

#	Design Components ¹	Status Quo	A	AMP 9-26-2017	AMP 10-25-2017
*	Implementation			Delete	
1	Coordination		regularly scheduled meetings	<ul style="list-style-type: none"> PJM-facilitated Subregional Meetings on EOL Planning plus individual TO meetings. Process must include/allow for meaningful input by Stakeholders. Nothing precludes any TO from having additional stakeholder meetings or communications regarding a Local Plan that affects such stakeholders in addition to the Planning Meetings. 	<p><u>Assumptions Meeting:</u></p> <ul style="list-style-type: none"> TOs provide (and PJM posts) assumptions 30 days before meeting. Stakeholder comments 15 days after meeting. 30 day after assumptions meeting, PJM provides assumptions to be used in performing the evaluation and analysis of the potential projects as well as an explanation of why other assumptions were not adopted. <p><u>Assumptions Meeting:</u></p> <ul style="list-style-type: none"> TOs provide (and PJM posts) assumptions 30 days before meeting. Stakeholder comments 15 days after meeting. 30 day after assumptions meeting, PJM provides assumptions to be used in performing the evaluation and analysis of the potential projects as well as <u>any concerns with TO-provided explanation of why other assumptions were not adopted.</u>
				<p><u>Planning Meeting(s):</u> [To include a review of system needs and drivers of needs, based on application of TO methodology and assumptions used to plan EOL projects and alternatives considered.]</p> <ul style="list-style-type: none"> 20 days prior to planning meetings, TOs provide and PJM posts all any PJM or TO criteria violations; potential solutions; and, alternatives. Stakeholders provide written comments w/in 20 days for TO consideration. TOs provide written responses prior to Local Plan finalization. 	<p>Criteria should be quantifiable and include details about associated criteria thresholds. Each TO proposing EOL driven projects should have an established, company-approved, public set of quantifiable criteria established that can be replicated by external entities.</p> <p><u>Criteria assessments</u> should include asset scoring data inputs, analysis, and final results.</p> <p><u>Criteria</u> should also assess EOL priority ranking relative to entire system under study. All TO facilities need to continue to be part of the overall system level average.</p> <p><u>Drivers</u> contributing to EOL determination (including performance, condition and risk) should be included. TOs</p>

					<p>should provide quantifiable values pertaining to what is driving the selection of the facility. Details should be comparable to system level averages.</p> <p>TOs should coordinate TO EOL process with their yearly local reliability planning to better demonstrate why a more expensive solution might be brought forward.</p>	
2	Openness/ Transparency			<ul style="list-style-type: none"> • TOs' EOL/aging infrastructure decision-making process fully incorporated into the protocols. • PJM reviews and approves the TO criteria, assumptions, guidelines and models. • TOs should also identify the specific company that owns the asset being assessed and if the asset is currently a transmission or distribution asset, as well as what entity will be owning, operating and maintaining the replacement facilities. • When EOL transmission projects are replacing distribution assets, the TO also provides drivers to support a transmission improvement over a distribution improvement. 	<p>For Stakeholders who have completed PJM's CEII Request form and have executed the PJM CEII NDA in accordance with the PJM and FERC processes for CEII as defined at 18 CFR §388.113 (c), PJM shall make available all assumptions to be used in performing the evaluation, including, but not limited to: i) all assumptions and methodology, including any criteria, guidelines and models that PJM and each TO uses to identify issues, develop alternatives and recommend solutions; ii) the impacts of regulatory actions, projected changes in load growth, demand response resources, energy efficiency programs, price responsive demand, generating additions and retirements, market efficiency and other trends in the industry; and (iii) alternative sensitivity studies, modeling assumptions and scenario analyses.</p> <ul style="list-style-type: none"> • TOs' EOL/aging infrastructure decision-making process fully incorporated into the protocols. • PJM reviews and validates and approves the TO criteria, assumptions, guidelines and models. PJM provides feedback and any concerns with TO-provided criteria, assumptions, guidelines and models. • TOs should also identify the specific company that owns the asset being assessed and if the asset is currently a transmission or distribution asset, as well as what entity will be owning, operating and maintaining the replacement facilities. • When EOL transmission projects are replacing distribution assets, the TO also provides drivers to support a transmission improvement over a distribution improvement. • TOs will communicate any concerns that proposed changes or alternatives may negatively impact TO risk profile and how. 	
3	Communication Information Exchange	<p>-1 assumptions meeting annually at the beginning of cycle</p> <p>- meetings as needed for the rest of year</p>	identify any facilities that TO thinks that are 5 years within EOL (asset or project list)			

		-southern, maac, west subregional meetings focusing less than 200 kv -pc, teac, subregional rtep postings via pjm.com webex, special pc			
4	Reference Materials	- formula rates, ferc filings posted to pjm.com - tabular data, construction status, cost allocation and associated filings, post TO criteria, form 715, posted teac whitepapers, deactivation/retirement notices, secure posting of models, special webcasts, all queue information		Subject to CEII requirements, PJM from the TOs, provides the system needs and drivers of those needs, based on the application of its methodology and assumptions used to plan EOL projects, and potential alternatives and solutions being considered to meet those needs (including whether any non-transmission alternatives considered) and drivers in sufficient detail to allow others to use the criteria when performing their own planning or screening studies and to reasonably anticipate the outcome of TOs' EOL assessments	
5	Comparability		pjm and to's agree upon guidelines how identify end of life assets	<ul style="list-style-type: none"> • TOs' EOL planning processes are not so different that they would produce wildly different outcomes • TOs treat non-TO load comparably to TO load 	
6	Dispute Resolution	-pjm standard adr processes in OATT and OA (process assertion for violating OATT and OA) -participate in discussion by TEAC, letters TO the board, siting proceedings by state		Subregional RTEP Committee meetings. Should there be disagreement between the TO and the stakeholder regarding a Local Plan project, the committee participant will document its disagreement in writing and provide that to the Office of Interconnection for a determination on the Local Plan project in the final Local Plan.	Subregional RTEP Committee meetings. Should there be disagreement between the TO and the stakeholder regarding a Local Plan project, the committee participant will document its disagreement in writing. <u>If the disagreement cannot be resolved informally, either stakeholder may utilize the standard OA ADR process. and provide that to the Office of Interconnection for a determination on the Local Plan project in the final Local Plan.</u>
7	transparency (pjm recommends dropping design component, included elsewhere)	see communications above	costs	For Stakeholders who have completed PJM's CEII Request form and have executed the PJM CEII NDA in accordance with the PJM and FERC processes for CEII as defined at 18 CFR §388.113 (c), PJM shall make available all assumptions to be used in performing the evaluation, including, but not limited to: i)	Criteria should be quantifiable and include details about associated criteria thresholds. Each TO proposing EOL driven projects should have an established, company-approved, public set of quantifiable criteria established that can be replicated by external entities.
					Delete as covered in Coordination and Openness/Transparency above.

				<p>all assumptions and methodology, including any criteria, guidelines and models that PJM and each TO uses to identify issues, develop alternatives and recommend solutions; ii) the impacts of regulatory actions, projected changes in load growth, demand response resources, energy efficiency programs, price responsive demand, generating additions and retirements, market efficiency and other trends in the industry; and (iii) alternative sensitivity studies, modeling assumptions and scenario analyses.</p>	<p><u>Criteria assessments</u> should include asset scoring data inputs, analysis, and final results.</p>	<p><u>Delete as covered in Coordination above.</u></p>
					<p><u>Criteria</u> should also assess EOL priority ranking relative to entire system under study. All TO facilities need to continue to be part of the overall system level average.</p>	<p><u>Delete as covered in Coordination above.</u></p>
					<p><u>Drivers</u> contributing to EOL determination (including performance, condition and risk) should be included. TOs should provide quantifiable values pertaining to what is driving the selection of the facility. Details should be comparable to system level averages.</p>	<p><u>Delete as covered in Coordination above.</u></p>
					<p>TOs should coordinate TO EOL process with their yearly local reliability planning to better demonstrate why a more expensive solution might be brought forward.</p>	<p><u>Delete as covered in Coordination above.</u></p>
8	replicability	<p>some ability to replicate stability, short circuit, powerflow - pjm working on tools to improve - ability to review but not replicate aging infrastructure analysis</p>		<p>Sufficient detail describing assessment practices (in addition to modeling assumptions) that TOs use in applying criteria at a level equivalent to the Form 715 requirements to allow replication of EOL analysis.</p>		
9	consistency	<p>individual TO approach TO aging infrastructure based on historic practice</p>	<p>- consistency of application by TO - some degree of consistency across TOs</p>			
10	Market Efficiency		<p>potential integrate market efficiency analysis into decision making related to supplementals and aging infrastructure</p>			

11	project reporting standards	- qtr reports for rtep projects - apprx qtr updates to construction status	Can PJM create a periodic report to help clarify what transmission costs will be? Pjm created periodic report to clarify transmission costs	Consistency and thoroughness of information and timeliness is improving but needs additional improvements. Will provide example.	AMP and ODEC to walk through template example.
12	Evaluation of non-transmission alternatives (beyond scope)	market based solutions included in all rtep analysis (queue, rpm auctions, assumptions)		Ok with deleting	
13	TO's autonomy (covered under interests)		do not supplant TO's engineering	Ok with deleting	
14	evaluation of risk impacts	part of to decision making		Ok with deleting	See change to Openness/Transparency Above.
15	use of applicable design criteria	ensure that the process will provide planning of the system consistent with the local planning design (interest) design criteria posted on pjm.com	ensure that the process will provide planning of the system consistent with the local planning design (interest)	Ok with deleting	
16	process for providing input	see communications above	shall be constructive, and project focused. appears to be an interest, rewrite	See above.	
17	length of project review process which includes emergency projects process speed and implementation	teac process and sub regional rtep	speed, non-dilatory (eg. Within 2 months, the issues resolved) appears to be an interest	See above for timelines and data requirements.	