



## Western EIM Regional Issues Forum Roundtable

Regional Issues Forum  
December 11, 2023

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# Western EIM Governance Review – Phase 3 (EDAM)

- Annual “roundtable” discussion to “kick off” annual policy roadmap process
  - Discussion of stakeholder priorities
  - Precedes publication of the policy roadmap
- Sector liaison(s) to specify priorities and preferences, including statements as to sector consensus
  - Open to all stakeholder participants, including representative of WEIM Body of State Regulators
  - Intent for “give and take” discussion about relative priorities for initiatives
- RIF to determine process and implementation
- Western EIM Governance Review – Phase Three (EDAM), Governance Review Comm. Final Proposal (Jan. 9, 2023), available at [EDAM-Governance-Final-Proposal-WEIM-Governance-Review-Committee-Phase-3.pdf \(westerneim.com\)](https://www.westerneim.com/EDAM-Governance-Final-Proposal-WEIM-Governance-Review-Committee-Phase-3.pdf)

# Western EIM RIF Roundtable – Looking Ahead to 2024

- September 13, 2023 RIF Meeting - CAISO presentation of 2024 approach and timing for Policy Initiatives Catalog and Roadmap and conceptual approach for roundtable discussed by RIF sector liaisons
- CAISO has identified engagement with stakeholders and integration of stakeholder priorities as one goal for Catalog and Roadmap process in 2024
  - Level-setting workshop will kick off 2024 process on Jan. 30
  - See [California ISO - Miscellaneous Stakeholder Meetings \(caiso.com\)](https://www.caiso.com/California-ISO-Miscellaneous-Stakeholder-Meetings)
- RIF targeting March 18, 2024, for roundtable (likely hybrid format)
  - Coincides with schedule for EIM Governing Body/CAISO Board of Governors meetings scheduled for same week
  - Will enable feedback on both Catalog and Roadmap
    - **January** – ISO holds level-setting stakeholder workshop
    - **February** – Stakeholders submit potential discretionary initiatives
    - **March** – Regional Issues Forum holds prioritization roundtable, ISO hosts stakeholder prioritization workshops
    - **April** – ISO publishes draft Catalog for stakeholder comment
    - **May** – ISO publishes final Annual Catalog
    - **September** – ISO publishes draft Roadmap for stakeholder comment
    - **December** – Present final Roadmap to ISO Board and WEIM Governing Body

# 2024 Roundtable – Stakeholder Input Requested

- Stakeholder engagement essential to successful roundtable process
- RIF sector liaisons will seek sector input in Q1 2024 in preparation for March 2024 roundtable meeting
- Questions for stakeholder consideration:
  - What processes do you suggest for the RIF to consider in conducting the roundtable?
  - How can the catalog be streamlined so that initiatives that have been addressed, can be resolved in another way, are no longer needed, or do not represent stakeholder priorities can be removed?
  - What are individual stakeholder or sector priorities for 2024 and longer term?
  - As a stakeholder, how can the RIF sector liaisons best facilitate your participation in the roundtable process?
    - Sector-level representation at the roundtable
    - Providing time at the roundtable meeting for individual stakeholders to express positions
- If you have views on these or other topics relating to the roundtable implementation, ***please communicate with your sector liaisons or RIF leadership***

# Questions?

Thank you

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## Indicative Polling By Regional Issue Forum on issue XYZ

Sector	Name	Organization	Email	Position	Yes	No	Abstain	Comment (limit to x characters)
<i>(Issue Description)</i>								
<b>WEIM Entities</b>					X			
<b>ISO PTOs</b>						X		
<b>Public Interest/Consumer Advocate</b>							X	
<b>Consumer Owned Utilities</b>					X			
<b>IPPs &amp; Power Marketers</b>						X		
<b>Federal PMAs</b>							X	