



**BPA Strategic Plan
and
Pro Forma/Industry Standard Gap Analysis
Customer Workshop**

February 21, 2018

Customer Workshop Agenda

TIME	TOPIC	PRESENTERS
1:00 – 1:30	BPA Strategic Plan Opening Remarks	Michelle Manary/Rachel Dibble
1:30 – 2:30	Rollover Options	Laura Green/Tasha Bryan
2:30 – 3:00	Long Term Available Transfer Capability & Study	Bob King/Abbey Nulph
3:00 – 3:15	Wrap up	Rachel Dibble

BPA 2018-2023 Strategic Plan

Align BPA's open access transmission tariff with *pro forma* and industry best practices

- FERC created the *pro forma* tariff to standardize the terms and conditions for transmission service while providing flexibilities to efficiently and economically plan and operate the transmission system
- Although BPA is not subject to FERC, we believe there is value in adopting the *pro forma* tariff to the extent possible
- By offering an open access transmission service product portfolio that is consistent with industry standards, we will be able to proactively plan for the operations, maintenance and expansion of the transmission system to optimize our transmission assets.

WE ENERGIZE THE PACIFIC NORTHWEST

Transmission Value Proposition

Operating a High
Performing Grid

Enabling Economic
Growth in the Region

Providing Access to Federal
and Non-Federal Resources
And Markets

Through Excellence in Offering and Managing

Product Portfolio

Providing standardized options
Value-based price profiles
Drawing from integrated regional planning

Infrastructure

Advanced situational awareness
Right-sized investments in assets
Value and risk-based asset management

Long-Term Viability

Data-driven decision making
Integrated and efficient processes
Innovation and continuous improvement

A Dependable and Responsive Business Partner

BPA's *Pro Forma* Strategic Guidance

Since the strategy of the BPA Strategic Plan and Transmission Business Model is in alignment with the FERC *pro forma* tariff where practicable, the starting point for BPA's new tariff proposal is the FERC *pro forma* tariff. BPA will consider differences from the FERC *pro forma* tariff if the differences are based on at least one of the following:

- BPA's statutory and legal obligations, authorities, or responsibilities
- The reliable and efficient operation of the federal system
- Preventing significant harm or providing significant benefit to BPA's mission or the region
- The FERC *pro forma* tariff is lagging behind industry best practice, including instances of BPA setting the industry best practice

PFGA - Tariff Customer Meeting Schedule

February 21, 2018 (12pm-4pm)

- Rates Hearing Room & WebEx
- Topics
 - Workshop Series Kickoff
 - Queue Management: Rollover Policy
 - Long-Term Available Transfer Capability & Study Process: status update

March 13, 2018

- Conference Call & WebEx
- Topics
 - Generator/Load Information Requirements (formerly Source/Sink)
 - Unlimited Hourly Firm
 - Tariff Proceeding *
 - Tariff language review process

April 23, 2018, (9am-3pm)

- Rates Hearing Room & WebEx
- Topics
 - Network Transmission Service
 - Unlimited Hourly Firm
 - Ancillary Services
 - Tariff Proceeding
 - Section 9
 - Tariff language review update

May 29, 2018

- Conference Call & WebEx
- Topics
 - Long-Term Available Transfer Capability Method
 - Losses Methodology

June 26, 2018 (9am-3pm)

- Rates Hearing Room & WebEx
- Topics
 - Queue Management: Remainder Policy
 - Network Transmission Service
 - Long-Term Available Transfer Capability Method

July 24, 2018

- Conference Call & WebEx
- Topics
 - Long-Term Available Transfer Capability Base Case

August 21, 2018, (9am-3pm)

- Rates Hearing Room & WebEx
- Topics
 - Network Transmission Service
 - Tariff Proceeding
 - Final Tariff proposal

September 25, 2018, (9am-3pm)

- Rates Hearing Room & WebEx
- Topics
 - Network Transmission Service
 - Unlimited Hourly Firm

PFGA FY18 Roadmap

Initiatives	Solutions	FY18 Q1	FY18 Q2	FY18 Q3	FY18 Q4	
Queue Management	Revise Rollover & Reminders Policy	Proposed Rollover Policy presented to customers		Rollover Policy Customer Outreach	Submit Rollover Policy Tariff changes - Placeholder if Option B is chosen Determine Remainder Strategy	
	Revise Source Sink (Gen Load)	Revise Source Sink (Gen Load) Policy			Source Sink (Gen Load) Customer Outreach	Source Sink (Gen Load) Live
	ST & LT Rebids on Capacity Offering	Present ST Rebid offerings to PFGA Mgrs	Customer ST outreach: updated BP, tech forum notice & AE outreach	ST Rebids Offering Live	Present LT Rebid offerings to PFGA Mgrs	Customer LT outreach: updated BP, tech forum notice & AE outreach
Ancillary Services	Schedule 3, Schedule 9 and Schedule 3A/10 Changes	Finalize language for Schedule 3 (FERC speed and accuracy), Schedule 9 (Loss calculation & Generation imbalance service) & Schedule 3A/10 Balancing service				
		New language for Schedule 3, Schedule 9 and Schedule 3A/10 presented to Customers in Regional Stakeholders Process (part of 212 workshop)				
NT	Update NOA, conditional firm, Re-dispatch, manage load growth & process documentation	Conduct NOA, CF & load growth industry scans				
		Determine implications of scans on NOA & tariffs				
		Draft tariff language				
		Conduct resource assessment of service options			Review & apply eligibility criteria	
		Document NT service current state			Document NT service future state	
		Define new policy & procedures				
ST ATC	Develop ST ATC Improvements	Share operational improvements with customers	Best practices meeting w/TVA			
Losses	Explore Losses Methodology	Conduct industry scan & customer outreach				
		Determine New Loss Methodology for Tariff & Rate Case				
Study & LT ATC	Develop modified study process & more tools than build	Inform customers of commercial asmt timeline & SOA yr 1 pilot results	Develop internal gap closure actions for study follow through			
		Conduct SOA non-wires technical studies				Begin risk-informed commercial assessment
	Develop LT ATC Model Assumptions	Develop new LT ATC Methodology & share with customers				New ATC Base Case Update
Hourly Firm	Unlimited HF Alternatives	Analyze customer usage, power market impacts & posting accurate ATC		Develop alternatives with customer input		
Tariff Proceeding	Develop 212 Process	Propose 212 as Tariff Change Process (inform customers)		Identify Tariff Language and Customer Outreach		

Legend:

- text Not started
- text Green, On Track
- text Yellow, On Track w/Caution
- text Red, Behind Schedule
- text Blue, Work Complete