* 1. Align Retail Market Subcommittee Goals with TAC goals and the strategic vision of the ERCOT Board of Directors.
  2. Maintain rules that support Retail Market processes and promote market solutions that are consistent with PURA and PUC.
  3. Collaborate with WMS to ensure the incorporation of demand response and load participation in the Wholesale market including participation in the ERCOT annual demand response survey.
  4. Support ERCOT’s initiatives to develop retail processes for integrating or transitioning Load into ERCOT as needed.
  5. Explore and implement Retail Market enhancements, process improvements, cost efficiencies, and evaluate lessons learned from previous events.
  6. Maintain market rules that support open access to the ERCOT retail market.
  7. Continue to work with ERCOT to develop Protocols and other market improvements that support increased data transparency and data availability to the market.
  8. Assess and develop Retail Market training initiatives that may include ERCOT’s Learning Management System’s (LMS) online modules and Instructor Led Market Training courses and/or webinars.
  9. Continue to monitor the stabilization of NPRR 778, Modifications to Date Change and Cancellation Evaluation Window, including but not limited to market education and communications.
  10. Assess and improve communications and notifications processes for all Market Participants including ERCOT.
  11. Assess and develop Retail Market processes in support of NPRR850, Market Suspension and Restart, as necessary.
  12. Work with ERCOT staff and Transmission and Distribution Service Provider staff to address issues and facilitate improvements to market rules pertaining to load profiling as reflected in the ERCOT Protocols and the Load Profiling Guide
  13. Perform Retail Load Profiling Annual Validation

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| ***Retail Market Subcommittee (RMS) 2018  Approved Goals Year End Report Card*** | **Status – 2018 End of Year Review** | | | **Comments:** |
| **Pending** | **Complete** | **Cancelled/ Withdrawal** |
| 1. Align Retail Market Subcommittee Goals with TAC goals and the strategic vision of the ERCOT Board of Directors. |  |  |  | **12/31/18:** Supported the TAC Subcommittee Restructuring Task Force (TSRTF) initiatives by facilitating the transition of Commercial Operations Subcommittee issues, activities and Working Groups to the WMS and RMS. |
| 1. Maintain rules that support Retail Market processes and promote market solutions that are consistent with PURA and PUC. |  |  |  | **12/31/18:** RMS held a series of workshops to address lessons learned with the Mass Transition process and identified areas of improvement for Market Participants. |
| 1. Collaborate with WMS to ensure the incorporation of demand response and load participation in the Wholesale market including participation in the ERCOT annual demand response survey. |  |  |  | **12/31/18:** 2018 Price Responsive Load/Retail Demand Response Data Collection presentation provided to RMS during 9/11/18 meeting.   Link here: <http://ercot.com/content/wcm/key_documents_lists/139231/12._RMS_Data_Collection.pptx> |
| 1. Support ERCOT’s initiatives to develop retail processes for integrating or transitioning Load into ERCOT as needed. |  |  |  | **12/31/18:** Work Completed to Date:  Profiling Working Group (PWG) discussed the impact of Lubbock’s entry to ERCOT. No action items as a result of discussion; pending further action by PUCT. |
| 1. Explore and implement Retail Market enhancements, process improvements, cost efficiencies, and evaluate lessons learned from previous events. |  |  |  | **12/31/18:** Work Completed to Date:  Approved the following RMGRRs:   * RMGRR150, Appendix Removal and Cleanup of the Competitive Retailer Safety Net Spreadsheet * RMGRR151, Updates to Retail Market Guide for TAC Subcommittee Restructuring * RMGRR152, Additional Alignment with NPRR778, Modifications to Date Change and Cancellation Evaluation Window * RMGRR153, Modifications to TDSP References and Processes in the Retail Market Guide * RMGRR154, Remove References to Lite Up Texas * RMGRR155, Retailed to NPRR889, RTF-1 Replace Non-Modeled Generator with Settlement Only Generator * RMGRR156, Market Notie Communication Process Clean Up * RMGRR158, Revisions to Retail Market Guide Section 7.10 Unplanned Outages * RMGRR159, Related to NPRR908, Revisions to Mass Transition Process   Reviewed & Endorsed the following NPRRs:   * NPRR850, Market Suspension and Restart * NPRR851, Procedure for Managing Disconnections for Bi-Directional Electrical Connections at Transmission Level Voltages * NPRR853, Availability of ERCOT Estimated Meter Data * NPRR877, Use of Actual Interval Data for IDR ESIIDs for Initial Settlement * NPRR889, RTF-1 Replace Non-Modeled Generator with Settlement Only Generator * NPRR899, Digital Certificate and User Security Administrator Clarifications and Opt Out Procedure   Facilitated the following workshops to discuss Retail issues:   * Mass Transition * Market Interface Service Provider (MISP) * Sharyland-Oncor asset swap transition   Reviewed lessons learned from Hurricane Harvey to identify potential areas for Retail Market Participants to gain efficiencies when working through storm recovery. |
| 1. Maintain market rules that support open access to the ERCOT retail market. |  |  |  | **12/31/18:** Work Completed to Date:  RMS Approved 2019 Market Test Flight Schedule:  <http://ercot.com/content/wcm/key_documents_lists/27303/Approved_2019_Test_Flight_Schedule.doc>  RMS Approved 2019 Retail Market Services SLA  <http://ercot.com/content/wcm/lists/93796/Retail_SLA_2019_Final.pdf> |
| 1. Continue to work with ERCOT to develop Protocols and other market improvements that support increased data transparency and data availability to the market. |  |  |  | **12/31/18:** Work Completed to Date   * NPRR877, Use of Actual Interval Data for IDR ESIIDs for Initial Settlement |
| 1. Assess and develop Retail Market training initiatives that may include ERCOT’s Learning Management System’s (LMS) online modules and Instructor Led Market Training courses and/or webinars. |  |  |  | **12/31/18:** Work Completed to Date:   * Retail Market Training Task Force (RMTTF) created Texas SET training from scratch in addition to existing Retail 101 and MarkeTrak. * RMTTF & ERCOT instructors gave 3 trainings in 2018:  1. January 30th & 31st (WebEx only): Retail 101 & Inadvertent Gains 2. May 1st & 2nd (Dallas – Oncor): Retail 101 & MarkeTrak/IAG    * Retail 101 - 38 attendees    * MarkeTrak-IAG – 33 attendees 3. Sept 25th & 26th (Houston – CNP): Retail 101 & TXSET (inaugural)    * 50+ attendees each day    * Attended by REPs, TDSPs and 3rd party service providers representing 16 different companies |
| 1. Continue to monitor the stabilization of NPRR 778, Modifications to Date Change and Cancellation Evaluation Window, including but not limited to market education and communications. |  |  |  | **12/31/18:** Work Completed to Date:   * RMGRR152, Additional Alignment with NPRR778, Modifications to Date Change and Cancellation Evaluation Window |
| 1. Assess and improve communications and notifications processes for all Market Participants including ERCOT. |  |  |  | **12/31/18:** Work Completed to Date:   * Submitted RMGRR156, Market Notice Communication Process Clean Up to support the TSRTF with communications and notification process improvements *(approved at January 2019 TAC)* |
| 1. Assess and develop Retail Market processes in support of NPRR850, Market Suspension and Restart, as necessary. |  |  |  | **12/31/18:** Work Completed to Date:   * TXSET submitted comments to NPRR850 to establish suspension and restart processes for the Retail market. |
| 1. Work with ERCOT staff and Transmission and Distribution Service Provider staff to address issues and facilitate improvements to market rules pertaining to load profiling as reflected in the ERCOT Protocols and the Load Profiling Guide. |  |  |  | **12/31/18:** Work Completed to Date:   * Facilitated transfer of the Profiling Working Group from COPS to RMS (via TSRTF) * RMS inherited the Load Profiling Guide * Modified Annual Validation process via NPRR881, Annual Validation Process Revisions   Approved LPGRRs:   * LPGRR064, Updates to LPG for TAC Subcommittee Restructuring * LPGRR065, Annual Validation Process Revisions |
| 1. Perform Retail Load Profiling Annual Validation |  |  |  |  |