

**RTO West Stage 2  
Ancillary Services Content Group  
Follow-Up List**

**Follow-Up to 2/9/01 and 2/28/01 Meetings**

**Prepared 3/05/01**

**Work Plan/Schedule/Assignments**

<b>TASK</b>	<b>RESPONSIBLE PARTIES</b>	<b>TARGET COMPLETION DATE</b>	<b>STATUS</b>
Review CA Opinion and related material for Potential Modifications to Stage One Ancillary Services  Distill to single list of A/S related items  Develop recommendation on single vs price as bid	Orens, Gibson, Olson	First cut – 2/22  By 3/14  By 3/14	Completed
Complete Scope/Definition of A/S Filing Materials	Speckman, Robinette	Consult with Tariff Integration by 2/22	Completed
Review/Develop Penalties/Incentives related to scheduling	Miller, Reese	First cut by 2/22  New Target 3/14	Open
Develop A/S Quantity Requirements With Consideration for Congestion and Other Locational Constraints  Develop requirements determination process on a One World basis for RO an any necessary subregions	Ryan, Perrino, Paschall, Connolly  Ryan, Perrino, Paschall, Connolly, Speckman	First cut by 2/22  By 3/14	Completed
Develop Approach to A/S Deployment	Kieran  Speckman	Research Cal ISO approach to splitting BEEP by 2/2  Develop plan to address by 2/22	Completed material distributed  Completed
Develop Pricing Mechanisms for Various Payments/Products  Develop overall approach to deployment and pricing	Speckman  Silverstein	Develop plan to address by 2/22  By 3/14	Completed
Develop RTO Requirements Document for External Market	None assigned		
Develop Performance Standards/Penalties for Each IOS, Self Provision and Self Tracking  Comment on draft	Miller, Conger, Clark, Reese  All CG Members	First cut by 2/22  Revised as needed by 3/14  By 3/12	Completed

Develop Canadian Implementation	Will be assigned when scope established		
Develop RTO A/S Purchase Processes and Timelines	Wallis, Scheduling Content Group assumed responsibility		
Develop Detailed Description of PTO's IOS Requirements	Connolly, Orens	First cut by 2/22	Completed
Develop recommended approach to implement TOA A/S provisions		By 3/14	
Market Design Validation Testing and Analysis	Working with CMCG members Brush, Orens, Marcy, Conger, Halpin	Report on status by 2/22	Completed
Compare RTO West approach to NERC's current proposed policy	Grow	Provide link to current NERC policy by 2/15	Completed
Review need for expert consultants in area of deployment, pricing and mitigation of market abuse	Speckman, Silverstein	Report by 2/22	In Progress
Review A/S provisions in TOA	Connolly	Develop list of sections by 2/22	Completed
	Speckman	Distribute provisions by 2/22	Completed
Develop Provider of Last Resort Options For RTO role including 1)SC's provide all non contingency A/S in DA Market and 2)SCs can provide none and buy all from RTO For consideration by RRG	Connolly	by 3/5	
Review if option1 within FERC's Order 2000	Sliverstein	By 3/14	
Raise potential need for arrangements to deal with what are called RMR (Reliability Must Run) generators in Cal and LGR (Local Generating Resources)	Speckman	By 3/14	

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### **Work Products Discussed at 2/9/01 Meeting**

(Dates Are Tentative)

	Start	End
<b>ANCILLARY SERVICES APPENDIX</b>		
Review CA Opinion for Potential Modifications to Stage One Ancillary Services	12/21/00	6/1/01
Complete Scope/Definition of A/S Filing Materials	12/21/00	2/1/01
Review/Develop Penalties	1/15/01	2/15/01
Develop A/S Quantity Requirements With Consideration for Congestion and Other	1/9/01	3/1/01
Locational Constraints	1/15/01	1/20/01
Develop Approach to A/S Deployment	1/9/01	3/14/01
Develop Pricing Mechanisms for Various Payments/Products	1/9/01	3/30/01
Develop RTO Requirements Document for External Market	1/9/01	3/30/01
Develop Performance Standards for Each IOS, Self Provision and Self Tracking	1/9/01	3/30/01
Develop Canadian Implementation	1/9/01	3/30/01
Develop RTO A/S Purchase Processes and Timelines	2/20/01	3/30/01
Develop Detailed Description of PTO's IOS Requirements	1/9/01	3/30/01
Market Design Validation Testing and Analysis	1/20/01	3/15/01
Draft Appendix	3/30/01	6/1/01
Finalize Appendix	2/16/01	5/1/01
	3/9/01	5/22/01

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### **Decisions at 2/9/01 Meeting**

Agreed to separate A/S and Scheduling meeting agenda items to allow individuals to participate in one or both. Next meeting of both Content Groups will be separate one for A/S and one for Scheduling. Eventually the A/S and Scheduling CG meetings would be held together with the normal date being a Friday and meeting times of 8 – 1pm and held at the PDX.

Next meeting of A/S CG is scheduled for 2/28 from 10 – 4:30 in Portland. The first combined meeting is tentatively scheduled for 3/16 at PDX.