

**PROVIDER OF CHOICE**

**D R A F T Provider of Choice Issue Inventory (PI): Not final; subject to change**

**Last Updated 1/22/2024 Version notes: Includes stakeholder written feedback received to-date**

| ID # | Primary Category           | Workshop Type                         | Topic/Theme Description   | Notes on sequencing/ interdependencies with other topics | Submitted by           | Date Submitted |
|------|----------------------------|---------------------------------------|---|--|------------------------|----------------|
| 1    | Products                   |                                       | Consider a flat or diurnal monthly Block or a slice of a Tier 2 resource for planned product customers. A flat annual Block does not work very well for a planned product customer's AHWL load needs. A flat annual T2 block does work well for a load following customer because it sits at the bottom of their resource stack (underneath Tier-1). It's the opposite for a planned product customer, so a flat annual T2 block doesn't fit our 5(b) load needs. |  | Tacoma                 | 12/27/2023     |
| 2    | Markets                    | Phase 1. Discuss policy impl. details | DAM and WRAP compability and consideraons across products<br>o Product tmelines/operaons in a DAM<br>o RA, must offer and resource sufficiency obligaons in a DAM<br>o Transmission in DAM (Delivery, Congestion revenue)<br>o RSS vs QCC and resource accreditation  |  | EWEB                   | 1/5/2024       |
| 3    | Products - General         | Phase 1. Discuss policy impl. details | Value and use of capacity/flexibility under different constructs and timeframes<br>o Load following<br>o Block with Shaping<br>o Block with Shaping Plus  |  | EWEB                   | 1/5/2024       |
| 4    | Non-fed                    | Phase 1. Discuss policy impl. details | Calculation of Customer Dedicated Resources; defining declaration parameters  |  | SCL                    | 1/5/2024       |
| 5    | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Block with Shaping Capacity Product - further discussion; design  |  | SCL                    | 1/5/2024       |
| 6    | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Re-examine constraints around ramping rates and high/low load limitations. Consider different ramping rates by: month, load, etc.   | PNR Implementation                                       | Sarah Burczak, BPA     | 12/12/2023     |
| 7    | Products - General         | Phase 1. Discuss policy impl. details | Explore ability for flexible elements of planned products (slice, block w/shaping) to be economically dispatched by the day-ahead market. Options could include direct market participation by customers or via BPA.  | Markets  | Planned Products Group | 1/19/24        |
| 8    | Products - General         | Phase 1. Discuss policy impl. details | Explore ability for flexible elements of planned products (slice, block w/shaping) to be economically dispatched by the real-time market. Options could include direct market participation by customers or via BPA.  | Markets  | Planned Products Group | 1/19/24        |
| 9    | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concern with BPA proposal of Slice as a DA product - loss of customer ability to respond to load and non-fed resource changes between DA and RT   | Markets  | Planned Products Group | 1/19/24        |
| 10   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concern with BPA proposal of Slice as a DA product - significantly reduced capability for Slice to integrate VERs   | Markets  | Planned Products Group | 1/19/24        |
| 11   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concern with BPA proposal of Slice as a DA product - Timing of DA submittals for Slice RTP, Scheduling of slice commitments prior to BPA's DA market submittal (prior to T-1d at 10 am). May require customer commitments to slice and non-fed resources before other market participants. Ownership of Must-Offer Obligation (MOO) and obligations to offer flexibility/bid range is unknown.  | Markets  | Planned Products Group | 1/19/24        |
| 12   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concern with BPA proposal of Slice as a DA product - Slice does not submit bid ranges to the market. Single schedule is submitted prior to DA market submittal deadline (T-1d 10 am). Slice excluded from DA market optimization and response to DA market price signals, unknown DA and RT market (MOO) and flexibility reserve interactions.  | Markets  | Planned Products Group | 1/19/24        |
| 13   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Consider updating Slice RTP following DA Market Award based on bids   | Markets  | Planned Products Group | 1/19/24        |

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| 14   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Explore ability to update Slice RTP in real-time   | Markets  | Planned Products Group | 1/19/24        |
| 15   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concerns with Slice as DA product - examination of Slice inputs lockdown and fixed RTP at DA and extending through RT. Address issues related to customer scheduling flexibility, RSO implications, compatibility with DA and RT MOO, deviation of slice schedules from system capability through RT.  | Markets  | Planned Products Group | 1/19/24        |
| 16   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Slice as DA product - examination of simulation feasibility through simulation time horizon resulting from DA inputs and RTP lockdown  |  | Planned Products Group | 1/19/24        |
| 17   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Slice as DA product - examination of storage offset accounting (SOA) through simulation time horizon resulting from DA inputs and RTP lockdown   |  | Planned Products Group | 1/19/24        |
| 18   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concerns with Slice as DA product - examination of Must-Offer Obligations (MOO) for both DA and RT (market compatibility)  | Markets  | Planned Products Group | 1/19/24        |
| 19   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concerns with Slice as DA product - examination of WRAP compatibility for Forward Showing and Ops Programs   | WRAP/Resource Adequacy                                   | Planned Products Group | 1/19/24        |
| 20   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concerns with Slice as a DA product - examination of "reasonable representation of Federal System" criteria  |  | Planned Products Group | 1/19/24        |
| 21   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Slice as a DA product - examination of required modifications to existing Slice implementation systems (i.e. SWRS).  |  | Planned Products Group | 1/19/24        |
| 22   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Allocation of BPA's financial outcomes from the physical dispatch of Fed System in DA and RT markets.  | Cost   | Planned Products Group | 1/19/24        |
| 23   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Impacts of physical dispatch of Fed System in DA and RT markets on Slice capability  |  | Planned Products Group | 1/19/24        |
| 24   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Monthly shaping of annual Block amount - Does BPA propose to define a Block customer's ability to shape an annual Block (aMW) into monthly amounts according to the customer's monthly Energy Net Requirements (ENRs), as in Regional Dialogue?  | Net Req  | Planned Products Group | 1/19/24        |
| 25   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Further define the factors that establish shaping of annual Block into diurnal monthly Block and flat monthly Block. How will shaping of annual Block into monthly diurnal amounts be comparable to diurnal delivery (and pricing) of Load Following service?  |  | Planned Products Group | 1/19/24        |
| 26   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Provide additional details on defining maximum availability of Shaping Capacity (e.g., ENRs, PNRs, Block) to a Block customer. Will maximum available Shaping Capacity vary by month? How will the maximum availability of Shaping Capacity be comparable to the capacity services included in Load Following?   | Net Req  | Planned Products Group | 1/19/24        |
| 27   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Comparability of maximum available Shaping Capacity with capacity provided with other products such as Load Following.   |  | Planned Products Group | 1/19/24        |
| 28   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Ability and frequency of shaping capacity amounts to change over time during contract as net requirements change (energy and capacity) due to loads, resources changes, etc.   |  | Planned Products Group | 1/19/24        |
| 29   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Address any short-term and long-term actions BPA expects to take, and which costs would be incurred, due to an election by Block customers to purchase Shaping Capacity. How do these actions and costs differ from those associated with the capacity rights inherent in other products such as Load Following? If there are no long-term actions by BPA or costs to BPA, could Shaping Capacity be a rate period election, with reasonable notice? | Cost   | Planned Products Group | 1/19/24        |
| 30   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | LT firm transmission requirements for delivery of Shaping Capacity. How will Block customers coordinate purchases of Shaping Capacity and reservations of transmission capacity rights (e.g., timing, deadlines, required studies)? Which ancillary services will be required for the purchase of Shaping Capacity? What determinations or decisions are necessary by BPA's Transmission function in advance of execution of POC contracts in 2025?  | Transmission   | Planned Products Group | 1/19/24        |

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| 31   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Additional details on how Shaping Capacity is intended to meet BPA's statutory obligations to offer federal power.   | Statutory Requirements                                      | Planned Products Group   | 1/19/24        |
| 32   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Concern with BPA proposal of Slice as a DA product - No real-time component. Customers become price takers in DA and/or RT market with no ability to adjust, BPA maintains this capability with actual Fed resources to mitigate BPA's DA and/or RT market exposure.   | Markets, Cost   | Planned Products Group   | 1/19/24        |
| 33   | Products - Block and Slice | Phase 1. Discuss policy impl. details | RSO implications related to Slice as a DA product and its interaction with markets.  | Statutory Requirements                                      | Planned Products Group   | 1/19/24        |
| 34   | Products - General         | Phase 1. Discuss policy impl. details | DA and RT Planning obligations for load and resources - Address how market planning obligations ("uncertainty") will impact T1, T2, and non-federal deliveries.  |   | Planned Products Group   | 1/19/24        |
| 35   | Cost                       | Phase 1. Discuss policy impl. details | Financial settlements - Current cost pools and accounting tools are likely insufficient to reasonably allocate DA/RT financial outcomes to customers.  | Cost, Markets   | Planned Products Group   | 1/19/24        |
| 36   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Slice/Block % ratios - Address details, potential implications of fixing the block slice ratio for the term of the contracts.  |   | Planned Products Group   | 1/19/24        |
| 37   | Products - Block and Slice | Phase 1. Discuss policy impl. details | Firm commitment to product - Product design election thresholds of no less than 15% of the system and no more than 25%. Commitment decisions require sufficiently designed products, sufficiently designed rates, other customer product elections, sufficient customer public process and governing body participation. |   | Planned Products Group   | 1/19/24        |
| 38   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Establishing Block w/Shaping parameter settings (Shaping Capacity as % of Monthly Block, Ramp Rate, Min/Max Energy Delivery) - Do settings vary by customer, or are they set the same for everyone? Can they be changed over course of contract? If so, what frequency?  |   | Planned Products Group   | 1/19/24        |
| 39   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Peak Load Variance Service - Additional details on determination of amount available, PNR check, scheduling & delivery, when it's available (WRAP sharing event, extreme weather, etc).  | PNR, WRAP/Resource Adequacy                                 | Planned Products Group   | 1/19/24        |
| 40   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Market compatibility - how product is scheduled and delivered in DA and RT, examination of MOO (DA and RT).  | Markets, Cost   | Planned Products Group   | 1/19/24        |
| 41   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | WRAP compatibility - representation of capacity in Forward Showing, meeting requirements for Operations Program (multi-day, DA and RT).  | WRAP/Resource Adequacy                                      | Planned Products Group   | 1/19/24        |
| 42   | AHWM                       | Phase 1. Discuss policy impl. details | Tier 2 options for Planned Product Customers. The current and proposed flat annual block works for LF customers but Planned Product Customers would like to discuss options such as a flat Monthly Block or a Slice of an actual Tier 2 resource.  | Options for AHWM load service for planned product customers | Planned Products Group   | 1/19/24        |
| 43   | Products - Block w/Shaping | Phase 1. Discuss policy impl. details | Re-examine ramp rate and min/max defaults for customer load service obligations  | PNR, WRAP and market compatibility, statutory obligations   | Garrison Marr, Snohomish | 1/19/2024      |
| 44   | WRAP/Resource Adequacy     | Phase 1. Discuss policy impl. details | Determine WRAP compatibility pathways to products and appropriate treatment of cost and cost savings of BPA's WRAP obligations because of, or resulting from, customer WRAP compliance   | PNR, Rates, Products  | Garrison Marr, Snohomish | 1/19/2024      |
| 45   | Markets                    | Phase 1. Discuss policy impl. details | Determine Tier 1 Power Product compatibility with market obligations for DA and RT MOO   | Products, Rates, WRAP, markets                              | Garrison Marr, Snohomish | 1/19/2024      |
| 46   | Products - General         | Phase 1. Discuss policy impl. details | Evaluate Tier 2 election timing and flexibility for Short-Term and Long-Term Tier 2 options  | Products, Rates   | Garrison Marr, Snohomish | 1/19/2024      |

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| 47   | Products - General | Phase 1. Discuss policy impl. details | Evaluate efficacy of WRAP RA Transfer Product as mechanism to ensure cost recovery and equity across products and fill gaps in products for WRAP and Market Compatibility       | Products, Rates, PNR, markets, WRAP                      | Garrison Marr, Snohomish | 1/19/2024      |
| 48   | Rate Discounts     | Phase 1. Discuss policy impl. details | Explore expansion of WRAP billing credit to account for all customer resources which reduce BPA WRAP obligation, regardless of BPA product                                      | Products, Rates, PNR, markets, WRAP                      | Garrison Marr, Snohomish | 1/19/2024      |
| 49   | Other              | Phase 1. Discuss policy impl. details | Re-evaluate self-funding component of Conservation Program design   |  | Garrison Marr, Snohomish | 1/19/2024      |
| 50   | Products - General | Phase 1. Discuss policy impl. details | Evaluate alternate construction of Tier 2 products to include diurnal, monthly, slice and capacity constructs for long-term tier 2 offerings, particularly for planned products | Products, Rates  | Garrison Marr, Snohomish | 1/19/2024      |
| 51   | Products - General | Phase 1. Discuss policy impl. details | Evaluate alternatives to diurnal product and billing constructs in light of organized market developments   | Products, Rates  | Garrison Marr, Snohomish | 1/19/2024      |
| 52   | Markets            | Phase 1. Discuss policy impl. details | Evaluate Planned Product scheduling alternatives to better align with organized markets and WRAP  | Products, Markets, WRAP                                  | Garrison Marr, Snohomish | 1/19/2024      |
| 53   | Products - General | Phase 1. Discuss policy impl. details | Evaluate alternatives to RSS in light of organized markets  | Products, Markets, WRAP                                  | Garrison Marr, Snohomish | 1/19/2024      |
| 54   | Markets            | Phase 1. Discuss policy impl. details | Determine appropriate cost distribution of market participation costs across products and LSE categorization  | Markets, Rates   | Garrison Marr, Snohomish | 1/19/2024      |
| 55   | Products - General | Phase 1. Discuss policy impl. details | Ensure cost-causation of federal system augmentation and cost recovery for base system for both energy and capacity is appropriately allocated to the customers                 | Rates, Products  | Garrison Marr, Snohomish | 1/19/2024      |
| 56   | Non-fed            | Phase 1. Discuss policy impl. details | Evaluate appropriate incentive structure for BTM capacity resources such as energy storage and Demand Response across products, through product and/or rate design              | Rates, Products  | Garrison Marr, Snohomish | 1/19/2024      |