

| | Topic | Assignment | Hours |
|----|---|--------------|-------|
| 1 | Overview of PJM Planning Process | Paul McGlynn | |
| | Baseline RTEP Process | | |
| | Assumptions/Criteria | | |
| | Stakeholder Process/Subregional/TEAC | | |
| | Window Process | | |
| | - Qualifications | | |
| | - Evaluation | | |
| | - Selection | | |
| | Board Oversight | | |
| | - Recommendations to the Board | | |
| | - Approval | | |
| | Post Approval Process | | |
| | - Filings | | |
| | - Cost Allocation | | |
| | - Designation/Construction responsibility | | |
| | Project Tracking | | |
| | - Schedule, Progress, Cost | | |
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| 2 | Understanding the duties, rights and obligations of signatories to the CTOA | | |
| | | | |
| 3 | Cost Allocation | | |
| | What does it involve? Who is responsible / accountable for this? | | |
| | ER15-1387 – How does this most recent order guide our education sessions? | | |
| | What are the implications? | | |
| | What are the cost impacts that result from cost allocation? (impacts to regions, zones, PJM, PJM Members, Ratepayers) | | |
| | How are costs associated with Maintenance applied or affected? | | |
| | How are costs associated with capital projects applied or affected? | | |
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| 4 | Understanding the PJM OATT, OA and related PJM agreements and their interplay with / separation from the CTOA | | |
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| 5 | Local Planning Criteria | | |
| | What is a Form 715? What does it contain? Who files these? What is the periodicity of filing? | | |
| | What types of information (public and or confidential) and data is contained within a filing? | | |
| | Summarize – to the extent possible – which regions or companies utilize Form 715 as a vehicle for replacement of end of life assets | | |
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| 6 | Asset Management | | |
| | What is it? How is done throughout PJM? What is common? What is or may need to be specific to a region or company? | | |
| | | | |
| 7 | Risk/ Corporate Risk Tolerance / Business judgement applied to risk acceptance versus useful lives of assets | | |
| | Share principals of business judgement that weigh upon asset replacement (e.g. escalating costs of obsolescent maintenance items) | | |
| | Business case considerations for repair, reinforcement, replacement or upgrading/uprating | | |
| | | | |
| 8 | How do utilities deal with and address cost prudence? | | |
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| 9 | Detail and summarize the EOL linkages to the PJM RTEP | | |
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| 10 | Transparency | | |

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|-----------|--|--|--|--|
| | Outline the state of Transparency as it exists today via the RTEP, TEAC, Sub-regional planning efforts | | | |
| | Discuss and build common understanding of a desired threshold/definition? for "depth" of transparency | | | |
| | What are the stakeholders needs regarding transparency? | | | |
| | Timing? | | | |
| | Reporting needs? | | | |
| | Level of reporting/transparency? | | | |
| | Other? | | | |
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| 11 | Utility Decision Making for EOL | | | |
| | What are the elements of the decision making process? | | | |