

**RTO West Stage 2
Seams Content Group
Follow-Up List**

Follow-Up to 2/13/01 Meeting

Notes

-- The consensus recommendation for the role of the RTO West Stage 2 Seams Content Group was:

- Meet as needed and not necessarily on a regular basis
- Serve primarily an oversight/coordination/communication role making certain that issues of high priority to RTO West are being dealt with in one forum or another
- Rely on the RTO West content groups and their linkage to the WMIC seams task force to deal with the majority of the identified issues to the extent that progress continues to be made in that forum (See below for more discussion)
- Follow up to make certain progress is being made on the high priority issues and recommend corrective action if appropriate

-- Listed at the end of this summary is a handout from the Feb 13, 2001 Seams Content Group meeting. The handout represents the recommendations made to the Filing Utilities regarding an approach to dealing with Seams Issues in stage 2.

Listed below are the 12 seams related issues (identified in stage 1 or 2) that are not necessarily within the complete control of an RTO West work group and were felt to be of a high priority. It was agreed that each issue if possible should be associated with one of the stage 2 content groups to help make sure it will be addressed as a seams issue in one form or another. That could be to 1) encourage the WMIC Seams Task Force to include it in the multiparty discussions currently underway, 2) to address in mutli-party discussions outside of the WMIC forum, 3) to address in bilateral discussions or 4) take other approaches. The Stage 2 content group that each issue was associated with is show below.

Issues From Stage 1

1. Major Loop Flow (Congestion Model Content Group)
2. Congestion Management and FTRs at the Seams (Congestion Model Content Group)
3. Curtailment Procedures at Seams (Congestion Model Content Group)
4. Coordination of Commercial Practices at the Seams (Scheduling Content Group)
5. Coordinating Changes to Commercial Practices (Scheduling Content Group)
6. Coordinated Outage Planning (Operations Content Group)

7. Agreements with Adjacent Control Areas (Scheduling/Ancillary Services Content Group)
8. Roles/Responsibilities of RTO West related to reliability (Not considered a seams issue)
9. Integration/Coordination with Canada (to be dealt with by a yet to be determined work group)
10. Price Reciprocity (Pricing Content Group)

Issues Raised Since Stage 1

11. Phase Shifter Impacts on FTRs and Real Time Congestion Management (Congestion Model Content Group)
12. Market Rules Alignment at the Seams (Scheduling/Ancillary Services Content Group)

-- The WMIC Seams Task Force and working groups was discussed. The representation by RTO West on these groups was reviewed and the list of RTO West participants was also reviewed. This listing is also included at the end of this summary. Listed below are the WMIC work groups/effort and the Stage 2 content group associated with each.

- Scheduling Timelines (Scheduling Content Group)
- RTO Seams Examples (Congestion Model Content Group)
- Congestion Management/FTR Matrix (Congestion Model Content Group)
- Phase Shifter Operation (Congestion Model Content Group)
- California Import/Export Levels - Historical MWHr Data (Yet to be assigned)
- Market Rules Alignment (Scheduling/Ancillary Services Content Group)
- Outage Coordination (Operation Content Group)

It was also pointed out that the RTO West Coordinating Team was responsible for coordinating the work within the RTO West Stage 2 effort with Barney Speckman having lead responsibility in the seams area.

Work Plan/Schedule/Assignments

TASK	RESPONSIBLE PARTIES	TARGET COMPLETION DATE	STATUS
Communicate to all interested parties the responsibility for seams issues among the content groups and WMIC groups	Speckman	As soon as possible	Complete with this summary

Communicate the need to consider the potential for dealing with existing interconnection agreements between Calif or DSTAR entities and RTO West entities	Speckman	As soon as possible	Complete with this summary
Consider whether all high priority RTO West issues are or should be addressed in the WMIC forum	Gibson	By next WMIC Task Force Meeting	
Make certain that high priority RTO West issues are raised and addressed if appropriate in the WMIC forum	Afranji, Speckman	By next WMIC Task force meeting	
Provide an update to the Seams CG on progress in the seams area	Speckman	By 3/13	
Present consensus recommended role for the content group	Speckman	As soon as possible	
Work with others to develop recommended approach for PNCA and Hourly Coordination (items listed under seams/interregional coordination)	Speckman	By 3/10	

Meeting Handout

Provided For Discussion at the Meeting

Interregional Coordination (Seams) Update

Issues From Stage 1

13. Major Loop Flow
14. Congestion Management and FTRs at the Seams
15. Curtailment Procedures at Seams
16. Coordination of Commercial Practices at the Seams
17. Coordinating Changes to Commercial Practices
18. Coordinated Outage Planning
19. Agreements with Adjacent Control Areas (internal and external)
20. Roles/Responsibilities of RTO West related to reliability
21. Integration/Coordination with Canada (Dealt with by other work groups)

22. Price Reciprocity (Dealt with by Pricing Work Group)

Issues Raised Since Stage 1

- 23. Phase Shifter Impacts on FTRs and Real Time Congestion Management
- 24. Market Rules Alignment at the Seams

Recommended Approach For Stage 2

The approach recommended for Stage 2 is:

- Take full advantage of the forum established by the WMIC Seams Task Force to pursue issues that lend themselves to resolution through a multi-party discussion/problem solving format.

This would be accomplished by having RTO West representatives work with representatives of DSTAR and Cal ISO on the various task force subgroups to identify solutions to seams problems for consideration in the RTO West issues resolution/consensus process (RRG input and Filing Utility review and approval).

Each WMIC issue area would be associated with one of the RTO West Content Groups to provide an RTO West forum for discussion of options and to serve as sponsor for any recommendations forwarded to the RRG/Filing Utilities. For example, for the issues related to scheduling which are currently being discussed in a subgroup headed by Tarcy Lee of RTO West, any discussion of options or development of alternate approaches would be done under the coordination of the Scheduling Content Group. In addition, if a recommendation will be put forth to the RRG, the Scheduling Content Group would sponsor it.

The Seams Content Group's role would be to help coordinate the work going on to address seams issues and to help initiate efforts to address seams issues that are not already being addressed.

At the current time, it appears that WMIC is a useful forum to address items 1-6, 11 and 12. The WMIC Task Force currently has subgroups specifically looking at items 2, 6, 10, 11 and 12 and may be considering the potential benefit of addressing items 1, 3, 4, 5 and 7(for external seams) within the WMIC forum. Any issues that RTO West feels should be addressed within WMIC will likely be added to the Task Force effort.

- On a case-by-case basis deal with other Seams issues outside of the WMIC

forum. For example, the price reciprocity issue may be best resolved through bilateral discussions among RTOs.

The Canadian issues are also being dealt with on a bilateral basis by pursuing a relationship tailored to the needs of those two entities.

Item 8, Roles/Responsibilities of RTO West related to reliability, seems to be an issue that should be assigned to one of the Content Groups with the Scheduling/Ancillary Services Content Group as one logical possibility.

One issue that is not being addressed is Item 7, Agreements with Adjacent Control Areas for internal seams.

**LISTED BELOW ARE THE CURRENT ASSIGNMENTS TO THE
WMIC SEAMS TASK FORCE AND SUBGROUPS
FOR REVIEW AND DISCUSSION**

**Membership
WMIC
RTO SEAMS TASK FORCE**

**CHAIR – WALLY GIBSON
STAFF SUPPORT – DEAN PERRY**

RTO WEST	Primary – Frank Afranji Cliff Perigo Carolyn Cowan Ray Brush Rich Bayless Barney Speckman	Backup – Dennis Metcalf Lisa Grow Peggy Olds Mike Ryan
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DESERT STAR	Mike Raezer Bill Dunn
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CAISO	Ziad Alaywan Vick Kasarjian
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CREPC	Wally Gibson Larry Nordell Arne Olson
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OTHER	Steve Walton - Enron Rebecca Berdahl – BPA PBL Phil Park - Powerex Jim Byrne – WRTA Kevin Higgins – Energy Strategies Dennis Delaney – KR Saline Paul Barber – Edison Mission Marketing Ed Chang - WAPA Marshall Empey - UAMPS
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Subgroup Membership

Initial Subgroup Assignments

February 5, 2001

Scheduling Timelines

Tarcy Lee – RTO West - **Lead**
Lisa Grow – RTO West
Tara Exe – RTO West
Phil Park – Merchant
Jerry Smith – Desert Star
George Kelly – Desert Star
Vick Kasarjian - CalSO

Current Assignment:

Develop a coordinated scheduling procedure timeline chart for presentation to the Seams TF for consideration by the three RTOs, including identification of unresolved problem areas and identification of which cut off times are considered rigid by an RTO and which might be considered soft (could be changed). (A first cut at comparing the initial scheduling timelines of each RTO was included in the December 4 meeting material.)

RTO Seams Examples

Jim Byrne – **Lead**
Steve Walton – Merchant
Paul Arnold – RTO West
Jerry Smith – Desert Star
Vick Kasarjian - CalSO
Larry Nordell - CREPC

Current Assignment:

Modify Example 1 of the FTR Scenario examples distributed at the December 4 Seams TF meeting, using an open loop model for all three RTOs. Example 1 will then become an illustration of the RTO boundary conditions if each RTO were to adopt today's rating and scheduling practices.

Congestion Management/FTR Matrix

Jim Byrne – Other - **Lead**
Barney Speckman – RTO West
Bill Dunn – Desert Star
Vick Kasarjian – CalSO
Larry Nordell - CREPC

Current Assignment:

Modify the FTR Matrix presented at the December 4 Seams TF meeting to make it more clear where the RTO proposals are alike and where they are different. Add the additional attributes identified at the meeting. (zones/flow patterns, phase shifter operation and FTRs, etc.)

Phase Shifter Operation

Rich Bayless – RTO West - **Lead**
Chris Reese – RTO West
Ray Brush - RTO West
Steve Walton - Merchant
Phil Park - Merchant
Mike Raezer – Desert Star
Arne Olson – CREPC
Vick Kasarjian/Mark Willis - CalSO

Current Assignment:

Describe the issues related to phase shifter operation in the future RTO market environment and develop a proposed approach for operation of the phase shifters. (Rich Bayless distributed examples of phase shifter operation at the meeting. Papers on phase shifter operation previously prepared by Steve Walton and Phil Park were distributed after the meeting.)

California Import/Export Levels - Historical MWhr Data

Dean Perry – **Lead**
Wally Gibson - CREPC
Barney Speckman – RTO West
Vick Kasarjian – CalSO
Frank Afranji – RTO West

Current Assignment:

Gather data and analyze the magnitude of MWhr transfers between the NW and California and between the Desert Southwest and California for the last 3 years. The Seams TF felt that as a first step, it would be beneficial to gather information on the approximate levels of net transfers between the NW and California and between the Desert Southwest and California to get an indication of the potential magnitude of transfer payments.

Market Rules Alignment

Vick Kasarjian – California ISO - **Lead**
Rebecca Berdahl – Merchant
Brian Sickles – RTO West
Damon McCauley – RTO West
A.J. Sood – RTO West
Bill Dunn – Desert Star
Dave Perino – Other

Current Assignment:

Develop a Matrix similar to the FTR Matrix, identifying those RTO market rules that could, as a result of differences between the RTOs, detrimentally impact the efficient functioning of the market in the West. The Matrix should compare the proposed practices of each RTO and identify the detrimental impact on the market. A brief description of each Market Rule identified should be included (an initial Market Rule list was distributed with the December 4 meeting material).

Outage Coordination

Membership:

(This group is currently being organized)

Jim Vinson – RTO West
Phil Park – Other
George Kelly – Desert Star
Gregory VanPelt – CalSO
Ralph Underwood - Other

Current Assignment:

To develop a proposed process for coordinating planned outages among the proposed RTOs. This effort should be coordinated with the current WSCC OC effort looking into an interconnection wide database for planned transmission outages.