California ISO

EIM Track 1 Overview - Project Management and Planning

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REVISION HISTORY

VERSION NO. (Must match header)	DATE	REVISED BY	DESCRIPTION
1.0	01/24/2018	Ayman Fattah	First version
1.1	8/03/2018	Nancy Strouse	Wording edit
1.2	04/25/2019	Ayman Fattah, Cari Chenkin	Content updates (2019 updated), formatting updates

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1.0   Purpose

The purpose of this document is to provide entities with a summary of project management and planning activities that will happen as part of Track 1 of Energy Imbalance Market (EIM) implementation. This document also identifies key deliverables and general timing to ensure a successful EIM implementation.

The dates mentioned in this document are considered target guidelines; dates can be updated if agreed to by both parties.

2.0   Track 1 Overview

The EIM Project Management track will ensure project management and oversight coordination between CAISO and EIM Entity teams. The project management tasks in this track include developing planning documents, project schedule, status reports, issue and risk tracking, overall readiness checklists, and any other planning and controlling documents, processes and activities to support a successful implementation of the project.

This document will describe the general timeline, as well as summarize main deliverables with target deadlines for this track.

2.1   Project Management and Planning

Project management activities will commence as soon as the EIM Implementation Agreement has been executed and will extended for one month after the EIM entity Go-Live date. Project planning is an integral part of project management and is a joint effort between ISO and the EIM Entity project management teams.

2.2   ISO EIM Project Team

The ISO project management team will include the following members:

Role	Team Member	Description
Petar Ristanovic	VP, Technology	EIM Executive Sponsor
Khaled Abdul-Rahman	Executive Director, Power Systems and Smart Grid Development	EIM Technical Director
Janet Morris	Executive Director, PMO	Overall oversight of the EIM implementation and client executive management
TBD	Project Manager	Day-to-day project management activities

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Role	Team Member	Description
TBD	Project Coordinator	Coordination of meetings and scheduling
Angela Glover	EIM ISO Regional Coordinator	Scheduling of reoccurring executive meetings and updates

A comprehensive list of the ISO project implementation team will be provided in the Team Roster document.

3.0 Track 1 Deliverables

3.1 Project Planning Deliverables

The table below summarizes main deliverables for this track with target deadlines. Templates for all Track 1 deliverables can be found on the Accellion site in the Track 1 folder.

Deliverable	Description	Owner	Target Date
Project Implementation Plan	Document created by the ISO team that provides general guidelines for the EIM implementation including agreed upon payment and track Milestones. This document requires the ISO and EIM entity signatures and a formal change control process.	ISO	T-18
Project Joint Integration Schedule	The project schedule is in Microsoft Project format, listing the EIM project interrelated milestones, activities, and deliverables with intended start and finish dates. This schedule will be reviewed and updated regularly with both project managers.	Joint	T-17
Project Communication Plan	Document with specifics about how ISO and the EIM Entity will communicate throughout the project. This includes both written reports, meetings, and tracking of issues and risks.	Joint	T-17

Deliverable	Description	Owner	Target Date
Project Implementation Timeline	Visio diagram with a graphical representation of all tracks and key planned activities of the EIM implementation leading to Go-Live	ISO	T-17
Project Issues/Risks Tracker	Excel spreadsheet that will be used by both project managers to track project-wide issues and risks	Joint	T-17
Project Team Roster	Excel spreadsheet with names and contact details of the project implementation teams from both ISO and the EIM Entity	Joint	T-17
EIM Entity Assessment	Document completed by the EIM Entity to provide ISO with upfront information that will assist in the planning and support throughout the EIM implementation	EIM Entity	T-18
Parallel Operations EIM Activation Plan	Document that provides an overview of activities required by both the EIM Entity and the ISO as they transition from Market Simulation in the Map Stage environment to Parallel Operations in the Stage environment.	Joint	T-4
EIM Activation Plan	Document that provides an overview of activities required by both the EIM Entity and the ISO as they transition from Parallel Operations in the Stage environment to the Production environment	Joint	T-2
EIM Go Live Support Plan	Document detailing the ISO processes for transitioning from Parallel Operations to EIM Production	ISO	T-2

3.2   Project Status and Control Meetings

The project status and control meetings are details in the communication plan deliverable. These will be managed in Track 1 throughout the implementation where the project management team will be responsible for developing the agenda and presentations, scheduling and controlling the meetings.

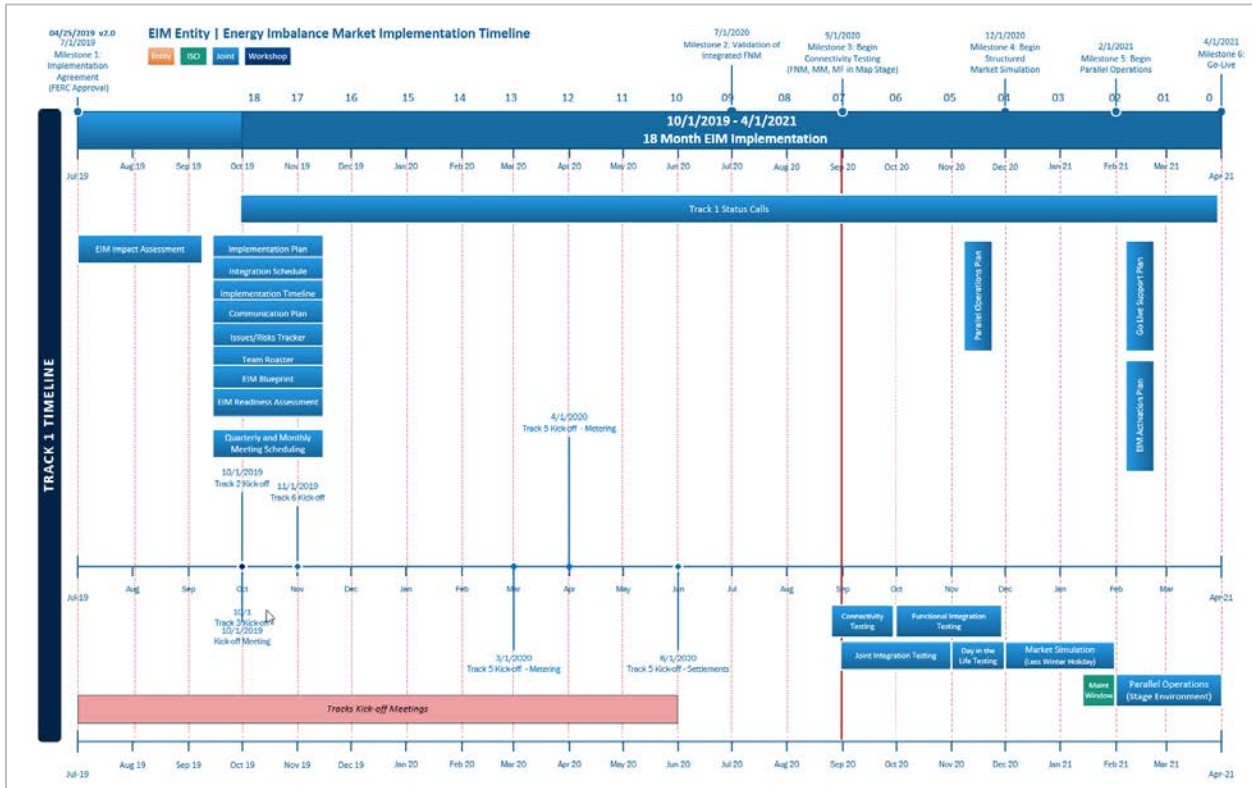| Deliverable	Description	Owner	Frequency
Executive Progress Review Meetings	Quarterly meetings with EIM Executive Steering Committee; envisioned to be face-to-face and alternating locations.	Joint	Quarterly T-18
Project Leadership Review Meetings	Monthly meetings with EIM Project Delivery Leadership team via phone conference and WebEx when needed.	Joint	Monthly T-18
Checkpoint Meetings – multiple tracks	Working and status meetings to evaluate and facilitate project implementation progress.	Joint	Weekly or bi-weekly

3.3   Tracks Kick-off Scheduling

Track Number	Track Description	Target Kick-off Date
Track 1	Planning and Project Management Track	T-18
Track 2	Policy, Legal and Support Track	T-18
Track 3	Modeling of Transmission and Generation Assets	T-18
Track 4	System Integration and Testing	T-12
Track 5	Metering and Settlements	T-15 Metering T-10 Settlements
Track 6	Operations Training and Readiness	T-8

Before their official kick-off, activities for different tracks can be discussed in Track 1 meetings until they are officially started. The kickoff dates for each track are discussed in detail in the specific track overview documents.

4.0 Track 1 Timeline