



Member Impacting Program Overview

The Strategic and Creative Re- engineering of Integrated Planning Team (SCRIPT) Program

REVISION HISTORY

DATE OR VERSION NUMBER	AUTHOR	CHANGE DESCRIPTION
09/26/2024 / v1.0	SPP Project Team	Initial Version for Hosting Capacity Tool Roll Out
<u>12/06/2024 / v2.0</u>	<u>SPP Project Team</u>	<u>Updates to timeline for the Hosting Capacity Tool (HCT) Roll Out</u> <u>Information added for updates to the GI Queue table</u>

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EXECUTIVE SUMMARY

This initiative is being managed as a program, a set of related projects, to obtain visibility and other benefits not available from managing the projects independently. This document will serve as the member impacting program overview (MIPO) for all projects within the program's scope vs. having separate MIPOs for each.

Certain elements of the MIPO will apply across all projects within the program, as described in the **Program-Level Information** section below. Other components will be specific to individual projects, as described in the **Project-Level Information** section below.

NOTE

In this document the term "members" refers to any and all stakeholders, which could include market participants, members, customers, transmission owners, vendors, etc.

ABOUT THIS PROGRAM

In 2020, the Southwest Power Pool (SPP) board of directors formed the Strategic and Creative Re-engineering of Integrated Planning Team (SCRIPT) and directed it to recommend broad changes to SPP's transmission planning processes that would better meet customer needs while resolving concerns about the nature of transmission investment amid rapid industry changes.

In a 109 page report, the SCRIPT documented 35 recommendations and 11 sub-recommendations for business practices, policies and tariff revisions to consolidate planning processes, improve services processes, optimize SPP's transmission network, improve decision quality, facilitate beneficial interregional energy transfers and improve cost-sharing.

One set of recommendations is interdependent, working together to form a consolidated planning process. These overarching **Consolidation** policy recommendations combine, modify or eliminate transmission planning and study processes to:

- Develop more optimal solutions that meet a broader set of customer needs
- Align analysis so beneficiaries and cost-causers are identified holistically
- Improve planning efficiency, effectiveness and timeliness
- Reduce the number of model sets needed
- Reduce reliance on customer-requested, queue-driven studies

Successful development and implementation of the recommendations are expected to lower costs of SPP's planning processes by more than \$3 million and to create more equitable cost sharing, increase economic benefits, open new markets for energy, create more timely process and enhance reliability and grid resiliency.

PROGRAM-LEVEL INFORMATION

BUSINESS IMPACT

SPP Transmission Planning and Cost Allocation processes

Attachment O of the SPP Open Access Transmission Tariff (OATT) describes SPP's transmission expansion planning processes. Seven different planning processes are described in Attachment O; the performance of any of these could result in transmission upgrades being directed for construction by SPP and included in the SPP Transmission Expansion Plan (STEP). These include:

1. Integrated Transmission Plan (ITP)
2. High Priority
3. Balanced Portfolio
4. Transmission Service, including the Aggregate Transmission Service Study (ATSS), Delivery Point Addition (DPA) and Delivery Point Transfer (DPT) assessment processes
5. Generator Interconnection (GI)
6. Sponsored Upgrade
7. Interregional planning

The ITP, Transmission Service, and GI processes are SPP's most used planning processes. The ITP process was established with the formation of the Synergistic Planning Project Team (SPPT) and, with the development of the highway/byway cost allocation mechanism, has proven to be very effective in facilitating the construction of a significant portion of over \$10 billion of regional transmission approved for construction in SPP. The ITP process was improved in 2017 based on recommendations from the Transmission Planning Improvement Task Force (TPITF).

The Transmission Service and GI processes have also undergone various incremental improvements over the last several years. Additionally, these three processes were the subject of certain proposed improvements being included in the Holistic Integrated Tariff Team (HITT) recommendations.

The conclusion of recommendations T1, T2, and T3 are expected to provide specific needed improvements to parts of the ITP, Transmission Service and GI planning processes; however, additional improvements are needed.

The seven planning processes use various, independently-applied mechanisms to determine cost allocation for resulting upgrades. Costs of regional upgrades derived from the ITP and High Priority study processes are shared among transmission zones using SPP's highway/byway structure. Upgrades needed to accommodate GI and sponsored upgrade requests are directly assigned to applicable requesting customers. Costs for upgrades needed to accommodate transmission service requests are shared using the highway/byway cost allocation, up to the

customers' safe harbor limit, with any costs in excess of that limit being directly assigned. SPP's negotiated cost share of any interregional upgrade is generally allocated using the highway/byway structure.

Consolidation

The SCRIPT participants and SPP staff identified the following critical issues with the current transmission planning processes to address through consolidation:

- SPP's multiple, disparately-performed studies yield sub-optimal transmission plans
- Current deficiencies in collective quantification of cost-causers and beneficiaries across planning processes create "free-rider" situations
- Processes used to identify upgrades needed to provide generator interconnection and transmission service only rely on reliability analysis that does not consider congestion costs and other economic impacts

The SCRIPT focused on reviewing current planning requirements and developing policy changes for a consolidated regional planning process including service driven processes. The SCRIPT Consolidation Sub-Team developed various policy recommendations to provide more optimal solutions, synergize analyses, and increase planning efficiencies in all SPP transmission planning processes. The four main areas of focus to achieve these goals were:

- Annual data submission
- Consolidated study approach for regional and service customers
- Portfolio optimization
- Cost sharing between load-serving and service customers

Benefits:

- Lower dependency on individual queued processes
- Improved planning efficiencies, effectiveness and timeliness
- Increased optimization of transmission analysis and portfolio
- Improved answers for service customers and potential cost-sharing with load customers
- Reduced need for SPP to manage multiple parallel service queues and assessments

USERS IMPACTED

The Consolidated Planning Process (CPP) will impact members and users of SPP's planning processes. Impacted users include: Transmission Owners (TOs), Transmission Customers (TCs), Generation Owners (GOs), users of Engineering Data Submission Tool (EDST), users of the Hosting Capacity Tool.

BUSINESS FUNCTIONS IMPACTED

The CPP will create updated processes that will change or replace existing processes for the 20 Year Assessment, ITP and GI DISIS studies. Updates will be made available to the EDST and new tools will be developed for Hosting Capacity and Load Hosting Capacity.

COMMUNICATIONS

MIPO AND PROGRAM/PROJECT DOCUMENTATION

All project communication and information for the Change User Forum (CUF) will be posted to the SPP CUF Project Documentation folder.

This MIPO will be updated with any new information. For all updates, a redline version will be posted to the project documentation folder, and the CUF will be notified.

PROGRAM COMMUNICATION AND PROJECT QUERIES

At any time, members can ask questions using SPP's [Request Management System](#) (RMS). Program-level questions, including any questions for which there is not a project-specific Quick Pick, can be submitted using the "Project Inquiries" Quick Pick and this program's subject option. RMS link: <https://spprms.issuetrak.com/login.asp>

If a new user ID is needed for RMS, click on that link and follow the directions for "Register Now."

TRAINING

Member training will be coordinated at the program level, as follows. All training will be coordinated through the Consolidated Planning Process Task Force. Education sessions will be scheduled and posted for all identified training needs.

TRAINING ASSUMPTIONS

- All member companies will identify personnel to receive project-related training and/or documentation.
- All member companies will use the LMS to register for any project-related training sessions, if applicable.
- SPP Training will provide learning opportunities that aid understanding, but each entity will be expected to certify performance readiness.

TESTING

Member testing will be coordinated at the project level, as defined in the Project-Level Information section below. The assumptions that follow will apply to all projects.

TESTING ASSUMPTIONS

- All member companies should have already conducted connectivity testing to the appropriate Integrated Test Environment. This project timeline will not include connectivity testing unless otherwise specified.
- Member company staff who are participating in the testing are trained on the systems they are testing unless otherwise specified.
- Project liaisons will be responsible for coordinating testing at their company and for reporting back to SPP on testing progress or issues.

PROGRAM ASSUMPTIONS

To be added at a later date.

PROGRAM RISKS

Program risks and challenges are frequently documented and updated to the CPPTF, TWG and MOPC. Risks will be added to the program MIPO quarterly or as needed.

ADDITIONAL PROGRAM DOCUMENTATION

To be added as needed.

FREQUENTLY ASKED QUESTIONS

A list of frequently asked questions (FAQ) can be found in Appendix A of this document.

PROJECT-LEVEL INFORMATION

What follows is project-level information that may be beneficial to all participants of the program.

GENERATOR INTERCONNECT STUDIES

PRE-SCREENING TOOLS: HOSTING CAPACITY TOOL IMPLEMENTATION PROJECT

The goal of the Pre-Screening Tools (PST) implementation project is to deliver a landing page for analysis tools to assist in planning. The Hosting Capacity Tool (HCT) application will provide data about the capacity of the existing transmission system to host new interconnections (per SCRIPT C1 and S2.1) and FERC Order 2023.

AFFECTED?	SERVICES IMPACTED BY CHANGES
Y	Eastern Interconnection (Integrated Marketplace)
NY	Western Reliability Coordination
N	Western Energy Imbalance Services Market

BUSINESS IMPACT

The HCT will provide information about the capacity to host new load and generation interconnections.

USERS IMPACTED

Users of the HCT include generator interconnection (GI) customers and transmission customers.

BUSINESS FUNCTIONS IMPACTED

Current and future business processes that will utilize the HCT:

- GI Studies process
- The Integrated Transmission Planning (ITP) process
- The Consolidated Planning Process (CPP)

TECHNICAL IMPACT

The technical impact for this project is the to provide any users who are engaged in transmission and generation planning (load and gen) a new tool for analysis.

SPP SYSTEMS/PROCESSES IMPACTED

The Hosting Capacity Tool is a new tool that will provide a new process for members and users of the GI studies processes. Other SPP systems impacted include the Engineering Platform and the Engineering Applications forum, both internal systems.

ANTICIPATED MEMBER SYSTEMS/PROCESSES IMPACTED

No member systems are impacted by the addition of the HCT.

MEMBER REQUIREMENTS

Members will not be required to make any program changes. Members have provided direction on the tool and feedback continues to be requested through end user and working groups.

TESTING

Member testing will be provided for a set number of weeks prior to the tool going live. Members are asked to provide availability of end users to test connectivity and functionality through the member testing environment (MTE). Testing will be available both as structured testing by completing a series of scripted functions, and un-structured testing whereas members may test all functionality and provide feedback.

Please refer to the Testing Assumptions in the Program-Level Information section above.

IMPLEMENTATION/BACK-OUT PLAN

Production Environment [PROD]:

- A back up copy of the HCT will be made prior to installing the first release to Production. This will allow restoration if necessary.

Production Implementation Plan:

- Six weeks prior to implementation to production, SPP Staff will coordinate efforts to notify members of the upcoming release of the HCT.

Back-Out Plan:

- In the event that the release needs to be backed out, the project team will remove the initial release of the HCT until necessary repairs have been made.

SUMMARY OF TIMELINE

DELIVERABLE	START	COMPLETE	RESPONSIBLE PARTY
In House Development and Testing	7/8/2024	10/24/2024 <u>02/06/2025</u>	<u>SPP</u>
Member Testing Environment (MTE) Upload	10/24/2024 <u>02/03/2025</u>	10/24/2024 <u>02/07/2025</u>	<u>SPP</u>
<u>Member Testing Kick-Off</u>	10/28/2024 <u>02/10/2025</u>	10/28/2024 <u>02/10/2025</u>	<u>SPP, Members</u>
Member Testing	10/28/2024 <u>02/10/2025</u>	11/15/2024 <u>02/28/2025</u>	<u>Members, SPP</u>
Code Freeze and Data Upload	11/18/2024 <u>03/03/2025</u>	11/28/2024 <u>03/14/2025</u>	<u>SPP</u>

Go-Live Externally	11/29/2024 03/17/2025	11/29/2024 03/17/2025	<u>SPP</u>
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PROJECT RISKS

1. The project needs to comply with FERC Order 2023-requirements. There could be additional requirements and scope that may create delays in development.

PROJECT COMMUNICATIONS

The HCT project is being advised by and communicated to the Generator Interconnect Advisor Forum (GIAG), the Consolidated Planning Process Task Force (CPPTF) and the Transmission Working Group (TWG).

ADDITIONAL PROJECT DOCUMENTATION

Testing information will be added to the CUF Project folder.

NEXT STEPS

ACTION	ASSIGNEE	STATUS AND DUE DATE
Updates to the CUF and the MIPO on testing phase	SPP Project Team	10/25/2024
Member Testing Kick Off and Testing Phase	SPP, Members	10/28/2024 – 11/15/2024 02/10/2025 – 02/28/2025

GI QUEUE UPDATES PROJECT

The Generation Interconnection (GI) Queue is a user interface providing information on the Ops Portal. Per SPP Tariff Attachment V, Section 3.5.1, certain minimal information from the SPP GI queue web data table URL is to be made publicly available.

The Ops Portal Release 2025.1.0.0 will make changes in columns and column names that will allow for the addition of deliverability areas for the Network Resource Interconnection Service+ (NRIS+) product.

<u>AFFECTED?</u>	<u>SERVICES IMPACTED BY CHANGES</u>
<u>Y</u>	<u>Eastern Interconnection (Integrated Marketplace)</u>
<u>Y</u>	<u>Western Reliability Coordination</u>
<u>N</u>	<u>Western Energy Imbalance Services Market</u>

BUSINESS IMPACT

The GI Queue provides information for processes of GI studies.

USERS IMPACTED

The members impacted included entities who use the GI Queue interface on the Ops Portal.

BUSINESS FUNCTIONS IMPACTED

Business Functions impacted include usage of the GI Queue data. Modifications to column names and/or additional columns may be added.

TECHNICAL IMPACT

The technical impact for this project is the potential of an impact to any users who utilize the .csv download feature. If users consume the .csv file programmatically to import data, those users may need to update those automation services to recognize the added column and column name change.

SPP SYSTEMS/PROCESSES IMPACTED

The Ops Portal will be upgraded to release 2025.1.0.0 to implement the GI Queue changes. No other systems are impacted.

ANTICIPATED MEMBER SYSTEMS/PROCESSES IMPACTED

No member systems are impacted.

MEMBER REQUIREMENTS

Any users who programmatically import the .csv download, may need to make updates.

TESTING

SPP is not requesting member testing for this minor release. However, the updates will be available for review in the Member Test Environment (MTE) 1/20/2025 through 1/31/2025.

Testing Assumptions if users opt to review the updates:

- All entities should have conducted connectivity testing to the appropriate Member Test Environment (MTE). This project timeline will not include connectivity testing.
- Members participating in the testing are knowledgeable of the tool.

IMPLEMENTATION/BACK-OUT PLAN

Production Environment [PROD]:

- A back up copy of the OpsPortal website will be made prior to installing the upgrade to Production. This will allow restoration the previous version of the website if necessary.

Production Implementation Plan:

- Six weeks prior to implementation to production, SPP Staff will coordinate efforts to notify members of the upcoming release of the Ops Portal.

Back-Out Plan:

- In the event that the release needs to be backed out, the project team will roll production back to the most recent release of the Ops Portal.

SUMMARY OF TIMELINE

<u>DELIVERABLE</u>	<u>START</u>	<u>COMPLETE</u>	<u>RESPONSIBLE PARTY</u>
<u>In House Development and Testing</u>	<u>In progress</u>	<u>01/06/2025</u>	<u>SPP</u>
<u>Open for optional Member Testing</u>	<u>01/20/2025</u>	<u>01/31/2025</u>	<u>Members, SPP</u>
<u>Production Implementation</u>	<u>02/03/2025</u>	<u>02/03/2025</u>	<u>SPP</u>

PROJECT RISKS

1. None identified to date.

NEXT STEPS

<u>ACTION</u>	<u>ASSIGNEE</u>	<u>STATUS AND DUE DATE</u>
<u>Optional Member Testing Available</u>	<u>Data Submitters</u>	<u>01/20/2025 – 01/31/2025</u>
<u>Implementation to Production</u>	<u>SPP</u>	<u>02/03/2025</u>

TRANSMISSION SERVICES

PRE-SCREENING TOOLS: LOAD HOSTING CAPACITY TOOL (LHCT) IMPLEMENTATION PROJECT

The Pre-Screening Tools (PST) implementation project will also create a Load Hosting Capacity Tool (LHCT) for ATC calculation and use (SCRIPT O4), as well as an AQ screening request process that, in coordination with HITT T3-2 recommendation, will evaluate requests and grant service if the request passes the screen.

AFFECTED?	SERVICES IMPACTED BY CHANGES
Y	Eastern Interconnection (Integrated Marketplace)
TBD	Western Reliability Coordination
TBD	Western Energy Imbalance Services Market

BUSINESS IMPACT

Information about the rollout of the LHCT for the CPP will be added in a later version of this MIPO. Tentative target go-live for the LHCT is Q2 2025 with member testing in early Q2 2025.

MODELING DATA SUBMISSIONS

ENGINEERING DATA SUBMISSION TOOL (EDST) – SCRIPT RELEASE PROJECT

AFFECTED?	SERVICES IMPACTED BY CHANGES
Y	Eastern Interconnection (Integrated Marketplace)
TBD	Western Reliability Coordination
TBD	Western Energy Imbalance Services Market

BUSINESS IMPACT

Information about the rollout of the EDST upgrades for the CPP will be added in a later version of this MIPO. The planned go-live date for the EDST SCRIPT release is Q3 2025 with member testing in early Q3 2025.

APPENDIX A

Here is a list of frequently asked questions, grouped according to functional area.

QUESTION	ANSWER