	© <i>ISO New England Inc. 2024</i>	<i>Procedure: Perform Operations</i>
	<i>Process Name: Perform Energy Analysis</i>	<i>Winter Readiness Assessment</i>
	<i>Procedure Number: OUTSCH.0060.0010</i>	<i>Revision Number: 0</i>
	<i>Procedure Owner: Mike Knowland</i>	<i>Effective Date: November 19, 2024</i>
	<i>Approved By: Director, OSS</i>	<i>Review Due Date: November 19, 2026</i>

SOP-OUTSCH.0060.0010

Perform Operations Winter Readiness Assessment

Contents

1. Objective

2. Background

3. Responsibilities.....

4. Controls.....

5. Instructions.....

5.1 Conduct Natural Gas Critical Infrastructure Survey Process

5.2 Conduct Generator Winter Readiness Survey Process

5.3 Executive Contact List

6. Performance Measures

7. References

8. Revision History

9. Attachments.....

2

2

2

3

4

4

5


7

8

8

8

8

	© ISO New England Inc. 2024	Procedure: Perform Operations
	Process Name: Perform Energy Analysis	Winter Readiness Assessment
	Procedure Number: OUTSCH.0060.0010	Revision Number: 0
	Procedure Owner: Mike Knowland	Effective Date: November 19, 2024
	Approved By: Director, OSS	Review Due Date: November 19, 2026

1. Objective


The objective of this procedure is to perform annual processes associated with winter readiness, ensuring Generators, pipelines, and other critical facilities serving the region are prepared for environmental conditions associated with winter.

2. Background

As part of New England's preparation for winter to ensure optimal performance and reliability of the grid, surveys are distributed and compiled prior to the winter months. Distribution of surveys ensures proper channels of communication in the event of abnormal conditions, and that infrastructure in region is prepared for stressed environmental conditions.


3. Responsibilities

1. The Energy Security Analyst (or designee) is responsible for performing the Natural Gas Critical Infrastructure Survey process
2. The Energy Security Analyst (or designee) is responsible for performing the Winter Readiness Survey process
3. The Energy Security Analyst (or designee) is responsible for validating the Executive Contact List
4. The Manager of Forecast & Scheduling (or designee) is responsible for reviewing completed survey responses
5. The Manager, Control Room Operations (or designee) is responsible for communicating with Local Control Center (LCC) Heads.
6. The Operations Analysis and Integration Department is responsible for updating tools used for winter readiness as a result of the processes outlined in this procedure

	© ISO New England Inc. 2024	Procedure: Perform Operations
	Process Name: Perform Energy Analysis	Winter Readiness Assessment
	Procedure Number: OUTSCH.0060.0010	Revision Number: 0
	Procedure Owner: Mike Knowland	Effective Date: November 19, 2024
	Approved By: Director, OSS	Review Due Date: November 19, 2026

4. Controls

1. Energy Security Analysts follow the Operations Forecasting Confluence calendar to perform responsibilities on schedule.
2. Energy Security Analysts follow the Operations Forecasting Confluence calendar to perform the Natural Gas Critical Fuel Infrastructure Survey on the schedule specified in Operating Procedure 21 (Operational Surveys, Energy Forecasting & Reporting, and Actions During an Energy Emergency) (“OP-21”)
3. Energy Security Analysts follow the Operations Forecasting Confluence calendar to perform the Winter Readiness Survey and the Executive Contact List on the schedule specified in Operating Procedure 21 (Operational Surveys, Energy Forecasting & Reporting, and Actions During an Energy Emergency) (“OP-21”)

	© ISO New England Inc. 2024	Procedure: Perform Operations
	Process Name: Perform Energy Analysis	Winter Readiness Assessment
	Procedure Number: OUTSCH.0060.0010	Revision Number: 0
	Procedure Owner: Mike Knowland	Effective Date: November 19, 2024
	Approved By: Director, OSS	Review Due Date: November 19, 2026


5. Instructions

5.1 Conduct Natural Gas Critical Infrastructure Survey Process

The objective of natural gas Critical Infrastructure Facility Survey (CIFS) is to review critical gas sector infrastructure, ensuring that critical components are not located on electrical circuits subject to automatic load shedding schemes.

A Natural Gas Critical Infrastructure Facility is defined (for use in this SOP) as a facility that is involved in natural gas production, processing, intrastate and interstate transmission and distribution pipeline facilities, which if curtailed, will impact the delivery of natural gas to Bulk Power System natural gas-fired generation.

1. The Energy Security Analyst (or designee) shall perform the actions of this step at the periodicity defined in OP-21.
 - A. Distribute CIFS
 - (1) Create a folder to gather and store responses from survey recipients
 - (2) Utilize Templates to compile and track distribution of the survey
 - a. *ISO CIFS Survey Responses-LCC.xlsx*
 - b. *YYYY ISO-NE Survey NG Critical Componets.xlsx*
 - (3) Using the CIFS Response template, send an email to each of the organizations responsible for critical natural gas facilities¹, requesting the *ISO-NE Survey NG Critical Components* survey be completed
 - (4) Attach the survey responses from the previous year, for reference
 - B. Compile and track responses from each organization using the *ISO CIFS Survey Responses-LCC* document
 - (1) The Distribution List tab includes space to track sent and received dates
 - (2) The ISO CIFS tab is a summary of responses; who responded, dates received, and any updates/changes
 - (3) Each LCC tab contains the details from survey recipients
 - a. Verify and revise responses on the appropriate LCC tab as needed
 - C. After receiving all survey responses, provide completed survey results to the Manager, Control Room Operations
2. Upon receiving the survey results, the Manager, Control Room Operations (or

	© ISO New England Inc. 2024	Procedure: Perform Operations
	Process Name: Perform Energy Analysis	Winter Readiness Assessment
	Procedure Number: OUTSCH.0060.0010	Revision Number: 0
	Procedure Owner: Mike Knowland	Effective Date: November 19, 2024
	Approved By: Director, OSS	Review Due Date: November 19, 2026

designee) shall provide the survey results to the LCC Heads

- (1) Each LCC should review their load shedding procedures, schemes, and circuits to verify that natural gas infrastructure deemed to be critical is not connected to or located on any predefined electrical circuits.

5.2 Conduct Generator Winter Readiness Survey Process

The objective of the Generator Winter Readiness Survey is to facilitate situational awareness of generator readiness for operations during the winter months.

1. The Energy Security Analyst (or designee) shall perform the following actions annually, as outlined in OP-21.

A. Confirm Survey Submitter Registration

- (1) Verify that each Lead Market Participant has at least one survey submitter registered in CAMS, starting at least 2 weeks prior to the survey distribution deadline specified in OP-21.
- (2) If any Lead Market Participant has no designated survey submitter, contact Participant Support to request that the Lead Market Participant's CAMS Security Administrator designate someone as a survey submitter.


B. Distribute the Winter Readiness Survey prior to the distribution deadline specified in OP-21.

- (1) In the ISO Surveys App within Salesforce, select "Generator Fuel and Emissions Survey" from the "Survey Configs" tab.
 - a. Review the survey details, then click the "Survey Request Batch" button.
 - b. Select the survey due date as specified in OP-21.

NOTE

The survey due date may be adjusted to ensure that the survey due date is a weekday.

- c. Verify that the Filter Method is set to "All Assets".
- d. Verify that the survey's asset count and list of assets reflect all generators listed as COMMERCIAL_OPERATION or NON_COMM_TESTING in CAMS.

	© ISO New England Inc. 2024	Procedure: Perform Operations
	Process Name: Perform Energy Analysis	Winter Readiness Assessment
	Procedure Number: OUTSCH.0060.0010	Revision Number: 0
	Procedure Owner: Mike Knowland	Effective Date: November 19, 2024
	Approved By: Director, OSS	Review Due Date: November 19, 2026

- e. Finalize by clicking the “Start Survey Request Batch” button. All Lead Market Participants will receive an email with a link to the survey.

C. Organize Survey Response Confirmations in Outlook

- (1) Create a new subfolder within the Fuel Surveys inbox.
 - a. Under the folder “4. Winter Readiness Survey”, create a new subfolder with the naming convention of “YYYY Winter Readiness Survey”.
- (2) As survey response confirmations arrive in the Fuel Survey inbox, move those confirmation emails to the newly created subfolder.

D. Send Survey Reminders to Lead Market Participants

- (1) Periodically, at the discretion of the Energy Security Analyst, send reminders to submitters with missing surveys using the ISO Surveys App in Salesforce.

NOTE

Suggested reminder schedule is as follows


- Once per week, until 1 week prior to the due date
- 7, 3, 2, and 1 day(s) prior to the due date

E. Prepare Winter Readiness Survey Report

- (1) Export survey response data from Salesforce.
- (2) Reformat and review the exported data.
- (3) Prepare the Winter Readiness Survey Report draft.
- (4) Share the draft report with the Manager, Forecast and Scheduling for review and incorporate any feedback.

F. Review the generator outages impacted by cold weather ensuring assumptions and tools for situational awareness are current.

- (1) In the event revisions are required, notify Operations Analysis and Integration of the changes necessary.


	© ISO New England Inc. 2024	Procedure: Perform Operations Winter Readiness Assessment
	Process Name: Perform Energy Analysis	
	Procedure Number: OUTSCH.0060.0010	Revision Number: 0
	Procedure Owner: Mike Knowland	Effective Date: November 19, 2024
	Approved By: Director, OSS	Review Due Date: November 19, 2026

- G. Share the final Winter Readiness Survey Report with Control Room Management, the Manager of Operations Analysis and Integration, and all Operations Directors

5.3 Executive Contact List

The objective of the Executive Contact List is ensure ISO-NE has an accurate and updated contact for oil stations greater than 100 MW, usually for use when the region is in abnormal conditions.

1. The Energy Security Analyst (or designee) shall perform these actions annually, in alignment with the Winter Readiness Survey, as outlined in OP-21.
 - A. Verify and compile Executive Contact List
 - (1) Utilize Templates to compile and track distribution and responses of the executive contacts
 - (2) Draft an email to each of the Lead Market Participants requesting that they confirm the previous year's executive contact information
 - a. Some stations may not have a secondary contact identified
 - b. Details required are
 - (i) Contact
 - (ii) Email
 - (iii) Primary Phone #
 - (iv) Alternate Phone #
 - (v) Title
 - B. Send Reminders to Lead Market Participants
 - (1) Throughout the month, send reminders to participants who have not verified and/or provided an executive contact
 - a. All responses should be verified and compiled by the due date designed in the Winter Readiness Survey
 - C. Share the completed Executive Contact List with the Manager of Forecast & Scheduling, the Director of Operations, and the Director of Operational Performance, Training & Integration

	© ISO New England Inc. 2024	Procedure: Perform Operations
	Process Name: Perform Energy Analysis	Winter Readiness Assessment
	Procedure Number: OUTSCH.0060.0010	Revision Number: 0
	Procedure Owner: Mike Knowland	Effective Date: November 19, 2024
	Approved By: Director, OSS	Review Due Date: November 19, 2026

6. Performance Measures

1. Winter Readiness procedure is properly followed as evidenced by the following:

- Completed Natural Gas Critical Infrastructure Survey
- Completed Winter Readiness Survey
- Completed Executive Contact List

7. References

- ISO New England Operating Procedure No. 21 – Operational Surveys, Energy Forecasting & Reporting and Actions During an Energy Emergency

8. Revision History

Rev. No.	Date	Reason	Contact
0	11/19/24	Initial SOP	Mallory Waldrip

9. Attachments

None