



NYSERDA

Integrated Energy Data Resource

Stakeholder Update

April 13, 2021

Introduction

Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data

- > Case Number 20-M-0082
- > <https://www.dps.ny.gov/>

Focus on stakeholder engagement; we will not be discussing procurement.

Overview of Commission Order Implementing an Integrated Energy Data Resource

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Scope

- **Directed the Implementation of an Integrated Energy Data Resource (IEDR) that securely collects, integrates, and provides useful access to a large and diverse set of energy-related information on one statewide data platform from the State's electric and gas utilities and other sources.**
- **Information and Tools made accessible through the IEDR will provide useful insights related to the provision and use of electricity and natural gas in New York State for all types of users.**
- **Inclusion of Analytic Tools that would enable DER providers, utilities, government agencies, and others to develop valuable technical and business insights .**

Process

- **Directed the development of the IEDR's design and adopted the necessary frameworks for funding, program management, and governance.**
 - **This begins with the assignment of the Program Sponsor role to NYSERDA, responsible for defining, initiating, overseeing, and facilitating the IEDR Program on behalf of the State.**
 - **The Program Sponsor will first select the Program Manager, that would determine and recommend how best to carry out the IEDR Stakeholder Engagement, Architecture, Design, Implementation, and Operation.**
 - **The Program Sponsor and Program Manager's work will be overseen by way of a Steering Committee and with input from an Advisory Group.**

Program Schedule

- **Adopted a two-phase approach for the IEDR Program schedule:**
 - **Program Phase 1, the initial IEDR implementation, shall enable at least *five of the highest priority use cases* with the expectation that there could be ten or more achieved.**
 - **Program Phase 2 shall expand and enhance the initial IEDR to enable approximately an *additional forty use cases* incrementally, by building upon the success of Phase 1.**
- **Total duration for enabling approximately fifty IEDR use cases shall be about 60 months.**
- **Phase 1 shall be completed in 24 – 30 months.**
- **Phase 2 shall be completed in 30 – 36 months.**

Phase 1 Project Sponsor Efforts

- **Order determines funding for Phase 1, for those efforts that shall be undertaken and competitively procured by the Project Sponsor which include:**
 - **Managing the IEDR Program**
 - **Developing the IEDR Architecture**
 - **Developing and Integrating Detailed IEDR Designs and Specifications**
 - **Deploying and Integrating IEDR Components and Services**
 - **Testing and Commissioning IEDR Use Cases**
 - **Operating the IEDR**

Phase 1 Utility Efforts

- **Order determines funding for Phase 1, for those efforts that shall be undertaken by the Gas and Electric Utilities which include:**
 - **Managing the utility's Internal IEDR Data Sourcing Program**
 - **Developing the Architecture for the utility's IEDR Data Sourcing Resources and Processes**
 - **Developing and Integrating Detailed Designs and Specifications for the utility's IEDR Data Sourcing Resources and Processes**
 - **Deploying and Integrating the utility's IEDR Data Sourcing Resources and Processes**
 - **Testing and Commissioning IEDR Use Cases**
 - **Operating and Managing the utility's IEDR Data Sourcing Resources and Processes**

Program Governance

➤ **Program Sponsor's Principal Duties shall include:**

- **Creating the IEDR Program Charter to formally establish the program's purpose, scope, guiding principles, objectives, participants, roles, and responsibilities;**
- **Organizing the membership and initial meeting schedule for an IEDR Steering Committee**
- **Organizing the membership and initial meeting schedule for an IEDR Advisory Group comprising representatives for all significant stakeholder categories;**
- **Specifying, procuring, and administering the services provided by a professional Program Manager;**
- **Ensuring Robust Stakeholder Engagement throughout the life of the IEDR program including a near-term process to solicit stakeholder comments addressing, at a minimum, initial use case prioritization before selection of the Program Manager and seating of the Advisory Group.**

Steering Committee

- **The Commission directs the Program Sponsor to convene an IEDR Steering Committee comprising five members of DPS Staff and four members of NYSERDA Staff who have the necessary experience, knowledge, and skills, to carry out the tasks as described in the Whitepaper.**
 - **The Steering Committee will address policy, schedule, and budget issues based on the Project Sponsor's recommendations to be developed in consultation with the Project Manager.**

Advisory Group

- **The Commission directs the Program Sponsor to convene an IEDR Advisory Group to enable stakeholder groups to timely provide informed commentary and guidance to the program team and carryout the activities as described in the Whitepaper.**
 - **The Advisory Group's members shall be selected by the Steering Committee and shall represent all relevant stakeholder groups including, but not limited to: DER developers; electric and gas utilities; energy consumers; state and local government entities; and interested industry groups.**
 - **The number and diversity of Advisory Group members should ensure adequate representation across stakeholder groups while remaining manageable.**

Program Manager

- **Within six months from the Order's issuance, and informed by the Steering Committee, the Program Sponsor shall acquire the services of a highly qualified Program Manager to carry out the activities as described in the Whitepaper.**
- **Those activities include obtaining the needed professional services for the Solution Architecture, System Design, System Implementation, and System Operation**
- **Each functional need or project phase or service provider need not be a different entity or contracted for separately**

Utility Coordination Group

- **Commission directs NYSERDA to form a Utility Coordination Group as a necessary component of the IEDR Program execution.**
- **The Utility Coordination Group shall include members of the Steering Committee (DPS and NYSERDA) or designees, Project Sponsor, Program Manager, Staff Resource for Utility Data Systems, and the senior-level leader of each Utility IEDR Implementation Team which the Commission directs be formed at each utility.**
- **The Utility Coordination Group will also be used to assure alignment of implementation schedules and policies of the IEDR and the potential Data Access Framework.**

NYSERDA Reporting Requirements

- **NYSERDA to file an Initial Implementation Plan detailing how it will carry out its duties as the Program Sponsor up to the commencement of the Program Manager. Updated plan to be filed by August 10, 2021, following the procurement of the Program Manager, to reflect all subsequent tasks to be carried out to complete Phase 1 of the IEDR Program.**
- **NYSERDA to file quarterly reports to the Commission, which include information from the Program Manager monthly reports, that address all aspects of the IEDR program, with reports being filed at the end of April, July, October, and January for the prior quarter.**
- **NYSERDA shall create a publicly accessible program dashboard that presents an at-a-glance summary of the IEDR program and shall maintain the dashboard on an ongoing basis.**

NYSERDA Reporting Requirements (con't)

- **Two additional reports that will inform the Commission's future directives:**
 - **At the end of Phase 1, after the initial use cases have been implemented and are operational, NYSERDA shall file a IEDR Phase 1 Status and Summary Report, on or before July 30, 2023.**
 - **The second report shall be an IEDR Phase 2 Proposal, filed on or before January 15, 2023, six months prior to end of end of Phase 1, that addresses the remainder of the use cases to be implemented by July 30, 2026 and include any information necessary to support Phase 2 funding and authorization, for efforts of the Project Sponsor and of the utilities, and shall be informed by the design and implementation process to date.**

Utility Obligations and Reporting

- **Commission directs each electric and gas utility to establish an IEDR Implementation Team led by a senior management team member.**
- **The utility IEDR Implementation Team leader shall have an obligation to actively engage with the IEDR Program Manager on all aspects of the IEDR Program execution and have the specific obligation to share information and data as necessary within the timeframes to be established by the process.**
- **Utilities shall continually identify opportunities where the IEDR can provide value to the respective utility's planning, operations, and Distributed Energy System Implementation Plan (DSIP) data obligations in the most effective and efficient manner.**

Utility Obligations and Reporting (con't)

- **Each utility shall file a quarterly report on IEDR enablement project planning and investments, with reports being filed at the end of April, July, October, and January for the prior quarter.**
- **Also included in these quarterly reports shall be any prospective economies of scope or scale identified for existing utility planning, operations, and DSIP data responsibilities that can be achieved as a result of the IDER implementation.**

IEDR Program Sponsor Implementation Plan and Stakeholder Engagement

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Public Record

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IEDR subpage to be added to NYSERDA website

IEDR@nyserda.ny.gov

Introduction

- **The Program Sponsor Implementation Plan (PSIP) is intended to provide an overview of the activities and schedule that the program sponsor will carry out and thereby meet its responsibilities to achieve the goals and deadlines established by the PSC.**
- **NYSERDA, as the program sponsor, will establish a process that is based on three commitments:**
 - 1. Effective 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**

Program Sponsor

The Program Sponsor's principal duties include:

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

Stakeholder Participation

Meaningful stakeholder participation is essential to the success of the IEDR initiative.

- **The IEDR Order articulates policy objectives and establishes venues and process that are intended to assure the broadest possible opportunity for stakeholder contributions throughout the entire lifecycle of the IEDR initiative.**
- **Robust stakeholder engagement is required to assure that the platform provided by the IEDR will be a trusted resource that all interested parties and stakeholders can use to efficiently access and analyze the elements of the State's energy system and customer information that are most useful to them.**

Stakeholder Engagement

Promptly commence meaningful stakeholder engagement

- **Defining, identifying and prioritizing use cases that provide the most value to New York's energy stakeholders is a foundational activity**
- **Important and valuable work addressing initial use case prioritization and the rationale supporting that use can be accomplished prior to the selection of the Program Manager**
 - **Begin development of a common understanding of the definition of a use case and criteria for prioritization**
- **IEDR Order provides initial guidance that a use case will be particularly beneficial if it materially improves or accelerates investment, operational, or regulatory decisions related to DERs, energy efficiency, environmental justice, or electrification strategies for transportation and buildings, thereby facilitating faster fulfillment of one or more of New York State's Climate Act objectives.**

Stakeholder Engagement

NYSERDA will invite stakeholders to provide initial recommendations addressing

- **Definition, including elements, of a use case**
- **Criteria for prioritizing use cases**
- **Suggested prioritization of top 5-10 use cases**

Stakeholder Engagement

Initial Plan – Subject to Adjustment

- **Webinar workshop on approaches to define and prioritize use cases**
- **Opportunity for groups of stakeholders or an industry sector to request brief meeting/workshop with the Program Sponsor to address questions related developing comments**
- **Invitation will provide a structure to standardize the collection of information**
- **Individual stakeholders will have the option to submit comments individually or as part of a group**
- **Program Sponsor will organize and provide responses to serve as a resource for further consideration and development by stakeholders, the Steering Committee, Advisory Group, and Program Manager**

Questions?