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Integrated Energy Data Resource (IEDR) Responses to Submitted Questions

NYSERDA IEDR Webpage: https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Standard/Important-Orders-Reports-and-Filings/Integrated-Energy-Data-Resource

Category	Question	Response
IEDR Website	1. The initial Program Plan mentioned an IEDR-specific subpage on the NYSERDA website. Is that up and running yet?	The IEDR webpage is active and includes links to additional resources and an option to sign-up for the IEDR mailing list: https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Standard/Important-Orders-Reports-and-Filings/Integrated-Energy-Data-Resource
Pilot	2. There was a Pilot previously completed. It would be helpful for Stakeholders to review these results. When will that be made available? Please share the DMM website for pilot details and findings from the pilot.	An interim report on the Pilot project, issued July 2019, can be found here: http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId=%7B82933BE2-76A8-4787-A491-39FC681EF834%7D. Other related documents can be found in DMM under case number 18-E-0130, "In the Matter of Energy Storage Deployment Program."
Defining, Identifying, and Prioritizing Use Cases	3. Can you give an example of what is considered a "use case" or a top use case? When is a use case counted as its own use case, and when is it a sub of another use case? How will decisions be made about use case definitions and their MVP requirements?	There is currently no agreed upon definition of "use case". NYSERDA, as Program Sponsor, will be initiating a process inviting stakeholders to comment on the question of how to define and prioritize use cases. The recommendations developed through this process will be reviewed and considered by the Program Manager, Advisory Committee, and Steering Committee. Further stakeholder process is anticipated that will lead to the recommendations from those groups that will be the basis of the Steering Committee's consideration and adoption of a definition of the term "use case" and the criteria that will be considered to prioritize use cases for inclusion in the IEDR.

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Defining, Identifying, and Prioritizing Use Cases	4. What is the deadline for use case submissions?	The deadline for stakeholder comments to provide initial recommendations addressing the identification and prioritization of use cases is July 23, 2021. More information is available on the IEDR website linked above in question 1. Beyond initial stakeholder comments, we anticipate that use case identification and prioritization will continue for several months.
Defining, Identifying, and Prioritizing Use Cases	5. Has the use case priority already been identified? At least for the first five use cases?	No, the process for establishing priorities will commence with the invitation to stakeholders described above (Question 4).
Defining, Identifying, and Prioritizing Use Cases	6. What is the form of the output? Is it a table/csv? Or more of a dedicated "dashboard" for each use case?	No decision has been made and the form of the output will be discussed as part of the process to identify use cases.
Defining, Identifying, and Prioritizing Use Cases	7. Who will define evaluation criteria and their weights in prioritization?	The Steering Committee will decide based on input from stakeholders, the Advisory Group, as well as the Program Manager and Solution Architect.
Defining, Identifying, and Prioritizing Use Cases	8. Is there a deadline for identifying priority use cases and data sets? Or can that evolve in August once the Program Manager has had a chance to get involved?	No deadline has been established and the work is planned to evolve after the selection of the Program Manager and Solution Architect. A schedule will be developed at the time of the commencement of work by the Program Manager.
Defining, Identifying, and Prioritizing Use Cases	9. Can we have a template for a use case scenario to use as a reference?	A template will be provided as part of the invitation to provide initial comments concerning use cases.
Defining, Identifying, and Prioritizing Use Cases	10. Will there be a way to review use cases and requirements materials online? Will this be made available publicly?	Yes, we intend for use case material, both interim and final documents, to be made available online via the IEDR webpage: https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Standard/Important-Orders-Reports-and-Filings/Integrated-Energy-Data-Resources

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Defining, Identifying, and Prioritizing Use Cases	11. How will we decide on the "MVP" data points and data exchange methods needed for each use case? Just prioritizing use cases isn't enough, we also need to agree on what standards to leverage, and what acceptable exchange methods are: what delay between request and receipt of data is acceptable. Just a data set isn't enough, we also need to define use cases for exchange and authorization scenarios, in particular.	These concerns are addressed thoroughly by the program plan described in the Whitepaper and the IEDR Order.
Defining, Identifying, and Prioritizing Use Cases	12. How will we gather and maintain useful input on data points and exchange methods gathered beyond the MVP data set, and how will we re-prioritize on an ongoing basis?	We plan on maintaining a process of continuous evolution and improvement based on a procedure that will be established with the advice of the Program Manager and stakeholders.
Stakeholder Engagement	13. How can organizations unable to make the time commitment to be in the Advisory Group and meetings still participate asynchronously and provide feedback?	We intend to offer numerous opportunities to participate and offer comments. While the Advisory Group will provide a venue for intersectional discussion among people familiar with the concerns of stakeholder constituencies, a robust program for stakeholder input is planned to include workshops, technical conferences, and the opportunity to provide written comments.
Advisory Group	14. How can interested stakeholders be added to the Advisory Group?	Stakeholders interested in serving on the Advisory Group or recommending someone to serve may submit a self or third-party nomination by email to iedr@nyserda.ny.gov. In addition to the name, the nomination should include a resume, bio, and other narrative explanation of why the nominee should be considered for appointment to the Advisory Group.
Advisory Group	15. Can members of the Advisory Group still participate in other aspects of the IEDR or are they limited in some way to only engage there?	Members of the Advisory Group can participate in any IEDR activity except serving as a compensated advisor or subcontractor to the Program Sponsor or any member of the IEDR project team such as the Program Manager, Solution Architect, etc.
Advisory Group	16. Is there a mechanism for consultants to participate in the Advisory Group in a paid capacity?	No. The Program Manager and other professionals procured by the Program Sponsor support the work of but are not consultants to the Advisory Group.

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Advisory Group	17. Is there an estimate of the amount of time stakeholder advisory group participants will need to dedicate?	The expectation is that Advisory Group members will prepare for and participate in monthly meetings of the Advisory Group. We estimate this to be about 6 hours per month. Other time commitments will be based on the availability of the member and the scope of the work taken on by Advisory Group as a whole. We understand that the availability of individuals to participate as a member of the Advisory Group will be based on individual circumstances.
Selection of the Program Manager and Other Professionals	18. Could you please clarify the Program Manager selection process and timeline? What is the RFP release date?	The Program Manger will be selected through a competitive procurement. As described in the PSIP, the Program Manager is expected to commence work in August 2021. RFP 4737 was released on May 24, 2021 and can be found here: https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Standard/Important-Orders-Reports-and-Filings/Integrated-Energy-Data-Resource
Selection of the Program Manager and Other Professionals	19. If a stakeholder/interested party responds to the RFP for the Data Systems Consultant, does it preclude them from responding to the IEDR Program Manager RFP?	An interested party may respond to both RFPs, but they may only be engaged to perform one of the roles.
Selection of the Program Manager and Other Professionals	20. Are companies who are considering competing for the Program Manager role eligible to participate in Stakeholder Engagement activities related to use cases?	Yes
Selection of the Program Manager and Other Professionals	21. Is August 10th the start of the Initial Implementation Plan or the time for the Selection of the Program Manager?	The PSIP anticipates both that the Program Manager will commence work on or about August 11, 2021 and that the Program Sponsor will file an Updated PSIP on August 11, 2021.
Selection of the Program Manager and Other Professionals	22. Can we assume selection of more than one company or person to provide Program Manager services will be dependent on team proposals? That is, you might pick a proposed Team. Or might you actually pick pieces of different proposals or individual companies and put together your own team composition?	Please see the Program Manager RFP (4737) for further information: https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Standard/Important-Orders-Reports-and-Filings/Integrated-Energy-Data-Resource

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Selection of the Program Manager and Other Professionals	23. Will the Solution Architect role be fulfilled from NYSERDA?	No, this will most likely be a competitive procurement.
Data Standardization	24. What is the planned approach on data standardization? There is concern among some stakeholder companies about the amount of time it will take to come up with new data standards and implement them across utilities, their vendors, and 3rd parties. The new standards will need to follow use cases but will be a significant undertaking on their own. Are data compliance standards being emphasized as required across all utilities? This would promote ease of IEDR data ingestion.	Standardization is recognized as a required activity that will require significant resources. These factors may influence the prioritization of a particular use case and whether a particular use case is implemented simultaneously or phased among the utilities.
Data Standardization	25. Assuming one function of an electric utility is to effectively identify and prioritize load relief and reliability projects in the most cost-effective way, should the data sets, maps, and analytical tools provided by the IEDR not be identical (in function more so than form) than those already used by utilities to increase efficiencies among the total talent pool of all companies supporting the shared mission?	Information provided by the IEDR will be identical to that which is used by utilities. Yet to be determined is whether the information used by utilities can and should be improved and therefore may be different from what is currently available and used by one or more utilities.
Leveraging Existing Resources	26. It was recommended that each utility continue to develop and improve systems as the IEDR moves to RFP. Shouldn't the systems be immutable/unchanged to ensure success?	This approach was established by the Commission in the IEDR Order. An explanation of the Commission's rationale can be found in the Order. The development of the IEDR work plan will consider how to leverage these existing resources and an appropriate schedule for their retirement.
Access to Relevant Expertise	27. How will the expertise of energy data domain expert consultants be leveraged in this process? Companies themselves, especially smaller companies, will likely not have the expertise or bandwidth.	The State does not intend to compensate energy consultants to participate on behalf of stakeholders. The Program Sponsor will be building a team of professionals that will provide all needed expertise for the IEDR. In addition, relevant expertise will be provided through the stakeholder engagement process.
Design of IEDR	28. Is there consideration of a central gateway for data rather than redundant copies? Real time data access to smart meter HAN radios is an example use case where having a copy doesn't make sense.	Yes. The appropriate determination(s) will be made during the design process with consideration of the input form stakeholders and the Advisory Group.

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Design of IEDR	29. Has there been consideration to include data elements not identified in the 'White Paper' (example - land use or parcel data to aid in siting DER)?	Yes. These will be considered as part of the ongoing design process.
Best Practices	30. Will this project include establishment of best practices for collecting and reporting data to encourage consistency and usability of data?	Yes
Alignment with Data Access Framework	31. How do we ensure that ESE registration is easy and directly integrated with the IEDR system?	This is an issue that is addressed by the Commission's Order Adopting a Data Access Framework. The Order can be found here: http://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=20-M-0082
Alignment with Data Access Framework	32. What if the IEDR vendor realizes data access before the PSC has built its registration system?	This is a coordination issue that will be addressed during implementation of the IEDR and the Data Access Framework that was recently adopted by the Commission.
Evaluation and Feedback	33. What type of virtual environment does NYSERDA envision using to ensure transparency, interaction between stakeholders, and a productive collaboration leading to tangible results?	Means and methods for ensuring transparency and effectiveness will be developed in detail with contributions from the Program Manager and stakeholders.
LMI Households	34. Following the CLPCA, top of mind in use case prioritization should be any use cases important for accelerating energy solutions for LMI households. How will we ensure proper representation of their needs? Organizations representing them are likely to be under-resourced and occupied supporting their constituents.	New York State has demonstrated its ability to access the knowledge of individuals and organizations who have provided insights and advocacy on behalf of the LMI community in other proceedings. We look forward to their active participation in all aspects of the IEDR initiative through stakeholder proceedings and the Advisory Group.

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General	35. Is there a possibility that the IEDR may replace portions of the SIR in a way that allows storage developers to begin performing studies at their own time and cost using the same tools? Speaking from experience at both Con Ed and an energy storage developer, it would seem that this may be beneficial and save costs on all sides.	This will be dependent on many complex factors such as use case prioritization. A use case should be submitted as part of the stakeholder process; creative ideas and solutions regarding use cases and the implementation of the IEDR are highly encouraged.
General	36. Do you envisage the IEDR on a government designated hyperscaler platform (which requires additional compliance) or commercial designated hyperscale since this is a collaboration with utility companies (commercial)?	The competitively selected program team (i.e., Program Manager, Solution Architect, etc.) will be responsible for finalizing technical decisions based on cost, security, time to deploy, etc.
General	37. What plans are there to accelerate ESE onboarding? Trainings, hackathons? There currently is no mention of this in the plans.	Onboarding plans have not yet been finalized. Training and onboarding plans will be finalized in coordination with the competitively selected program team, stakeholders, the Steering Committee and the Advisory Group. NYSERDA recognizes the importance of onboarding ESEs and having sufficient training materials and will be looking for noteworthy approaches and best practices to ensure the successful use of the IEDR.
General	38. What's the diversity like of the NYSERDA team? How will we ensure diversity and inclusion not only of NYSERDA, Utilities, and vendor staffing but also in the Advisory Group?	Diversity will be considered during all competitive solicitations issued by NYSERDA to build the program team as well as all other activities to create the IEDR.
General	39. Lacking right now is a strategy for ESE onboarding, and testing of ESE onboarding processes. The reason this hasn't been done well in the past is as much a reason for IEDR to get built as anything else. How will we ensure the program manager has sufficient experience performing this work, and that sufficient NYSERDA budget will go towards trainings and for example hackathons.	The approach to and experience conducting onboarding will be part of the scoring criteria for future competitive solicitations to ensure that the program team has the capabilities required to successfully onboard ESEs.
General	40. Will there be intermediate evaluations of the effectiveness of NYSERDA staff, and the advisory group process, and a way for participants and vendors to submit anonymous feedback?	The ability to submit anonymous feedback had not been previously considered. This is an idea that will be thoroughly explored by NYSERDA leadership for possible inclusion in the IEDR initiative.