



May 9, 2016

Module 1: Overview of PJM Planning Process

Education provided by Paul McGlynn et al (~4 hours):

- RTEP Process Overview
- Assumptions/Criteria
- Stakeholder Process/Subregional/TEAC
- Window Process
 - Qualifications
 - Evaluation
 - Selection
- Board Oversight
 - Recommendations to the Board
 - Approval
- Post Approval Process
 - Filings
 - Cost Allocation
 - Designation/Construction responsibility
- Project Tracking
 - Schedule, Progress, Cost
- Supplemental, Baseline, Network Projects
- Detail and summarize the EOL linkages to the PJM RTEP
- Status quo of transparency and consistency

May 23, 2016

Module 2: Planning Criteria (TO Obligation)

Education provided by Exelon, Dominion, and possibly additional TOs (~2.5 hours):

- What is a Form 715? Detail Parts 1-6 and how you comport with the requirements? (Including instructions)
- What types of information (public and or confidential) and data is contained within a filing?
- Summarize – to the extent possible – which regions or companies utilize Form 715 as a vehicle for replacement of end of life assets
- NERC Criteria
- PJM Planning Criteria

- TO Local Planning Criteria, Individual TO Planning Criteria
- End of Life Criteria (what are considerations?)
- How does an individual company implement its criteria?

Module 3: Asset Management

Education provided by Exelon, Dominion, and possibly additional TOs (~4 hours):

- What is it? How is done throughout PJM? What is common? What is or may need to be specific to a region or company?
- How is asset management different from expansion planning? Why the difference?
- To what extent are asset management decisions coordinated with expansion planning decisions? When and why the need for coordination?
- In addition to end-of-life, what other needs are addressed through asset management? Why do some owners choose to address those needs through asset management constructs while others choose to address them through expansion planning constructs?
- Utility Decision Making for EOL
 - What are the elements of the decision making process? How is the decision made to maintain or replace?
 - Include discussion re Risk/ Corporate Risk Tolerance / Business judgment applied to risk acceptance versus useful lives of assets Exelon
 - Share principals of business judgment that weigh upon asset replacement (e.g. escalating costs of obsolescent maintenance items)
 - Business case considerations for repair, reinforcement, replacement or upgrading/uprating
 - Is there sufficient opportunity for the stakeholders to review and comment end of life projects?
 - Risk/ Corporate Risk Tolerance / Business judgement applied to risk acceptance versus useful lives of assets
 - Role of compliance and other regulatory requirements
 - Alternatives considered

June 3, 2016

Module 4: Understanding the PJM OATT, OA and related PJM agreements and their interplay with / separation from the CTOA

Education provided by PPL (on behalf of other TOs) and PJM (~2 hours):

- Understanding the duties, rights and obligations of signatories to the CTOA (Includes risk/obligations discussion)
- Where are we today?
 - e.g. Order 888, Order 890, Order 1000, Atlantic City decision

Module 5: Planning Process and Transparency

Education provided by Lisa McAlister (~2 hours):

- What does FERC say in past rules and orders?
- Discussion of Order 888, Order 890, Order 1000, FERC whitepaper, and recent issuances on guidance to orders

Module 6: Cost Recovery and Cost Allocation

Education provided by PSEG on behalf of other TOs (~2 hours utilities +1):

- What does it involve? Who is responsible / accountable for this?
- ER15-1387 – How does this most recent order guide our education sessions?
- What are the implications?
- What are the cost impacts that result from cost allocation? (impacts to regions, zones, PJM, PJM Members, Ratepayers)
- How are costs associated with Maintenance applied or affected?
- How are costs associated with capital projects applied or affected?
- For projects, whether triggered by the criteria, how/where are the costs recovered?

June 20, 2016

AEP-Specific Planning Criteria / Asset Management

Education provided by AEP (~2 hours tentative)

- AEP-specific planning criteria and asset management processes and activities