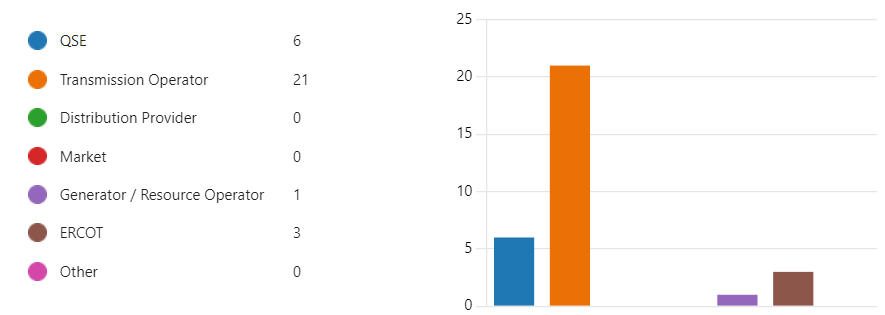
The Electric Reliability Council of Texas

Operations Training Working Group



**January 11th, 2024**



Operations Training Working Group (OTWG)

# Minutes

January 11th, 2024

WebEx

0900-1100

WEBEX ONLY for January.

Must RSVP to attend the on site OTWG meeting.

RSVP at: *insert link*

RSVP deadline, 1730 January 8th.

### Anti-trust Admonition:

To avoid raising concerns about antitrust liability, participants in ERCOT activities should refrain from proposing any action or measure that would exceed ERCOT’s authority under federal or state law. For additional information, stakeholders should consult the Statement of Position on Antitrust Issues for Members of ERCOT Committees, Subcommittees, and Working Groups, which is posted on the ERCOT website.

### Disclaimer:

All presentations and materials submitted by Market Participants or any other Entity to ERCOT staff for this meeting are received and posted with the acknowledgement that the information will be considered public in accordance with the ERCOT Websites Content Management Operating Procedure.

# Open Session

Chair/Vice-Chair will only recognize those that use the ‘raise hand” feature in WebEx

|  |  |  |
| --- | --- | --- |
| Previous meeting minutes | Made motion | Rosemary H. |
|  | 2nd motion | John J. |

## CURRENT/UPCOMING EVENTS - 2024 Training Schedule

### ERCOT Grid Fundamentals Training Opportunity

* + - John Jarmon has a physical system demonstrating the principles of voltage, reactive devices, voltage effects on load and voltage reduction.
    - A demo will be available for a limited time to those interested in attending.
    - Cycle 1 starts 1/16/2024 – 2/22/2024. Coordinate with John for coordinating a visit checking out this System Voltage demo.
    - Planning to present the demo on Thursdays every week (start at 0700). Potentially leaving the demo up for additional two weeks after cycle training is over.
    - Send an email to [john.jarmon@ercot.com](mailto:john.jarmon@ercot.com)
    - No plans to have this option open to virtual or recorded session.
    - No CEHs are planned to be awarded for this session.

## OPERATIONS NOTICES, NOGRRs and NPRRs

None at this time.

## ITEMS FOR DISCUSSION

Chair: [Manuel.Sanchez@oncor.com](mailto:Manuel.Sanchez@oncor.com)

Vice-Chair: [James.Ballard@ercot.com](mailto:James.Ballard@ercot.com)

## OTWG OFFICER ELECTIONS 2024 (2-year term)

OTWG Chair nominations: Manuel Sanchez

Vote using raised hand within WebEx

All in favor: 22/33

Opposed: 0/33

OTWG Vice Chair Nominations: Benny Ray, James Ballard

Vote using raised hand within WebEx

All in favor: 19/33 Benjamin Ray 8/33 James Ballard

Opposed: 0/33 Benjamin Ray 0/33 James Ballard

Approved vote for Chair Manuel Sanchez and Vice-Chair Benjamin Ray as officers for OTWG group.

## TASK FORCES & TRAINING EVENTS

* Interest in serving on Task Forces should be emailed to Leadership (above)
* An NDA on file with ERCOT is required to join OTWG Task Forces and participate in CLOSED sessions (one document covers all TFs Forces - NO renewal required)

Email to [NDA@ercot.com](mailto:NDA@ercot.com)

### ERCOT Operator Certification Task Force (EOCTF) - Updates

**Chair Steve Rainwater, Vice-Chair Dante' Jackson**

**Members – T. Chilton, James Wallace**

**Requesting additional members – seeking member(s) from a QSE**

* If there are problems with registration to the exam, contact and coordinate with PSI.
* Use the Contact # PSI Candidate support at 855-746-8173 for any problems.
* PSI has issues to login process for NERC exams as well as ERCOT’s exam.
* ERCOT has enough data collected from exam completions and able to begin item analysis procedures.
* Invite QSE member to be part of this task force is highly encouraged.
* There is a list of items to evaluate based in the result of data analysis.
  + Passing rate was about 39% initially, then re-evaluated program to be increased up to 50%.
  + Objectives to be evaluated based on the passing rate
  + Evaluate the pass rate and identify best practices to optimize question bank for the exam.

### Human Performance Improvement Task Force (HPITF) - Updates

**Chair Miguel Cruz-Montes, Vice-Chair Michael Goulding**

**Members – K. Adare, J. Ballard, D. Penny, S. Rainwater, T. Chilton, Jonathan Love**

**Requesting additional members**

* Visit North American Transmission Forum website (<https://www.natf.net/>) for additional resources related to Human Performance Improvement strategies.
* Evaluate the engagement and importance of keeping this Task Force for 2024.
* Continue with this group to find additional ways to prepare topics or resources to include for future training sessions.
* Need more support and participation from members to keep this on track. Requires time and resources to fully engage in content development.
  + Identify ways to establish performance metrics for training
  + Access to NERC data for Human Error events and David Penny can share some of this data to the group for reference and analysis. No information related to Human or Performance Metrics at the moment.
  + Potentially have a workshop or session to discuss ideas, resources and data collection to performance metrics or Human Error events data.
* Keep the topics to analyze data available for Human Performance or performance metrics but potentially not doing it as a task force.
* Motion to dismantle Human Performance Task Force but keep the topics for later discussion.
  + Motion to disband this task force made by James Ballard and second by Miguel Cruz-Montes.
  + Vote using the raised hand within WebEx:
  + In favor to dismantle task force: 25/42
  + Opposed: 0/42
  + Votes Passed to dismantle the task force and keep the topics as part of discussion within OTWG meetings.

### ERCOT Black Start and Restoration Training Task Force (BSTTF) - Updates

**Chair John Jarmon, Vice-Chair N. Perio**

**Members –, S. Aragon, T. Chilton, A. Ballew, D. Penny, Jonathan Love**

2024 Black Start Training

* New features are being developed in GridGeo
  + On Track to use Grid Geo for Black Start Training Simulation Exercises.
  + Losing islands due to generation issues – user awareness for hitting minimum excitation limiter
  + TO alarm identification – will only see their own alarms/equipment
* 2024 and beyond will be held on-site (Taylor ERCOT T4) and typically 2.5 days of simulation and CBTs for additional CE hours.
* Dates for the weeks of October 14th - November 21st, 2024 are confirmed.
* Pilot session will happen in late September 2024. More details will be available at a later time.
* Training will be provided to become familiar with the new Grid Geo tool. Some internal discussion will evaluate the approach.
  + Proposed a couple of WebEx sessions
  + No CEHS
  + Potentially use LMS to have the material before formal training.
* Items to consider including to the Black Start training:
  + Use of batteries during restoration, also considering the use of renewable generators (solar, wind, etc.) within the simulator.
  + Some of these items may be included in the current black start plans but these assets may not be modeled correctly.
  + Review of the study from Texas A&M by bringing external connections to ERCOT to help and expedite system restoration (such as Load Block Transfers, DC ties, etc.).
  + Check available publications and share the information with the group (David Penney will follow up with additional information)
  + Each TO should be considering not using UFLS during initial state of Restoration and should be included in their internal Black Start Plans.
  + ERCOT may evaluate to develop a CBT to include additional next start units requirements and capabilities that could be used during restoration (such as ISOC capabilities, Frequency Control, Voltage Control, etc. during restoration)
* No make-up sessions available at the moment to market participants if they can’t attend in person. There will be the CBT portion of Black Start that can be used as reference.
  + If someone cannot attend during the registered week, it is highly encouraged to re-register to another week based available openings. Coordinate with ERCOT training team to evaluate changes as needed.
  + Typically, the later sessions of ERCOT Black Start Seminar have more open seats for additional attendees (both QSEs and TOs).

### ERCOT Region Operator Training Seminar Task Force (OTSTF) – Updates

**Chair Manuel Sanchez, Vice-Chair Aaron Ballew**

**Member – M. Cruz-Montes, T. Chilton, Jonathan Love**

**Requesting additional members**

40th Annual 2024 Operations Training Seminar (on-site)

* Market participants are encouraged to please submit potential topics and presenters for future OTS to [systemoperationstraining@ercot.com](mailto:systemoperationstraining@ercot.com)
* 2024 ERCOT OTS & Summer Prep and Load shed will be onsite and scheduled after spring break:
  + Week 1: 3/18 – 3/21 Half-day Monday and Half-day Thursday
  + Week 2: 3/25 – 3/28
  + Week 3: 4/1 – 4/4
  + Week 4: 4/8 – 4/11
  + Week 5: 4/15 – 4/18
  + Week 6: 4/22 – 4/25
* The plan for 2024 OTS will be for first 1.5 days for locked-in topics, followed by 1.5 days of EEA Emergency conditions for the same training week.
  + Topics Locked-in and Confirmed for each week of training (first 1.5 days):
    - 1 Hour – CEO Update
    - 1 Hour – Summer Weather Outlook
    - 3 Hours - Power System Stability
    - 2 Hours - New EEA Triggers and Capacity Monitoring
    - 1 Hour requirement - System Restoration
    - 1 Hour - Large Flexible Loads and Blockchain
    - 1 Hour - FACTS – Fast acting A/C Transmission Systems (Statcoms, VSC Voltage Source Converters, Synchronous Condensers
  + Topics open for discussion/recommendations
    - 1 Hour – Batteries (pending confirmation)
    - 1 Hour – TRE Updates (pending confirmation)
* CEHs will be granted for the 2024 OTS per week of training.
  + There will be about 10 CE hours awarded (first 1.5 days), we will re-adjust/validate the hours to be in alignment of the list of topics. (Seats for 112 total per week)
  + There will be about 12 additional hours (second 1.5 days) for TOs to participate in the Load Shed drill and communication exercise. (Seats for 112 total per week)
* The second portion of the training will include a presentation going through the ERCOT notices followed by simulation reviewing the decision-making tools and procedures utilized for the emergency conditions.
  + Utilize the simulator (Macomber Map) to go through scenarios
  + Complete communication and analysis for TOs in this session
* The notifications may be sent a little earlier than usual to allow enough time to process Purchase Orders (PO). If the cost is posted earlier, would that be enough time to process any POs before the registration deadline? Market participants using POs agreed that this notification sent earlier may help process POs before the registration deadline.
  + Market Notification target date will be the week of January 22nd.

### ERCOT Severe Weather Drill (SWDTF) – Updates

**Chair Nate Perio, Vice-Chair John Jarmon**

**Member – T. Chilton, Jonathan Love**

**Requesting additional members**

* During cycle 4 2024, no final date available yet.
  + Facilitation Window (8/12/2024 – 9/16/2024)
  + This is a one-day drill that will fall in one of the weeks listed above.
* Details on how this training will look like will be available later. The approach may be similar to the 2023 drill.
* This potentially will be mainly for communication and Emergency notifications for market participants and ERCOT.
* CEHs may not be available for market participants.

## Trainers sharing with Trainers

Training with Mixed Media – Michael Goulding

* Lesson Plan for PER-005 preparation

February’s Presentation by: \_\_\_\_Michael Goulding\_\_\_\_\_\_\_

## OLD Business

* Update ROS participation of the names of changes in officers for the different Task Forces and Working Groups.

## NEW Business

## 2024 OTWG meeting schedule Proposal

Proposed the second Thursday after ROS meetings seems to be the most viable option.

* Second Thursday of the month after ROS meetings, then our next OTWG meeting will be 1/11/2024.
* Potential Dates for OTWG Meeting 2024

|  |  |  |
| --- | --- | --- |
| **First Six Months** |  | **Second Six Months** |
| January 11th, 2024 (Virtual) |  | July 18th, 2024 (Virtual) |
| February 8th, 2024 (Hybrid) |  | August 8th, 2024 (Hybrid) |
| March 21st, 2024 Cancelled |  | September 12th, 2024 (Virtual) |
| April 11th, 2024 (Virtual) |  | October 10th, 2024 (Hybrid) |
| May 9th, 2024 (Hybrid) |  | November 14th, 2024 (Virtual) |
| June 13th, 2024 (Virtual) |  | December 12th, 2024 (Virtual) |

* Motion to the proposed dates:
  + Motion by Aaron B. and second by James B.
* Votes using raise hand within WebEx:
  + All in favor: 26/36
  + All opposed: 2/36
* **Approved to the proposed dates OTWG meetings.**
* Quarterly in-person/virtual meetings could be good to establish for OTWG in 2024. Get final voting and approval from market participants.
  + From the list above, there are a couple of conflicts that will be evaluated when time is closer:
    - March 21st, 2024 is a week after Spring Break and it is the first week of ERCOT Operations Training Seminar, may need to move the OTWG meeting to the afternoon of Thursday or select another date.
    - November 14th, 2024 is week 5 of ERCOT Black Start Seminar, may need to move OTWG meeting to the afternoon of Thursday or select another date.

# Closed Session

|  |  |  |
| --- | --- | --- |
| *No need* for closed session | Motion Made | Michael G. |
|  | 2nd motion | Rosemary H. |

# Adjourn

Time: Dismissed at 1037 on January 11th, 2024.