



RELIABILITY FIRST

**Planning Resource Adequacy Analysis, Assessment and Documentation (PRAA)
SDT Conference Call/WebEx Agenda
Wednesday August 17, 2016 2:00 – 3:00 ET (1:00-2:00 CT)**

[Join WebEx meeting](#)

Meeting number (access code): 732 703 127

Meeting password: 081716

Join by phone

1-855-244-8681 Call-in toll-free number (US/Canada)

1-650-479-3207 Call-in toll number (US/Canada)

- 1. Welcome and Attendance**
- 2. Review Anti-Trust statement**
 - RF Antitrust Statement.pdf
- 3. Approve July 29, 2016 Draft Notes**
 - PRAA_SDT_072916_Notes.doc
- 4. Review Draft Assessment of the Impact Neighboring Regions**
 - Draft_BAL-502-RF-03_Impact_on_Neighboring_Regions_080816.doc
- 5. Review Draft Perceived Reliability Impact**
 - Draft_BAL-502-RF-03_Perceived_Reliability_Impact_080816.doc
- 6. Review Draft Implementation Plan**
 - Draft_BAL-502-RF-03_Implementation_Plan_080816.doc
- 7. Review Draft Posting Questions**
 - Questions_for_1st_Posting_BAL-502-RF-03.doc
- 8. Determine if Draft Standards is Ready for First Comment Posting Period**
 - Draft_BAL-502-RF-03_Redline_072916.docx
- 9. Action Items**
- 10. Schedule Upcoming Conference Call**

ANTITRUST STATEMENT

IT IS THE POLICY OF RELIABILITYFIRST TO OBEY THE ANTITRUST LAWS AND TO AVOID ALL CONDUCT THAT UNREASONABLY RESTRAINS COMPETITION. IT IS THE RESPONSIBILITY OF EACH DIRECTOR, MEMBER AND EMPLOYEE OF RELIABILITYFIRST TO ADHERE TO RELIABILITYFIRST'S "ANTITRUST COMPLIANCE GUIDELINES," A COPY OF WHICH IS AVAILABLE ON RELIABILITYFIRST'S WEBSITE.



RELIABILITY FIRST

**Planning Resource Adequacy Analysis, Assessment and Documentation (PRAA)
SDT Conference Call/WebEx Notes
Friday July 29, 2016 10:00 – 11:00 ET (9:00-10:00 CT)**

[Join WebEx meeting](#)

Meeting number (access code): 735 013 499

Meeting password: 072916

Join by phone

1-855-244-8681 Call-in toll-free number (US/Canada)

1-650-479-3207 Call-in toll number (US/Canada)

Member	Company
Joe O'Brien	NIPSCO
Jeffery W. Beattie	Consumers Energy
Tom Falin (Chair)	PJM
Jordan Cole (Vice Chair)	MISO
Anthony Jablonski	ReliabilityFirst Staff
Tim Fryfogle	ReliabilityFirst Staff
Paul Kure	ReliabilityFirst Staff
Susan Morris	FERC

* Denotes not in attendance

1. Welcome and Attendance

Tony welcomed the SDT and attendance was taken. SDT members introduced themselves.

2. Review Anti-Trust statement

➤ RF Antitrust Statement.pdf

Tony reviewed the Anti-Trust statement.

3. Approve July 1, 2016 Draft Notes

Action: Approve July 1, 2016 Draft Notes

Motion: Joe O'Brien

Second: Tom Falin

Outcome: The SDT approved the July 1, 2016 draft notes.

4. Review Draft Work Plan

- PRAASDT_Draft_Work_Plan_072516.doc

Tony and the SDT reviewed the draft work plan and the SDT felt the plan was reasonable. Tony added the caveat that the work plan is subject to change depending on potential items (e.g., number of comment periods, amount of comments received, etc.) but if possible, we have a good shot at getting this to the RF BOD by their December meeting.

5. Review and Discuss 2015 Long-Term Reliability Assessment and 2014 Probabilistic Assessment Reports

- Reliability Assessments DL-2015LTRA - Final Report.pdf
- Reliability Assessments DL-2014ProbA April Report Final_Final.pdf

Jordan led a discussion regarding the two reports. He noted that the reports do identify the gaps between the resource adequacy analyses and projected reserve margins. The SDT then agreed that even though this gap is identified in these two reports, there are no requirements for these to be included in these reports. It was decided that a new Requirement R3 should be added to the BAL-502-RF-03 standard to specifically address the FERC Directive as outlined in the SAR. Both Tom and Jordan also noted that the addition of the new Requirement R3 will require very minimal additional effort to be performed by PJM and MISO.

6. Review Initial Strawman of Non-Substantive Changes

- Non-Substantive_Changes.docx
- BAL-502-RFC-03_Redline_072516.docx

Tony and the SDT reviewed the draft strawman proposal of the non-substantive changes. The non-substantive changes were a result of bringing the standard up to the new format of NERC Standards. Tony also explained the rationale for changing the bulleted items in R1.3.1, R1.3.2 and R1.4 to sub-parts. He noted bullets in Reliability Standards are meant to be “OR” statements. The intent of these bulleted items was not to be “OR” statements, rather be “AND” statements. Both Tom and Jordan confirmed Tony’s understanding that these have always been “AND” statements and had no issues changing them to sub-parts.

7. Action Items

- Request Availability for future call – Tony
- Review draft language for new Requirement R3 – SDT
- In the VSL Section, rename sub-requirements to sub-Parts - Tony
- Draft assessment of the impact of the SAR on neighboring regions – Tony
- Draft Implementation Plan – Tony

- Draft identification of any existing Standard that will be deleted, in part or whole, or otherwise impacted by the implementation of the draft Standard – Tony
- Draft perceived reliability impact should the Standard be approved - Tony

8. Schedule Upcoming Conference Call
TBD



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**Draft Planning Resource Adequacy Analysis, Assessment and Documentation
(BAL-502-RF-03) Assessment of Impact on Neighboring Regions**

The Planning Resource Adequacy and Assessment (PRAA) Standard Drafting Team (SDT) believes there is no impact on neighboring regions as a result of the recommended non-substantive changes, addition of “Time Horizons” and addition of a new the Requirement R3. Requirement R3, requires the Planning Coordinator to identify any gaps between the needed amount of planning reserves defined in Requirement R1, Part 1.1 and the projected planning reserves documented in Requirement R2. Historically, the two Planning Coordinators within the ReliabilityFirst region have already been identifying this gap via a number of public reports, thus this change will result in no change for neighboring Regions which also include these two Planning coordinators.

Since there is no impact on neighboring regions, there was no need for the PRAA SDT to solicit appropriate input from the neighboring regions.



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**Draft Planning Resource Adequacy Analysis, Assessment and Documentation
(BAL-502-RF-03) Perceived Reliability Impact**

The Planning Resource Adequacy and Assessment (PRAA) Standard Drafting Team (SDT) believes the additions of Time Horizons and non-substantive changes will have no reliability impact as these are more administrative in nature.

The Planning Resource Adequacy and Assessment (PRAA) Standard Drafting Team (SDT) believes the new Requirement R3 will have a perceived reliability impact of ensuring the Planning Coordinators within the ReliabilityFirst footprint identify any gaps between the needed amount of planning reserves defined in Requirement R1, Part 1.1 and the projected planning reserves determined from the resource adequacy analysis. By identifying these gaps, the Planning Coordinator will document any deficiencies in planning reserves to help ensure that entities within their footprint are aware of potential risks regarding the capability to balance resources and demand in a planning timeframe. **NOTE to SDT – is there anything else anyone wants to add here?**



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**Draft Planning Resource Adequacy Analysis, Assessment and Documentation
(BAL-502-RF-03) Implementation Plan**

Requested Approvals

- None

Requested Retirements

- BAL-502-RFC-02

Prerequisite Approval

- None

Revisions to Defined Terms in the NERC Glossary

- None

Effective Date

- BAL-502-RF-03 shall become effective on the first day of the first calendar quarter that is after the date that this standard is approved by applicable regulatory authorities or as otherwise provided for in a jurisdiction where approval by an applicable governmental authority is required for a standard to go into effect.



RELIABILITY FIRST

**Draft Planning Resource Adequacy Analysis, Assessment and Documentation
(BAL-502-RF-03) 1st 30-Day Comment Posting Questions**

1. [OPTION 1] - Do you agree that the modifications made to the BAL-502-RF-03 draft standard are consistent with the scope of the BAL-502-RF-03 Standard Authorization Request (SAR)? If not, please provide specific comments why you do not agree that the BAL-502-RF-03 draft standard is consistent with the scope of the BAL-502-RF-03 SAR.
2. [OPTION 2a] Do you agree with the newly added Time Horizons for each Requirement? If not, please provide specific comments why you do not agree the newly designated Time Horizons.
3. [OPTION 2b] Do you agree with the non-substantive changes made throughout the standard? If not, please provide specific comments why you do not agree with the non-substantive changes made throughout the standard.
4. [OPTION 2c] Do you agree that the newly added Requirement R3 is responsive to the Directive noted in FERC Order No 747, to include a requirement requiring the Planning Coordinator to identify any gap between the needed amount of planning reserves defined in Requirement R1.1 and the planning reserves determined from the resource adequacy analysis? If not, please provide specific comments why you do not agree the newly added Requirement R3 is responsive to the FERC Directive
5. Do you agree with the newly included Measure M3? If not, please provide specific comments why you do not agree with the newly included Measure M3.
6. Do you agree with the newly included Violation Severity Levels (VSLs) for Requirement R3? If not, please provide specific comments why you do not agree with the newly included VSLs for Requirement R3.
7. Do you agree with the BAL-502-RF-03 Implementation Plan? If not, please provide specific comments why you do not agree with the Implementation Plan.

NOTE: This is posted for informational purposes only. Please supply all comments via the ReliabilityFirst site located at: [123](#)

Standard BAL-502-RF-03

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A. Introduction

1. Title: Planning Resource Adequacy Analysis, Assessment and Documentation

2. Number: BAL-502-RF-03

3. Purpose: To establish common criteria, based on "one day in ten year" loss of Load expectation principles, for the analysis, assessment and documentation of Resource Adequacy for Load in the ReliabilityFirst Corporation (RF) region

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4. Applicability

4.1 Functional Entities

4.1.1 Planning Coordinator

5. Effective Date:

5.1 BAL-502-RF-03 shall become effective on the first day of the first calendar quarter that is after the date that this standard is approved by applicable regulatory authorities or as otherwise provided for in a jurisdiction where approval by an applicable governmental authority is required for a standard to go into effect.

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B. Requirements and Measures

R1 The Planning Coordinator shall perform and document a Resource Adequacy analysis annually. The Resource Adequacy analysis shall [Violation Risk Factor: Medium] [Time Horizon: Long-term Planning]:

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1.1 Calculate a planning reserve margin that will result in the sum of the probabilities for loss of Load for the integrated peak hour for all days of each planning year¹ analyzed (per R1.2) being equal to 0.1. (This is comparable to a "one day in 10 year" criterion).

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1.1.1 The utilization of Direct Control Load Management or curtailment of Interruptible Demand shall not contribute to the loss of Load probability.

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1.1.2 The planning reserve margin developed from R1.1 shall be expressed as a percentage of the median² forecast peak Net Internal Demand (planning reserve margin).

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1.2 Be performed or verified separately for each of the following planning years:

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¹ The annual period over which the LOLE is measured, and the resulting resource requirements are established (June 1st through the following May 31st).

² The median forecast is expected to have a 50% probability of being too high and 50% probability of being too low (50:50).

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Standard BAL-502-RF-03

1.2.1 Perform an analysis for Year One.

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1.2.2 Perform an analysis or verification at a minimum for one year in the 2 through 5 year period and at a minimum one year in the 6 through 10 year period.

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1.2.2.1 If the analysis is verified, the verification must be supported by current or past studies for the same planning year.

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1.3 Include the following subject matter and documentation of its use:

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1.3.1 Load forecast characteristics:

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1.3.1.1 Median (50:50) forecast peak Load.

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1.3.1.2 Load forecast uncertainty (reflects variability in the Load forecast due to weather and regional economic forecasts).

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1.3.1.3 Load diversity.

1.3.1.4 Seasonal Load variations.

1.3.1.5 Daily demand modeling assumptions (firm, interruptible).

1.3.1.6 Contractual arrangements concerning curtailable/Interruptible Demand.

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1.3.2 Resource characteristics:

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1.3.2.1 Historic resource performance and any projected changes

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1.3.2.2 Seasonal resource ratings

1.3.2.3 Modeling assumptions of firm capacity purchases from and sales to entities outside the Planning Coordinator area.

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1.3.2.4 Resource planned outage schedules, deratings, and retirements.

1.3.2.5 Modeling assumptions of intermittent and energy limited resource such as wind and cogeneration.

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1.3.2.6 Criteria for including planned resource additions in the analysis

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1.3.3 Transmission limitations that prevent the delivery of generation reserves

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1.3.3.1 Criteria for including planned Transmission Facility additions in the analysis

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Standard BAL-502-RF-03

1.3.4 Assistance from other interconnected systems including multi-area assessment considering Transmission limitations into the study area.

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1.4 Consider the following resource availability characteristics and document how and why they were included in the analysis or why they were not included:

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1.4.1 Availability and deliverability of fuel.

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1.4.2 Common mode outages that affect resource availability

1.4.3 Environmental or regulatory restrictions of resource availability.

1.4.4 Any other demand (Load) response programs not included in R1.3.1.

1.4.5 Sensitivity to resource outage rates.

1.4.6 Impacts of extreme weather/drought conditions that affect unit availability.

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1.4.7 Modeling assumptions for emergency operation procedures used to make reserves available.

1.4.8 Market resources not committed to serving Load (uncommitted resources) within the Planning Coordinator area.

1.5 Consider Transmission maintenance outage schedules and document how and why they were included in the Resource Adequacy analysis or why they were not included

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1.6 Document that capacity resources are appropriately accounted for in its Resource Adequacy analysis

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1.7 Document that all Load in the Planning Coordinator area is accounted for in its Resource Adequacy analysis

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M1 Each Planning Coordinator shall possess the documentation that a valid Resource Adequacy analysis was performed or verified in accordance with R1

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R2 The Planning Coordinator shall annually document the projected Load and resource capability, for each area or Transmission constrained sub-area identified in the Resource Adequacy analysis [Violation Risk Factor: Lower] [Time Horizon: Long-term Planning].

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2.1 This documentation shall cover each of the years in Year One through ten.

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2.2 This documentation shall include the Planning Reserve margin calculated per requirement R1.1 for each of the three years in the analysis.

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2.3 The documentation as specified per requirement R2.1 and R2.2 shall be publicly posted no later than 30 calendar days prior to the beginning of Year One.

M2 Each Planning Coordinator shall possess the documentation of its projected Load and resource capability, for each area or Transmission constrained sub-area identified in the Resource Adequacy analysis on an annual basis in accordance with R2.

R3 The Planning Coordinator shall identify any gaps between the needed amount of planning reserves defined in Requirement R1, Part 1.1 and the projected planning reserves documented in Requirement R2 [Violation Risk Factor: Lower] [Time Horizon: Long-term Planning].

M3 Each Planning Coordinator shall possess the documentation identifying any gaps between the needed amounts of planning reserves and projected planning reserves in accordance with R3.

C. Compliance

5. Compliance Monitoring Process

5.1. Compliance Monitoring Authority

As defined in the NERC Rules of Procedure, "Compliance Enforcement Authority" means NERC or the Regional Entity in their respective roles of monitoring and enforcing compliance with the NERC Reliability Standards.

5.2. Evidence Retention

The following evidence retention periods identify the period of time an entity is required to retain specific evidence to demonstrate compliance. For instances where the evidence retention period specified below is shorter than the time since the last audit, the Compliance Enforcement Authority may ask an entity to provide other evidence to show that it was compliant for the full time period since the last audit.

The Applicable Entity shall keep data or evidence to show compliance with Requirements R1 through R3, and Measures M1 through M3 from the most current and prior two years.

If an Applicable Entity is found non-compliant, it shall keep information related to the non-compliance until mitigation is complete and approved, or for the time specified above, whichever is longer.

The Compliance Enforcement Authority shall keep the last audit records and all requested and submitted subsequent audit records.

5.3. Compliance Monitoring and Assessment Processes

- Compliance Audit
- Self-Certification
- Spot Checking
- Compliance Investigation
- Self-Reporting
- Complaint

5.4. Additional Compliance Information

None

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M1 . Each Planning Coordinator shall possess the documentation that a valid Resource Adequacy analysis was performed or verified in accordance with R1¶
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M2 . Each Planning Coordinator shall possess the documentation of its projected Load and resource capability, for each area or Transmission constrained sub-area identified in the Resource Adequacy analysis on an annual basis in accordance with R2.¶
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				<p>The Planning Coordinator Resource Adequacy analysis failed to include 1 of the Resource Characteristics subcomponents under Requirement R1, Part 1.3.1 and 1.3.2 and documentation of its use</p> <p>OR</p> <p>The Planning Coordinator Resource Adequacy analysis failed to document that all Load in the Planning Coordinator area is accounted for in its Resource Adequacy analysis per Requirement R1, Part 1.7</p>	<p>more of the Load forecast Characteristics subcomponents under Requirement R1, Part 1.3.1 and documentation of their use</p> <p>OR</p> <p>The Planning Coordinator Resource Adequacy analysis failed to include 2 or more of the Resource Characteristics subcomponents under Requirement R1, Part 1.3.2 and documentation of their use</p> <p>OR</p> <p>The Planning Coordinator Resource Adequacy analysis failed to include Transmission limitations and documentation of its use</p>	<p>The Planning Coordinator failed to perform an analysis for Year One per Requirement 1.2.1</p>
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					<p>per <u>Requirement R1, Part 1.3.3</u></p> <p>OR</p> <p>The Planning Coordinator Resource Adequacy analysis failed to include assistance from other interconnected systems and documentation of its use per <u>Requirement R1, Part 1.3.4</u></p> <p>OR</p> <p>The Planning Coordinator Resource Adequacy analysis failed to consider 3 or more Resource availability characteristics subcomponents under <u>Requirement R1, Part 1.4</u> and documentation of how and why they were included in the analysis or why they were not included</p>		
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					<p>OR</p> <p>The Planning Coordinator Resource Adequacy analysis failed to document that capacity resources are appropriately accounted for in its Resource Adequacy analysis per Requirement R1, Part 1.6</p>		<p>Deleted: C</p> <p>Deleted: 2</p> <p>Deleted: 12/04/08</p>
R2	Long-term Planning	Lower	<p>The Planning Coordinator failed to publicly post the documents as specified per requirement Requirement R2, Part 2.1 and Requirement R2, Part 2.2 later than 30 calendar days prior to the beginning of Year One per Requirement R2, Part 2.3</p>	<p>The Planning Coordinator failed to document the projected Load and resource capability, for each area or Transmission constrained sub-area identified in the Resource Adequacy analysis for one of the years in the 2 through 10 year period per Requirement R2, Part 2.1.</p> <p>OR</p> <p>The Planning Coordinator failed to document the Planning</p>	<p>The Planning Coordinator failed to document the projected Load and resource capability, for each area or Transmission constrained sub-area identified in the Resource Adequacy analysis for year 1 of the 10 year period per Requirement R2, Part 2.1.</p> <p>OR</p> <p>The Planning Coordinator failed to document the projected Load and resource</p>	<p>The Planning Coordinator failed to document the projected Load and resource capability, for each area or Transmission constrained sub-area identified in the Resource Adequacy analysis per Requirement R2, Part 2.1.</p>	<p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: R</p> <p>Deleted: December 4th</p> <p>Deleted: 08</p>

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				Reserve margin calculated per requirement R1.1 for each of the three years in the analysis per Requirement R2, Part 2.2 .	capability, for each area or Transmission constrained sub-area identified in the Resource Adequacy analysis for two or more of the years in the 2 through 10 year period per Requirement R2, Part 2.1 .	
R3	Long-term Planning	Lower	None	None	None	The Planning Coordinator failed to identify any gaps between the needed amount of planning reserves and the projected planning reserves, per R3

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D. Regional Variances

None

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E. Interpretations

None

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F. Associated Documents

None

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Version History

Version	Date	Action	Change Tracking
BAL-502-RFC-02	12/04/08	ReliabilityFirst Board Approved	
BAL-502-RFC-02	08/05/09	NERC BoT Approved	
BAL-502-RFC-02	03/17/11	FERC Approved	

Deleted: Definitions:
Resource Adequacy - the ability of supply-side and demand-side resources to meet the aggregate electrical demand (including losses).
Net Internal Demand - Total of all end-use customer demand and electric system losses within specified metered boundaries, less Direct Control Load Management and Interruptible Demand.
Peak Period - A period consisting of two (2) or more calendar months but less than seven (7) calendar months, which includes the period during which the responsible entity's annual peak demand is expected to occur.
Year One - The planning year that begins with the upcoming annual Peak Period.
The following definitions were extracted from the February 12th, 2008 NERC Glossary of Terms:
Direct Control Load Management - Demand-Side Management that is under the direct control of the system operator. DCLM may control the electric supply to individual appliances or equipment on customer premises. DCLM as defined here does not include Interruptible Demand.
Facility - A set of electrical equipment that operates as a single Bulk Electric System Element (e.g., a line, a generator, a shunt compensator, transformer, etc.).
Interruptible Demand - Demand that the end-use customer makes available to its Load-Serving Entity via contract or agreement for curtailment.
Load - An end-use device or customer that receives power from the electric system.

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Deleted: Posted for 2nd Comment Period
Deleted: 3rd Draft
Deleted: 10/16/08 Through 10/30/08
Deleted: Posted for 15-Day Category Ballot
Deleted: BAL-502-RFC-02 3rd Draft
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