

General

1. The End of Life (EOL) process must fit within the PJM RTEP, both the regional and local planning schedules
2. After EOL projects have been finalized, PJM, the TO's and the stakeholders shall coordinate regional and local planning for baseline projects to evaluate whether any finalized EOL project may contribute to solve a subsequently identified reliability violation in a least cost manner, and similarly, if an EOL reinforcement is identified which will eliminate the need for a previously, or subsequently, identified baseline violation, PJM and the TO's will work to find the least cost solution(s).

Assumptions Meeting

1. TOs provide overview of asset management program as they relate to end of life projects. Include 5 year look ahead which will indicate whether there is the potential future replacements of specific equipment or group of equipment at a location, or any group of assets which may be the subject of concerns relating to specific equipment manufacturers, models, types, etc.
2. TOs provide (and PJM posts) all TO planning criteria, EOL models, criteria, and assumptions 20 calendar days in advance of scheduled SRRTEP or TEAC meeting. The TOs shall provide sufficient information for stakeholders to be able to understand how assets will be prioritized for replacement, how the replacement versus maintenance decision is made, how assets rank relative to other assets on the system and the system average values. The level of detail will be sufficient to enable stakeholders to replicate the TO decision-making process for EOL facilities. Dependent on the TO's process, to the extent available:
 - a. Criteria must be quantifiable and include details about associated criteria thresholds. Each TO proposing EOL driven projects must have and share an established, company-approved, public set of quantifiable criteria that can be replicated by stakeholders.
 - b. Provide asset specific scoring criteria (to facilitate prioritization during needs meeting(s))
 - c. For developed criteria thresholds used to justify the replacement of an asset, the TO will provide system level averages specific to that type/class of asset to support their replacement decision. These system level averages will include but not be limited to any data inputs used to rank and prioritize an individual asset's replacement against another asset of same type/class located on the TO's system.
3. Stakeholders can provide written comments regarding the criteria, assumptions, and models posted for use in the EOL process within 10 days of the assumptions meeting to be included in the TO review and consideration of all comments received for the assumptions meeting. The TOs may provide written responses within 10 days of stakeholder comments, such responses may include a response that there will be no response in regards to the comment(s) offered. PJM shall note that no written responses were provided if the TOs choose not to provide written responses.

4. PJM shall schedule and facilitate all SRRTEP/TEAC meetings.
5. To the extent possible, a uniform template shall be used by all TOs to convey the information above.
6. PJM shall facilitate the SRRTEP/TEAC meetings in a timely fashion to support the progress of the RTEP planning process.

Needs Meeting

1. PJM schedule a minimum of one SRRTEP/TEAC committee meeting no fewer than 25 days after the assumptions meeting to review the identified violations and resulting system needs, if any, that may drive the need for an EOL project.
2. In order to allow stakeholders to provide meaningful input, the Needs meeting must occur prior to a TO finalizing its annual budget.
3. TO shall post identified criteria violations and needs no fewer than 10 days in advance of the Needs Meeting. Dependent on the TO's process, to the extent available:
 - a. Criteria assessments must include at a minimum: asset scoring data inputs, analysis, and final results. All TO facilities need to continue to be part of the overall system asset averages.
 - b. Drivers contributing to EOL determination (including performance, condition and risk) should be included. TOs will provide quantifiable values pertaining to what is driving facility's need to be replaced. These values must include system asset averages. As applicable, TOs shall provide documentation developed of condition assessments (e.g. photographs, field assessment reports, etc.).
 - c. On an annual basis, the TOs must provide a complete list of all assets (CB, Transformer, Line, Station, etc.), and their relative ranking from highest priority to lowest priority, and the associated input data supporting their ranked priorities, in order to discuss prioritization rather than just dealing with individual projects.
 - d. TOs provide 5 year annual forecast of upcoming end of life projects based on currently known information.
 - e. f. TOs must also identify the specific company that owns the asset and if the asset is currently a transmission or distribution asset, as well as what entity will be owning, operating and maintaining the replacement facility.
 - g. When EOL transmission projects are replacing distribution assets, the TO also provides drivers to support a transmission improvement over a distribution improvement, including the supporting evidence that demonstrates the transmission alternative is lower in cost and/or the distribution alternative would not meet the needs. Finally, for any EOL project that is replacing a distribution facility, the TO must demonstrate that the distribution replacement need is imminent.

4. Stakeholders can provide written comments no later than 10 days following the Needs Meeting for the TOs to review and consider so that the TOs may respond or provide feedback as appropriate. TOs may provide written responses, including all additional information requested, prior to Solutions Meeting(s), such responses may include a response that there will be no response in regards to the comment(s) offered. PJM shall note that no written responses were provided if the TOs do not so provide. However, proposed projects will not be brought to a Solutions Meeting until the TO has responded.

5. Nothing precludes any TO from having additional stakeholder meetings or communications regarding EOL projects.

Solutions Meeting(s)

1. PJM-facilitated TEAC and Subregional Meetings on EOL facilities.

2. No fewer than 25 days after the Needs Meeting but after the TOs have responded to all written comments from Needs Meeting, each TEAC or Subregional RTEP Committee shall schedule and facilitate a minimum of one TEAC or Subregional RTEP Committee meeting to review potential solutions for the identified criteria violations (Solutions Meeting).

3. TOs shall share and PJM shall post their potential solutions, as well as any alternatives identified by the TOs or stakeholders, at least 10 days in advance of the Solutions Meeting.

4. Dependent on the TO's process, to the extent available, only EOL solutions that include the following information should be brought forward for consideration:

- a. Asset specific EOL scoring data inputs, analysis, and final results;
- b. Asset specific EOL priority ranking relative to entire system under study; and,
- c. Asset specific EOL Quantifiable values pertaining to what is driving the replacement selection of the facility.

5. Stakeholders may provide comments on all proposed solutions(TO's solutions and any alternatives proposed by the TO or stakeholders) for TO consideration either prior to or within 10 days following the Solutions Meeting. -

6. The TO shall review and consider comments that are received within 10 days of the Solutions Meeting and may respond or provide feedback in writing no later than 20 days after the Solutions Meeting, such responses may include a response that there will be no response in regards to the comment(s) offered. PJM shall note that no written responses were provided if the TOs do not so provide.

Alternative Project Solutions Meeting:

7. Only applies to those projects where alternatives have been identified.

8. PJM-facilitated TEAC and Subregional Meetings on EOL facilities.
9. No more than 10 days after the initial Solutions Meeting, any stakeholder shall share and PJM shall post alternative solutions to the TO potential solutions.
10. No more than 20 days after the alternative solutions are posted, the TEAC or Subregional RTEP Committee shall schedule and facilitate another Solutions Meeting which would include the Alternative Project Solutions for review and discussion.

Project Finalization:

11. PJM-facilitated TEAC and Subregional Meetings on EOL Planning.
12. No fewer than 20 days after the Alternative Solutions Meeting, the TEAC or Subregional RTEP Committee shall schedule another Solutions Meeting to review and discuss the TO's final decision and for the TO to respond to questions.
13. The TOs shall share and post their proposed final solution no fewer than 10 days before the final Solutions Meeting. TOs shall provide justification and documentation for their selected solution.
14. Stakeholders may provide written comments or feedback no later than 10 days prior to the Local Plan being submitted for integration into the RTEP.
15. The TOs may respond to comments on their EOL projects being submitted into the Local Plan for inclusion in the RTEP. Such responses may include a response that there will be no response in regards to the comment(s) offered. PJM shall note that no written responses were provided if the TOs do not so provide.

Finalization of Projects for Local Plan

1. Each TO will submit to PJM EOL Projects that were finalized through the TEAC or Subregional RTEP committees from January through May for inclusion in the finalized PJM RTEP base case and Local Plan for that planning year.
2. Projects for the PJM RTEP and the Local Plan will not be final "finalized" until the conclusion of Dispute Resolution (if applicable).