

# Integrated Marketplace Program Organization and Governance

March 6, 2012





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# Marketplace Program Governance

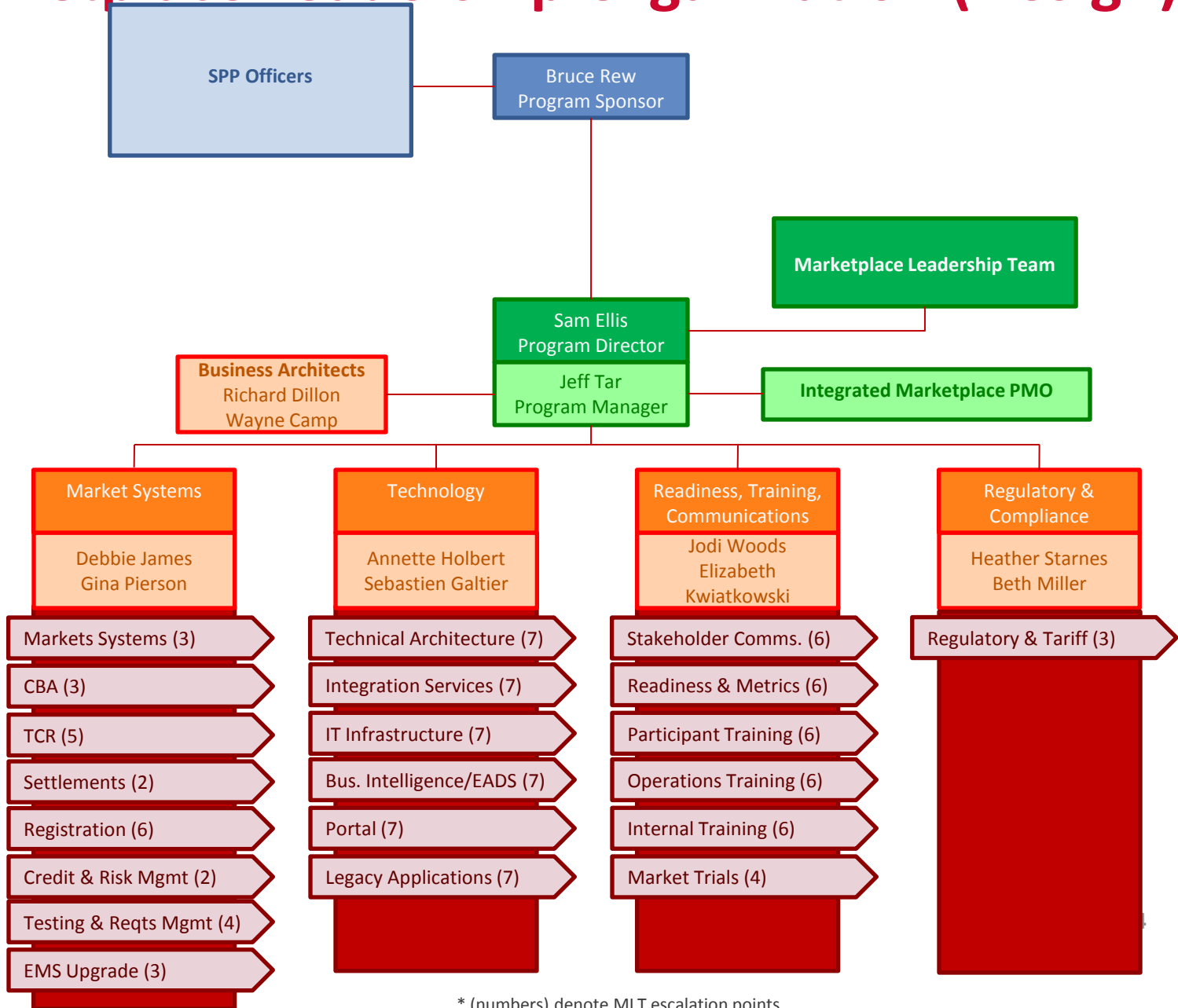
The purpose of this document is to define the governance structure of the Integrated Marketplace (Marketplace) Program.

Governance is NOT just for management level roles. It is critical at all levels of a program and is required to ensure the correct assignment of ownership and responsibility.

A properly defined governance structure will provide the following benefits:

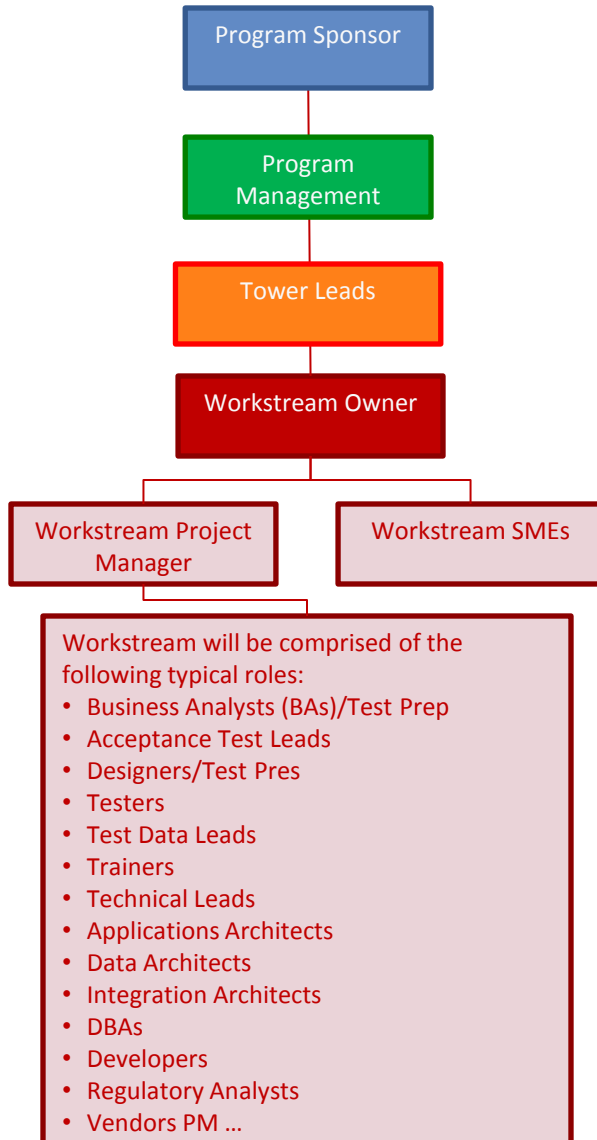
- Reduces ambiguity in roles and responsibilities
- Provides for more timely and balanced decision making
- Naturally balances business outcomes with Program budget and schedule targets
- Facilitates knowledge transition
- Increases ownership and acceptance of program/project outcomes

# Marketplace Leadership Organization (Design)



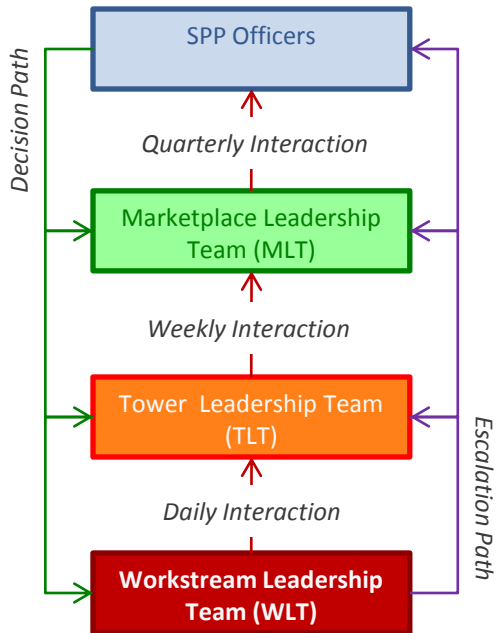
\* (numbers) denote MLT escalation points

# Marketplace Workstream Organization Model

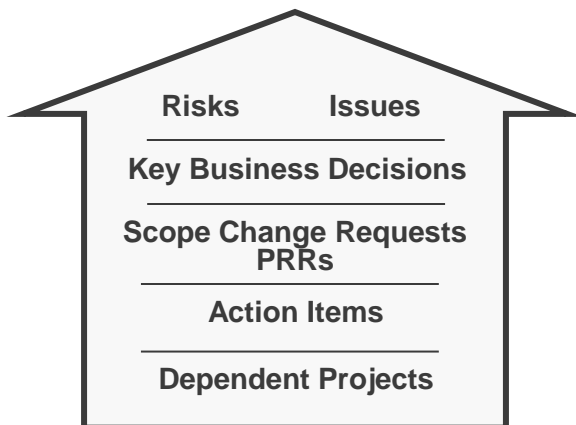


- ✓ **Program Management** is responsible for the overall delivery of the Program based on the specified scope, schedule, and budget
- ✓ **Tower Leads** serve as an escalation point for the 18 Workstreams and facilitate cross-workstream coordination and communications
- ✓ **Workstream Owner** is responsible for delivering the Workstreams' capabilities on time, within budget and to the defined scope
- ✓ **Workstream Functional Leads/PM** is responsible for workstream execution and delivery of outcomes
- ✓ **Workstream SMEs** work with Functional Leads to provide deep industry, system, and vendor expertise; assist with cross-tower and cross-workstream issues; participate in Scope Change analysis
- ✓ **Workstream Roles**, for a complete list of Workstream roles, please see the "SPP Integrated Marketplace Roles & Responsibilities"

# Marketplace Program Escalation Routes



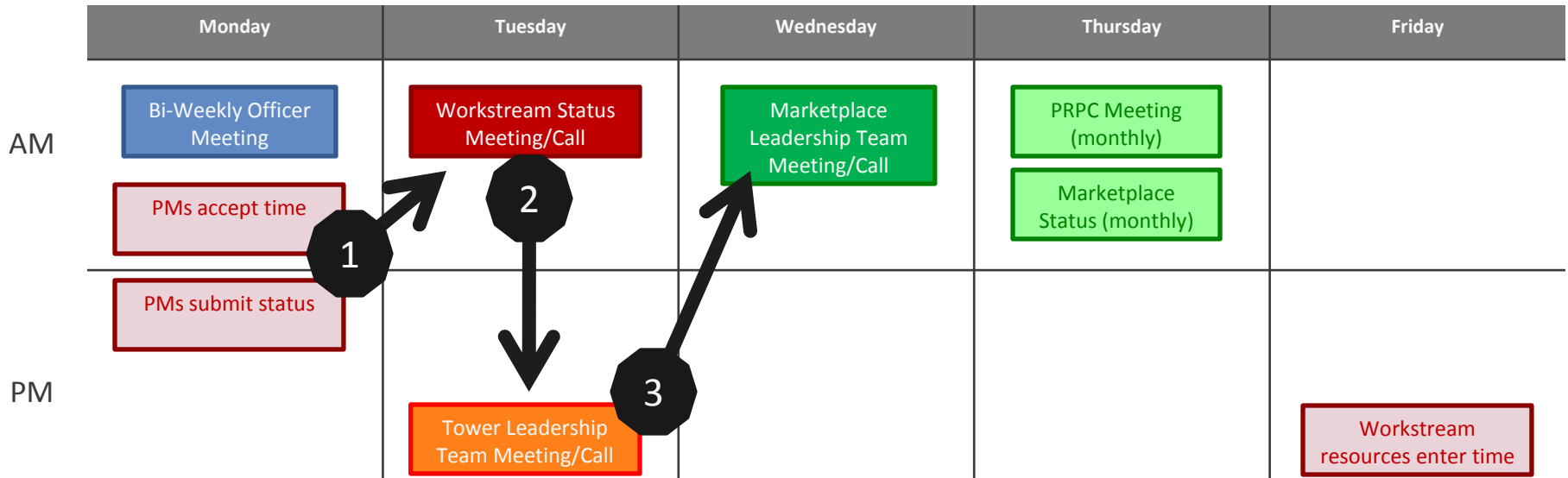
Moderated By	Purpose	Meeting Schedule
Bruce Rew, Program Sponsor	Communicate Marketplace Program status (schedule, budget), escalate issues requiring ESC action, and receive directional feedback from SPP Officers.	Quarterly, Monday (am)
Sam Ellis, Program Director	Address escalated actions items, key program decisions, risks, and issues	Wednesdays, 9a
Jeff Tar, Program Manager	Address action items, key program decisions, milestones, dependencies, risks, and issues	Tuesdays 3p
Tower Leads	Communicate deliverable status, identify issues affecting workstream progress and risks that could impact progress; identify escalation items	Tuesday morning



# Marketplace Weekly Meeting Cadence

The Program follows the “2-Meeting Rule” such that leads should only have to attend 2 status meetings:

- 1 meeting where they *hear* status
- 1 meeting where they *escalate* issues, risks, actions items, etc.
- The following status meetings (Workstream Status, Tower Leadership Status, Marketplace Status) will alternate between face-to-face and conference call



# Marketplace Program Meetings (1 of 2)

Meeting	Host	Attendees	Purpose	Frequency	Inputs
<b>Marketplace Leadership Team (MLT) Meeting</b>	Sam Ellis, Program Director	<ul style="list-style-type: none"> <li>Marketplace Leadership Team</li> <li>Bruce Rew (optional)</li> </ul>	Address escalated actions items, key program decisions, risks, and issues	Wednesdays, 9a	<ul style="list-style-type: none"> <li>Key Decision Log</li> <li>Action Item Log</li> <li>Risk Log</li> <li>Issue Log</li> <li>Program Workplan</li> </ul>
<b>Tower Leadership Team (TLT) Meeting</b>	Jeff Tar, Program Manager	<ul style="list-style-type: none"> <li>Tower Leadership Team</li> <li>Sam Ellis (Optional)</li> </ul>	Address action items, key program decisions, milestones, dependencies, risks, and issues	Tuesdays, 3p	<ul style="list-style-type: none"> <li>Key Decision Log</li> <li>Action Item Log</li> <li>Risk Log</li> <li>Issue Log</li> <li>Program Workplan</li> </ul>
<b>Workstream Leadership Team (TLT) Meeting</b>	Tower Leads	<ul style="list-style-type: none"> <li>Workstream Functional Leads/PMs</li> <li>Workstream Owners (optional)</li> </ul>	Address key program decisions, milestones, dependencies, risks, issues	Tuesday mornings	<ul style="list-style-type: none"> <li>Key Decision Log</li> <li>Action Item Log</li> <li>Risk Log</li> <li>Issue Log</li> <li>Program Workplan</li> </ul>
<b>Workstream Status</b>	Workstream Functional Leads	<ul style="list-style-type: none"> <li>Workstream Functional Leads</li> <li>Vendor PMs</li> <li>Team members</li> <li>Workstream Owner (optional)</li> </ul>	<ul style="list-style-type: none"> <li>Communicate progress &amp; deliverable status</li> <li>Identify issues affecting workstream progress</li> <li>Raise risks that could impact progress</li> <li>Identify escalation items</li> </ul>	Daily Stand-ups with Status Report complete EOD Fridays	<ul style="list-style-type: none"> <li>Workstream Scorecard</li> <li>Workstream Issue Log</li> <li>Workstream Risk Log</li> <li>Workstream Milestones &amp; Dependencies</li> <li>Workstream Workplan</li> </ul>
<b>Marketplace Program Status</b>	Jeff Tar, Program Manger	<ul style="list-style-type: none"> <li>Workstream Functional Leads</li> <li>Workstream Owners</li> <li>SPP Organization Reps</li> <li>Vendor PMs</li> </ul>	Communicate Marketplace Program status	Monthly (week 1); Thursdays 1030a	<ul style="list-style-type: none"> <li>Program Scorecard w/Program Status Package</li> </ul>
<b>Marketplace Change Control Board (CCB)</b>	Marketplace PMO Lead	<ul style="list-style-type: none"> <li>CCB Members</li> <li>SCR Owner</li> </ul>	Review new and existing Scope Change Requests (SCRs)	Varies by Phase	SCR Log



# Marketplace Program Meetings (2 of 2)

Meeting	Host	Attendees	Purpose	Frequency	Inputs
SPP PRPC Meeting	Tom Carnes, SPP PMO Lead	<ul style="list-style-type: none"><li>• Directors</li><li>• Functional Leads</li><li>• Project Managers</li></ul>	<ul style="list-style-type: none"><li>• Review status of existing programs and projects</li><li>• Rank prospective programs and projects</li></ul>	Mont (week 1) Thursdays, 815a	PRPC Project (Workstream) Status Reports
SPP Officers Meeting	Bruce Rew, Program Sponsor	<ul style="list-style-type: none"><li>• SPP Officers</li><li>• Program Director</li><li>• Program Manager (optional)</li></ul>	<ul style="list-style-type: none"><li>• Communicate Marketplace Program status (schedule, budget)</li><li>• Escalate items requiring ESC action</li><li>• Officers to provide executive advise and direction to the Program Sponsor and Program Director</li></ul>	Quarterly	<ul style="list-style-type: none"><li>• Program Scorecard w/Financials</li></ul>

# Appendix A: Program Roles

The Marketplace Program organization includes the following governance roles necessary to deliver a set of business capabilities with considerations for process, technology and people:

- Program Director
- Program Manager
- Marketplace Leadership Team (MLT)
- Tower Leadership Team (TLT)
  - Market System Tower Leads
  - Technology Tower Leads
  - Readiness, Training and Communications Tower Leads
  - Regulatory & Compliance Tower Leads
- Workstream Owner
- Workstream Project Manager
- Marketplace SMEs
- Marketplace Business Architect
- Marketplace Change Control Board (CCB)

For a complete list of Marketplace roles, please see the “SPP Integrated Marketplace Roles & Responsibilities”

# Program Director & Program Manager

The Program Director and Program Manager are jointly responsible for:

- ✓ The overall delivery of the Program based on the specified scope, schedule, and budget
- ✓ The Program functions and processes

The Program Director (Sam Ellis) manages and communicates upward—to the Program Sponsor, SPP Officers, Board of Directors, and external stakeholders—to ensure that they have the necessary information to execute their roles.

The Program Manager (Jeff Tar) manages and communicates upward as-needed, and downward to the Towers and Workstreams to ensure optimal execution of the overall program.

# Marketplace Leadership Team

The Marketplace Leadership Team (MLT) is responsible for:

- ✓ Both a steering committee and a “driving” committee
- ✓ Accountable for aspects of the program
- ✓ Provide feedback and recommendation
- ✓ Addressing escalated actions items, key program decisions, risks, and issues
- ✓ The MLT is comprised of:
  - Sam Ellis (Chair)
  - Dianne Branch
  - Philip Bruich
  - Michael Desselle
  - Richard Dillon
  - Jeff Tar
  - Reed Thornton

# Tower Leadership Team

The Tower Leadership Team (TLT) serves as an escalation point for the 18 Workstreams and facilitate cross-workstream coordination and communications.

- ✓ Market Systems:
  - Debbie James
  - Gina Pierson
- ✓ Technology:
  - Annette Holbert
  - Sebastien Galtier
- ✓ Readiness, Training and Communications:
  - Jodi Woods
  - Elizabeth Aguilar
- Regulatory & Compliance:
  - Heather Starnes
  - Beth Miller
- Business Architects:
  - Richard Dillon
  - Wayne Camp

# Market Systems Tower Leads

The Market Systems Tower Leads (Debbie James, Gina Pierson) are responsible for:

- ✓ Working with Functional Leads and vendors to design and test software configurations and customizations
- ✓ Analyzing business process designs to identify integration requirements
- ✓ Facilitating design sessions with vendors and SPP IT
- ✓ Collaborating with interfacing workstreams to ensure cross-workstream communication
- ✓ Identifying and communicate any cross-workstream issues that affect other program areas
- ✓ Validating that requirements meet overall business process needs, are within the project scope, and are internally consistent
- ✓ Participating in and executing quality management reviews
- ✓ Provides status to the Program Manager
- ✓ Reports to the Program Director

# Technology Tower Leads

The Technology Tower Leads (Annette Holbert, Sebastien Galtier) are responsible for:

- ✓ Leading and managing the Technology team members
- ✓ Leading the application and technical architecture analysis, design, and implementation, and ensuring that the product fulfills the requirements
- ✓ Working with the Markets Systems tower to define technical requirements
- ✓ Understanding the capabilities and limitations of the vendors' products
- ✓ Leading the Technical Architecture analysis and ensuring that the product(s) fulfills the requirements. When applicable, working with the solution architect.
- ✓ Creating an inventory of services and "black boxes" related to the Marketplace
- ✓ Define the interaction and interfaces between services and "black boxes"
- ✓ Reviewing application and technical architecture deliverables to ensure quality and requirement traceability
- ✓ Identifying and communicating any cross-workstream issues that affect other program areas
- ✓ Leading and directing the development of Technology Blueprint
- ✓ Owning the design, build, and test of all technical architecture components/solutions (e.g., execution architecture solution, operations architecture solutions, and development architecture solutions)
- ✓ Validating design with the stakeholders to ensure that the design satisfies the requirements
- ✓ Provides status to the Program Manager
- ✓ Reports to the Program Director

# Readiness, Training & Comms Tower Leads

The Readiness, Training, and Communications Leads (Jim Gunnell, Elizabeth Kwiatkowski) are responsible for:

- ✓ Leading and managing the Readiness, Training and Communications resources
- ✓ Owning the readiness of “People, Processes and Technology” for SPP and its members
- ✓ Identifying and communicate any cross-workstream issues that affect other program areas
- ✓ Validating that requirements meet overall business process needs, are within the project scope, and are internally consistent
- ✓ Participating in and executing quality management reviews
- ✓ Provides status to the Program Manager
- ✓ Reports to the Program Director



# Regulatory & Compliance Tower Leads

The Regulatory & Compliance Leads (Heather Starnes, Beth Miller) are responsible for:

- ✓ Leading and managing the regulatory, tariff, and compliance resources
- ✓ Create and manage filing of the Integrated Marketplace regulatory items, including updates to SPP Tariff based on Markets Protocols
- ✓ Coordinates and analyzes the impact of future regulatory changes with the market design, and any appropriate workstreams
- ✓ Provides Integrated Marketplace training for regulatory employees
- ✓ Communicates with federal and state regulatory entities, and support of the “Markets Readiness” workstream for regulatory matters.
- ✓ Identifying and communicate any cross-workstream issues that affect other program areas
- ✓ Provides status to the Program Manager
- ✓ Reports to the Program Director

# Workstream Owner

The Workstream Owners is responsible for:

- ✓ Delivering the Workstream's capabilities on time, within budget and to the defined scope
- ✓ Communicating the Workstream's objectives, scope, schedule, policies, and procedures to their workstream
- ✓ Resolving Workstream Issues—escalating to the Program as needed
- ✓ Mitigating Workstream Risks—escalating to the Program as needed
- ✓ Identifying, with the Workstream Functional Leads, the Workstream's milestones and dependencies
- ✓ Participating in regular Workstream Owner meetings to resolve and mitigate Program issues and risks
- ✓ Reports to Tower Lead

# Workstream Project Manager

The Workstream Project Manager is responsible for:

- ✓ Ensuring that the deliverables created by the workstream are of high quality, add value, and contribute to the Program's success
- ✓ Using acceptable project management practices, adhering to the processes instituted by the PMO to effectively plan and accomplish the work
- ✓ Responsible for workstream execution and delivery of outcomes
- ✓ Managing workstream scope and work plan
- ✓ Facilitating communications, activities and dependencies across enabling projects and dependent workstreams
- ✓ Managing workstream Issues—escalating to the PMO as required
- ✓ Managing workstream Risks and develops mitigation strategies—escalating to PMO as needed
- ✓ Responsible for obtaining appropriate sign-off for deliverables
- ✓ Managing workstream resources
- ✓ Providing the actual and projected metrics through workstream-level reports

# Workstream SMEs

The Workstream SMEs are responsible for:

- ✓ Acting as an application architect, with responsibilities across all functional, business and technical workstreams
- ✓ Working with Functional Leads and vendors to design software configurations and customizations
- ✓ Analyzing business process designs to identify integration requirements
- ✓ Validating that scope change requests meet overall business process needs
- ✓ Participating in and executing quality management reviews
- ✓ Reports to the Program Director

# Marketplace Business Architect

The Marketplace Business Architect is responsible for:

- ✓ Acting as a marketplace solution architect with responsibilities across all towers (breadth) and workstreams (depth)
- ✓ Working with Workstream Functional Leads, Workstream SMEs, and vendors to design software configurations and customizations
- ✓ Analyzing business process designs to identify integration requirements
- ✓ Participating in and executing quality management reviews
- ✓ Validating that scope change requests meet overall marketplace solution
- ✓ Validating that key business and program decisions align to Marketplace Design (protocols)
- ✓ Vetting key program and business decisions against industry best practices
- ✓ Participates in Tower Leadership Meetings
- ✓ Reports to the Program Director and Program Manager

# Marketplace Change Control Board (CCB)

The Marketplace CCB is responsible for:

- ✓ Ensure that the impact of SCRs has been fully vetted
- ✓ Approving SCRs that fit within the Integrated Marketplace budget and schedule
- ✓ Recommending SCRs that require additional budget or have impact to schedule for approval to Program Director
- ✓ Deferring SCRs to be included in future Integrated Marketplace Releases
- ✓ Rejecting SCRs that do not fit within the Integrated Marketplace scope and solution
- ✓ Communicate SCR decisions to their organization
- ✓ The CCB will be comprised of the following members with additional members to be invited as-needed:
  - ✓ Program Director
  - ✓ Program Manager
  - ✓ Tower Leadership Team
  - ✓ Marketplace Leadership Team
  - ✓ Project Managers and SMEs as needed

# Appendix B: Workstreams Details

- The Integrated Marketplace Program Management Office (PMO) manages the delivery of the Integrated Marketplace systems within SPP, including:
  - New Markets (Day-Ahead, Operating Reserve)
  - Consolidated Balancing Authority (CBA)
  - Transmission Congestion Rights (TCRs)
  - Settlements
  - Business Intelligence (BI)
- The Marketplace Program structure will evolve throughout the program delivery lifecycle
- The following section describes the workstreams under Marketplace Program, including:
  - Phase(s) in which the workstream will be active
  - Business Capability Area(s) the workstream addresses
  - Workstream Owner responsible for the delivery of the scope of work
  - Scope of work to be completed by the Worksteam

# Marketplace Program Workstream Model

Markets	CBA	TCRs	Settlements	Credit & Risk	BI	Registration
Program Management						
Stakeholder Communications						
Regulatory & Tariff						
Technical Architecture						
IT Infrastructure						
Integration Services						
Legacy Applications						
EMS Upgrade						
Testing & Requirements Management						
Market Trials						
Internal Training						
Participant Training						
Operations Training						
Readiness & Metrics						



# Market Systems

<b>Business Capability Area(s)</b>	08 Market Management 09 Market Operations Support 10 Market Monitoring 11 Market Design
<b>Owner</b>	Casey Cathey
<b>Project Manager</b>	Lawson Arnett

- **Scope: Implement the business and systems changes in support for the Integrated Marketplace's core market functionalities, including:**
  - Day-Ahead, Real Time Balancing and Operating Reserves Markets
  - Reliability Unit Commitment function
  - Integration with TCR
  - Maintaining designs/protocols with Market Working Group
  - Maintain Business Process Designs impacted by Integrated Marketplace
  - Educating and communicating Marketplace business design, and progress-to-date (board of directors, MOPC, working groups, regulatory agencies) during requirement phase of the program.
  - Coordination with "Regulatory & Tariff" of tariff review by MWG
- This workstream includes managing the vendor project teams for the components related to Markets systems (e.g. Alstom Markets System) , and Acceptance Testing activities.

# Consolidated Balancing Authority (CBA)

<b>Business Capability Area(s)</b>	07 Consolidated Balancing Authority 11 Market Design
<b>Owner</b>	Shari Brown
<b>Project Manager</b>	Beth Miller

- **Scope: Implement the business and systems changes in support for the Integrated Marketplace' Consolidated Balancing Authority functionalities, including:**
  - CBA business processes
  - Outage scheduling processes
  - Changes in EMS system for CBA functionalities
  - Changes in Outage Scheduling system for CBA functionalities
  - Balancing Authority certification
- This workstream includes managing the vendor project teams for the components related to CBA (e.g. Alstom EMS, Outage scheduler vendor), and Acceptance Testing activities.
- This workstream will integrate with the Market Implementation project and Systems Integration vendor activities.

# Transmission Congestion Rights (TCR)

<b>Business Capability Area(s)</b>	17 TCRs 18 Service Development 19 IT Governance 20 Service Delivery
<b>Owner</b>	Mak Nagle
<b>Project Manager</b>	Brett Crane

- **Scope: Implement the Transmission Congestion Rights business functionality and supporting systems, including:**
  - Execution of mock TCR auctions (stand-alone models)
  - Identification, deployment and management of Integrated and stand-alone TCR models within SPP
- This workstream includes managing the vendor project teams for the components related to TCRs (e.g. Nexant TCR solution) , and Acceptance Testing activities.
- This workstream will integrate with the Market Implementation and Systems Integration vendors activities.

# Settlements

<b>Business Capability Area(s)</b>	08 Market Management 12 Settlements and Billing 17 TCRs
<b>Owner</b>	Tony Alexander
<b>Project Manager</b>	Ashley Churilla

- **Scope: Implement the Settlements business and systems changes in support for Integrated Marketplace, including markets and TCRs functions and settlements data pre-processing, processing and publishing.**
- **This workstream includes managing the vendor project teams for the components related to Settlements (e.g. Alstom eTS) , and Acceptance Testing activities.**
- **This workstream will integrate with the Market Implementation project and Systems Integration vendors activities.**

# Credit & Risk Management

<b>Business Capability Area(s)</b>	08 Market Management 12 Settlements and Billing 29 Finance and Administration 31 Credit Management
<b>Owner</b>	Tom Dunn
<b>Project Manager</b>	Chuck Jennings

- **Scope: Implement the Risk Management and Credit business and systems changes in support for Integrated Marketplace, including**
  - **Integration with markets, settlements and TCRs functions and related workstreams**
  - **Modification to the current Risk Management & Credit tools and/or selection of new tools**

# Business Intelligence

<b>Business Capability Area(s)</b>	10 Market Monitoring 14 Information Service Provision 18 Service Development 20 Service Delivery 28 Compliance
<b>Owner</b>	Alan McQueen
<b>Project Manager</b>	Kirk Anderson

- **Scope: Implement the internal and external business intelligence components of Integrated Marketplace, including:**
  - Reporting
  - Data Warehousing
  - Data analytics and correlation
  - Data management
- **This workstream will integrate with the Market Implementation project and Systems Integration vendors activities.**

# Registration

<b>Business Capability Area(s)</b>	01 Operations Support 09 Market Operations Support 13 Customer Service 16 Planning & Engineering
<b>Owner</b>	RJ Robertson
<b>Project Manager</b>	Ginny Watson

- **Scope: Manage the roll-out of the market registration process, and resulting model updates, including:**
  - Commercial model
  - TCR model
  - Physical model

# Program Management

<b>Business Capability Area(s)</b>	11 Market Design 26 Program Management
<b>Program Director</b>	Sam Ellis
<b>Program Manager</b>	Jeff Tar

- **Scope: Manage the delivery of the Integrated Marketplace Program, including Markets, CBA, TCRs and Settlements business areas and supporting processes and systems, including the following management areas:**
  - **Governance**
  - **Scope, Release, Work Plan and Time**
  - **Performance & Reporting**
  - **Issue & Risk, Quality**
  - **Resource**
  - **Deliverables**
  - **Contract and Financial Management**
  - **Stakeholder Expectations**
  - **Vendor (with support from SPP Vendor Manager)**
  - **Communication (with support from SPP Communications Specialist)**



# Stakeholder Communications

<b>Business Capability Area(s)</b>	23 Communications
<b>Owner</b>	Tom Kleckner

- **Scope: Manage Integrated Marketplace communications to stakeholders, including:**
  - MOPC and working groups
  - Board of Director
  - Regulatory entities

# Regulatory & Tariff

<b>Business Capability Area(s)</b>	22 Legal and Regulatory
<b>Owner</b>	Heather Starnes
<b>Project Manager</b>	Beth Miller

- **Scope: Create and manage all necessary FERC and state filings related to the Integrated Marketplace**
- **This workstream also coordinates and analyze the impact of future regulatory changes with the market design, and any appropriate workstreams**
- **This workstream will provide Integrated Marketplace training for regulatory employees**
- **This workstream includes communications with federal and state regulatory entities, and support of the “Markets Readiness” workstream for regulatory matters.**

# Technical Architecture

<b>Business Capability Area(s)</b>	11 Market Design 18 Service Development 19 IT Governance 20 Service Delivery
<b>Owner</b>	Annette Holbert
<b>Project Manager</b>	Bob Cicalese

- **Scope: Design and manage the technical architecture for Integrated Marketplace systems, including:**
  - Requirements analysis for technical characteristics
  - Business processes to services matrix
  - Architecture specifications for application, integration and service-oriented architecture (SOA)
  - Application disposition plan
  - Oversee implementation of the components of development, operation and execution architectures
- **This workstream will integrate with the Market Implementation project and Integrated Marketplace Systems Integration activities.**

# IT Infrastructure

<b>Business Capability Area(s)</b>	01 Operations Support 09 Market Operations Support 16 Planning & Engineering
<b>Owner</b>	Tom Burdick
<b>Project Manager</b>	Robert Juergens

- **Scope: Deployment and management of the IT infrastructure in support of the Integrated Marketplace program, including:**
  - Data center facilities, Tests lab and Operations desks setup
  - Development environments (local and remote)
  - Test environments (Test, ITE and QA)
  - Future production and disaster recovery environments (Prod, DR)
  - Network services
  - Desktop support
  - Backup/restore and DR services
  - Release management

# Integration Services

<b>Business Capability Area(s)</b>	14 Information Service Provision 18 Service Development 20 Service Delivery
<b>Owner</b>	Annette Holbert
<b>Project Manager</b>	Bob Cicalese

- **Scope: Design and implement business and system integration services for the Integrated Marketplace systems, including:**
  - Data flow
  - Orchestration
  - Services / integration unit testing
  - Connectivity (internal and external)
- This workstream will integrate with the Market Implementation project and Systems Integration vendors activities.

# Legacy Applications

<b>Business Capability Area(s)</b>	18 Service Development
<b>Owner</b>	Angelica Ivester
<b>Project Manager</b>	Dena Giessmann

- **Scope: This workstream will address changes to the following SPP applications:**
  - AFC Coordination
  - JOA
  - JAMS (Job Scheduling Activity)
  - Windows Scheduler
  - AF C Coordination NSI
  - Corporate Web - member-facing/member-impacting
  - SDA File Parser (Security Data Applications) - member-facing/member-impacting
  - SDX NERC Report (System Data Exchange)
  - SENDS - member-facing/member-impacting
  - SPP Studies - member-facing/member-impacting

# EMS Upgrade

<b>Business Capability Area(s)</b>	TBD
<b>Owner</b>	Scott Aclin
<b>Project Manager</b>	Elizabeth Solano

- **Scope:** Deliver an EMS 2.5 development environment along with a DTS 2.5 that will be used for the Integrated Marketplace and its related projects to test and validate EMS system changes and interfaces. This workstream does not include RTGEN changes for CBA.

# Testing & Requirements Management

<b>Business Capability Area(s)</b>	18 Service Development 20 Service Delivery
<b>Owner</b>	Rebecca Sanders
<b>Project Manager (Testing)</b>	Michael Fisher
<b>Project Manager (Reqs)</b>	Michael Davis

- **Scope: Maintain baselined requirements and requirements traceability matrix through Design, Build, Test phases as well as complete the following testing activities for the Integrated Marketplace systems:**
  - **System Integration Testing**
  - **Functional Integration Testing**
  - **Performance Testing**
  - **IT Operations Readiness Testing**
  - **Testing metrics reporting for the associated test phases**
  - **Test Data Management**



# Market Trials

<b>Business Capability Area(s)</b>	11 Market Design 13 Customer Service 15 Training 18 Service Development
<b>Owner</b>	TBD
<b>Project Manager</b>	TBD

- **Scope: Manage the execution of the Integrated Marketplace Trials, including:**
  - Definition of Market Trials phases
  - Definition of trials testing scenarios
  - Interaction with SPP market participants, including support during Trials execution
  - Interaction with SPP market support and IT

# Internal Training

<b>Business Capability Area(s)</b>	15 Training
<b>Owner</b>	Gay Anthony
<b>Project Manager</b>	Diana Arthur

- **Scope: Manage training capabilities related to Integrated Marketplace Program, including:**
  - Identification of functional areas within SPP directly impacted by the Integrated Marketplace
  - Identification of processes within each functional area related to the Integrated Marketplace
  - Identification of market-related tasks performed by SPP personnel
  - Identification of knowledge and performance gaps
  - Creation, delivery and assessment of task-driven Integrated Marketplace training

# Participant Training

<b>Business Capability Area(s)</b>	15 Training
<b>Owner</b>	Gay Anthony
<b>Project Manager</b>	Diana Arthur

- **Scope: Manage training capabilities related to Integrated Marketplace Program, including:**
  - Identification of functional areas within SPP market participant companies directly impacted by the Integrated Marketplace
  - Identification of processes within each functional area related to the Integrated Marketplace
  - Identification of market-related tasks performed by market participants
  - Identification of knowledge and performance gaps
  - Creation, delivery and assessment of task-driven Integrated Marketplace training

# Operations Training

<b>Business Capability Area(s)</b>	15 Training
<b>Owner</b>	Carl Stelly
<b>Project Manager</b>	Diana Arthur

- **Scope: Manage training capabilities related to Integrated Marketplace Program, including:**
  - Identification of functional areas within SPP directly impacted by the Integrated Marketplace
  - Identification of processes within each functional area related to the Integrated Marketplace
  - Identification of market-related tasks performed by SPP personnel
  - Identification of knowledge and performance gaps
  - Creation, delivery and assessment of task-driven Integrated Marketplace training

# Readiness & Metrics

<b>Business Capability Area(s)</b>	13 Customer Service 14 Information Service Provision
<b>Owner</b>	Jodi Woods
<b>Project Manager</b>	Elizabeth Aguilar
<b>CWG Liaison</b>	Erin Jester

- **Scope: Manage market readiness capabilities related to Integrated Marketplace, including:**
  - **Definition of internal and external readiness criteria for Integrated Marketplace (including CBA)**
  - **Assistance to SPP business units with internal readiness**
  - **Assistance to Market participants with market readiness**
  - **Internal audit, compliance and security readiness (with assistance from Regulatory & Tariff Workstream)**