

Transmission Reliability Program



Customer Workshop

BPA Rates Hearing Room

July 28, 2011



Agenda

1 p.m.	Welcome – BPA Internal Operations Manager Overview	John Quinata
1: 30 p.m.	O & M agreement update	<i>Transmission Reliability Program Manager</i>
1:45 p.m.	LSE/DP Discussion Potential Updates/Revisions of the Delegation Agreements	<i>Lorissa</i>
2:30 p.m.	BPA – Customer Annual System Review Letters	<i>Matt Donald Transmission Reliability Program</i>
Break		
3: 30 p.m.	Improvements to the Transmission Reliability Program Improved methods of customer communication Quarterly newsletter Bi-annual customer workshop Enhanced External Website	<i>Lorissa Matt</i>
4:00 p.m.	BPA obligations and response times for reliability request	<i>Lorissa</i>
4:30 p.m.	Open Forum BPA staff will remain to answer outstanding questions or issues	<i>Transmission Staff</i>



Welcome to Transmission Reliability Program Customer Workshop Summer 2011

Welcome message from BPA Internal Operations Manager – John Quinata

- We have heard the customers request and are happy to report that we have been increasing the Transmission Reliability Program:
 - Staffing levels
 - Outreach efforts
 - Improved response time



Transmission Reliability Program (TxRP) Team Members

Program Manager

- Lorissa Jones

Program Support

- Matt Donald
- Denise Koehn
- Aaron Paulson
- Jennifer Cameron

Standards Coordination

- Chris Higgins
- Vacancy to be filled





Transmission Reliability Program

*"Providing reliability coordination for our customers,
while maintaining a strategic approach for standards development."*

Our Mission:

- TxRP's first priority is to uphold and support BPA's Transmission Reliability
- To continually work to improve internal processes to provide increased support to all customers and, ultimately, the best value to the Region.
- To provide BPA's overall coordination of standards and requirements



O & M agreement update

- BPA has bi-lateral O&M responsibilities with approximately 50 NERC registered customer utilities
- 11 entities have obligations to BPA
- BPA Commitments:
 - Collaborative Relationships
 - Jointly evaluate O & M responsibilities and shared ownership arrangements
 - Simplify reporting requirements
 - Reliability
 - Validate and clarify O & M responsibilities
 - Ensure there are no gaps

More materials can be found: <http://www.bpa.gov/corporate/business/reliability/>



Key Milestones

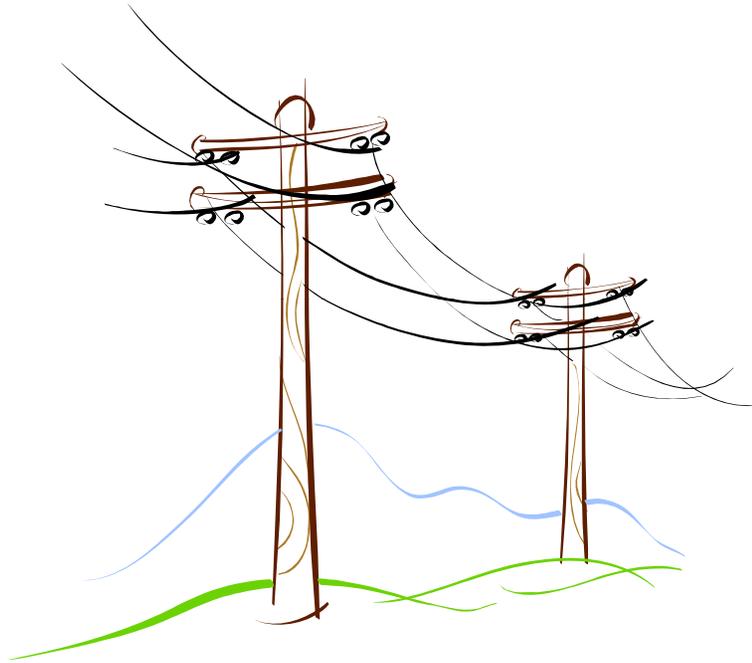
8/8/11 - 8/12/11	Customers receive customer specific impacted asset list
8/10/11	BPA will formally request compliance documentation on Customer obligations to BPA
8/16/11 - 9/26/11	BPA available for customer meetings
8/26/11	Comments due on O & M contract template
8/18/11 – 9/23/11	Customer obligations to BPA Compliance materials Due
10/1/11	BPA will send out Customer Compliance packets for BPA obligations to Customers



Next Steps

- Review
 - O & M template comments due 8/22/11
 - O & M Equipment list provided by BPA
- Prepare inventory and compliance documentation of O & M obligations to BPA
- Receive compliance documentation of O & M obligations from BPA





Load Serving Entity (LSE) & Distribution Provider (DP) Update



Load Serving Entity (LSE) & Distribution Provider (DP) Coordinated Functional Registration Agreement (CFR)

- What is a CFR agreement?
 - A formal agreement recognized by NERC that addresses the division of responsibility by requirement by two or more entities for one function in a common footprint.
 - Entities registered as LSE and DP only would have jointly registered with BPA for the LSE and DP functions. BPA would have retained the majority of the LSE and DP requirements while also being audited for them.



Load Serving Entity (LSE) & Distribution Provider (DP) Coordinated Functional Registration Agreement (CFR)

Why is BPA unable to offer the CFR agreement?

- Internal risk analysis and further review by the Department of Energy (DOE) have placed the proposed CFR on hold – indefinitely
 - Hinges on FERC and court's ruling on whether FERC has the authority to assess monetary penalties to Federal agencies
 - Section 215 of the Federal Power Act for Reliability Standard violations
 - Concern about BPA expanding a Federal shield to non-Federal entities



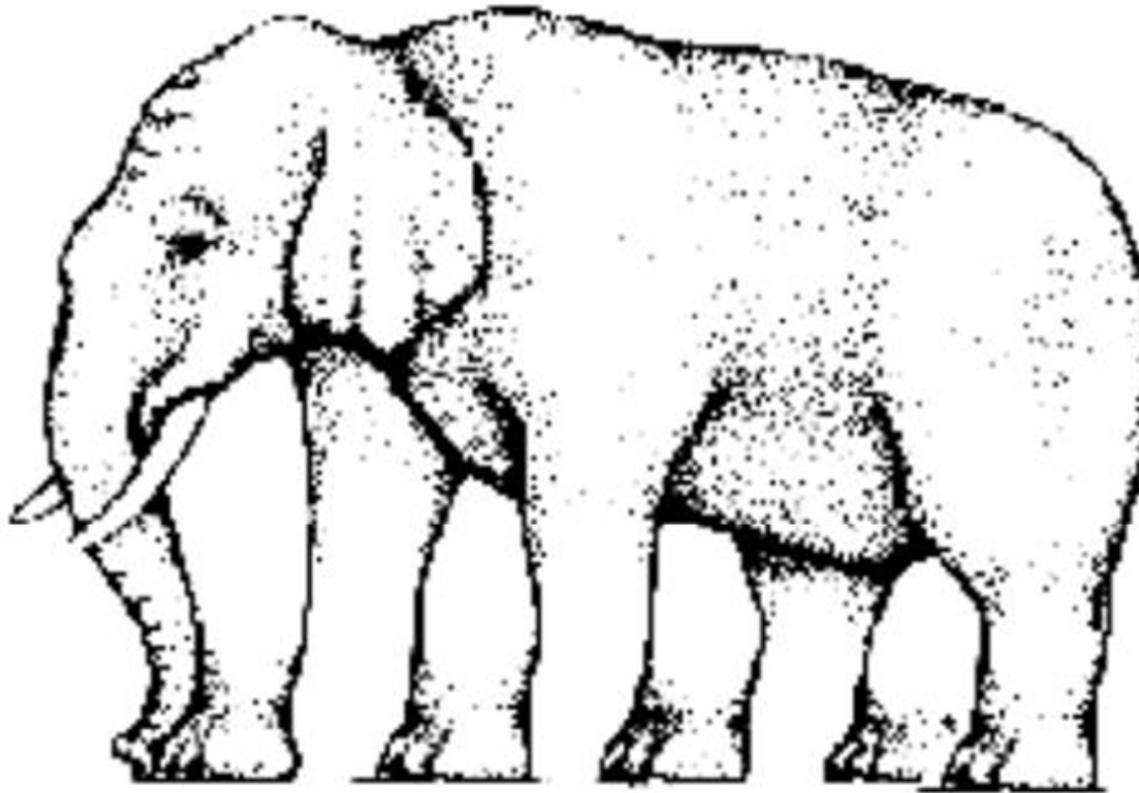
Existing Delegation Agreements

- Potential Updates/Revisions of Delegation Agreements
 - Existing Delegation agreements are outdated and in need of attention
 - Agreements don't address the applicable standards and requirements adequately
 - BPA is exploring revising the Delegation Agreements among other options



BPA-Customer Annual System Review Letters





How many legs does this elephant have?
Do we concur?



Annual System Review (ASR) Letters

- What is the Annual System Review letter?
 - It is a reliability-based document that clearly identifies the relationship that BPA has with another entity.
 - Reliability standards and requirements are identified
 - Upon concurrence, BPA and entity (x) initial
 - ASR letters are regularly referenced during audits

Concur	Do Not Concur	Standards & BPA Programs
		<p>[CUSTOMER] is registered with WECC as <i>Transmission Owner, Load Serving Entity and Distribution Provider</i></p>
		<p>Metered Boundaries BAL-005 - R1, R 1.3</p> <p>All of [CUSTOMER] load is within the BPA's Balancing Authority metered boundaries.</p> <p>OR</p> <p>All of [CUSTOMER] load is within the BPA's Balancing Authority metered boundaries with the exception of (meter points) which are within (adjacent BA)'s metered boundaries to the best of BPA's knowledge.</p>



Annual System Review Letters

- How will the ASR letter improve?
 - TxRP will continue to add/update standards and requirements, other reliability information and background documentation to assist with customer compliance efforts
 - BPA will expand coordination and outreach with WECC staff on improvements to the ASR letter
 - TxRP will continue to add registration functions until most are covered in the letter
 - Balancing Authority correspondence is handled independently of the ASR process
 - TxRP will follow up with questions involving the letter more quickly as new internal processes are implemented



Next Steps

- Analysis for the 2011 ASR letters has begun.
 - TxRP will complete analysis and letter creation by end of August
 - BPA Customer Service Engineers will review completed letters in September and provide draft copies to customers upon request
 - BPA Customer Service Engineers will also schedule in-person meetings with customers for letter review
 - TxRP will complete final formatting review and attend meetings with Customers and BPA Customer Service Engineers starting in October
 - All letters are to be reviewed by December 15, 2011



Improvements to the Transmission Reliability Program



“Providing reliability coordination for our customers, while maintaining a strategic approach for standards development.”



TxRP improvements **are** possible and include:

- *Reliability Matters* Quarterly Update
- Bi-annual Customer Workshops
 - Summer and Winter Workshops will be held
 - Next Workshop – November 2011
- Enhanced External Website
 - <http://www.bpa.gov/corporate/business/reliability/>
- Additional TxRP Resources



Reliability Matters Quarterly Update

- Features articles that are of interest and importance to BPA Customers
- Will be distributed electronically and in print
- Will contain “live links” for easy access to Reliability website and contact information
- Will introduce staff members and important upcoming events



Reliability Matters Quarterly Update

B O N N E V I L L E P O W E R A D M I N I S T R A T I O N

RELIABILITY MATTERS

Transmission Services Reliability Program Quarterly Update

Volume 1, Issue 1 July 2011

A Message from the Reliability Program Manager

Welcome to the first edition of *Reliability Matters*!



Lorissa Jones -
Transmission Reliability Program Manager

Greetings! I would like to personally welcome you to the first edition of the Transmission Reliability Program's *Reliability Matters* Quarterly Update. We are excited to offer this new communication to you and have included topics that we believe will be of interest to everyone.

Many of you have expressed that you would like

You'll have access to additional reliability compliance resources as well as be able to easily submit questions and comments to our Reliability Team.

The world of reliability compliance is always changing and doesn't appear to be slowing down anytime soon. In light of this, The Transmission Reliability Program at BPA has changed dramatically over the last year as new reliability "matters" have been introduced into the industry, most recently NERC Alerts that require reporting, etc.

Inside this issue:

RELIABILITY PROGRAM MISSION	2
OPERATIONS & MAINTENANCE PROJECT	2
EXTERNAL WEBSITE	2
TXRP STAFF SPOTLIGHT	3



Bi-annual Customer Workshops

- To be held annually Summer and Winter
- Will allow for deep-dive discussions involving critical Reliability matters
- Offers BPA and Customers networking opportunities
- Allows for open forum discussion



Enhanced External Website

Located at:

<http://www.bpa.gov/corporate/business/reliability>

- Features new “What’s Happening” section
- Features new web form for submitting questions as well as TxReliabilityProgram team mailbox address and suggested format for e-mail communication



Enhanced External Website

BONNEVILLE POWER ADMINISTRATION Agency Topics Finance & Rates Jobs Public Involvement Conta

BPA

About BPA Newsroom Publications Community Doing Business

BPA Home ▶ Doing Business ▶ Reliability Program And NERC Standards

Transmission Reliability Program Customer Workshop - July 28, 2011

Operation & Maintenance Project Session (9:00 a.m. - 12:00 p.m.)

- ▶ Agenda
- ▶ Operation & Maintenance Project Presentation
- ▶ Customer Assets Template
- ▶ Operation & Maintenance Draft Agreement Template Comment Instructions
- ▶ Operation & Maintenance DRAFT Agreement Templates
 - ▶ BPA Owned, Customer Maintained
 - ▶ Customer Owned, BPA Maintained

Break (12:00 p.m. - 1:00 p.m.)

Transmission Reliability Program Customer Workshop Session (1:00 p.m. - 5:00 p.m.)

BPA RP & NERC Home

- BPA Reliability Contacts
- Reliability Process and Coordination Manual
- Reliability Standard Implementation (ERO)
- Reliability Standard Development
- Calendar

▶ Visiting BPA Facilities

▶ How to Pay BPA

▶ Technology Innovation

▶ Reliability Program and NERC Standards

▶ Metering Services

▶ Customer Billing

▶ Bonneville Purchasing Instructions

▶ Buying or Selling Products or Services



Additional TxRP Resources

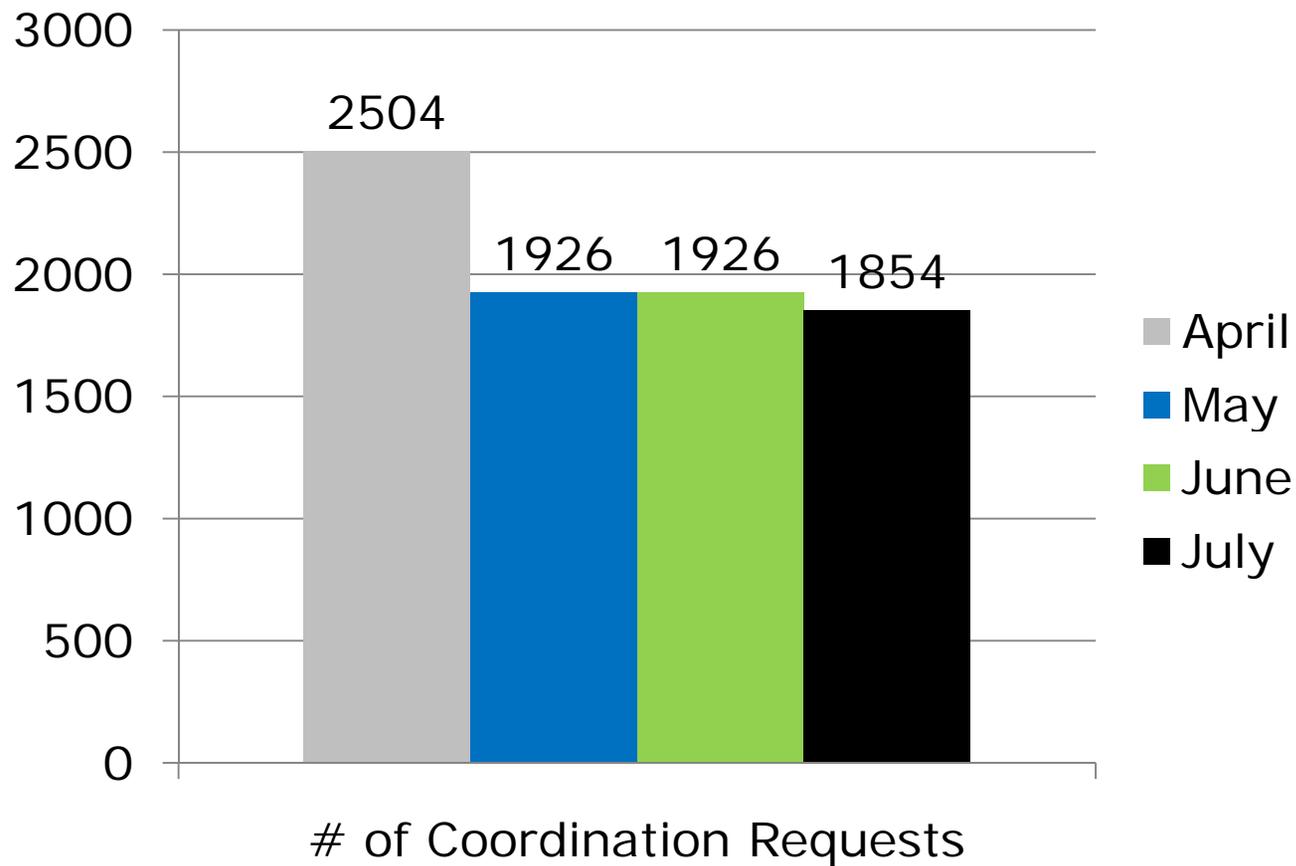
- Dedicated number of TxRP resources has increased.
- Cross training has lead to greater efficiency
- TxRP processes and procedures have been documented and continue to be updated
- Able to provide Lorissa with help!



BPA Obligations and Response Times for Reliability Requests



TxRP Coordination Request Activity



New TxRP Request Web Form

Reliability Question/Comment Form

We welcome your questions and comments. Please fill out the form below and click "Submit".

* Indicates required fields

Entity Name *	Requestor's Job Title
<input type="text"/>	<input type="text"/>
Requestor's Name *	Requestor's Phone Number
<input type="text"/>	<input type="text"/>
Requestor's E-mail Address *	
<input type="text"/>	
Title/Summary of request *	
<input type="text"/>	
Description of request (include all pertinent information) *	
<input type="text"/>	



BPA Obligations and Response Times for Reliability Requests

- Due to high volume of reliability requests, TxRP has implemented a new tracking system
 - TxRP receives requests via phone, web form, e-mail, etc.
 - All requests are logged, communications saved
 - BPA will provide initial response within 1-3 business days
 - If more information is needed; TxRP will follow up with additional communication*

* Timeframe for additional communication depends upon complexity of requests



TxRP Contacts

Program Manager

- Lorissa Jones

Program Support

- Denise Koehn
- Matt Donald
- Aaron Paulson
- Jennifer Cameron

Standards Coordination

- Chris Higgins

E-mail:

TxReliabilityProgram@bpa.gov



How can we help you?

- BPA is committed to continuously improving the coordination efforts with our customers and region
- Please let us know how we can help you



