

## Standard Development Roadmap

### Development Steps Completed:

1. Reliability Authority Certification SAR Requested — October 7, 2002.
2. Reliability Authority Certification SAR Authorized to Post — November 20, 2002.
3. SAR Drafting Team appointed — January 6, 2003.
4. Reliability Authority Certification SAR 1<sup>st</sup> Posting — December 1, 2002 to January 10, 2003.
5. Reliability Authority Certification SAR 2<sup>nd</sup> Posting — February 28, 2003 to March 31, 2003.
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7. Reliability Authority Certification SAR approved by SAC to move to standard development phase — September 8, 2003.
8. Standard Drafting Team appointed — September 24, 2003.
9. Reliability Coordinator Certification Standard first posting — June 1, 2005 to July 8, 2005.

### Description of Current Draft:

This is the ~~second~~first posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the ~~first two~~three postings of the Balancing Authority Certification Standard, ~~and~~ applicable comments received during the ~~two~~first postings of the Transmission Operator Certification Standard, ~~and the first posting of the Reliability Coordinator Certification Standard.~~ ~~As was identified in the first posting of the Transmission Operator Certification Standard and the third posting of the Balancing Authority Certification Standard, the Drafting Team has removed the process that was previously included. In addition, the standards have been re-formatted to conform to the NERC standard format.~~

~~To address comments received from the previous postings of the BA and TOP standards and to maintain consistency with the current NERC Reliability Standards, the term Reliability Authority has been replaced throughout the certification standards with the term Reliability Coordinator. All references to the Interchange Authority have been removed from the certification standards.~~

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<del>4.3.</del> BOT adoption.	February 6, 2006
<del>5.4.</del> Proposed effective date.	April 1, 2006

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**Agreement:** A contract or other document delineating an arrangement that expresses assent by two or more parties to the same object. This arrangement determines a course of action to be followed by all parties involved in the situation. The key components of the agreement must identify the ability, intent, and authority of the parties. The requirement for an agreement can be satisfied in a variety of ways, including but not limited to: contracts, designation of authority documents, policies, and procedures.

[Above definition is proposed to replace the existing definition of Agreement in the Reliability Standards Glossary of Terms:]

**Balancing Integrated Operational Plan (BIOP):** A plan formulated by the Balancing Authority incorporating the intended operation of resources, interchange, and demand expectations to satisfy balancing requirements. The plan is provided to the Reliability Coordinator for performing reliability analysis.

## A. Introduction

1. **Title:** Reliability Coordinator Certification — Certification
2. **Number:** ORG-020-1
3. **Purpose:** To ensure that each entity that performs the reliability coordination function ~~operating reliability function~~ is certified as a NERC Reliability Coordinator by the NERC Regional Reliability Organization using the NERC Certification Process for Reliability Coordinators.
4. **Applicability**
  - 4.1. Entity seeking certification as a Reliability Coordinator
  - 4.2. Regional Reliability Organization
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1. The entity that intends to perform the reliability coordination function ~~operating reliability function~~ shall obtain certification as a NERC Reliability Coordinator by satisfying all of the requirements identified in the NERC Reliability Coordinator Certification Standards:
  - Reliability Coordinator Certification — Certification
  - Reliability Coordinator Certification — Agreements
  - Reliability Coordinator Certification — Personnel
  - Reliability Coordinator Certification — Data Acquisition and Monitoring
  - Reliability Coordinator Certification — System Analysis
  - ~~Reliability Coordinator Certification — System Monitoring~~
  - Reliability Coordinator Certification — Emergency Operations
  - Reliability Coordinator Certification — Loss of Control Center Functionality
  - Reliability Coordinator Certification — Restoration
- R2. The entity seeking certification as a Reliability Coordinator shall apply for certification in accordance with and adhere to the administrative requirements of the NERC Certification Process for Reliability Coordinators.
- R3. A Reliability Coordinator may delegate tasks, but shall retain responsibility for all tasks. Each entity seeking certification as a Reliability Coordinator shall identify any task for which it is responsible that will be performed by another entity and shall ensure that the entity has the capability to perform the tasks. The entity, to which a task is delegated, shall be subject to review as part of the NERC Certification Process for Reliability Coordinators.
- R4. The Reliability Coordinator shall have procedures, processes, and tools for adhering to NERC Reliability Standards including reporting requirements.
- R5. The NERC Regional Reliability Organizations' awarding of certification to the Reliability Coordinator shall be based on satisfying all of the requirements defined in the NERC Reliability Coordinator Certification Standards identified in Requirement R1.
- R6. The NERC Regional Reliability Organizations shall administer the certification process using the NERC Certification Process for Reliability Coordinators.

~~R7. The process for certification shall include an on-site visit of the Reliability Coordinator's control center facilities.~~

**C. Measures**

- M1. The Reliability Coordinator shall meet Requirement R1.
- M2. The Reliability Coordinator shall have available for inspection, documentation to meet Requirements R2 through R4.
- M3. The Regional Reliability Organization shall have available for inspection, documentation to meet ~~administer the certification process in adherence with~~ Requirements R5 ~~through and~~ R6.

**D. Compliance**

**1. Compliance Monitoring Process**

**1.1. Compliance Monitoring Responsibility**

1.1.1 Regional Reliability Organization for Requirements R1 through R4.

1.1.2 NERC for Requirements R5 through ~~R7~~.

**1.2. Compliance Monitoring Period and Reset Timeframe**

None

**1.3. Data Retention**

Regional Reliability Organization — None

1.4. NERC — Regional Reliability Organization letter of certification approval

**1.5. Additional Compliance Information**

None

**2. Levels of Non-Compliance**

2.1. Level 1: Not Applicable

2.2. Level 2: Not Applicable

2.3. Level 3: Not Applicable

2.4. Level 4: Not Applicable

**E. Regional Differences**

None identified

**Version History**

Version	Date	Action	Change Tracking

## Standard Development Roadmap

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This is the second posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the three postings of the Balancing Authority Certification Standard, applicable comments received during the two postings of the Transmission Operator Certification Standard, and the first posting of the Reliability Coordinator Certification Standard. This is the first posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the first two postings of the Balancing Authority Certification Standard and applicable comments received during the first posting of the Transmission Operator Certification Standard. As was identified in the first posting of the Transmission Operator Certification Standard and the third posting of the Balancing Authority Certification Standard, the Drafting Team has removed the process that was previously included. In addition, the standards have been re-formatted to conform to the NERC standard format.

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**Agreement:** A contract or other document delineating an arrangement that expresses assent by two or more parties to the same object. This arrangement determines a course of action to be followed by all parties involved in the situation. The key components of the agreement must identify the ability, intent, and authority of the parties. The requirement for an agreement can be satisfied in a variety of ways, including but not limited to: contracts, designation of authority documents, policies, and procedures.

[Above definition is proposed to replace the existing definition of Agreement in the Reliability Standards Glossary of Terms:]

**Balancing Integrated Operational Plan (BIOP):** A plan formulated by the Balancing Authority incorporating the intended operation of resources, interchange, and demand expectations to satisfy balancing requirements. The plan is provided to the Reliability Coordinator for performing reliability analysis.

## A. Introduction

1. **Title:** Reliability Coordinator Certification — Agreements
2. **Number:** ORG-021-1
3. **Purpose:** To ensure that the entity seeking certification as a Reliability Coordinator has agreements in place that define its responsibilities, authority, and interaction with entities that are necessary to perform its operating reliability function.
4. **Applicability**
  - 4.1. Entities seeking certification as a Reliability Coordinator
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1. The Reliability Coordinator shall have an executed copy of the NERC Confidentiality Agreement to which the Reliability Coordinator is bound.
  - R1.1. The Reliability Coordinator shall confirm that all its personnel who have access to information that is deemed confidential in conjunction with the NERC Confidentiality Agreement have been trained ~~on and understand~~ their ~~obligations-responsibilities~~ under the agreement.
  - R1.2. An entity to whom a Reliability Coordinator has delegated tasks shall confirm that its personnel who have access to information that is deemed confidential in conjunction with the NERC Confidentiality Agreement have been trained on their responsibilities under the agreement.
- R2. The Reliability Coordinator shall have an executed copy of the NERC Standards of Conduct applicable to the Reliability Coordinator.
  - R2.1. The Reliability Coordinator shall confirm that all its personnel subject to the NERC Standards of Conduct have been trained ~~on and understand~~ their ~~obligations and responsibilities~~. ~~under the NERC Standards of Conduct.~~
  - R2.2. An entity to whom a Reliability Coordinator has delegated tasks shall confirm that all its personnel subject to the NERC Standards of Conduct have been trained on their responsibilities.
- R3. The Reliability Coordinator shall have agreements that define the responsibilities and authority of that Reliability Coordinator with respect to its ~~Generator Owners~~, Generator Operators, Planning Authorities, Transmission Operators, Transmission Owners, Transmission Service Providers, Balancing Authorities, Transmission Planners, and ~~adjacent other~~ Reliability Coordinators for the defined Reliability Coordinator Area that addresses:
  - R3.1. The Reliability Coordinator's commitment to provide reliability analyses to the Transmission Operators, Balancing Authorities, and Transmission Service Providers in its Reliability Coordinator Area and ~~adjacent other~~ Reliability Coordinators.
  - R3.2. The Balancing Authorities within the Reliability Coordinator Area commitment to:
    - R3.2.1. Identify the Balancing Authority's area metered boundaries.
    - R3.2.2. Provide the Balancing Integrated Operational Plans.
    - R3.2.3. Provide balancing information for real-time monitoring.
    - ~~R3.2.4. Provide generator commitment and dispatch schedules.~~

~~R3.2.5~~.~~R3.2.4.~~ Provide real-time operational information.

~~R3.2.6~~.~~R3.2.5.~~ Comply with Reliability Coordinator directives under both normal and emergency conditions.

~~R3.2.7~~.~~R3.2.6.~~ Provide notice of Interchange Schedule interruptions.

~~R3.2.8~~.~~R3.2.7.~~ Provide notice of the implementation of the Balancing Authorities' own emergency procedures.

**R3.3.** The Transmission Operators within the Reliability Coordinator Area commitment to:

**R3.3.1.** Provide facility and operational data.

**R3.3.2.** Provide real-time operational data.

**R3.3.3.** Provide outages related to transmission maintenance and construction plans.

**R3.3.4.** Comply with Reliability Coordinator directives under both normal and emergency conditions.

**R3.3.5.** Provide notification of the implementation of the Transmission Operators' own emergency procedures.

**R3.4.** The Transmission Service Providers within the Reliability Coordinator Area commitment to:

**R3.4.1.** Coordinate Available Transmission Capacity (ATC) with the Reliability Coordinator.

**R3.4.2.** Enforce transmission system limitations as directed by Reliability Coordinator.

~~R3.4.3.~~~~Follow the direction of the Reliability Coordinator.~~

**R3.5.** The Generator Operators within the Reliability Coordinator Area commitment to provide facility and operational data to the Reliability Coordinator for modeling.

**R3.6.** The Transmission Planners within the Reliability Coordinator Area commitment to provide transmission system limitations, transmission adequacy plans, and determination of Total Transmission Capability values.

**R3.7.** The Planning Authorities within the Reliability Coordinator Area commitment to:

**R3.7.1.** Provide system protection and control information, including special protection systems.

**R3.7.2.** Coordinate with the Reliability Coordinator on transmission system limitations and reliability issues.

**R3.8.** The Transmission Owners within the Reliability Coordinator Area commitment to provide facility ratings and outages related to construction plans.

**R3.9.** The ~~adjacent-other~~ Reliability Coordinators commitment to:

**R3.9.1.** Provide reliability analysis information.

**R3.9.2.** Coordinate reliability processes and actions.

## C. Measures

**M1.** The Reliability Coordinator shall have available for inspection documentation to meet Requirements R1 and R2.

M2. The Reliability Coordinator shall have available for inspection agreement(s) that meet Requirement R3.

**D. Compliance**

**1. Compliance Monitoring Process**

**1.1. Compliance Monitoring Responsibility**

Regional Reliability Organization

**1.2. Compliance Monitoring Period and Reset Timeframe**

None

**1.3. Data Retention**

None

**1.4. Additional Compliance Information**

None

**2. Levels of Non-Compliance**

**2.1. Level 1:** Not Applicable

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**E. Regional Differences**

None identified

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## A. Introduction

1. **Title:** Reliability Coordinator Certification — Personnel
2. **Number:** ORG-022-1
3. **Purpose:** To ensure that the entity seeking certification as a Reliability Coordinator has operating personnel that have been trained and are NERC certified to perform Reliability Coordinator real-time responsibilities.
4. **Applicability**
  - 4.1. Entities seeking certification as a Reliability Coordinator
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1. The Reliability Coordinator shall have NERC-certified personnel to perform any of the real-time Reliability Coordinator responsibilities 24 hours a day, seven days a week. Personnel shall have a current certification credential applicable to the Reliability Coordinator function. If any of these real-time tasks are delegated, the personnel performing these tasks shall also be certified.
  - R1.1. Tasks considered real-time Reliability Coordinator responsibilities include:
    - Monitors real-time operational information from Balancing Authorities and Transmission Operators.
    - Issues reliability alerts to Generator Operators, Load-Serving Entities, Transmission Operators, Transmission Service Providers, Balancing Authorities, ~~Planning Authorities~~, Regional Councils, and NERC.
    - Issues corrective actions (e.g., curtailments or load shedding) to Transmission Operators, Transmission Service Providers, and Balancing Authorities.
    - Coordinates reliability processes and actions with and among other Reliability Coordinators.
    - Coordinates with Transmission Operators and Transmission Service Providers on real-time transmission system limitations.
    - Monitors Interconnection Reliability Operating Limits.
- R2. The Reliability Coordinator shall have a training program and provide its operating personnel with training that addresses all of the procedures, processes, and tools associated with performing the Reliability Coordinator responsibilities identified in Requirement R1.
  - R2.1. The Reliability Coordinator shall have a training program that addresses the knowledge and competencies required for reliable system operations.
  - R2.1.R2.2. The Reliability Coordinator shall have training records identifying when the training occurred, who attended the training, and the material that was covered.

## C. Measures

- M1. The Reliability Coordinator shall have available for inspection, record of all certification for personnel identified in Requirement R1.

M2. The Reliability Coordinator shall have available for inspection, documentation of its training program and record of ~~all~~ training activities for personnel identified in Requirement R2.

**D. Compliance**

**1. Compliance Monitoring Process**

**1.1. Compliance Monitoring Responsibility**

Regional Reliability Organization

**1.2. Compliance Monitoring Period and Reset Timeframe**

None

**1.3. Data Retention**

None

**1.4. Additional Compliance Information**

None

**2. Levels of Non-Compliance**

**2.1. Level 1:** Not Applicable

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## A. Introduction

1. **Title:** Reliability Coordinator Certification — Data Acquisition and Monitoring
2. **Number:** ORG-023-1
3. **Purpose:** To ensure that each entity seeking certification as a Reliability Coordinator has real-time transmission, generation, and protection and control data in order to adequately monitor its Reliability Coordinator Area.
4. **Applicability**
  - 4.1. Entity seeking certification as a Reliability Coordinator
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1. The Reliability Coordinator shall have and publish its data reporting requirements for its Reliability Coordinator Area that include: ~~data required~~, periodicity of transmittal, format of submission, and time frame.
- R2. The Reliability Coordinator shall have procedures, processes, and tools for acquiring or developing data to perform operational reliability assessments that includes:
  - R2.1. Generation facility data
  - R2.2. Generator real-time operational data
  - R2.3. Generator outages related to maintenance plans
  - R2.4. Transmission facility data
  - R2.5. Transmission real-time operational data
  - R2.6. Transmission outages related to maintenance and construction plans
  - R2.7. System protection and control information, including special protection schemes
  - R2.8. Area Control Error
  - R2.9. Frequency
  - R2.10. MW and MVAR Reserves
  - R2.11. Instantaneous demand
  - R2.12. Interchange Schedules
- R3. The Reliability Coordinator shall have procedures, processes, or tools for acquiring the Balancing Integrated Operational Plan and plan updates from its Balancing Authority(ies).
- R4. The Reliability Coordinator shall have processes, procedures, and tools for acquiring reliability analysis information from ~~other adjacent~~ Reliability Coordinator(s).
- R5. The Reliability Coordinator shall have processes, procedures, and tools for acquiring transmission system limitations, transmission adequacy plans, and determination of Total Transmission Capability values ~~from Transmission Planner(s)~~ in its Reliability Coordinator Area.
- R6. The Reliability Coordinator shall have procedures, processes, and tools for monitoring each Transmission Operator within its Reliability Coordinator Area that includes:

- R6.1. Transmission facility data
- R6.2. Transmission real-time operational data
- R6.3. System protection and control information, including special protection schemes
- R7. The Reliability Coordinator shall have procedures, processes, and tools for monitoring each Balancing Authority within its Reliability Coordinator Area that includes:
  - R7.1. Area Control Error
  - R7.2. Frequency
  - R7.3. MW and MVAR Reserves
  - R7.4. Instantaneous demand
  - R7.5. Interchange
  - R7.6. Generator real-time operational data
- R8. The Reliability Coordinator shall have procedures, processes, and tools for monitoring ~~its adjacent~~ other Reliability Coordinators that includes:
  - R8.1. Relevant real-time operating parameters of facilities to operate within Interconnection Reliability Operating Limits
  - R8.2. Reliability analysis information

### C. Measures

- M1. The Reliability Coordinator shall have available for inspection its established data reporting requirements identified in Requirement R1.
- M2. The Reliability Coordinator shall demonstrate that it can follow its procedure, process, or use its tools to collect the data or information identified in Requirement R2 through R5.
- M3. The Reliability Coordinator shall demonstrate that it can monitor the elements identified in Requirements R6 through R8.

### D. Compliance

- 1. **Compliance Monitoring Process**
  - 1.1. **Compliance Monitoring Responsibility**  
Regional Reliability Organization
  - 1.2. **Compliance Monitoring Period and Reset Timeframe**  
None
  - 1.3. **Data Retention**  
None
  - 1.4. **Additional Compliance Information**  
None
- 2. **Levels of Non-Compliance**

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5. Reliability Authority Certification SAR 2<sup>nd</sup> Posting — February 28, 2003 to March 31, 2003.
6. Reliability Authority Certification SAR 3<sup>rd</sup> Posting — May 15, 2003 to June 13, 2003.
7. Reliability Authority Certification SAR approved by SAC to move to standard development phase — September 8, 2003.
8. Standard Drafting Team appointed — September 24, 2003.
9. Reliability Coordinator Certification Standard first posting — June 1, 2005 to July 8, 2005.

### Description of Current Draft:

This is the second posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the three postings of the Balancing Authority Certification Standard, applicable comments received during the two postings of the Transmission Operator Certification Standard, and the first posting of the Reliability Coordinator Certification Standard.~~This is the first posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the first two postings of the Balancing Authority Certification Standard and applicable comments received during the first posting of the Transmission Operator Certification Standard. As was identified in the first posting of the Transmission Operator Certification Standard and the third posting of the Balancing Authority Certification Standard, the Drafting Team has removed the process that was previously included. In addition, the standards have been re-formatted to conform to the NERC standard format.~~

~~To address comments received from the previous postings of the BA and TOP standards and to maintain consistency with the current NERC Reliability Standards, the term Reliability Authority has been replaced throughout the certification standards with the term Reliability Coordinator. All references to the Interchange Authority have been removed from the certification standards.~~

### Future Development Plan:

Anticipated Actions	Anticipated Date
1. The drafting team will consider and respond to comments received during the current posting and revise the draft standard as needed.	<del>July 2005</del> <u>October 2005</u>
<del>2. It may be necessary to post this standard for a second time if changes are made after receiving the comments from this first posting.</del>	<del>August 2005</del>
<del>3.2.</del> Ballot Standards.	<del>October</del> <u>November 2005</u>
<del>4.3.</del> BOT Adoption.	February 6, 2006

<del>54.</del> Proposed effective date.	April 1, 2006

### Definitions of Terms Used in Standard

*This section includes all newly defined or revised terms used in the proposed standard. Terms already defined in the Reliability Standards Glossary of Terms are not repeated here. New or revised definitions listed below become approved when the proposed standard is approved. When the standard becomes effective, these defined terms will be removed from the individual standard and added to the Glossary.*

**Agreement:** A contract or other document delineating an arrangement that expresses assent by two or more parties to the same object. This arrangement determines a course of action to be followed by all parties involved in the situation. The key components of the agreement must identify the ability, intent, and authority of the parties. The requirement for an agreement can be satisfied in a variety of ways, including but not limited to: contracts, designation of authority documents, policies, and procedures.

[Above definition is proposed to replace the existing definition of Agreement in the Reliability Standards Glossary of Terms:]

**Balancing Integrated Operational Plan (BIOP):** A plan formulated by the Balancing Authority incorporating the intended operation of resources, interchange, and demand expectations to satisfy balancing requirements. The plan is provided to the Reliability Coordinator for performing reliability analysis.

## A. Introduction

1. **Title:** Reliability Coordinator Certification — System Analysis
2. **Number:** ORG-024-1
3. **Purpose:** To ensure that the entity seeking certification as a Reliability Coordinator has the ability to perform system analyses, develop contingency plans, direct and coordinate actions to maintain reliable operation within its Reliability Coordinator Area and the Interconnection.
4. **Applicability**
  - 4.1. Entity seeking certification as a Reliability Coordinator
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1. The Reliability Coordinator shall have processes, procedures and tool(s) to develop ~~operating reliability limits.~~ Interconnection Reliability Operating Limits (IROLs).
- R2. The Reliability Coordinator shall have processes, procedures and tool(s) to perform real-time reliability analysis and alert operating personnel to limit violations.
- R3. The Reliability Coordinator shall perform contingency analyses, develop contingency plans and coordinate these plans with its Transmission Operators, Balancing Authorities, and ~~adjacent other~~ Reliability Coordinators.
  - R3.1. The Reliability Coordinator shall have processes, procedures and tool(s) to perform contingency reliability analysis with the following periodicity:
    - R3.1.1. Day-ahead based on projected system conditions
    - R3.1.2. On demand based on current or anticipated system conditions
    - ~~R3.1.3. On at least a 15 minute interval based on current system conditions~~
- R4. The Reliability Coordinator shall have processes, procedures and tool(s) to analyze, coordinate and direct actions with its Transmission Operators, Balancing Authorities, and ~~adjacent other~~ Reliability Coordinators.
- R5. The Reliability Coordinator shall have processes, procedures and tool(s) to analyze and, coordinate, ~~and approve~~ transmission outages within its Reliability Coordinator Area.
- R6. The Reliability Coordinator shall have processes, procedures and tool(s) to analyze and, coordinate, ~~and approve~~ generation outages within its Reliability Coordinator Area.
- R7. The Reliability Coordinator shall have processes, procedures and tool(s) to analyze and, coordinate, ~~and approve~~ the Balancing Integrated Operational Plan(s) within its Reliability Coordinator Area.
- ~~R8. The Reliability Coordinator shall have processes, procedures and tool(s) to analyze interchange into, out of, and through its Reliability Coordinator Area.~~

## C. Measures

- M1. The Reliability Coordinator shall have available for inspection its procedures and, processes, and demonstrate its tools to meet Requirements R1 through ~~R7~~8.

**D. Compliance**

**1. Compliance Monitoring Process**

**1.1. Compliance Monitoring Responsibility**

Regional Reliability Organization

**1.2. Compliance Monitoring Period and Reset Timeframe**

None

**1.3. Data Retention**

None

**1.4. Additional Compliance Information**

None

**2. Levels of Non-Compliance**

**2.1. Level 1:** Not Applicable

**2.2. Level 2:** Not Applicable

**2.3. Level 3:** Not Applicable

**2.4. Level 4:** Not Applicable

**E. Regional Differences**

None identified

**Version History**

Version	Date	Action	Change Tracking

## Standard Development Roadmap

*This section is maintained by the drafting team during the development of the standard and will be removed when the standard becomes effective.*

### Development Steps Completed:

1. Reliability Authority Certification SAR Requested — October 7, 2002.
2. Reliability Authority Certification SAR Authorized to Post — November 20, 2002.
3. SAR Drafting Team appointed — January 6, 2003.
4. Reliability Authority Certification SAR 1<sup>st</sup> Posting — December 1, 2002 to January 10, 2003.
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6. Reliability Authority Certification SAR 3<sup>rd</sup> Posting — May 15, 2003 to June 13, 2003.
7. Reliability Authority Certification SAR approved by SAC to move to standard development phase — September 8, 2003.
- ~~1.8.~~ Standard Drafting Team appointed — September 24, 2003.
9. Reliability Coordinator Certification Standard first posting — June 1, 2005 to July 8, 2005.

### Description of Current Draft:

~~This is the second posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the three postings of the Balancing Authority Certification Standard, applicable comments received during the two postings of the Transmission Operator Certification Standard, and the first posting of the Reliability Coordinator Certification Standard. This is the first posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the first two postings of the Balancing Authority Certification Standard and applicable comments received during the first posting of the Transmission Operator Certification Standard. As was identified in the first posting of the Transmission Operator Certification Standard and the third posting of the Balancing Authority Certification Standard, the Drafting Team has removed the process that was previously included. In addition, the standards have been re-formatted to conform to the NERC standard format.~~

~~To address comments received from the previous postings of the BA and TOP standards and to maintain consistency with the current NERC Reliability Standards, the term Reliability Authority has been replaced throughout the certification standards with the term Reliability Coordinator. All references to the Interchange Authority have been removed from the certification standards.~~

### Future Development Plan:

Anticipated Actions	Anticipated Date
1. The drafting team will consider and respond to comments received during the current posting and revise the draft standard as needed.	<del>July 2005</del> <u>October 2005</u>
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<del>3.2.</del> Ballot standards.	<del>October 2005</del> <u>November 2005</u>

	<u>2005</u>
<u>4.3.</u> BOT adoption.	February 6, 2006
<u>5.4.</u> Proposed effective date.	April 1, 2006

### **Definitions of Terms Used in Standard**

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## A. Introduction

1. **Title:** Reliability Coordinator Certification — Emergency Operations
2. **Number:** ORG-025-1
3. **Purpose:** To ensure that the entity seeking certification as a Reliability Coordinator has the capability for continued operations during bulk electric system Emergency conditions.
4. **Applicability:**
  - 4.1. Entity seeking certification as a Reliability Coordinator
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1. The Reliability Coordinator shall have procedures or processes that define its responsibilities, authority, and actions for responding, communicating status, and coordinating operations during a bulk electric system Emergency that address when:
  - R1.1. Balancing Authorities within the Reliability Coordinator Area are unable to meet their resource or load requirements.
  - R1.2. Transmission Operators within the Reliability Coordinator Area are unable to meet their:
    - R1.2.1. Voltage and reactive requirements
    - R1.2.2. System Operating Limits
    - ~~R1.3. Emergency requirements are imposed by any regulatory organization.~~
- R2. The Reliability Coordinator shall have procedures or processes that define its responsibilities, authority, and actions for responding, communicating status, and coordinating operations during a bulk electric system ~~an~~ Emergency that address when the Reliability Coordinator:
  - R2.1. Is required to issue directives for corrective actions.
    - R2.1.1. Notify and coordinate with adjacent-other Reliability Coordinators.
  - R2.2. Is requested by another Reliability Coordinator to take actions to maintain the reliability of the interconnection.
  - R2.3. Is required to take action to mitigate an IROL violation.
  - R2.4. Has experienced a partial or complete bulk electric system shutdown in its Reliability Coordinator Area.
  - R2.5. Has experienced or is informed of an actual or suspected act of sabotage that affects a physical or cyber asset within its Reliability Coordinator Area.

## C. Measures

- M1. The Reliability Coordinator shall have available for inspection demonstrate that it can follow its procedures ~~or, processes, or use its tools to operate during Emergency conditions~~ as identified in Requirements R1 and R2.

## D. Compliance

1. **Compliance Monitoring Process**

**1.1. Compliance Monitoring Responsibility**

Regional Reliability Organization

**1.2. Compliance Monitoring Period and Reset Timeframe**

None

**1.3. Data Retention**

None

**1.4. Additional Compliance Information**

None

**2. Levels of Non-Compliance**

**2.1. Level 1:** Not Applicable

**2.2. Level 2:** Not Applicable

**2.3. Level 3:** Not Applicable

**2.4. Level 4:** Not Applicable

**E. Regional Differences**

None identified

**Version History**

<b>Version</b>	<b>Date</b>	<b>Action</b>	<b>Change Tracking</b>

## Standard Development Roadmap

*This section is maintained by the drafting team during the development of the standard and will be removed when the standard becomes effective.*

### Development Steps Completed:

1. Reliability Authority Certification SAR Requested — October 7, 2002.
2. Reliability Authority Certification SAR Authorized to Post — November 20, 2002.
3. SAR Drafting Team appointed — January 6, 2003.
4. Reliability Authority Certification SAR 1<sup>st</sup> Posting — December 1, 2002 to January 10, 2003.
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9. Reliability Coordinator Certification Standard first posting — June 1, 2005 to July 8, 2005.

### Description of Current Draft:

This is the second posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the three postings of the Balancing Authority Certification Standard, applicable comments received during the two postings of the Transmission Operator Certification Standard, and the first posting of the Reliability Coordinator Certification Standard.~~This is the first posting of the Reliability Coordinator Certification Standards. These standards have been drafted based on the SARs and applicable comments received during the first two postings of the Balancing Authority Certification Standard and applicable comments received during the first posting of the Transmission Operator Certification Standard. As was identified in the first posting of the Transmission Operator Certification Standard and the third posting of the Balancing Authority Certification Standard, the Drafting Team has removed the process that was previously included. In addition, the standards have been re-formatted to conform to the NERC standard format.~~

~~To address comments received from the previous postings of the BA and TOP standards and to maintain consistency with the current NERC Reliability Standards, the term Reliability Authority has been replaced throughout the certification standards with the term Reliability Coordinator. All references to the Interchange Authority have been removed from the certification standards.~~

### Future Development Plan:

Anticipated Actions	Anticipated Date
1. The drafting team will consider and respond to comments received during the current posting and revise the draft standard as needed.	<del>July 2005</del> <u>October 2005</u>
<del>2. It may be necessary to post this standard for a second time if changes are made after receiving the comments from this first posting.</del>	<del>August 2005</del>
<del>3.2.</del> Ballot standards.	October <del>2005</del> <u>November</u>

	<u>2005</u>
<u>4.3.</u> BOT adoption.	February 6, 2006
<u>5.4.</u> Proposed effective date.	April 1, 2006

### **Definitions of Terms Used in Standard**

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## A. Introduction

1. **Title:** Reliability Coordinator Certification - Loss of Control Center Functionality
2. **Number:** ORG-026-1
3. **Purpose:** To ensure that the entity seeking certification as a Reliability Coordinator has the capability for continued operations during loss of its control center functionality.
4. **Applicability:**
  - 4.1. Entity seeking certification as a Reliability Coordinator
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1.** The Reliability Coordinator shall have procedures, processes, tools, or facilities to continue to operate ~~in accordance with NERC standards for~~ its Reliability Coordinator Area under the single occurrence for each of the following conditions:
- Evacuation of control center building
  - Loss of communications<sup>1</sup>
  - Loss of Monitoring and Assessment Systems functionality<sup>2</sup>
  - Loss of critical ~~Supervisory Control and d~~Data ~~a~~Acquisition system data
  - Loss of control center support functions, i.e. air conditioning, power, water
- R2.** The Reliability Coordinator shall have procedures, processes, or tools to operate ~~in accordance with NERC standards within the defined Reliability Coordinator Area~~ during ~~the loss of control center functionality for the~~the conditions identified in requirement R1 that addresses:
- R2.1.** Acquiring and monitoring real-time operational data for its Reliability Coordinator Area.
- R2.2.** Acquiring the Balancing Integrated Operational Plan and plan updates from the Balancing Authorities within its Reliability Coordinator Area.
- R2.3.** Acquiring outages related to maintenance and construction plans and equipment ratings from the Transmission Operators within its Reliability Coordinator Area.
- R2.4.** Acquiring system protection and control information, including special protection systems ~~from its Planning Authority~~.
- R2.5.** Acquiring reliability analysis information from adjacent other Reliability Coordinators.
- R2.6.** Acquiring transmission system limitations, transmission adequacy plans, and determination of Total Transmission Capability values ~~from Transmission Planner(s)~~ within its Reliability Coordinator Area.

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<sup>1</sup> Loss of communications is meant to include all communications other than that associated with SCADA data (internet, administrative and operational voice, etc)

<sup>2</sup> Loss of monitoring and assessment systems functionality is meant to include any method that entities' utilize in monitoring, controlling, and assessing their area of responsibility.

- R2.7. Acquiring facility ratings and operational data from the Transmission Owners within its Reliability Coordinator Area.
- R2.8. Monitoring the relevant real-time operating parameters of ~~adjacent~~ other Reliability Coordinator's facilities to operate within its IROLs.
- R2.9. Performing real-time reliability analysis including contingency analysis.
- R2.10. Analyzing and, ~~coordinating, and approving~~ transmission and generator outages from a reliability perspective.
- R2.11. Analyzing and, ~~coordinating, and approving~~ the Balancing Integrated Operational Plans submitted by the Balancing Authorities within its Reliability Coordinator Area from a reliability perspective.
- R2.12. Coordinating day-ahead analyses with other Reliability Coordinators.
- R2.13. Implementing real-time actions with other Reliability Coordinators.
- ~~R2.14. Analyzing arranged interchange into, out of, and through its Reliability Coordinator Area.~~
- ~~R2.15.~~ R2.14. Developing Interconnection Reliability Operating Limits (IROLs) ~~operating reliability limits.~~
- ~~R2.16.~~ R2.15. Calculating, reporting, and archiving data necessary to support Reliability Coordinator reporting requirements of NERC standards.
- ~~R2.17.~~ R2.16. Maintaining its responsibilities, authority, and actions taken in responding, communicating status, and coordinating operations under anticipated or actual bulk electric system emergency conditions.
- ~~R2.18. Maintaining its responsibilities, authority, and actions in responding, communicating status, and coordinating following a partial or total bulk electric system shutdown.~~
- ~~R2.19.~~ R2.17. Adhering to NERC Reliability Standards related to cyber security protocols.

## C. Measures

- M1. The Reliability Coordinator shall have available for inspection its procedures, processes, tools or facilities to meet Requirements R1 and R2.

## D. Compliance

- 1. **Compliance Monitoring Process**
  - 1.1. **Compliance Monitoring Responsibility**
    - Regional Reliability Organization
  - 1.2. **Compliance Monitoring Period and Reset Timeframe**
    - None
  - 1.3. **Data Retention**
    - None
  - 1.4. **Additional Compliance Information**

None

**2. Levels of Non-Compliance**

2.1. Level 1: Not Applicable

2.2. Level 2: Not Applicable

2.3. Level 3: Not Applicable

2.4. Level 4: Not Applicable

**E. Regional Differences**

None identified

**Version History**

Version	Date	Action	Change Tracking

## Standard Development Roadmap

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### Development Steps Completed:

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### Future Development Plan:

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<del>3.2.</del> Ballot standards.	<del>October</del>

	<del>2005</del> November <del>2005</del>
<del>4.3.</del> BOT adoption.	February 6, 2006
<del>5.4.</del> Proposed effective date.	April 1, 2006

### **Definitions of Terms Used in Standard**

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## A. Introduction

1. **Title:** Reliability Coordinator Certification — Restoration
2. **Number:** ORG-027-1
3. **Purpose:** To ensure that the entity seeking certification as a Reliability Coordinator has a detailed restoration plan for implementation after a bulk electric system shutdown.
4. **Applicability:**
  - 4.1. Entity seeking certification as a Reliability Coordinator
5. **(Proposed) Effective Date:** April 1, 2006

## B. Requirements

- R1. ~~The Reliability Coordinator shall have a restoration plan that assures effective restoration by enabling, and coordinating required operating actions necessary for system restoration of all the Balancing Authorities, Generator Operators, and Transmission Operators operating within its Reliability Coordinator Area and other Reliability Coordinators. The Reliability Coordinator shall have a restoration plan that integrates the restoration plans of all of the entities operating within its Reliability Coordinator Area including its Balancing Authorities, Generator Operators, Transmission Operators, and adjacent Reliability Coordinators.~~
- R2. The Reliability Coordinator shall have procedures or processes that define its responsibilities, authority, and actions in responding, communicating status, and coordinating following a partial or total bulk electric system shutdown.

## C. Measures

- M1. The Reliability Coordinator shall have available for inspection the documentation specified in Requirements R1 and R2.

## D. Compliance

1. **Compliance Monitoring Process**
  - 1.1. **Compliance Monitoring Responsibility**

Regional Reliability Organization
  - 1.2. **Compliance Monitoring Period and Reset Timeframe**

None
  - 1.3. **Data Retention**

None
  - 1.4. **Additional Compliance Information**

None
2. **Levels of Non-Compliance**
  - 2.1. **Level 1:** Not Applicable
  - 2.2. **Level 2:** Not Applicable
  - 2.3. **Level 3:** Not Applicable
  - 2.4. **Level 4:** Not Applicable

**E. Regional Differences**

None identified

**Version History**

Version	Date	Action	Change Tracking