *Every 2 weeks*



Biweekly forum for market initiatives to discuss project milestones and deliverables. Projects are managed through the Master Stakeholder Engagement Plan and follow a standard project lifecycle

<https://www.caiso.com/meetings-events/topics/release-users-group-rug>

## Settlements User Group *Every 2 weeks*



Biweekly discussion forum for market participants and RC West customers to obtain information, provide input and ask questions on current ISO initiatives and activities affecting the settlement and invoicing processes

<https://www.caiso.com/meetings-events/topics/settlement-user-group>

## Technical User Group *Every 2 weeks*



Biweekly discussion forum for participants to brainstorm and evaluate solutions for technology and process based problems for ISO development of prioritized implementation roadmaps. This forum will not discuss release dates, release plans, project status or policy

<https://www.caiso.com/meetings-events/topics/technical-user-group-tug>

**Legend**

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# Engagement Opportunities

## Webinar Training *Ongoing*



These live instructor-led courses and past recordings are organized into training topics that are designed to be an industry resource for market participants and the general public to learn about electric grids and markets, and the ISO's role in the electricity system

<https://www.caiso.com/stakeholder/training>

## WEIM Governing Body *Monthly*



Requesting two representatives from each market participant and suggestions for agenda topics

<https://www.westerneim.com/Pages/Governance/GoverningBody.aspx>

## WEIM Regional Issues Forum *Quarterly*



This forum is organized by 12 sector selected liaisons that facilitate input and participation from their respective sectors on relevant topics and allow stakeholders to discuss broad issues related to the Western Energy Markets including the Western Energy Imbalance Market (WEIM) and the Extended Day-Ahead Market (EDAM)

<https://www.westerneim.com/Pages/Governance/RegionalIssuesForum.aspx>

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## Case Study: Customer Engagement

- Tariff Interpretation
- BPM Interpretation
- Settlement Disputes
- Understanding of Policy changes
  - Direct engagement in policy and shaping future changes
- Rules of Conduct Violations/Process
- Resource Compliance