Policy Initiatives Catalog & Roadmap
2025 Kickoff Meeting

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January 30, 2025

Annual Policy Catalog & Roadmap Process

Policy Initiatives Catalog

- ISO accepts policy initiative proposals from stakeholders and documents stakeholder support for proposed initiatives
- Catalog reflects shared priorities of ISO stakeholders and Regional Issues Forum (RIF)
- Input to the Policy Roadmap prioritization process

Policy Initiatives Roadmap

- Work plan that describes the policy initiatives the ISO will undertake over the next 3 years
- Final Roadmap represents intersection of stakeholder-identified priorities from the Catalog, ISO Critical & Strategic objectives, initiative feasibility, urgency, and ISO resources.
- Includes initiatives identified by both stakeholders and the ISO

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Policy Catalog and Roadmap Objectives

- **Meaningfully engage external stakeholders**
  - Stakeholders propose and advocate for their own initiatives
  - Final catalog includes stakeholder prioritization
- **Transparent**
  - Clear methods to identify and prioritize proposals
  - Open and transparent access to all stakeholders to influence policy enhancements roadmap
- **Allows stakeholder prioritization to be considered in the ISO's internal planning processes, together with**:
  - Alignment with ISO strategic goals and already planned work
  - Project impact on market efficiency and system reliability
  - Implementation cost
  - Other ISO commitments

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Policy Roadmap & Catalog Timeline

Month	Activity
January	• 2025 kickoff stakeholder call
February	• Stakeholders submit policy initiatives to Catalog
March-April	• Stakeholder prioritization workshops & RIF Roundtable Workshop
May	• Stakeholders submit prioritization rankings
June	• ISO releases Policy Initiatives Catalog
July	• ISO begins Policy Initiatives Roadmap development
December	• ISO releases Policy Initiatives Roadmap

Catalog: Policy initiative proposal template

- Submission template released January 30, 2025

  - Available via comment template on 2025 Catalog & Roadmap website

- Submissions accepted January 30 to February 28

- Requested information:

  - Issue description
  - Initiative description
  - Market impact
  - Timing/urgency
  - Data availability/needs

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Catalog: stakeholder-led prioritization process

Stakeholder Working Groups

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

Regional Issues Forum Roundtable

- RIF sector liaisons compile feedback from members about themes, issues, and priorities; synthesize common priorities among sectors.
- WEM Regional Issues Forum: April 9, 2025, PacifiCorp, 825 NE Multnomah St, Portland, OR

Prioritization Ranking Survey

- All stakeholders invited to nominate individual initiatives and categories of initiatives as top priorities, and rank remaining initiatives as support/neutral/oppose

Categorizing Potential Submissions

1. **Discretionary market design initiatives** – candidates for the Catalog
2. **Non-discretionary initiatives** (e.g. FERC Orders)
3. **Issues being addressed** in current initiatives / working groups
4. **Transmission and Infrastructure Planning**
5. **Process improvements**

Process change for 2025: Submissions that are **not** discretionary market design initiatives will be directed to the relevant ISO process for prioritization

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Infrastructure-related policy suggestions will be considered in existing, recurring policy initiatives.

- The ISO will consider new infrastructure-related policy concepts in the 2025-2026 Transmission Planning Process (TPP) or the next (2025-2026) Interconnection Process Enhancements (IPE) initiative.
  - If neither the TPP nor IPE initiatives are appropriate venues for certain policy recommendations, the ISO will consider a new stakeholder initiative.

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Process Improvements & Enhancements

Enhancement are assessed based on their level of impact to the broader market and feasibility from a technical perspective. This review helps drive the appropriate level of prioritization against the "Big Picture" of current efforts in flight and their associated business drivers.

Updates are typically provided when an enhancement is being delivered depending on its overall external visibility in the Release User Group, Technical User Group, and potentially Market Simulation Forums.

New Enhancement Tool

- The ISO recognizes the opportunity to maximize transparency of enhancement requests. We are still in the developmental stage of an enhancement tool that will provide greater visibility not only our Market Participants, but to our broader group that includes our direct customers, regulatory bodies, government agencies, associations, advocacy groups, and the general public.

- The new enhancement tool is separate from our CIDI application
- Some of the request data will be visible for all parties to view to ensure transparency and to increase efficiencies (avoid duplication)
  - No user account / passwords needed
  - No certificate, access or privileges needed

- Further updates on this tool once ready will be provided by end of Q2 2025.

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Enhancement Requests – Scheduling Coordinators

- Enhancement requests to existing processes or tools can be made by Scheduling Coordinators via the following process:
- Submit a CIDI ticket with the following information:
  - Subject Line: "Enhancement Request"
  - Description:
    - Application: Application Name/Process
    - What: provide a detailed description of the request
    - Why: explain purpose of request (reason it is needed)
    - Who: who benefits from this enhancement - including level of impact to you organization
    - Reliability impact?

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Enhancement Requests – Other Market Participants

- Enhancement requests to existing processes or tools can be made via the following process:

- Submit a Contact Us case via caiso.com with the following information:

  - Subject Line: "Enhancement Request"

  - Description:

    - Your Organization

    - Application: Application Name/Process

    - What: provide a detailed description of the request

    - Why: explain purpose of request (reason it is needed)

    - Who: who benefits from this enhancement - including level of impact to you organization

    - Reliability impact?

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Catalog & Roadmap Schedule: Next Steps

- **January 30:** Catalog submissions template posted

- **January 30 - February 28**: ISO accepting Catalog submissions for new discretionary market design policy initiatives from all stakeholders

- **March & April**: Stakeholder prioritization workshops for Catalog submissions

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

- **May**: Stakeholders submit prioritization rankings

Resources

- Visit process webpage for more information: [2025 Catalog & Roadmap webpage](#)

- Comment template located [here.](#)

Web meeting

1/30/2025
02:00 pm – 03:00 pm PT

Details

Kick-off meeting - The ISO will update stakeholders on the timeline for proposing new policy initiatives and preview the catalog submission template that will be made available following the call. The ISO will also preview how stakeholders can participate in the policy initiative prioritization process to help shape the initiatives included in the 2025 Catalog and Roadmap.

Presentation - Annual Policy Initiatives Roadmap Process - Jan 30, 2025
01/28/2025

Submit comments

Due: Feb 28, 05:00 pm

- View 2024 submissions, presentations, and draft/final products on the [2024 Catalog & Roadmap webpage](#)

  – [Final 2024 Roadmap](#) and [Final 2024 Catalog](#)

- Questions? Please contact Brenda Marquez at bmarquez@caiso.com or ISO Stakeholder Affairs: isostakeholderaffairs@caiso.com

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