



California ISO

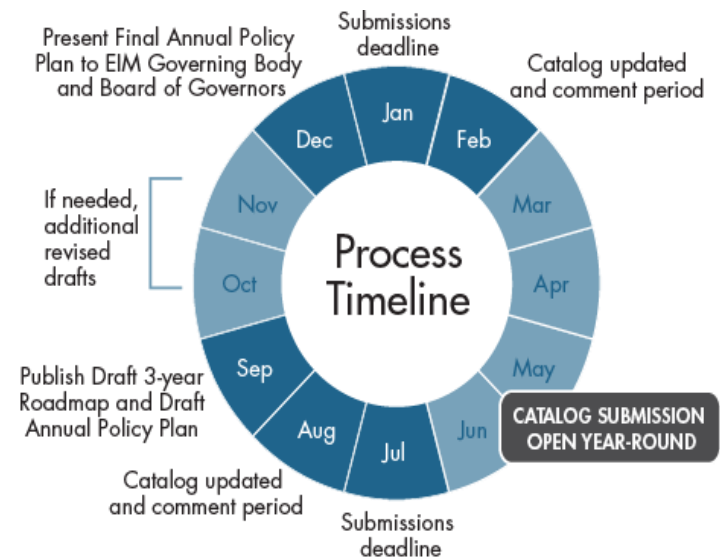
Process Update: Policy Initiatives Catalog & Roadmap

Regional Issues Forum

September 12, 2023

Current Catalog and Roadmap Process

- **Catalog:** Stakeholders submissions accepted on a rolling basis; Catalog is updated and published twice per year
- **Roadmap:** updated annually in the fall for the following three calendar years



There are opportunities to improve internal coordination and external engagement.

- **Internal planning is now focused on prioritization**
 - With suggestions for around 60 policy initiatives, the Catalog is unwieldy as an internal planning document.
 - Policy Roadmap should be coordinated with ISO Strategic Goals, Strategic Planning, Enterprise Roadmap, budget, and resources.
- **We want our policy efforts to reflect the shared priorities of our stakeholders**
 - Catalog feels like a laundry list; Stakeholders perceive Policy Roadmap as largely final.

Goals for new Catalog and Roadmap

- **Transparent**
 - Clear methods to identify & prioritize proposals
 - Fair access to ISO for all stakeholders
- **Aligned with internal planning processes**
 - Strategic goals, strategic and enterprise roadmaps
- **Focused scope**
 - Initiatives connect with ISO strategic goals, ISO capacity, and SH priorities
- **Incorporate urgent requests**
 - Allow for unexpected initiatives, scope changes, and timeline extensions
- **Meaningfully engage external stakeholders**
 - Integrate priorities from stakeholders, including RIF Roundtable

Policy Catalog and Roadmaps should be integrated with other internal planning processes.

- **Strategic goals** inform stakeholders of our vision for all our efforts and what comes into policy catalog process.
- Policy catalog and stakeholder input generally feeds into, as appropriate, our internal **strategic roadmap**.
- Internal **enterprise roadmap and budget and resource limitations** inform policy roadmap.

Stakeholders will have multiple touchpoints for input.

- **January** – Level-setting stakeholder workshops.
- **February** – Stakeholders submit potential discretionary initiatives.
- **March** – RIF holds prioritization roundtable, ISO hosts stakeholder prioritization workshops.
- **April** – Publish draft Catalog for stakeholder comment.
- **May** – Publish final Catalog.
- **September** – Publish draft Roadmap for stakeholder comment.
- **December** – Present final Roadmap to BOG/GB.

Catalog 2.0: Consolidate or Clean Slate?

Consolidate

- Stakeholders collectively prioritize and group existing initiatives.
- Internal and external stakeholders: ISO portfolio sponsors, RIF sector liaisons, and stakeholder working groups.

Clean Slate

- Start from scratch.
- Level-setting stakeholder workshop to frame ISO priorities.
- Stakeholders can re-submit previous proposals or new proposals aligned with ISO guidelines.

Goal: a Catalog document that is more relevant.

Next Steps

- **Mid-September 2023:** RIF feedback on the new catalog and roadmap processes.
- **October-November 2023:** Stakeholder meeting(s) to discuss and provide feedback on new process.
- **January 2024:** Kickoff annual new process.
- **March 2024:** RIF Roundtable and Stakeholder feedback on new catalog.
- **September 2024:** Draft Roadmap for stakeholder review.

Feedback?