* 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. Assess and improve communications and notifications processes for all Market Participants including ERCOT.
  10. 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.
  11. Monitor Retail Load Profiling Annual Validation.
  12. Support retail system testing and implementation and continue to monitor performance post-implementation.
  13. Support ERCOT’s Summer preparedness efforts including Mass Transition drill and associated workshops.

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| ***Retail Market Subcommittee (RMS) 2020 Accomplishments*** | **Status – 2020 EOY 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. |  |  |  |  |
| 1. Maintain rules that support Retail Market processes and promote market solutions that are consistent with PURA and PUC. |  |  |  | **COVID-19 Electricity Relief Program (ERP) –** RMS served as the central forum for discussion and collaboration between PUCT Staff, CRs and TDSPs to address issues and questions related to ERP functionality, financial impacts (CR Reimbursement), processing of customer registration and de-registration (Adds and Deletes). RMS was essential in supporting the PUCT order for operationalizing the COVID ERP program, conducted several market-wide workshops to further address questions, and clarified processes as necessary. Continued support of the COVID ERP at monthly RMS meetings from March to December 2020.  **Texas SET 5.0 Release** – majority of TXSET5.0 work completed in 2020. Expect project to be initiated at ERCOT in early 2021 with implementation in 2024.  **Continued support of ERCOT NAESB TLS (PR288\_02) & EDI Translator (PR288\_01) project implementation** |
| 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. |  |  |  | **Coordinated with ERCOT to host a REP/NOIE Demand Response Workshop on 1/24/20.** Workshop was pivotal for ERCOT and REP/NOIEs to identify areas of improvement for data gathering, reporting enhancements, and future procedural improvements to the overall Demand Response reporting process.  **Supported implementation of NPRR933, Reporting of Demand Response by REPs and NOIEs – approved 6/9/20** |
| 1. Support ERCOT’s initiatives to develop retail processes for integrating or transitioning Load into ERCOT as needed. |  |  |  | **Integration of Lubbock P&L.** Continue to monitor Lubbock’s entry to ERCOT and potential for retail choice. RMS did not take action in 2020, expect more in 2021. |
| 1. Explore and implement Retail Market enhancements, process improvements, cost efficiencies, and evaluate lessons learned from previous events. |  |  |  | **Workshops** to discuss Retail issues:   * REP/NOIE Demand Response Workshop (1/24) * Mass Transition Testing Workshop (3/3) * REP/TDSP Summer Preparedness (5/5) * COVID19 ERP Workshops (4/2; 4/14) * AMS/IDR Workshops (6/1; 10/6) * Settlement Timeline Workshop (6/2) * TDU/REP Solar Workshop (10/14)   Approved the following RMGRRs:   * **RMGRR163**, Discontinue Generation of Legacy Retail Reports   Reviewed & Endorsed the following NPRRs:   * **NPRR933,** Reporting of Demand Response by Retail Electric Providers and Non-Opt-In Entities   Reviewed & Endorsed the following OBDRR:   * **OBDRR022**, Updates to Demand Response Data Definitions and Technical Specifications Following NPRR933 Approval (eff 7/1/20)   Approved and Implemented 11 TXSET Change Control Requests for TXSET 4.0A:   * **2020-810 through 814;** * **2020-820;** * **2020-822 through 826**   Recommended Approval of 6 TXSET Change Control Requests for TXSET 5.0:   * **2020-815 through 819;** * **2020-821** |
| 1. Maintain market rules that support open access to the ERCOT retail market. |  |  |  | **2021 Market Test Flight Schedule:**  <http://www.ercot.com/content/wcm/key_documents_lists/89630/Approved_2021_Test_Flight_Schedule.docx>  **2021 Retail Market IT Services SLA:**  <http://www.ercot.com/content/wcm/key_documents_lists/189664/05.__Retail_Market_IT_Services_SLA_2021_Final.v2.docx> |
| 1. Continue to work with ERCOT to develop Protocols and other market improvements that support increased data transparency and data availability to the market. |  |  |  | **2021 Market Data Transparency SLA:**  <http://www.ercot.com/content/wcm/key_documents_lists/189664/05.__Market_Data_Transparency_SLA_2021_Final.v2.docx> |
| 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. |  |  |  | **2020 Retail Market Instructor-Led Training** Statistics:   * Pivoted from In-person to WebEx-only training for 2020 due to COVID19 restrictions * 2 classes: Retail 101 (1/14 & 8/6), MarkeTrak & Inadvertent Gains (8/12) * Attended by 91 different Market Participants (REPs, TDSPs, Service Providers, PUCT Staff, ERCOT)   **2020 Retail Market Web-Based Training**   * Developed Mass Transition Module (13 total modules available) * 2,151 individuals have viewed/completed RMTTF online training modules (up from 1,784 in 2019) |
| 1. Assess and improve communications and notifications processes for all Market Participants including ERCOT. |  |  |  | **Held numerous workshops in 2020 to address various challenges throughout the year:**   * COVID19 ERP Workshop * Mass Transition Testing Plan * Summer Preparedness Workshop * AMS/IDR Workshop |
| 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. |  |  |  | **Approved LPGRRs:**   * **LPGRR067**, Profile Decision Tree Revisions   Profiling WG (PWG) activities supporting Load Profiling initiatives:   * Lengthy analysis related to Daily IDR Settlement initiative assigned by TAC to RMS. * IDR to AMI metering conversion – TDSP processes, ERCOT data transport, settlement considerations * Discussed impacts to Load Profiling changes, LPG modifications * Assisted ERCOT for two AMS/IDR Workshops (6/1; 10/6) * Resulted in NPRR1062, RMGRR164, and draft LPGRR to add new Load Profiles |
| 1. Monitor Retail Load Profiling Annual Validation. |  |  |  | Complete |
| 1. Support FlighTrak testing and implementation and continue to monitor performance post-implementation. |  |  |  | **Flight Testing.** Complete, Monitored Flight Testing and Updated Changes to Scripts. |
| 1. Support ERCOT’s Summer preparedness efforts including Mass Transition drill and associated workshops. |  |  |  | **Summer Preparedness Workshop held May 5, 2020.**   * Discussed energy emergency procedures and roles/responsibilities for ERCOT, TDSPs and CRs in preparation for 2020 summer. * Reviewed Market Notice process and information channels available to CRs for Customer communications during an energy emergency situation. * Reviewed information distributed via TDSPs – social media, text messages, mobile alerts, etc. * Reviewed processes related to EEA 3 and rotating outages on Distribution system.   **Mass Transition Preparation:**   * **Workshop** March 3, 2020. Reviewed Mass Transition testing requirements and plan for executing Mass Transition test. * **Drill.**  April 28-30.  Over 3500 Mass Transition orders were completed successfully. * **Training Module:** RMTTF developed Mass Transition training module to help interested parties familiarize themselves with the Mass Transition process. |