



California ISO

Policy Catalog and Roadmap Stakeholder Meeting

January 30, 2024


Reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- If you need technical assistance during the meeting, please send a chat to the event producer is Candice.

Great news with Intellor platform, specifically around audio while joining meetings

- The “call me” feature now enabled when joining Operator assisted meetings.
- I have a very positive update regarding the Webex Webinar(s) you have scheduled with us for January 2024. Integrated Webex telephone audio is now enabled for these webinars – meaning, speakers and attendees can join Webex and then use the call-me feature for the best experience. (We will still open the separate teleconference in case any of your attendees choose to use it.)

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: #2 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 either Brenda Corona or to all panelists.

2024 Policy Initiatives Catalog and Roadmap Process

ANNUAL POLICY INITIATIVE CATALOG AND ROADMAP PROCESS

- JAN** ● — Level-setting stakeholder workshops
- FEB** ● — Stakeholders submit potential discretionary initiatives
- MAR** ● — Regional Issues Forum Roundtable
- APRIL** ● — Stakeholder prioritization workshop
Draft Annual Catalog published for stakeholder comment
- MAY** ● — Final Annual Catalog published
- SEP** ● — Draft Policy Roadmap published for stakeholder comment
- DEC** ● — Final Roadmap published

Goals for Catalog and Roadmap

- **Meaningfully engage external stakeholders**
 - Integrate priorities from stakeholders, including RIF Roundtable
- **Transparent**
 - Clear methods to identify & 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
- **Incorporate urgent requests**
 - Allow for unexpected initiatives, scope changes, and timeline extensions

Background

- Catalog reflects shared priorities of ISO stakeholders
 - Integrate priorities from stakeholders and Regional Issues Forum Roundtable
- Catalog and Roadmap aligned with ISO planning processes
 - ISO strategic goals, enterprise roadmap, budget, and resources

STRATEGIC PLAN 2022-2026



CRITICAL STRATEGIC AND TACTICAL OBJECTIVES

- 1: RELIABLY AND EFFICIENTLY INTEGRATE NEW RESOURCES BY PROACTIVELY UPGRADING OPERATIONAL CAPABILITIES
- 2: STRENGTHEN RESOURCE ADEQUACY AND MEET CALIFORNIA'S SB100 GOALS THROUGH LONG-TERM TRANSMISSION PLANNING AND EFFECTIVE COORDINATION WITH STATE AGENCIES
- 3: BUILD ON THE FOUNDATION OF THE WESTERN ENERGY IMBALANCE MARKET TO FURTHER EXPAND WESTERN MARKET OPPORTUNITIES
- 4: PROVIDE HIGHLY RESPONSIVE AND INCLUSIVE STAKEHOLDER ENGAGEMENT AND CUSTOMER SERVICE
- 5: CREATE A FLEXIBLE AND ADAPTIVE WORK ENVIRONMENT THAT RETAINS AND ATTRACTS A HIGHLY SKILLED AND ENGAGED WORKFORCE

STRATEGIC OBJECTIVE 1:

Reliably and efficiently integrate new resources by proactively upgrading operational capabilities

- 1A. Modernize tools that support control center operations.
- 1B. Ensure that our mission-critical information technology is secure, scalable, and resilient.
- 1C. Increase coordination with distribution system operators.



See pages 5-6, [2022-2026 Strategic Plan](#)

STRATEGIC OBJECTIVE 2:

Strengthen resource adequacy and meet California's SB 100 goals through long-term transmission planning and effective coordination with state agencies

- 2A. Ensure development of long-lead transmission plans that meet goals reliably and economically.
- 2B. Reimagine grid interconnection, prioritization, and coordination processes.
- 2C. Sharpen the ISO's resource adequacy strategy and clarify priorities for engagement in CPUC and CEC policy processes.



See pages 7-8, [2022-2026 Strategic Plan](#)

STRATEGIC OBJECTIVE 3:

Build on the Foundation of the Western Energy Imbalance Market to Further Expand Western Market Opportunities

- 3A. Extend the ISO day-ahead market to participants across the West and pursue additional opportunities for regional coordination
- 3B. Effectively prioritize and sequence market design enhancements.
- 3C. Enable new technologies through efficient market rules and interfaces.



See pages 9-11, [2022-2026 Strategic Plan](#)

STRATEGIC OBJECTIVE 4:

Provide highly responsive and inclusive stakeholder engagement and customer service

- 4A. Foster broad stakeholder trust through transparency, collaboration and mutually beneficial solutions.
- 4B. Provide highly accurate, easily accessible, clear information to ensure customer preparedness and to deepen understanding about the reliability needs of the grid.
- 4C. Ensure rigorous information-driven decision making across the ISO.
- 4D. Maintain customer confidence through continued disciplined cost management and strategic investments.



See pages 12-13, [2022-2026 Strategic Plan](#)

STRATEGIC OBJECTIVE 5:

Create a flexible and adaptive work environment that retains and attracts a highly skilled and engaged workforce

- 5A. Foster an equitable and inclusive workplace that models excellence and the ISO's cultural values.
- 5B. Cultivate strong leadership and technical competencies.

See pages 14-15, [2022-2026 Strategic Plan](#)



Two formal opportunities:

1: Review and feedback sessions

2: Policy requests

The stakeholder catalog process is one way to suggest market design changes, but not the only way

- Contact the ISO directly:
 - Customer service or CIDI tickets
 - Market performance calls
- Working groups and ongoing stakeholder processes:
 - Initiatives on the [2023-2025 Roadmap](#)
 - (e.g., day-ahead resource sufficiency)
 - Price formation enhancements working group
 - Greenhouse gas coordination (GHG) working group
 - Gas resources management working group
 - Resource adequacy (RA) working group
- Submit a proposal in the Catalog process to ensure that is prioritized with others for the 2024 Catalog

Break

Catalog Submission Template

- Released January 31, 2024
 - Submissions open February 1 – Feb 28, 2024
 - New initiatives or resubmissions accepted
- Changes from 2023
 - Single annual submission period
 - Additional information requested:
 - Proposed initiative scope & market design elements to be addressed
 - Business justification: alignment with ISO strategic objectives and impact on other market participants
 - Timing & urgency

Submissions Template Questions

- **Issue Description**
- **Proposed Initiative Description**
 - Scope of proposal, elements of existing market design proposing to address
- **Business Justification**
 - Alignment with ISO strategic objectives, impact on other market participants
- **Timing & Urgency**
 - Regulatory requirements or time-sensitive reliability impacts
- **Data**
 - Identify existing data and missing data needed to analyze issue & develop solutions

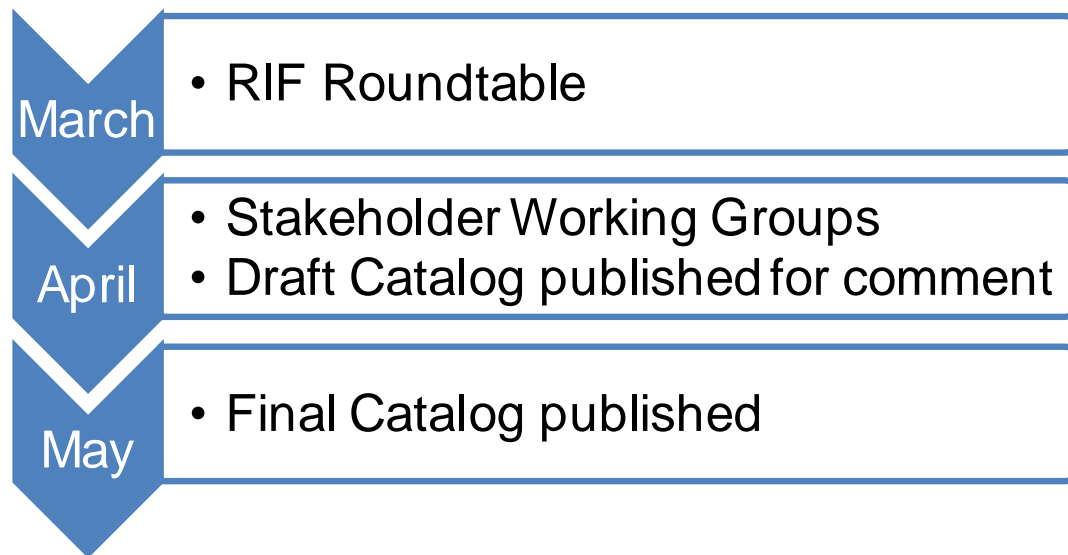
Urgent Policy Initiative Requests

- Alternative initiative submission process will be available on a rolling basis for unexpected time-sensitive initiative needed to meet a significant and immediate reliability threat or regulatory requirement.
- Goal: predictable, transparent process to communicate urgent policy initiative needs.

Stakeholder Prioritization Working Groups

Goals

- Develop understanding of breadth of stakeholder support for individual submissions & reasons for support
- Identify logical groupings of submissions
- Clarify purpose of submissions



Catalog Submission Prioritization Criteria

- **Stakeholder-identified priorities**
- **Alignment with ISO strategic plan and objectives**
- **Feasibility**
 - Objectives are implementable and realistic
- **Timing and complexity**
 - ISO staff resources are available to develop and implement changes
 - 2024 consideration: staff resources used for EDAM implementation
- **Urgency**
 - Consequences of failing to address the issue are high and impact the broader stakeholder community


Next Steps

- February 1 – 28: Discretionary policy initiatives submission period
- March: RIF Roundtable
- April: Stakeholder prioritization workshop
- April: Draft Catalog published for stakeholder comment
- May: Final Catalog published

Questions?

Next Steps

- Visit Annual Policy Initiatives Roadmap Process 2024 webpage for more information:
<https://stakeholdercenter.caiso.com/RecurringStakeholderProcesses/Annual-policy-initiatives-roadmap-process-2024>

<p>Web meeting 1/30/2024 09:00 am – 12:00 pm PT Details</p>	<p> Presentation - Policy Initiatives Catalog and Roadmap Process 2024 - Jan 30, 2024 01/26/2024</p>	<p>Submit Comment Submission here now till Feb 28, 2024</p>
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- Leads
 - Alyssa Krag-Arnold
 - Gillian Biedler
- If you have any questions, please contact Brenda Corona at bcorona@caiso.com or isostakeholderaffairs@caiso.com

NEWS RELEASE: FERC accepts ISO tariff changes for a Western day-ahead electricity market

- New rules adopted for the Day-Ahead Market Enhancements (DAME) and the Extended Day-Ahead Market (EDAM).
- Stakeholders were deeply engaged in designing the market rules through a collaborative working group process, which included regional utilities, independent energy providers, state regulators, public interest organizations, and a variety of entities representing various interests and points of view throughout the Western Interconnection.
- Learn more about EDAM through this [link](#).
- Find out [What They're Saying](#), [News Release](#)



- *Energy Matters* blog provides timely insights into ISO grid and market operations as well as other industry-related news

<http://www.caiso.com/about/Pages/Blog/default.aspx>.



January 18, 2024
Inside the ISO, Leadership, Operations

The great transformation: Designing the grid of the future

By Mark Rothleder

California ISO executives and staff members are frequently asked to address energy conferences across the U.S. and abroad. The following is a keynote speech from Mark Rothleder, the ISO's Senior Vice President and Chief Operating Officer, delivered at "The Great Transformation: Designing the Grid of the Future" conference hosted Jan. 16 ...

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