

# Integrated Energy Data Resource (IEDR) Program Quarterly Report through June 30, 2022

Final Report | August 2022



**NYSERDA**

## **NYSERDA's Promise to New Yorkers:**

NYSERDA provides resources, expertise, and objective information so New Yorkers can make confident, informed energy decisions.

### **Our Vision:**

New York is a global climate leader building a healthier future with thriving communities; homes and businesses powered by clean energy; and economic opportunities accessible to all New Yorkers.

### **Our Mission:**

Advance clean energy innovation and investments to combat climate change, improving the health, resiliency, and prosperity of New Yorkers and delivering benefits equitably to all.



# **Integrated Energy Data Resource (IEDR) Program Quarterly Report through June 30, 2022**

*Final Report*

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## **Abstract**

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The Integrated Energy Data Resource (IEDR) Quarterly Report is intended to inform the Public Service Commission (PSC), market participants, and additional parties interested in the progress of the IEDR program. More specifically, this report provides information on progress made in achieving the IEDR program's stated goals and objectives.

## **Keywords**

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Integrated Energy Data Resource, IEDR, use case, IEDR Advisory Group, IEDR Steering Committee, Utility Coordination Group

# Table of Contents

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<b>NYSERDA Record of Revision .....</b>	<b>i</b>
<b>Abstract .....</b>	<b>iii</b>
<b>Keywords.....</b>	<b>iii</b>
<b>List of Tables.....</b>	<b>iv</b>
<b>Background.....</b>	<b>v</b>
<b>1 Program Status .....</b>	<b>1</b>
1.1 Completed Milestones.....	1
1.2 Future Milestones.....	1
1.3 Quarter 2 2022 Schedule Deviations and Planned Response Activities.....	2
1.4 Future Potential Schedule Deviations and Planned Response Activities.....	3
<b>2 Stakeholder Engagement.....</b>	<b>4</b>
2.1 Background .....	4
2.2 Stakeholder Engagement Status .....	4
2.3 Advisory Group .....	5
2.4 Utility Coordination Group .....	6
<b>3 Use and Status of Funding .....</b>	<b>8</b>
<b>4 Program Plans for the Remainder of 2022 .....</b>	<b>10</b>
<b>5 Program Risk Assessment and Mitigation Plan .....</b>	<b>11</b>
<b>Appendix A: Completed Milestones to Date .....</b>	<b>A-1</b>
<b>Endnotes .....</b>	<b>EN-1</b>

## List of Tables

---

Table 1. Milestone Status—Second Quarter 2022 .....	1
Table 2. Future Milestones.....	2
Table 3. IEDR Cost Allocation.....	8
Table 4. IEDR Budget Allocation for Phase 1.....	9
Table 5. High and Critical Risks to the IEDR Program as of June 30, 2022.....	12

# Background

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Through changes in its energy policy, New York State is transforming its electricity system into one that is cleaner and more resilient and affordable. However, effective access to useful energy-related data is required to achieve these goals. The urgency of providing this data has increased with the recent adoption of the Climate Leadership and Community Protection Act (Climate Act).

On February 11, 2021, the New York Public Service Commission (PSC) issued its Order implementing an integrated energy data resource (IEDR Order)<sup>1</sup> and directed the implementation of an IEDR to securely collect, integrate, and provide broad and appropriate access to large and diverse sets of useful energy-related information on one statewide data platform. The IEDR Order designated The New York State Energy Research and Development Authority (NYSERDA) as the IEDR Program Sponsor responsible for defining, initiating, overseeing, and facilitating the IEDR program on behalf of New York State.

The IEDR Order directs NYSEDA to file quarterly reports in this proceeding, with reports filed at the end of April, July, October, and January for the prior quarter, including information from the Program Manager monthly reports, addressing all aspects of the IEDR program. As directed, these program reports will—in the context of the schedule and budget—describe and explain (where necessary) the program's accomplishments and expenditures to date, current work and expenditures in progress, the latest program risk assessment and mitigation plan, and upcoming work and expenditures.

In issuing the IEDR Order, the PSC adopted the detailed approach and plan for the establishment of an IEDR presented in a whitepaper published by the staff of the Department of Public Service (DPS) in May 2020.<sup>2</sup>

The IEDR Order articulated the foundational principles for the development of the IEDR through the entire life cycle of the initiative and stated that the IEDR will be guided by the policy of obtaining the best overall value for New York State. This involved stakeholders to accelerate implementation timelines, reduce initiative costs and risks, and protect the agreed-upon scope by partnering with high-quality service providers aligning with the State's values.<sup>3</sup>

NYSERDA, as the Program Sponsor, has established a process that is based on three commitments:

1. Effective and extensive collaboration with and among stakeholders, including the State's utilities.
2. Procuring the services of individuals and organizations that possess the necessary expertise and experience in the development, implementation, and operation of a data platform of similar scale and scope.
3. Unambiguous regulatory requirements including firm schedules and milestones.

On April 15, 2021, the PSC issued an order to establish a uniform and comprehensive Data Access Framework to govern the means and methods for accessing and protecting all types of energy-related information.<sup>4</sup> This order was based on DPS Staff recommendations.<sup>5</sup> Accordingly, all aspects of designing and operating the IEDR will comply with any such framework that the PSC may establish.

The IEDR Order designated NYSERDA to assume the role of the IEDR Program Sponsor and assigned responsibility for defining, initiating, overseeing, and facilitating the IEDR program on behalf of the State. The Program Sponsor's principal duties include the following:

1. Creating the IEDR Program Charter to formally establish the IEDR Program's purpose, scope, guiding principles, objectives, participants, roles, and responsibilities.
2. Organizing the membership and initial meeting schedule for an IEDR Steering Committee.
3. Organizing the membership and initial meeting schedule for an IEDR Program Advisory Group.
4. Organizing the membership and initial meeting schedule for an IEDR Program Utility Coordination Group.
5. Specifying, procuring, and administering the services provided by a professional program manager.
6. Providing the means and methods for expending the PSC-directed funding related to the program and reporting of such expenditures and IEDR program progress.
7. Ensuring robust stakeholder engagement throughout the life of the IEDR program through multiple means of communication.
8. Monitoring adherence to the Program Charter by all program participants.
9. Helping the Program Manager investigate and resolve issues that could negatively affect costs, schedule, or benefits.

The IEDR Order establishes the regulatory expectation that the IEDR will enable approximately 50 use cases over Phase 1 and 2 and specific deadlines for achieving minimum performance capabilities. This approach enables the development, implementation, and operation of the IEDR in meaningful and achievable segments. Specifically, the PSC established a two-phase schedule of the development and operation of the IEDR:



- Phase 1: The initial IEDR implementation will enable at least five of the highest priority use cases with an expectation that there could be 10 or more achieved. Phase 1 will be completed within 24 months of the work's commencement by the Program Manager (Q4 2023).
- Phase 2: The initial IEDR will expand and enhance approximately 40 additional use cases, building on the successful implementation and operation of Phase 1. Phase 2 will be completed 36 months after the completion of Phase 1 (on or about July 30, 2026).

The IEDR Order further recognizes that details—associated with the development, design, and implementation of each phase of the IEDR Program—must be preceded by specific activities requiring planning that will impact the scheduling of subsequent activities and the establishment of milestones. These activities include obtaining:

- Advice and recommendations of stakeholders through workshops and technical conferences.
- The services of a Program Manager, Solution Architect, and other professional resources as described in the IEDR Order.
- A workplan and budget from the Program Manager for both Phase 1 and Phase 2.
- Recommendations of the Advisory Group.

# 1 Program Status

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## 1.1 Completed Milestones

Table 1 provides an overview of completed and in-progress milestones during the second quarter of 2022. Milestones are established through the Updated Program Sponsor Implementation Plan (PSIP), which was filed on October 1, 2021.<sup>6</sup> A full list of completed milestones retroactive to the beginning of the program is available in appendix B of the PSIP. One Q2 milestone experienced a schedule deviation, as noted in Table 1 below.

**Table 1. Milestone Status—Second Quarter 2022**

Milestone	Program Topic	Date Complete/ Date Expected	Status
Outreach to organizations that submitted use cases and may be aligned with prioritized use cases.	Stakeholder Engagement	Q2 2022	Completed for IPV– Ongoing
Use case interviews to assist in user story and user journey development.	Stakeholder Engagement	Q2 2022	Completed for IPV– Ongoing
Workshops/focus groups for each use case to validate user stories and user journeys.	Stakeholder Engagement	Q2 2022	Completed for IPV- Ongoing
Contract with Solution Architect + Development team executed, and work commences.	Solution Architect + Development RFP	Q3 2022	In Progress—Deviation (Originally anticipated Q2 2022)

## 1.2 Future Milestones

Table 2 provides an overview of near-term milestones including expected dates for completion as established through the PSIP and any expected deviations from such dates.

**Table 2. Future Milestones**

Milestone	Program Topic	Date Expected	Schedule Deviation
Outreach to organizations that submitted use cases and may be aligned with prioritized use cases.	Stakeholder Engagement	Ongoing through Phase 1	Completed for IPV- Ongoing for additional MVP and Phase 2 use cases
Use case interviews to assist in user story and user journey development.	Stakeholder Engagement	Ongoing through Phase 1	Completed for IPV- Ongoing for additional MVP and Phase 2 use cases
Workshops/focus groups for each use case to validate user stories and user journeys.	Stakeholder Engagement	Ongoing through Phase 1	Completed for IPV- Ongoing for additional MVP and Phase 2 use cases
Contract with Solution Architect + Development team executed, and work commences.	Solution Architect + Development RFP	Q3 2022	In Progress—Deviation (Originally anticipated Q2 2022)
Sprint cycles focused on converting user stories/journeys for 3-5 use cases into functional IEDR prototypes.	Public Iterations of IEDR	Q3 2022 – Q4 2022	Not Started—Deviation expected (Originally anticipated Q2 – Q3 2022)
Final round of data access/security review and User Acceptance Testing of the IEDR’s first public iteration.	Public Iterations of IEDR	Q4 2022	Not Started—Deviation expected (Originally anticipated Q3 2022)
First public iteration of the IEDR released.	Public Iterations of IEDR	Q4 2022	Not Started—Not expected
Sprint cycles focused on converting user stories/journeys for an additional 2-5 use cases into functional IEDR prototypes.	Public Iterations of IEDR	Q4 2022 – Q3 2023	Not Started—Not expected
Phase 2 proposal filed.	Reporting	January 15, 2023	Not Started—Not expected
IEDR Platform User Conference	Stakeholder Engagement	Q2 2023	Not Started—Not expected
Phase 1 summary report filed	Reporting	July 30, 2023	Not Started—Not expected
Steering Committee reviews and approves declaration of IEDR MVP.	Public Iterations of IEDR	Q3 2023	Not Started—Not expected
IEDR MVP declared (5-10 use cases deployed) and end of Phase 1.	Public Iterations of IEDR	Q4 2023	Not Started—Not expected

### 1.3 Quarter 2 2022 Schedule Deviations and Planned Response Activities

Achievement of the milestone “Contract with Solution Architect + Development team executed, and work commences” was delayed from Q2 2022 to Q3 2022. The Solution Architect and Development Contractor (Development Team) RFP was released in Q1 2022 as anticipated. But the robust response to NYSERDA’s RFP 4968: IEDR Development Team, and the complex and in-depth nature of the program and solicitation responses resulted in the RFP review, award, and contracting processes requiring additional time to ensure both a high-quality selection and the future success of the selected entity.

To mitigate the impacts of this delayed milestone, NYSERDA and the Program Manager proactively developed materials throughout Q2 2022 to reduce lead times for the Development Team once onboarded. This activity included the development of use case wireframes of the IEDR platform and initiating a collaborative agile management tool for tracking use case requirements.

## **1.4 Future Potential Schedule Deviations and Planned Response Activities**

As a result of the previously discussed Q2 2022 schedule deviations, it is anticipated that the following schedule deviations will also occur:

- Milestone: Sprint cycles focused on converting user stories/journeys for 3-5 use cases into functional IEDR prototypes.
  - Schedule impact: The start of this activity has been delayed from Q2 2022 to Q3 2022.
  - Summary: IEDR development (Sprint 1) has been delayed by the deviation in Development Team on-boarding (see milestone: Contract with Solution Architect + Development team executed, and work commences).
  - Planned Response Activities: The Program Manager has initiated a collaborative, agile management tool and created wireframes for the initial 3-5 use cases to allow the development team to begin creating the functional IEDR prototypes immediately after onboarding. The Program Manager will continue to provide technical support throughout the early stages of integrating the Solution Architect + Development team into the program.
- Milestone: Final round of data access/security review and User Acceptance Testing of the IEDR's first public iteration.
  - Schedule impact: The start of this activity is anticipated to be delayed to Q4 2022.
  - Summary: The final testing and validation of the IEDR Initial Public Version (IPV) has been delayed, as IEDR development (Sprint 1) has been postponed because of deviations in Development Team on-boarding (see milestone: Contract with Solution Architect + Development team executed, and work commences).
  - Planned Response Activities: The Program Manager will onboard the Solution Architect and Development team as seamlessly as possible, and will collaboratively review the milestone schedule to determine the most efficient manner to conduct User Acceptance Testing (UAT).

## **2 Stakeholder Engagement**

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### **2.1 Background**

The IEDR Order articulates policy objectives and establishes venues and processes that are intended to assure the broadest possible opportunity for stakeholder contributions throughout the entire life cycle of the IEDR initiative. Robust stakeholder engagement is required to ensure the centralized platform provided by the IEDR will be a trusted resource that all interested parties and stakeholders can use to efficiently access and analyze pertinent elements of the State’s energy system and customer information. Furthermore, stakeholder engagement will play a critical role in defining and prioritizing the many use cases anticipated by the IEDR Order. The IEDR Order provides for the establishment of an Advisory Group that will bring together a broad spectrum of stakeholder perspectives to inform the design and operation of the IEDR. The Program Sponsor will organize, convene, and facilitate the work of the Advisory Group.

Achieving the breadth and depth of stakeholder participation envisioned by the IEDR Order requires meaningful opportunities for broad stakeholder engagement that complements and contributes to the Advisory Group’s work. To that end, the Program Sponsor will continue to provide all interested stakeholders with meaningful opportunities to contribute to the development of the IEDR through a robust schedule of workshops, technical conferences, periodic reports, and other formats.

These activities are and will continue to be designed in consultation with stakeholders, the Advisory Group, Steering Committee, and Program Manager. Overall responsibility and accountability for stakeholder engagement reside with the Program Sponsor who will continue to collaborate with and call upon the Program Manager to facilitate stakeholder engagement activities.

### **2.2 Stakeholder Engagement Status**

Interested stakeholders were invited to participate in an initial process to identify, characterize, and prioritize IEDR use cases. Initial use case comments were submitted by stakeholders by July 23, 2021, and are available on NYSERDA’s IEDR website.<sup>7</sup> Throughout Q2 2022, the IEDR program team hosted several workshops to better understand the perceived impact of the use case on both the organization and

New York State’s Climate Leadership and Community Protection Act (Climate Act) goals, in addition to the feasibility of implementation based on data needs and other factors. Stakeholder outreach will continue throughout Phase One as the Program Management team and the Development Team engage with stakeholders and, eventually, end users of the IEDR platform.

- IEDR Utility Data Workshop #1: Hosting Capacity (April 11, 2022)- This meeting between the program team and utilities was broken up into small group sessions to discuss specifics about the needs and pain points highlighted in the end-user solar siting workshop, discuss prioritized data fields, and ideate utility resolution plans.
- IEDR Utility Data Workshop #2: Installed and Planned DERs (April 18, 2022)- This meeting between the program team and utilities was broken up into small group sessions to discuss specifics about the needs and pain points highlighted in the end-user Installed and Planned Distributed Energy Resources (DERs) workshop, discuss prioritized data fields, and ideate utility resolution plans.
- IEDR Machine Readable Rate and Tariff Use Case Deep Dives (May 4, May 10, and May 13, 2022)- These sessions provided an opportunity for small groups to discuss specifics about the Rate/Tariff Data user journey including current processes, pain points, and IEDR requirements.
- IEDR IPV Wireframe Feedback Session (May 17, 2022) - During this meeting, stakeholders were walked through draft wireframes (including data and functionality) to solicit input on ways the program team could improve initial IEDR design to better meet stakeholder needs ahead of implementation.

The Program Team also held the following stakeholder events in support of NYSERDA’s RFP 4968: IEDR Development Team, a funding opportunity designed to select the entity responsible for designing, building, and operating the IEDR software platform.

- IEDR Development Team Bidders’ Conference (April 6, 2022): This 90-minute session provided an opportunity to review the contract structure, discuss the evaluation criteria, and —most importantly—answer any stakeholder questions.
- IEDR Development Team RFP Matchmaking Session (April 12, 2022): This ~3-hour session was an opportunity to allow RFP respondents to showcase their organizations and capabilities and provided the opportunity for interested bidders to explore effective teaming arrangements.

## **2.3 Advisory Group**

NYSERDA held three Advisory Group meetings during Q2 2022, which provided the opportunity to work collaboratively and gather commentary from a diverse stakeholder group. Advisory Group meetings have a public segment available to public stakeholders, followed by more in-depth conversations with the Advisory Group itself. The April 21, 2022, Advisory Group meeting focused on reviewing and discussing the outcomes from the Solar Siting, Hosting Capacity, and Planned and Installed DER

workshops, as well as the next steps for IEDR IPV use cases. The May 19, 2022, session focused on reviewing and soliciting feedback regarding IPV use case wireframes developed for the Solar Siting/Hosting Capacity and Machine-Readable Rate and Tariff use cases. The last Advisory Group meeting of Q2 2022, held on June 16, had a public portion that focused on reviewing IPV use cases and a private portion that focused on discussing non-utility data that could be integrated into the IEDR IPV to generate additional user value, specifically as it relates to supporting Solar Siting use cases. The list of Advisory Group members is available on the IEDR website.

## **2.4 Utility Coordination Group**

NYSERDA convenes a Utility Coordination Group (UCG) as established by the IEDR Order. The UCG provides a venue for collaboration, coordination, and oversight of utility activities related to the design and implementation of the IEDR and alignment with the schedules and activities of the potential Data Access Framework. The UCG is comprised of members of the Steering Committee or their designees, NYSERDA, the Program Manager, and the senior-level leader of each utility IEDR implementation team that is established in compliance with the IEDR Order.

During Q2 2022, the UCG established a more frequent meeting cadence starting May 19, 2022. For the foreseeable future, the UCG will meet at least once a week; one 60-minute session will be held to address specific coordination topics, and one optional 60-minute session will be held as an open format, programmatic “office hour” to address questions from all participants and support additional communication as needed.

- IEDR UCG Meeting (April 11, 2022)- Note: the April UCG meeting was repurposed for IEDR Utility Data Workshop #1: Hosting Capacity as noted above.
- IEDR UCG Meeting (May 9, 2022) - Discussed the Data Transfer plan and approach for transferring IEDR Sample Dummy Data.
- IEDR May UCG Follow-up Meeting (May 12, 2022) - The discussion regarding the Data Transfer plan and approach for transferring IEDR Sample Dummy Data was continued.
- Weekly IEDR Office Hour (May 19, 2022) - Feedback on future UCG meeting topics and data transfer.
- Weekly IEDR UCG (May 24, 2022) - Discussed the modified request in replacement of providing dummy data, the outstanding data field questions for IPV, and continued discussion on data transfer process.
- Weekly IEDR Office Hour (May 26, 2022) - Discussed utility progress on IPV sample data with an ability to conduct Q&A.
- Weekly IEDR UCG (May 31, 2022) - Discussed data transfer process and modified Sample Data request.

- Weekly IEDR Office Hour (June 2, 2022) - Discussed the machine-readable rates and tariffs use case, stakeholder feedback regarding the use case, the draft rate and tariff data fields expected to support the use case, and options for the IEDR to ingest rate and tariff data based on how data is structured and stored in utility systems.
- Weekly IEDR UCG (June 7, 2022) - Discussed questions regarding IPV data fields and the revised timeline for Sample Data transfers.
- Weekly IEDR Office Hour (June 9, 2022) - Continued IPV data fields discussion and timeline moving forward.
- Weekly IEDR UCG (June 14, 2022) - Discussed current customer consent processes at each utility and updates since the release of the JU Customer Consent Plan on September 20, 2021.
- Weekly IEDR Office Hour (June 16, 2022) - Discussed availability of rate and tariff data fields and feasibility of transfer to the IEDR.
- Weekly IEDR UCG (June 21, 2022) - Continued discussion regarding rate and tariff data fields and feasibility of transfer to the IEDR. Also briefly discussed utility Sample Data submissions.
- Weekly IEDR UCG (June 28, 2022) - Review updated IEDR program timeline and discuss updates on MVP use cases and the respective timelines and data required.



### 3 Use and Status of Funding

The IEDR Order established a budget of \$13.5 million for NYSERDA's Phase 1 efforts. The Order directed recovery of these costs in proportion to the total electric load for 2019 among New York Power Authority (NYPA), Long Island Power Authority (LIPA), and jurisdictional utilities, with the costs allocated among jurisdictional utilities in the same manner as costs allocated and collected through the bill-as-you-go agreements. Based upon 2019 load values provided by DPS Staff, costs will be allocated in the following apportionment:<sup>8</sup>

**Table 3. IEDR Cost Allocation**

IEDR Cost Allocation										
IOU	Delivery Service Load <sup>1</sup>	2019			%		BAYG Allocation%	=	IEDR Allocation%	
		NYPA Load Delivered by IOU	IOU Load net of NYPA Load							
Central Hudson	4,962,793	98,360	4,864,433	3.4%	74.2%	x	5.5%	=	4.1%	\$551,000
Consolidated Edison	55,401,075	10,722,982	44,678,093	31.1%			40.5%		30.1%	\$4,057,364
New York State Electric and Gas	17,217,304	1,149,292	16,068,012	11.2%			12.9%		9.6%	\$1,292,346
Niagara Mohawk	33,986,467	4,098,738	29,887,729	20.8%			30.1%		22.3%	\$3,015,473
Orange and Rockland	4,122,410	28,326	4,094,084	2.8%			4.1%		3.0%	\$410,746
Rochester Gas and Electric	7,290,413	123,701	7,166,712	5.0%	12.6%		6.9%		5.1%	\$691,255
Long Island Power Authority	18,801,000	696,124	18,104,876	12.6%			12.6%		12.6%	\$1,698,947
New York Power Authority	18,999,198		18,999,198	13.2%			13.2%		13.2%	\$1,782,869
	160,780,660		143,863,137	100.0%	100.0%		100.0%		100.0%	\$13,500,000

The following table summarizes the approved budget and cumulative activity through June 30, 2022.

**Table 4. IEDR Budget Allocation for Phase 1**

Table 1: Cumulative activity through June 30, 2022										
	Cumulative Approved Budget	Expended (b)	Encumbered (c)	Expended + Encumbered	Expended + Encumbered as a % of Total Budget	Pre-encumbered Contracts (d)	Pre-encumbered Solicitations (d)	Expended + Encumbered + Pre-encumbered	Expended + Encumbered + Pre-encumbered as a % of Total Budget	Uncommitted
<b>Phase 1</b>										
Administration costs as Project Sponsor	1,500,000	311,732	-	311,732	20.8%	-	-	311,732	20.8%	1,188,268
Procured Resources	12,000,000	1,811,501	3,559,400	5,370,902	44.8%	6,499,940	-	11,870,842	98.9%	129,158
<b>Total</b>	<b>13,500,000</b>	<b>2,123,233</b>	<b>3,559,400</b>	<b>5,682,633</b>	<b>42.1%</b>	<b>6,499,940</b>	<b>-</b>	<b>12,182,573</b>	<b>90.2%</b>	<b>1,317,427</b>

(a) Case 20-M-0082: Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data. Order Implementing an Integrated Energy Data Resource, issued and effective February 11, 2021

(b) Expended funds include contractor invoices processed for payment by NYSERDA.

(c) Encumbered funds include remaining funds obligated under a contract or purchase order.

(d) Pre-Encumbered funds include planned funding for contracts awarded and under negotiation; and planned funding under active development through open solicitations with upcoming proposal due dates.

All IEDR program-related expenditures will be managed by the Program Sponsor in compliance with NYSERDA’s budget and accounting policies and principles.

The IEDR program expects significant growth in expenditures in Q3 2022 as system development costs for software services related to the IEDR’s design, build, and operation are incurred. The IEDR program will provide more detail regarding these expenditures against baseline estimates in future reports.

For a full overview of the projected costs of the IEDR, please refer to the Updated PSIP.

## 4 Program Plans for the Remainder of 2022

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The focus over the remainder of the year will be on execution and implementation. Priorities over Q3 of 2022 will include: (1) procuring the Solution Architect and Development Team to begin IEDR development, (2) Sprint cycles focused on converting user stories/journeys for three to five use cases into functional IEDR prototypes, (3) continuing stakeholder engagement efforts to refine the prioritized IEDR use cases, (4) expanding and refining the consolidated use-case repository, and (5) continuing to identify specific utility and non-utility data required to support high-priority Phase 1 use cases.

Quarter 4 efforts will be centralized around further development of the IEDR Program, including:

(1) performing final rounds of data access/security review and User Acceptance Testing of the IEDR's first public iteration and (2) releasing the IEDR IPV.

## 5 Program Risk Assessment and Mitigation Plan

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As stated in the PSIP and as outlined in section 5.5 of the IEDR Whitepaper:

The Program Manager will organize and conduct the activities—including regular consultations with NYSERDA—needed to facilitate the timely anticipation, identification, and mitigation of risks that could hinder or prevent successful IEDR implementation, and provide the approach to enable NYSERDA to provide timely communication of risks with the Steering Committee.

With the commencement of Phase 1, a comprehensive risk assessment and mitigation plan with extensive tracking has commenced. The Program Manager is actively coordinating with all external partners to capture and mitigate risks in accordance with the Risk Management Plan. At this time, there is 1 “high” severity risk identified. Figure 1 depicts an overview of the Risk Management Plan. Table 5 provides an overview of the “high” and “critical” IEDR Program Risks identified as of June 30, 2022. Within the context of Figure 1, PM&C is defined as Program Management and Control as performed by the Program Manager.

Figure 1. IEDR Risk Management Plan Overview

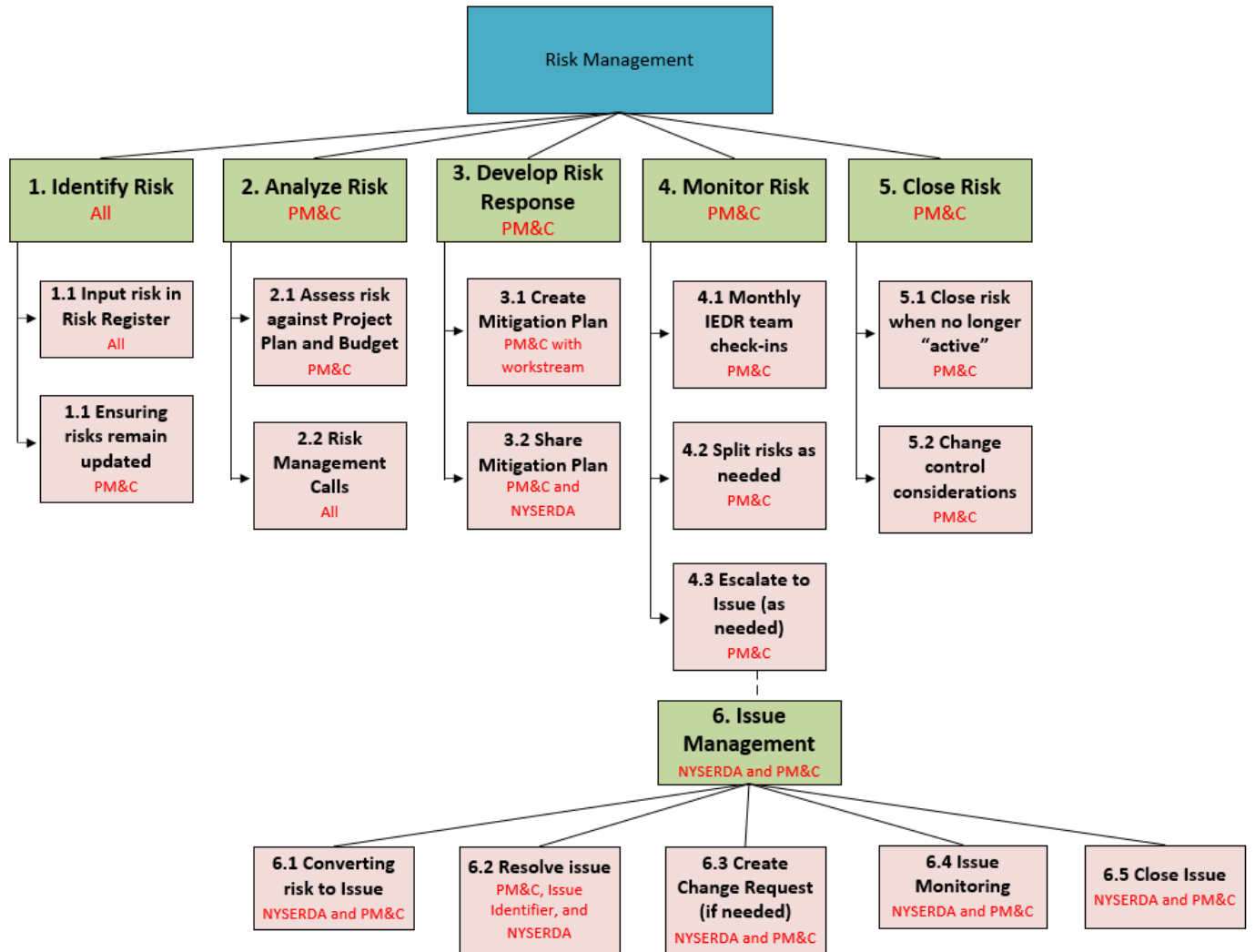


Table 5. High and Critical Risks to the IEDR Program as of June 30, 2022

Risk Description	Impact Area(s)	Risk Severity	Mitigation Approach
With delayed onboarding of the Development Team, there is risk that the IPV will not be released in Q4 2022.	Schedule	High	The Program Management team has been actively developing a transition plan to support the Development Team in an expedited onboarding (activities include creating wireframes and utilizing agile management tools).

## Appendix A: Completed Milestones to Date

Milestone	Program Topic	Date Completed
Program Manager RFP response submission deadline.	Program Manager	July 1, 2021
Program Charter adopted by Utility Coordination Group.	Charter	July 12, 2021
Initial use case comments from stakeholder response deadline.	Stakeholder Engagement	July 23, 2021
Program Charter adopted by IEDR Steering Committee.	Charter	August 6, 2021
Initial meeting of the Advisory Group.	Advisory Group	August 17, 2021
Program Manager contract executed and work commenced	Program Manager	September 28, 2021
Utility Data Advisor contract executed and work commenced.	Utility Data Advisor	September 30, 2021
Updated Program Sponsor Implementation Plan filed.	Reporting	October 1, 2021
IEDR Program Dashboard operational.	Reporting	October 31, 2021
First quarterly report filed.	Reporting	October 21, 2021
Program Charter to be adopted by the Advisory Group.	Charter	October 21, 2021
General Stakeholder Engagement Meeting (Virtual use case stakeholder event).	Stakeholder Engagement	November 15, 2021
Stakeholder Engagement and Communication Plan drafted and finalized.	Stakeholder Engagement	October 29, 2021
Outreach to organizations that submitted use cases and may be aligned with prioritized use cases.	Stakeholder Engagement	Started Q4, 2021, as anticipated
Use case interviews to assist in user story and user journey development.	Stakeholder Engagement	Started Q4, 2021, as anticipated
Workshops/focus groups for each use case to validate user stories and user journeys.	Stakeholder Engagement	Started Q4, 2021, as anticipated
Develop draft procurement documentation for IEDR Development team.	Solution Architect + Development RFP	December 31, 2021
IEDR Utility Data Assessment completed.	Utility Coordination Group	December, 2021
Issue RFP for Solution Architect + Development Contractor teaming arrangement and related services.	Solution Architect + Development RFP	March 25, 2021

# Endnotes

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- <sup>1</sup> Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order implementing an integrated Energy Data Resource, issued and effective February 11, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>
- <sup>2</sup> Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Whitepaper Recommendation to implement an integrated Energy Data Resource, May 29, 2021. <http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={43298F6A-3CA4-435F-BC9D-6DEF6F575836}>
- <sup>3</sup> The IEDR Order, P.33.
- <sup>4</sup> Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Adopting a Data Access Framework and Establishing Further Process, April 15, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A228D385-3E0E-41BC-A433-8ABD62F8A6E4}>
- <sup>5</sup> Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Staff Whitepaper Regarding a Data Access Framework, May 29, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={0375BBDD-5F71-44E0-A897-9BE2AD5F2A0E}>
- <sup>6</sup> Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Updated Program Sponsor Implementation Plan October 1, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={B9BC09C2-F8F1-43B4-8CF5-D90C10C6AD2C}>
- <sup>7</sup> IEDR Use Case submissions can be found at: <https://www.nyscrda.ny.gov/All-Programs/Integrated-Energy-Data-Resource/Use-Case-Development>
- <sup>8</sup> These numbers differ from those originally published in the integrated Energy Data Resource Initial Program Sponsor Implementation Plan. The update reflected here and in the Updated Program Sponsor Implementation Plan disaggregates NYPA load from the loads of the investor-Owned Utilities and presents the adjusted Bill as You Go allocation.





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