



California ISO

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

Calendar	Initiatives (Updated Weekly)	Initiative 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 meetings	N/A	Recurring						
	EIM Body of State Regulator meetings	N/A	Recurring						
	EIM Governing Body meetings	N/A	Recurring						
	EIM Regional Issues Forum meetings	N/A	Recurring						
	Market Surveillance Committee meetings	B. Cooper	Recurring						
	Market Performance and Planning Forum meetings	J. Morris	Recurring						
Policy Development	Business Practice Manual Change Management meetings	J. Payton	Recurring						
	Congestion Revenue Rights Auction Efficiency	P. Servedio	Q1 2018	5-Mar-18 15-Mar-18 5-Apr-18			Mar 2018 Jun 2018 Jul 2018	Concurrent proposals (Tracks 1 and 2) targeting approval in the stakeholder process schedule currently under development	
	Day-Ahead Market Enhancements	M. Poage	Q1 2018	5-Apr-18	E4	Aug 2018	Sep 2018		
	Energy Storage and Aggregated Distributed Energy Resource Phase 3	E. Kim	Q3 2017		E2	Aug 2018	Sep 2018		
	Extend Day-Ahead Market Enhancements to EIM Entities	TBD	Q2 2018			Aug 2018	Sep 2018	Stakeholder process schedule currently under development	
	Flexible Resource Adequacy Criteria and Must-Run Obligation Phase 2	K. Meeusen	Jun 2015				Q4 2018		
	Imbalance Conformance Enhancements	M. Poage	Q4 2017		E1* E2*	Apr 2018	May 2018		
	Interconnection Process Enhancements 2018	D. Le Vine	Q1 2018				TBD		
	Intertie Deviation Settlement	M. Poage	Q1 2018				Nov 2018		
	RA Enhancements (Track 1 and Track 2)	TBD	Q1 2018				TBD	Stakeholder process schedule currently under development	
	Reliability Coordinator Services Rate Design, Terms and Conditions	A. Gordon	Q1 2018				TBD	Stakeholder process schedule currently under development	
	Review of Reliability Must-Run and Capacity Procurement Mechanism	K. Johnson	Q1 2018				May 2018		2018
	Review Transmission Access Charge Structure	C. Devon	Q3 2017				Sep 2018		
	EIM Offer Rules	M. Poage	Q2 2018		TBD	TBD	TBD	Stakeholder process schedule currently under development	
Regional Integration	Storage as a Transmission Asset	K. Meeusen	Q2 2018				Nov 2018		
	Regional Integration and EIM Greenhouse Gas Compliance	D. Tretheway	Q3 2018		E1	Jul 2017	Jul 2017		
Recurring Initiatives	Flexible Capacity Needs Technical Study Process	C. Loutan	Recurring						
	Budget and Grid Management Charge Process	A. Gordon	Recurring				Jul 2017		
	2019 and 2023 Local Capacity Requirements	C. Micasa	Recurring						
	Participating Transmission Owner Per-Unit Cost	R. Emmert/ M. Wu	Recurring						
	Annual Policy Initiatives Roadmap Process	B. Dean	Q3 2018			Jan 2018	Feb 2018		N/A
	2018-2019 Transmission Planning Process	R. Sparks	Recurring						N/A
	2017 Tariff Clarifications Filing Process	K. Meeusen	Recurring				N/A		
Tariff Development	Western Regions Planning Coordination	G. DeShazo	Recurring				N/A		
	Legal Lead	Legal Lead	Start				Filing Date		
	Commitment Costs and Default Energy Bid Enhancements	B. Dean	Q4 2016			Mar 2018	Mar 2018		
	Commitment Cost Enhancements Phase 3	B. Cooper	Q3 2015				Mar 2016	targeting RRC approval by mid-June, to allow participants to prepare their annual	Q2 2018
	Congestion Revenue Rights Auction Efficiency (Track 1A)	P. Servedio	Feb 2018				Mar 2018		Jun 2018
	Contingency Modeling Enhancements	P. Servedio	Mar 2013				Dec 2017		2018
	Capacity Procurement Mechanism Risk of Retirement Enhancements	K. Johnson	Oct 2017				Nov 2017		Q1 2018
	Consolidated Energy Imbalance Market Initiatives	M. Pogue	Q2 2017		E1, E2 *	Nov 2017	Dec 2017		2018
	Clarification of Tariff Rules Regarding Following DOT	D. Tretheway	Q1 2018		E2	TBD	TBD		2018
	Energy Storage and Distributed Energy Resources Phase 2	J. Bishara	Q1 2016		E1, E2*	Jul 2017	Jul 2017		Jul 2018
	Generator Contingency and Remedial Action Scheme Modeling	P. Servedio	Q2 2016	10-Jul-17	E1, E2 *	Aug 2017	Sep 2017		TBD
	Resource Adequacy Availability Incentive Mechanism (RAAIM)	K. Meeusen	July 2017				Nov 2017		TBD
	Petition Tariff Waiver - 2018 Availability Assessment Hours	J. Bishara	Q3 2017				Aug 2017		Aug 2017



Calendar	Release / Implementation (Updated Monthly)	Deployment	Market Simulation Start - End		Activation	Project Manager
Independent 2018	Black Start and System Restoration Phase 2	10/1/18	N/A	N/A	Dec 2018	John Williams
	Commitment cost enhancements phase 3	5/1/18	8/30/18	10/4/18	Nov 2018	Ray Riley
	RIMS functional enhancements	4/30/18	N/A	N/A	Apr 2018	Marcelo Da Costa
Spring 2018	RAAIM Calculation Modifications	5/1/2018	1/16/2018	2/16/2018	Jul 2018	Jeremy Malekos
	Reliability Services 2017	3/15/2018	12/5/2017	1/31/2018	May 2018	Marci Stuckey
	SIBR UI Upgrade	5/1/2018	2/27/2018	4/27/2018	May 2018	John Williams
Fall 2018	ADS Replacement	10/1/2018	7/17/18	8/31/18	Oct 2018	John Williams
	Commitment cost and Default Energy Bid Enhancements	10/1/2018	TBD	TBD	Oct 2018	Ray Riley
	Congestion Revenue Right auction efficiency	10/1/2018	7/17/18	8/31/18	Oct 2018	LeAnn McLaughlin
	Contingency modeling enhancements	10/1/2018	7/17/18	8/31/18	Oct 2018	LeAnn McLaughlin
	CPM Risk-of-Retirement	10/1/2018	N/A	N/A	Oct 2018	Marci Stuckey
	EIM Greenhouse Gas Compliance	10/1/2018	TBD	TBD	Oct 2018	Ray Riley
	Energy storage and aggregated distributed energy resource, Phase 2	10/1/2018	7/17/18	8/31/18	Oct 2018	Mohan Koya
	Generator contingency/RAS modeling	10/1/2018	7/17/18	8/31/18	Oct 2018	LeAnn McLaughlin
	Settlements Performance Improvements	10/1/2018	7/17/18	8/31/18	Oct 2018	Ayman Fattah
	EIM - Balancing Authority of Northern California (BANC/SMUD)	4/1/2019	12/1/2018	1/31/2019	Apr 2019	Ayman Fattah
Fall 2019	ESDER Phase 3	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Day-Ahead Market Enhancements	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Flexible resource adequacy criteria and must run obligation phase 2	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
	Transmission Access Charge Billing Structure	10/1/2019	TBD	TBD	Oct 2019	Adrian Chiosea
Spring 2020	EIM - LADWP	4/1/2020	12/1/2019	1/31/2020	Apr 2020	Ayman Fattah
	EIM - Salt River Project	4/1/2020	12/1/2019	1/31/2020	Apr 2020	Joanne Alai
	EIM - Seattle City Light	4/1/2020	12/1/2019	1/31/2020	Apr 2020	Ayman Fattah
TBD	EIM Offer Rules	TBD	TBD	TBD	TBD	Adrian Chiosea
	Imbalance Conformance Enhancements (ICE)	TBD	TBD	TBD	TBD	Adrian Chiosea
	Intertie Deviation Settlement	TBD	TBD	TBD	TBD	Adrian Chiosea
	RA Enhancements (Track 1 and Track 2)	TBD	TBD	TBD	TBD	Adrian Chiosea
	Reliability Must Run and Capacity Procurement Mechanism	TBD	TBD	TBD	TBD	Adrian Chiosea
	Storage as a Transmission Asset	TBD	TBD	TBD	TBD	Adrian Chiosea
	Variable Energy Resource Dispatch Operating Point (VER DOT)	TBD	TBD	TBD	TBD	Adrian Chiosea



Changes 4/27/18

Policy & Tariff Development Updates

- Updated timeline for the Energy Storage and Distributed Energy Resources Phase 3 initiative
- Updated timeline for the Commitment Costs and Default Energy Bid Enhancements initiative
- Updated the Board date for the Regional Integration and EIM Greenhouse Gas Compliance initiative
- Updated the Storage as a Transmission Asset (May web conference date)
- Updated the Intertie Deviation Settlement initiative timeline (May web conference date)

Changes 4/20/18

Policy & Tariff Development Updates

- Updated the Day Ahead Market Enhancements initiative timeline (reflecting new Sep Board target date)
- Updated EIM Governing Body and Board dates for the Extend DAM Enhancements to EIM Entities initiative

Changes 4/13

Policy & Tariff Development Updates

- Corrected project lead information for the Commitment Costs and Default Energy Bid Enhancements and Commitment Cost
- Modified the EIM Category for the Day-Ahead Market Enhancements initiative
- Updated timeline for the Commitment Costs and Default Energy Bid Enhancements initiative (upcoming tariff)
- Updated timeline for the Intertie Deviation Settlement initiative (upcoming initiative)
- Updated timeline for the Review Transmission Access Charge Structure initiative
- Updated timeline for the Energy Storage and Distributed Energy Resources Phase 2 initiative (revised tariff)

Implementation Milestones Updates:

- Removed Winter 2017 release which activated on 4/4/18
- Moved CCE3 and RIMS Functional Enhancements from Spring 2018 release to Independent Projects
- Removed Aliso Canyon Gas-Electric Coordination Phase 3 from Fall 2018 release
- Added Congestion Revenue Right (CRR) Auction Efficiency (phased implementation) to Fall 2018 release
- Moved EIM-LADWP from Spring 2019 to Spring 2020
- Added to TBD: EIM Offer Rules, Storage as a Transmission Asset, RA Enhancements (Track 1 and Track 2)
- Updated dates for CCE3 project to reflect 6 month period between deployment and activation
- Other minor updates to align with RUG presentation dated 4/10/18.

Changes 4/6

Policy & Tariff Development Updates

- Removed month of March from timeline
- Updated May timeline for Track 1B timeline for the Congestion Revenue Rights Auction Efficiency initiative
- Updated straw proposal meeting date for the Storage as a Transmission Asset initiative
- Updated dates for Reliability Coordinator Rate Design, Terms and Conditions
- Updated April/May dates for FRACMOO 2

Changes 3/30

Policy & Tariff Development Updates

- Updated comments deadline for the Energy Storage and Distributed Energy Resources Phase 3 initiative
- Added timeline for the Storage as a Transmission Asset initiative
- Removed Commitment Costs and Default Energy Bid Enhancements (it has been placed in Tariff)
- Moved the Dispatch Operating Target Clarification process to Tariff Section
- Add dates for paper, meeting and comments for generator contingency and remedial action scheme modeling
- Add April dates for clarification of tariff rules regarding following DOT
- Add dates for FRACMOO 2
- Update April dates for Flexible Capacity Needs Technical Study Process
- Add meeting dates in Sep and Nov for 2018-2019 transmission planning process
- Removed 2017-2018 transmission planning process
- Add comments date in April for 2019 and 2023 local capacity requirement

Changes 3/23

Policy & Tariff Development Updates

- Removed the 2017 Expedited GIDAP Enhancements initiative from the Tariff section (Implementation (FERC-rejected; no rehearing requested))
- Removed the Competitive Solicitation Process Enhancements initiative from Tariff section (initiative has been removed)
- Removed the Revised Settlement Statement & Dispute Timeline for T+35M initiative (initiative has been removed)
- Removed Reactive Power Requirements and Financial Compensation from Tariff section (Implementation)
- Removed Reliability Services Phase 1B/2 from Tariff section (currently in Implementation phase)
- Removed the Aliso Canyon Gas-Electric Coordination Phase 3 initiative from Tariff section (currently in Implementation phase)
- Moved Commitment Costs and Default Energy Bid Enhancements to Tariff section
- Updated timeline for the Commitment Cost Enhancements phase 3 initiative (Tariff filing pending)
- Updated timeline for the Intertie Deviation Settlement upcoming initiative
- Updated the timeline for the Congestion Revenue Rights Auction Efficiency initiative (moved Track 1A to Tariff)
- Updated the proposed Tariff filing date for the Energy Storage and Distributed Energy Resources Phase 2
- Removed month of February from spreadsheet

Changes 3/16

Policy & Tariff Development Updates

- Updated timeline for the Reliability Coordinator Services Rate, Design, Terms and Conditions initiative
- Updated timeline (April meeting) for the Review Transmission Access Structure initiative
- Updated EIM categorization for the Imbalance Conformance Enhancements initiative

Changes 3/9

Policy & Tariff Development Updates

- Updated Market Surveillance Committee dates for the Congestion Revenue Rights Auction Efficiency and the Commitment Costs
- Updated initiative name for Storage as Transmission Facility (now Storage as a Transmission Asset)

Changes 3/2

Policy & Tariff Development Updates

- Updated timeline for Business Practice Manual Change Management meetings
- Updated timeline for Market Performance and Planning Forum recurring bi-monthly meetings (tentative)
- Updated timeline for Day-Ahead Market Enhancements initiative
- Updated the Flexible Capacity Needs Technical Study Process April date(s)
- Updated March meeting date for ESDER Phase 3
- Removed 2018 and 2022 Local Capacity Requirement
- Removed 2017 and 2021 Local Capacity Requirement
- Updated the FRACMOO2 timeline with tentative meetings
- Removed Black Start and System Restoration Phase 2 from spreadsheet (initiative has been completed)

Changes 2/23

Policy & Tariff Development Updates

- Removed month of January
- Updated the FRACMOO2 timeline (with the targeted 4/6/18 posting of next iteration)
- Updated the Day-Ahead Market Enhancements timeline and targeted Board dates
- Updated the Storage as a Transmission Facility initiative with the policy lead
- Updated the annual Western Regional Planning Coordination timeline (reflecting upcoming comments due)
- Removed the Intertie Deviation Settlement current timeline (initiative in short delay and new schedule in

Implementation Milestones Updates:

- Removed Frequency Response Phase 2 from Fall 2019 as inactive
- Moved RAAIM Calculation Modifications, Reliability Services 2017, and RIMS functional enhancements from Winter 2017 to Spring
- Updated Congestion Revenue Right Auction Efficiency dates to reflect July 2019 rather than October 2019

Changes 2/16

Policy & Tariff Development Updates

- Updated the Energy Storage and Distributed Energy Resources Phase 3 schedule (to reflect correct straw

Changes 2/8

Policy & Tariff Development Updates

- Updated the Flexible Resource Adequacy and Must Offer Obligations schedule
- Updated the Intertie Deviation Settlement schedule
- Updated the Congestion Revenue Rights Auction Efficiency schedule (to reflect latest proposal posting date)
- Updated Participating Transmission Owner Per Unit Cost Guides Schedule (recurring process update)

Implementation Milestones Updates:

- Removed OMS Generation Nature of Work Updates as complete
- Updated dates for Winter 2017 release projects (see RUG slides for more details)
- Updated Market Simulation dates for SIBR UI Upgrade

Updated Market Simulation dates for Fall 2018 release

Changes 2/2

Policy & Tariff Development Updates

Updated upcoming proposal publication date and associated meeting/comments dates for the Energy Storage and Distributed

Updated schedule for the annual Flexible Capacity Technical Needs Assessment process

Updated schedule for the Commitment Costs and Default Energy Bid Enhancements initiative

Added schedule for new Day Ahead Market Enhancements initiative (issue paper phase)

Updated schedule for Imbalance Conformance Initiative (draft final proposal phase)

Changes 1/26

Policy & Tariff Development Updates

Updated schedule for the Regional Integration and EIM Greenhouse Gas Enhancements

Updated schedule for the Review RMR and CPM Revisions initiative

Rescheduled the ESDER3 Feb. 15 call to Feb. 21

Updated the Intertie Deviation Settlement Apr. 12 meeting to Apr. 11

Moved the Generator Contingency and Remedial Action Scheme Modeling initiative to the Tariff

Updated the Flexible Capacity Technical Needs Assessment annual recurring initiative to show 1/15/18

Updated the EIM Governing Body meetings timeline (added Nov date)

Updated the Board of Governor's meetings timeline (removed Oct date as it is not a general session)

Updated the Commitment Costs and Default Energy Bid Enhancements remaining schedule

Updated the Imbalance Conformance Enhancements initiative schedule

Updated the schedule for the Annual Policy Initiatives Roadmap recurring initiative

Changes 1/19

Policy & Tariff Development Updates

Replaced RT Sufficiency initiative with EIM Offer Rules initiative, per the 2018 final Policy Initiatives Roadmap

Remove 2016-2017 Transmission Planning Process

Added 2018-2019 Transmission Planning Process

Moved Contingency Modeling Enhancements to tariff section

Implementation Milestones Updates:

Removed Independent 2017 and added Independent 2018

Removed EIM 2017 Enhancements as completed

Removed Support for Imperial Valley Phase Shifter as completed

Moved SIBR UI Upgrade to Spring 2018 (from Independent 2017)

Moved EIM Greenhouse Gas Compliance to Fall 2018 from Spring 2018

Moved EIM - Seattle City Light to Spring 2020 (from Spring 2019)

Moved Generator contingency/RAS modeling to Fall 2018 from Fall 2019

Moved CPM Risk-of-Retirement from Spring 2018 to Fall 2018

Moved Energy storage and aggregated distributed energy resource, Phase 2 from Spring 2018 to Fall 2018

Moved ADS Replacement from Fall 2019 to Fall 2018

Added Enhanced Day-Ahead Market to Fall 2019

Removed Real-Time Market Enhancements from Fall 2019

Updated dates per 1/16/18 RUG slides

Updated Project Manager assignments

Added TBD section

Changes 1/12

Policy & Tariff Development Updates:

- Added the Clarification of Tariff Rules Regarding Following DOT (one-off) initiative
- Updated the Market Performance and Planning Forum (recurring meeting) timeline
- Updated ISO Board of Governors (recurring meeting) timeline
- Updated the EIM Governing Body (recurring meeting) timeline
- Added the Review RMR and CPM Revisions initiative and current timeline
- Added the RA Enhancements (Track 1 and Track 2) initiative
- Added the RC Services initiative
- Added the RT Resource Sufficiency initiative
- Added the Storage as a Transmission Facility initiative
- Added the DAM Enhancements for EIM Entities initiative
- Added the DAM Enhancements initiative
- Added the Intertie Deviation Settlement initiative and tentative timeline
- Added the Interconnection Process Enhancements initiative and current timeline
- Updated the Western Regional Planning Forum (recurring meeting) timeline
- Updated the Congestion Revenue Rights Auction Efficiency timeline
- Updated the Annual Policy Initiatives Roadmap Process (recurring initiative) timeline (updated Board meeting
- Updated the Commitment Costs and Default Energy Bid Enhancements timeline

Changes 1/5

Policy & Tariff Development Updates:

- Removed month of December from initiative timelines
- Updated the Tariff filing date for the expedited GIDAP initiative
- Updated the Commitment Costs and Default Energy Bids Enhancements initiative January comments deadline

Changes 12/21

Policy & Tariff Development Updates:

- Updated the CRR Auction Efficiency initiative schedule (tentative dates beyond Jan 8 comments due date)
- Updated ESDER EIM GB meeting and comments due date
- Updated review TAC with paper, meeting and comments dates

Changes 12/14

Policy & Tariff Development updates:

- Updated Commitment Cost Enhancements Phase 3 proposed tariff filing date
- Updated the Annual Policy Initiatives Roadmap Process schedule (added Board and EIM Governing Body
- Updated the Energy Storage and Distributed Energy Resources Phase 2 tariff filing date to February 2018
- Updated 2017 Expedited GIDAP Enhancements schedule for tariff development
- Added Resource Adequacy Availability Incentive Mechanism (RAAIM) to tariff section

Changes 12/7

Policy & Tariff Development updates:

- Removed month of November from timeline
- Updated EIM Governing Body meetings schedule

Updated Board of Governors meetings schedule
Updated Market Surveillance Meetings schedule
Updated Commitment Costs and Default Energy Bid Enhancements schedule
Updated Energy Storage and Distributed Energy Resources Phase 3 initiative schedule
Added EIM Gov. Body and Board meeting proposed dates for the Imbalance Conformance Enhancements

Changes 12/1

Policy & Tariff Development updates:

Updated ESDER3 schedule (upcoming workshop rescheduled to TBD, tentatively to Jan 16)
Updated Imbalance Conformance Enhancements schedule - Rescheduled call to Dec 8 from Dec 6
Updated Consolidated EIM Initiatives schedule - Revised draft tariff language

Changes 11/29

Policy & Tariff Development updates:

Updated Review TAC Structure schedule- Next phase straw proposal
Updated Commitment Cost Enhancements Phase 3 tariff process schedule
Added new Imbalance Conformance Enhancements initiative to policy development section

Implementation Milestones updates:

Updated dates per 11/21/17 RUG slides
Added Settlements Performance Improvements in Fall 2018 Release

Changes 11/17

Policy & Tariff Development updates:

Added the Congestion Revenue Rights Auction Efficiency initiative (upcoming initiative, but still in pre-initiative status/analysis)
Updated ESDER2 tariff development timeline
Updated ESDER3 12/7 workshop date to 12/11
Added meeting and comments dates for CPM ROR

Changes 11/10

Policy Development updates:

Added potential 12/7 workshop to ESDER3 schedule (may be canceled depending on comments received from the 11/6 workshop)
Moved the Consolidated EIM Initiatives from Policy to the Tariff Development section
Review TAC Structure - Schedule under development; updated schedule to be announced in a future market

Implementation Milestones updates:

Removed Fall 2017 release as it completed with PGE activation on 10/1/17 and BRE-B and Gas Burn Reports
Added OMS Generation Nature of Work as Independent 2017
Removed Temporary Shutdown of Resource Operations from release plan (no longer active policy)
Removed CIRA Technology Upgrade from Fall 2018 release
Updated meeting date for FRACMOO
Updated dates per 11/7/17 RUG slides

Changes 11/3

Policy Development updates:

- Updated schedule for the Annual Policy Initiatives Roadmap Process recurring initiative
[Added months of April 2018 - December 2018 to the Policy Development timeline]
[Deleted month of September from the Policy Development timeline]
- Added the 2019 and 2034 Local Capacity Study schedule
- Updated the Market Surveillance Committee schedule

Changes 10/27

Policy Development updates:

- Updated schedule for Regional Integration and EIM GHG Compliance initiative (for attribution report)
- Deleted dates related to the Review TAC Structure initiative - new schedule will be announced in November
- Moved the CPM Risk of Retirement initiative to tariff section
- Added dates for the FRACMOO2 initiative
[Added link to ISO calendar in top left (corner) column header]

Changes 10/19

Policy Development updates:

- Added EIM Body of State Regulators timeline in Recurring Meetings section
- Updated Nov meeting date for the EIM Regional Issues Forum
- Added proposed Tariff filing date for Commitment Cost Enhancements Phase 3
- Deleted Oct 29 EIM Governing Body meeting (canceled)
- Deleted month of Aug / added months of Jan-Mar 2018
- Updated FRACMOO2 Board date
- Updated GCARM Board date
- Added October dates for CPM ROR
- Deleted Temporary Suspension of Resource Operations (initiative closed; see also 10/17 market notice for

Changes 10/13

Policy Development updates:

- Added Nov workshop and new comments date to the Energy Storage and Distributed Energy Resources Phase

Changes 10/4

Policy Development updates:

- Added next Transmission Planning Process stakeholder meeting
- Added Market Surveillance Committee Meeting for November
- Added Tariff filing date for Aliso Canyon Phase 3 initiative
- EIM Consolidated Initiatives - Accepting supplemental comments on draft final proposal
- 2017 Expedited GIDAP Enhancements - Updated schedule TBD
- Review TAC Structure - Added Nov 9 meeting to discuss straw proposal

Changes 9/29

Implementation Milestone Updates:

Removed Consolidated Energy Imbalance Market Initiatives from Release Plan (remaining policy changes to be implemented)

Updated Independent 2017 to include projects that were disaggregated from the Fall 2017 Release

Updated various milestone dates for Independent 2017 to match RUG presentation dated 9/26/17

Updated projects in Fall 2018 and Fall 2019 release to match policy roadmap

Changes 9/29

Policy Development updates:

Contingency modeling enhancements board date

EIM consolidated initiatives board dates

add dates for Review TAC structure

Changes 9/8

Policy Development updates:

Updated date for next CPM Risk of Retirement stakeholder call

Updated schedule for the Contingency Modeling Enhancements initiative (Board date deferred from Sep to

Changes 9/1

Policy Development updates:

Removed month of July

Added EIM Regional Issues Forum meetings to list and updated schedule

Updated Energy Storage and Distributed Energy Resources Phase 2 proposed tariff filing date

Added "E2" EIM Category designation to the Consolidated Energy Imbalance Market Initiatives

Update September meeting dates for Temporary Shutdown of Resource Operations, CPM Risk of Retirement

Updated 2017 Expedited GIDAP Enhancements schedule for Draft Final Proposal phase

Review TAC Structure - Comments deadline for the Aug 29 will be extended; look for dates and details in a "Inactive Initiatives" tab created; moved the following initiatives to this tab:

Bid cost recovery enhancements

Frequency response phase 2

Self-schedules bid cost recovery allocation and bid floor

Regional Resource adequacy (regional integration)

Transmission access charge (regional integration)

Changes 8/22

Implementation Milestones updates:

Separated Winter 2017 and Spring 2018 releases and updated accordingly based on discussion in the 8/29/17

Removed Aliso Canyon Phase 3 from Independent 2017

Updated dates of Independent 2017 projects as discussed in the 8/29/17 RUG meeting

Updated dates of Fall 2017 market simulation as discussed in the 8/29/17 RUG meeting

Changes 8/28*Policy Development updates:*

Removed these inactive initiatives from main tab and moved them to the newly-created "Inactive Initiatives" tab:

- Bid Cost Recovery Enhancements
- Frequency Response Phase 2
- Self-Schedules Bid Cost Recovery Allocation and Bid Floor (inactive but not previously on milestones document)

Changes 8/22*Policy Development updates:*

Deleted schedule for Regional Integration and EIM GHG Compliance initiative - New schedule TBD
Updated upcoming dates for ISO Board of Governor meetings, Market and Surveillance Committee meetings, EIM Governing

Changes 8/16*Policy Development updates:*

Deleted meeting dates for TRSO for Aug/Sep

Added dates for the preliminary results TPP meeting.

Changes 8/11*Policy Development updates:*

Added "E2" designation to Generator Contingency and Remedial Action Scheme Modeling, to reflect the EIM Governing Body's

advisory role within one elements of the initiative (in addition to an existing element of the initiative that currently falls within

Updated Commitment Costs and Default Energy Bid Enhancements comments due date

Changes 8/4*Policy Development updates:*

Updated the CCDEBE Schedule

Moved Energy Storage and Distributed Energy Resources Phase 2 from Policy to Tariff section

[Removed the month of June]

Inserted the Tariff Waiver filing for the 2018 Availability Assessment Hours (a non-initiative, but requires an impact assessment)

Changes 7/28*Policy Development updates:*

Moved Aliso Canyon Gas-Electric Coordination Phase 3 initiative to Tariff section; updated Tariff timeline
Updated Commitment Cost Enhancements Phase 3 initiative Tariff timeline

Implementation Milestone updates:

Added Support for Imperial Valley Phase Shifter as Independent 2017
Added CMRI Access Control Level Enhancement as Independent 2017
Moved Commitment cost enhancements phase 3 from Fall 2017 to Winter 2017 / Spring 2018
Aliso Canyon Phase 3 will have non-system changes in 2017 and system changes in Fall 2018
Moved Flexible resource adequacy criteria and must run obligation phase 2 from Fall 2018 to Fall 2019
Added Energy storage and aggregated distributed energy resource, Phase 1C to Winter 2017 / Spring 2018
Added Congestion Revenue Right auction efficiency to Fall 2019
Other minor edits to match with RUG slides

Changes 7/20

Added new initiative and schedule - Generation Interconnection and Deliverability Allocations Procedures
Updated schedule for the Consolidated Energy Imbalance Market initiative

Changes 7/14

Annual Policy Initiatives Roadmap recurring initiative - updated schedule

Changes 7/10

Energy Storage and Distributed Energy Resources Phase 2 - updated EIM category
Grid Management Charge recurring initiative MSC date added

Changes 7/5

Moved Temporary Suspension of Resource Operations (no system changes expected) from Fall 2018 to Spring
Moved Capacity Procurement Mechanism – risk-of-retirement (no system changes expected) from Fall 2018 to
Moved Energy Storage and DER Phase 2 (tentative) from Fall 2018 to Spring 2018 to align with the DRS
Added EIM greenhouse gas compliance to Spring 2018
removed Creation of new TAC area for metropolitan water district of southern california - completed

Changes 6/29

Updated stakeholder initiative catalog" to "policy initiatives roadmap" and updated Board date
Removed BlackStart and System Restoration Phase 2 from policy development section (captured in Tariff
Corrected Board date for Contingency Modeling Enhancements initiative
Updated Generator Contingency and Remedial Action Scheme Modeling with updated EIM category
Updated Aliso Canyon Gas-Electric Coordination Phase 3 with updated EIM category

Changes 6/23

Regional Integration and EIM Greenhouse Gas Compliance - updated policy schedule
Consolidated EIM Initiatives - Updated policy schedule
Pricing Enhancements - Initiative completed; deleted from milestone document

Changes 6/21

Updated template (removed April)

Changes 6/20/2017

MRI-Settlements implementation complete on 6/21/17. Removed from report.

Administrative Pricing Policy Updates completed on 5/2/17. Removed from report.

Forecasting & Data Transparency Improvements (PIRP System Application Decommissioning) completed on 6/20/17. Removed from report.

Added EIM- Powerex Implementation in Spring 2018

Added EIM- LADWP Implementation in Spring 2019

Added EIM Winter 2017 Enhancements to Spring 2018

Moved Reliability Services 2017 from Fall 2017 to Spring 2018

Added RAAIM Implementation Update to Fall 2017 Release

DRS Replacement moved from TBD to Spring 2018

Added Temporary Suspension of Resource Operations, CPM Risk of Retirement, and Consolidated Energy Imbalance Market Initiatives to Fall 2018 release

Moved other TBD initiatives to Fall 2019

Updated market simulation dates for Fall 2017 release

Changes 6/9/17

New initiative: Consolidated Energy Imbalance Market Initiatives (policy)

Changes 6/8/2017

Updated Commitment Cost and Default Energy Bid Enhancements initiative proposed EIM Governing Body date

Updated Generator Contingency and Remedial Action Scheme Modeling initiative proposed Board date

Changes 6/6/2017

Load Serving Entity Definition Refinement - Initiative closed; removed from milestone document

Added Aliso Canyon Gas-Electric Coordination Phase 3

Added hyperlinks for TSRO and CPM Risk-of-Retirement

Changes 6/2/2017

Reliability Services Phase 2 - Updated schedule (tariff)

Review TAC Structure - Updated schedule (policy)

Updated (clarified) leads for Energy Storage and Distributed Energy Resources, Phase 2 and Phase 3

Changes 5/25/2017

Added the next MSC meeting date.

Updated the Commitment Costs and Default Energy Bid Enhancements Schedule

Changes 5/19/2017

Corrected start date error (Q3 2016 to Q3 2017) for Energy Storage and Distributed Energy Resources Phase 3

Changes 5/11/2017

Updated lead change for Energy Storage and Distributed Energy Resources Phase 2 initiative

Changes 5/4/2017

Added workshop for the Black Start and System Restoration Phase 2 initiative.

Added two dates for the 2018 Budget and Grid Management Charge initiative.

Changes 5/2/2017

Spring 2017 deployed and activated on 5/2/17 and removed from report.

Changes 4/27/2017

Moved Spring 2017 release and Administrative Pricing Policy Updates deployment date from 4/18/17 to 5/2/17

Updated Energy Storage and Distributed Energy Resources Phase 2 schedule for June

Added EIM - Salt River Project to Spring 2020 release.

Removed Expanding metering and telemetry options phase 2 from tariff section as it is complete

Updated the Commitment Costs and Default Energy Bid Enhancements Schedule

Added Black Start and System Restoration Phase 2 Tariff

Changes 4/21/2017

Updated Temporary Suspension of Resource Operations schedule through Oct 2017

Updated CPM risk-of-retirement schedule through Oct 2017

Changes 4/21/2017

Energy Storage and Distributed Energy Resources Phase 1 - Removed from document; it was implemented in Fall

Updated Generation Interconnection Driven Network Upgrades Cost Recovery initiative Tariff filing date for April

Updated Commitment Costs and Default Energy Bid Enhancements schedule for comments and next working

Changes 4/14/2017

Updated comments due date for Flexible Capacity Needs Technical Studies recurring initiative

Updated schedule for Energy Storage and Distributed Energy Resources Phase 2 initiative

Added Black Start and System Restoration Phase 2 as an Independent 2017 project.

Removed Metering Rules Enhancements as it completed on 4/10/17.

Removed Acceptable Use Policy - CMRI as it completed on 4/3/17.

Added SIBR UI upgrade to Fall 2017 Release

Removed Bid cost recovery enhancements (formerly two-tier) from Fall 2018 Release per policy status

Added CIRA Technology Upgrade to Fall 2018 Release (rescoped from RSI 1B project)

Moved Energy storage and aggregated distributed energy resource, Phase 2 from TBD to Fall 2018 Release per

Moved Frequency Response Phase 2 from Fall 2018 Release to TBD per policy

Moved Generator contingency/RAS modeling from Fall 2018 Release to TBD per policy

Removed Stepped Constraint Parameters from TBD per policy

Review Transmission Access Charge Structure - Added to Policy section; Note: Stakeholder process will start mid-

Changes 4/7/2017

Regional and EIM CA GHG Compliance - Updated policy schedule

Updated schedule for the Flexible Capacity Technical Study Process initiative

Moved Generator Interconnection Driven Networks Upgrade Cost Recovery initiative to Tariff section

Removed outdated schedule for the Flexible Resource Adequacy Must Offer Obligation Phase 2 initiative

Changes 3/31/17

Updated MSC schedule for May 5 meeting

Updated Flexible Capacity Needs Technical Study Process schedule (moved paper posting from April 6 to March

Changes 3/23/17

Frequency Response Phase 2 - Updated schedule and removed working group for March 24.
Generator Contingency and Remedial Action Scheme Modeling - Updated schedule (comments due date)
Metering Rules Enhancements - Removed from policy and tariff sections; it's now in implementation phase
CRR Clawback Modifications - Removed from tariff section; it's now in implementation phase

Changes 3/17/17

Updated the schedule for Generator Contingency and Remedial Action Scheme Modeling initiative
Updated the schedule for Generator Interconnection Driven Network Upgrades Cost Recovery initiative
Updated the schedule for Energy Storage and Distributed Energy Resources initiative
Updated the schedule for the Flexible Capacity Technical Needs Study initiative
Added new initiative (Creation of a New TAC Area for Metropolitan Water District of California) and updated the
Updated the schedule for the Frequency Response Phase 2 initiative
Updated the schedule for Commitment Costs and Default Energy Bid Enhancements initiative

Changes 3/10/17

Stepped Constraint Parameters - Initiative has been closed; ISO will coordinate with stakeholders to further consider a more comprehensive review of penalty prices used in the ISO market under this initiative, which is needed in conjunction with Federal Energy Regulatory Commission Order No. 831 that increases the energy bid
Energy Storage and Distributed Energy Resources Phase 2 - Updated schedule for next proposal, comments due
2017-18 Transmission Planning Process - Inserted link to CAISO's initiative webpage

Changes 3/3/17

Metering Rules Enhancements - Updated Tariff filing date
Generator Contingency & Remedial Action Scheme - Updated schedule for proposal
Contingency Modeling Enhancements - Updated schedule for proposals, BOG date
Flexible Resource Adequacy & Must Offer Obligation Phase 2 - Updated schedule for proposal, BOG date
Energy Storage & Aggregated Distributed Energy Response - Updated initiative lead and schedule, proposed BOG
Reliability Services Phase 2 - Updated Tariff filing date
Stepped Constraint Parameters - Updated schedule for upcoming meetings, proposals
CRR Clawback Rule Modifications - Updated pending FERC ruling
Frequency Response Phase 2 - Updated BOG date

Changes 2/28/17

Added EIM - Balancing Authority of Northern California (BANC) for Spring 2019
Reactive power requirements and financial compensation effectiveness on 3/6 is pending FERC approval.
Update MRI-S Metering Enhancements market simulation and activation dates.
Added Gas Burn Report to Fall 2017 Release
Updated activation date for Administrative Pricing Policy Updates to 4/1/17
Several other minor updates made in milestones dates to match 2/28/17 RUG slides

Changes 2/24/17

Stepped Constraint Parameters - Added schedule for next proposal
Black Start and System Restoration Phase - Added comments deadline for recent proposal

Changes 2/15/17

Reliability Services - Updated tariff schedule (phase 1b and 2 will be filed together)
Added comments deadline for Frequency Response Phase 2

Added next MSC meeting date

PTO Per Unit Cost Guides - Updated comments deadline date

2017 Tariff Clarification Filing Process - New schedule added (miscellaneous changes to in advance of broader

Changes 2/3/17

Updated EIM categories and proposed meetings dates based on Feb 2017 policy outlook briefing

Changes 1/30/17

Generation Interconnection Driven Network Upgrades Cost Recover - updated policy schedule

Changes 1/26/17

Stepped Constraint Parameters - Updated schedule (policy)

Participating Transmission Owner Per Unit Cost Guides - Updated schedule (Recurring initiatives)

CRR Clawback Rule Modification - Added note to indicate tariff filing

Changes 1/23/17

Black Start and System Restoration Phase - updated policy schedule

Changes 1/20/17

Generation Interconnection Driven Network Upgrades Cost Recover - updated policy schedule

Changes 1/17/17

Removed ADS Client Replacement (completed)

Added Spring 2017 Release with existing projects with a target deployment date of 4/1/17

Updated the Fall 2017 Release date of 10/1/17 to be 11/1/17 and rescheduled market simulation dates

Moved ESDER Phase 2 and Stepped Transmission Constraints from Fall 2018 to TBD for implementation

Changes 1/9/17

Stepped Constraint Parameters - New stakeholder schedule (policy development)

Changes 1/6/17

Updated the Black Start schedule

Changes 12/22/16

Regional Integration and EIM Greenhouse Gas Compliance - Issuance date of next proposal TBD

Transitional Implementation Items (Regional Integration) - Removed

Changes 12/16/16

Regional Resource Adequacy - Extended comments deadline for draft regional framework proposal

Transmission Access Charge Options - Extended comments deadline for draft regional framework proposal

Changes 12/12/16

Removed: Capacity procurement mechanism replacement was activated on 11/1/16

Removed: Reliability Services Initiative (RSI) 1A and Commitment Cost Phase 2 completion was activated on

Removed: Flexible Ramping Product was activated on 11/1/16

Acceptable Use Policy - CMRI and ADS Client Replacement will be effective on 1/7/2017