

# WESTERN ENERGY IMBALANCE MARKET (WEIM)

## Western EIM Regional Issues Forum Roundtable

Implementation Approaches and Requests for Stakeholder Input

Regional Issues Forum Meeting  
Sept. 12, 2023



# Background – Role of the RIF

- Discuss issues related to EIM, including those that are pending in a CAISO stakeholder process
  - Facilitate discussions and provide educational or informational content
  - Not means to duplicate or circumvent CAISO stakeholder processes
- Share opinions on issues regarding the EIM and relevant topics
  - May address topics suggested by CAISO
- Produce documents or opinions for the benefit of the EIM Governing Body or the CAISO
- Establish procedures and methods of operation to accomplish these purposes
- Provide reports at EIM Governing Body meetings
- Charter for EIM Governance, § 7, available at [CharterforEnergyImbalanceMarketGovernance.pdf](https://www.westerneim.com/CharterforEnergyImbalanceMarketGovernance.pdf) ([westerneim.com](https://www.westerneim.com)); see *also* Operating Guidelines, EIM Regional Issues Forum (Sept. 2021), available at [OperatingGuidelines-EIMRegionalIssuesForumRevisedSep2021.pdf](https://www.westerneim.com/OperatingGuidelines-EIMRegionalIssuesForumRevisedSep2021.pdf) ([westerneim.com](https://www.westerneim.com))

# Western EIM Governance Review – Phase 3 (EDAM)

- Reiterated existing authorities to collect stakeholder input and to produce written documents and opinions, including for pending CAISO initiatives
  - Encouraged transition from educational role to actively providing advisory input
  - Deferred to RIF for implementation of this authority
  - Urged CAISO staff support for transition and noted procedural challenges
    - Liaison and stakeholder constraints, process for obtaining sector and stakeholder authorization to articulate positions
- 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)

# EIM Governance Review (Continued)

- Established new role for RIF in prioritizing CAISO stakeholder initiatives
- Annual “roundtable” discussion to “kick off” annual policy roadmap process
  - Discussion of priorities with the CAISO’s set of discretionary initiatives
  - After the CAISO publishes the policy catalog, identifies those as required per FERC orders, and provides guidance regarding resource capacity to conduct discretionary stakeholder initiatives
  - Precedes CAISO management’s publication of its own proposed prioritization (*i.e.*, the policy roadmap)
- Sector liaison(s) to specify sector priorities and preferences, including statements as to sector consensus
  - Open to all stakeholder participants—all interested stakeholders, including representative of WEIM Body of State Regulators, encouraged to participate and share views
  - Intent for “give and take” discussion about relative priorities for initiatives
- RIF to determine process and implementation

# Western EIM RIF Roundtable – Looking Ahead to 2024

- Sector liaisons have been considering process and timing for roundtable
- Intent to align with CAISO procedures and cadence for annual policy initiatives catalog and roadmap process
  - Ideas may include bifurcating roundtable to enable input on catalog and roadmap
- Stakeholder input is requested
  - Communications with sector liaisons - see contacts at [WEIMRegionalIssuesForumSectorLiaison.pdf \(westerneim.com\)](https://www.westerneim.com/WEIMRegionalIssuesForumSectorLiaison.pdf)
- Goal = framework and process for roundtable by Q1 2024
  - Contingent on CAISO process and timing for 2024 catalog and roadmap development

# 2024 Policy Initiatives Catalog and Roadmap Roundtable Process

- Questions for stakeholder consideration:
  - What goals or improvements to the CAISO’s policy initiatives catalog and roadmap are needed or appropriate?
  - What processes do you suggest for the RIF to consider in conducting the roundtable?
  - Do you think the RIF should weigh in on the catalog and the roadmap, or just the roadmap?
  - How can the catalog be streamlined so that initiatives that have been addressed, are susceptible to resolution in another way, are no longer needed, or do not represent stakeholder priorities can be removed?
  - In considering the 2023 roadmap, are there initiatives that you think were prioritized appropriately or should have been de-emphasized? How does this impact priorities for purposes of the 2024 roadmap?
  - 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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