ISO Planning Standards Update

Rene Romo de Santos - Regional Transmission Engineer Lead

Stakeholder meeting

July 27, 2026

ISO Public

Housekeeping

This call is being recorded for informational purposes and will be available on the CAISO website. Any related transcriptions should not be reprinted without the ISO's permission.

Today's meeting is designed to encourage open dialogue and diverse perspective. Your participation is valued.

Please engage in a respectful and professional manner.

Please keep comments brief and avoid repeating points already made so we can manage time and ensure everyone has an opportunity to participate.

You can access Closed Captioning and the Transparency Viewer using the controls located at the bottom of the Webex screen.

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.

If you are connected on the phone line only and not the Webex dial *3 to be added to the raise hand queue.

Please remember to state your name and affiliation before making your comment.

You may also send question via chat to all panelists.

If you need technical assistance during the meeting, please send a chat to the event producer at Intellor Events.

Today's Agenda

Time	Topic	Presenter
10:00–11:00am	Welcome and introductions	Yelena Kopylov-Alford
	ISO Planning Standards Update Issue Paper	Rene Romo de Santos
	Next Steps	Yelena Kopylov-Alford

Overview

- Update Voltage Standard
- Clarify for the Planning for New Transmission versus Involuntary Load Interruption Standard
- Introduce supplemental criteria related to requirement R6 of the NERC FAC-014-3 Standard
- Generation Loss Criteria and Considerations

Voltage Standard

- Outlines the voltage limits within which the ISO-controlled grid must operate, both under normal conditions and during contingencies

- Some of the operating voltage values in the ISO Planning Standards do not correspond to those specified in the latest version of the Operating Procedure 3100B "System Voltage Limits and Credible Multiple Contingency"

- Align voltage limits in the ISO Planning Standards with Operating Procedure

Planning for New Transmission versus Involuntary Load Interruption Standard

- Provides guidance on when it is necessary to upgrade the transmission system from a radial to a looped configuration or to eliminate load dropping otherwise permitted by WECC and NERC planning standards
- With the increase of large data center load interconnections, a question arose as to whether these standards apply to single-customer transmission connected loads
- Provide clarification for the following two items that will only apply to distribution loads and substations serving distribution loads:
  - No single contingency should result in the loss of more than 250 MW of load
  - All single substations of 100 MW or more should be served by a looped system with at least two transmission lines "closed in" during normal operations

Supplemental criteria related to requirement R6 of the NERC FAC-014-3 Standard

- R6 requirement of the NERC FAC-014-3 requires the ISO to implement a documented process to use Facility Ratings, System steady-state voltage limits and stability criteria in its Planning Assessment of Near-Term Transmission Planning Horizon that are equally limiting or more limiting than the criteria for Facility Ratings, System Voltage Limits and stability described in its respective Reliability Coordinator's SOL methodology

Supplemental criteria related to requirement R6 of the NERC FAC-014-3 Standard

- The ISO performed a gap analysis which includes the following:
  - Define Facility Ratings/Duration criteria in the ISO Planning Standards
  - Consider relationship between the Voltage Standard and supplemental criteria such as that system voltage limits must not conflict with relay trip settings for under voltage load shedding schemes (UVLS) and BES facilities or prevent the operation of protection systems
  - Identify Stability criteria related to formation of islands and that planning contingency events shall not lead to frequency decline or swings in the interconnected system that could trigger the action of Under Frequency Load Shedding (UFLS) schemes
  - Detail criteria for identifying potential cascading and uncontrolled system separation

Supplemental criteria related to requirement R6 of the NERC FAC-014-3 Standard

- As an interim solution, the ISO has included these additional criteria in the Transmission Plan Process Study Plan

- This recommended update to the ISO Planning Standards will finalize the implementation process for NERC FAC-014-3 Standard

Generation Loss Criteria and Considerations

- The ISO has identified the need to review its current practices regarding the amount of generation that can be shed either directly - consequentially - or indirectly via RAS for single and multiple transmission contingencies
- The contingency or RAS-driven loss of generation has implications for contingency reserves, frequency response, and other system parameters under both normal and pre-existing outage conditions
- The ISO has historically limited generation connected through single or double circuit lines exceeding existing ceilings to avoid driving up contingency reserve requirements and has established criteria in ISO Planning Standards for the amount of generation that can be shed through a RAS triggered from single or double contingencies to these same limitations
- These practices and requirements require review, as circumstances have evolved as the system has grown and standards have evolved

NEXT STEPS

Schedule

Date	Milestone
July 20, 2026	2026 ISO Planning Standards Update Issue Paper Posted
July 27, 2026	Stakeholder Meeting on Issue Paper
Aug 10, 2026	Comments due
Sept 7, 2026	Draft Final Proposal posted
Sept 14, 2026	Stakeholder Meeting on Draft Final Proposal
Sept 28, 2026	Comments due
Oct 28, 2026	Board of Governor's meeting

Next Steps

- Comments are due by end of day August 10, 2026 via the commenting tool on the Stakeholder Center or recurring process webpage linked below.

- Questions? Please email ISOStakeholderAffairs@caiso.com

- Additional in formation is available on the CAISO website at:https://stakeholdercenter.caiso.com/RecurringStakeholderProcesses/2026-ISO-Planning-Standards-Update

Energy Matters blog provides timely insights into ISO grid and market operations as well as other industry-related news and a new energy podcast from CAISO

FREQUENCY BAND

Listen and subscribe:

News Release | Western Energy Markets

Anita Decker reappointed to Western Energy Markets Governing Body

06/17/2026

Podcast | Markets

Episode 3: Wisdom and wonkiness of the Market Surveillance Committee

06/16/2026

Story | Operations, Inside the California ISO

Powering the West's future with demand flexibility

By Anja Gilbert

06/11/2026

Subscribe to the Energy Matters blog and Frequency Band podcast

Announcing the launch of a new publication series:

Western Energy Markets Observations

This new periodical offers concise and accessible insights into notable developments across the western power markets. Read the first issue for highlights on market performance during the first weeks of Extended Day-Ahead Market (EDAM) operations.

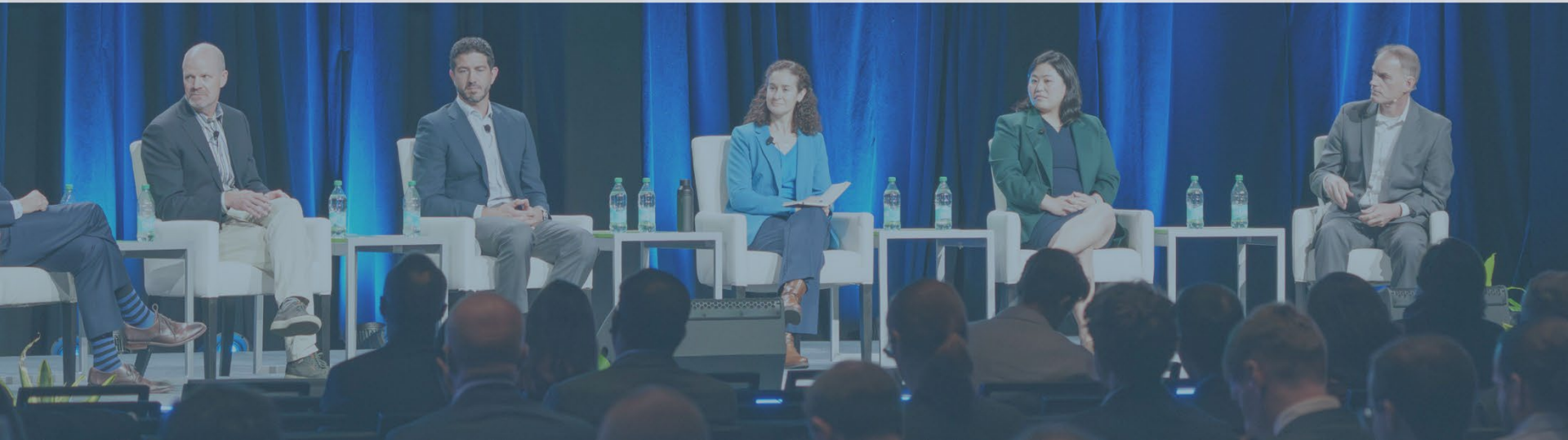
The document will be posted on the EDAM Overview page of WesternEnergyMarkets.com website.

REGISTRATION IS OPEN

2026 STAKEHOLDER SYMPOSIUM

Welcome reception - Oct. 5
at Kimpton Sawyer Hotel, Sacramento, CA

Symposium program - Oct. 6
SAFE Credit Union Convention Center
Sacramento, CA

Visit: https://www.caiso.com/meetings-events/events/stakeholder-symposium

SPONSORSHIP OPPORTUNITIES AVAILABLE