



California ISO

# Discretionary initiative prioritization

## Final working group


Annual policy initiatives roadmap process 2024

June 12, 2024

## Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without the ISO's permission.
- This collaborative working group is intended to stimulate open dialogue and engage different perspectives.
- Please keep comments professional and respectful.
- Please try to be brief and refrain from repeating what has already been said so that we can manage time efficiently.
- If you need technical assistance during the meeting, please send a chat to the event producer

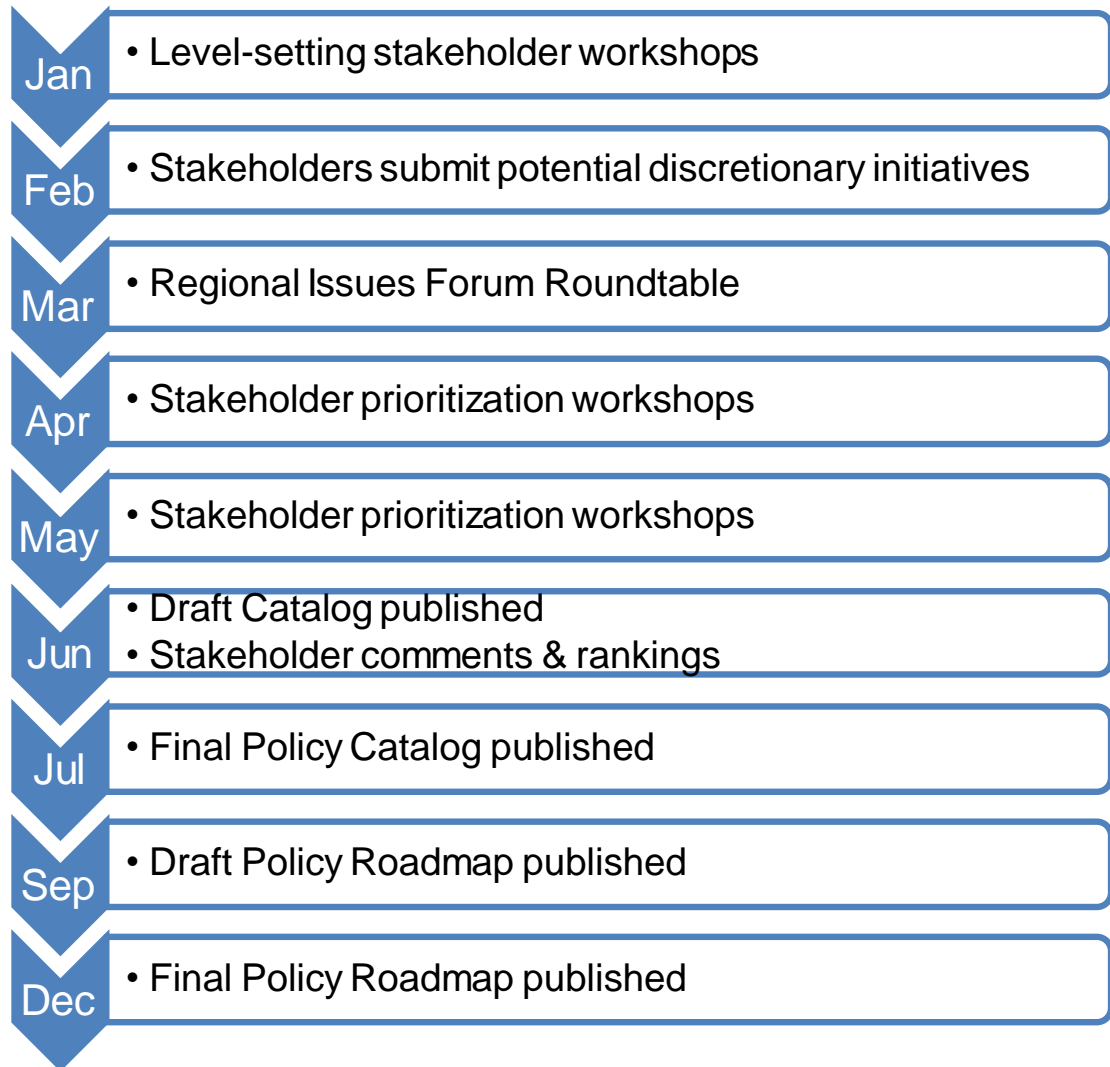
## Instructions for raising your hand to ask a question

- If you are connected to audio through your computer or used the “call me” option, select the raise hand icon  located on the bottom of your screen.
  - **Note:** \*3 only works if you dialed into the meeting.
  - Please remember to state your name and affiliation before making your comment.
- You may also send your question via chat to Brenda Corona or to all panelists.

# Goals for ISO Policy Catalog and Roadmap

- **Meaningfully engage external stakeholders**
  - Integrate priorities from stakeholders
  - Allow stakeholder to advocate and present their own proposed initiatives
  - Final catalog includes stakeholder prioritization
- **Transparent**
  - Clear methods to identify and prioritize proposals
  - Fair access to ISO for all stakeholders
- **Aligned with internal planning processes**
  - Strategic goals, strategic and enterprise roadmaps
- **Focused scope**
  - Initiatives connect with ISO strategic goals, ISO capacity, and stakeholder priorities

# 2024 CAISO Policy Initiatives Catalog & Roadmap Process



## Next Steps

- **June 5:** Draft Policy Catalog published
- **June 12:** Stakeholder meeting
  - Review Draft Policy Catalog
  - Review comment template & ranking criteria
- **Late June:** Stakeholders submit prioritization rankings of both categories & individual initiatives in Draft Policy Catalog
- **Early July:** Final Policy Catalog published

## Prioritization and stakeholder input

- Stakeholder prioritization survey for 2024 Draft Catalog submissions opens today!
  - Available June 12 – June 26
- Each stakeholder can nominate:
  - One category of initiatives as top priority
    - AS, bidding, CRRs, DR, new supply technology, RA, storage, transmission, WEIM
  - Two individual initiatives as top priorities
- Rank remaining initiatives as support, neutral, or oppose
- Comment field available to describe:
  - Initiative impact on market wide efficiency and system reliability
  - Urgency

## Each stakeholder should represent the interest of their own organization

- Refer to materials from stakeholder workshops and stakeholder submissions to assess the costs and benefits of each proposal
- Priorities should reflect each stakeholder's assessment of the relative priority of pursuing each proposed initiative to their organization.
- Stakeholder prioritization will be taken into account in the ISO's roadmap together with:
  1. Alignment with ISO strategic goals and existing planning
  2. Project impact on market efficiency and system reliability
  3. Implementation cost
  4. Other ISO commitments

# Categorizing Stakeholder Submissions

Submitted ideas fall into four categories:

1. **Discretionary initiatives** – candidates for the catalog
2. **Non-discretionary initiatives** (e.g. FERC Orders)
3. **Issues being addressed** in current initiatives / working groups
4. **Process improvements:**
  - Includes suggestions related to existing processes and requests for additional transparency
  - The ISO will determine whether to further address & how to prioritize

The ISO will respond to all submissions.



# Resources

- [2024 Catalog and Roadmap Stakeholder Initiative webpage](#)
  - Survey link will be posted here
  - Includes recordings of all stakeholder workshops and stakeholder presentations on each initiative
- [2024 Draft Catalog](#)
- [2024 Draft Non-Catalog Submissions](#)
- [2024 Stakeholder submissions](#)

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# SAVE THE DATE |

## 2024 STAKEHOLDER SYMPOSIUM

OCT. 30, 2024  
SACRAMENTO, CA

The California ISO Stakeholder Symposium will be held on Oct. 30, 2024 at the Safe Credit Union Convention Center in Sacramento, California.

A welcome reception for all attendees will be held the evening of Oct. 29.

Additional information, including event registration and sponsorship opportunities, will be provided in a future notice and on the ISO's website.

Please contact Symposium Registration at [symposiumreg@caiso.com](mailto:symposiumreg@caiso.com) with any questions.



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