

Standards Committee Procedure

Title: Approving a Field Test Associated with a Reliability Standard

Purpose: To ensure that each field test conducted to support the development of a reliability standard has technical merit and includes controls to protect the reliability of the Bulk Electric System (BES).

Conditions: When a drafting team wants to conduct a proof-of-concept field test to support development of a new or revised standard, or when a drafting team wants to conduct a field test of one or more elements of a proposed reliability standard

Responsibility	Activity
Drafting Team	Outline a field test plan that includes the following: <ul style="list-style-type: none"> - Purpose - Duration - Number of entities involved along with the criteria for selection - Description of data to collect or monitor, and associated periodicity - Criteria for success - Identification of any compliance-related impacts - Identification of steps to halt the field test if the test has an adverse impact on the reliability of the BES - Identification of a technical steering committee to provide oversight of the reliability-related impact of the field test - Plan for monitoring the field test and reporting the field test results to stakeholders and the Standards Committee - Plan to terminate the field test
Drafting Team Coordinator	Submit the initial field test plan to the Manager of Standards Development
Manager of Standards Development	Obtain a commitment from a new or existing technical group (technical steering committee) to provide an initial assessment of the field test plan, and, if the field test plan is approved by the Standards Committee, to provide oversight of the field test (Drafting team members are not eligible to serve on the technical steering committee however non-NERC resources can be included.)
Drafting Team Coordinator	Obtain confirmation from the technical steering committee that they have reviewed the field test plan for its technical soundness and its impact on reliability, and no fatal flaws were identified.
Manager of Standards Development	Coordinate with the Director, Compliance to obtain a commitment to approve, if needed, a waiver from compliance if the Standards Committee approves the field test

Drafting Team
Coordinator

Submit a request to the Manager of Standards Development, asking the Standards Committee to approve the field test plan that includes all of the following:

- The field test plan
- Evidence that a technical steering committee has reviewed the field test plan and has not identified any fatal flaws that would adversely impact reliability
- Evidence that the Director, Compliance will approve a waiver from compliance, if needed

Standards
Committee

If the field test meets the following criteria, approve the field test:

- The field test plan contains all of the following:
 - o Purpose
 - o Duration
 - o Number of entities involved along with the criteria for selection
 - o Description of data to collect or monitor, and associated periodicity
 - o Criteria for success
 - o Identification of any compliance-related impacts
 - o Identification of a technical steering committee to provide oversight of the reliability-related impact of the field test
 - o Plan for monitoring the field test
 - o Plan for periodically reporting the field test results
 - o Plan to terminate
- A technical steering committee is in place to provide oversight of the field test
- A technical steering committee has reviewed the field test plan for its technical soundness and its impact on reliability, and did not identify any fatal flaws.
- The Director, Compliance is prepared to issue a waiver from compliance if that is part of the field test plan

Standards
Administrator

If approved, post the field test description on the Standards Under Development web page

Drafting Team

If the field test includes a waiver from compliance, provide notice to the Director of Standards as follows:

- Before adding any participants to the field test
- Within 24 hours of the curtailment of any field test
- Within 24 hours of the removal of any participant in the field test

Director of
Standards

If the field test includes a waiver from compliance with one or more requirements of enforceable standards, each time there is a change to the participants in the field test, send a notice to the Director of Compliance, the Regional Entity

Technical Steering Committee	Provide a periodic report to the Standards Committee
Standards Administrator	Post the results of each periodic report
Drafting Team	At the conclusion of the field test, submit a final report to the Manager of Standards Development with notification that the field test has ended. The report should include the following: <ul style="list-style-type: none">– Dates of the field test– List of field test participants– Criteria for success– Summary of data collected– Analysis of data, including conclusions for use in modifying the associated standard
Manager of Standards Development	Notify the Standards Committee that the field test has concluded, and provide the drafting team's final report. (If applicable, notify the Director of Compliance and the Regional Entity Managers Group)