Subject: Integrated Energy Data Resource (IEDR) Invitation to Stakeholders to Provide Comments

Integrated Energy Data Resource
Call for Comments:
Identification and Prioritization of Use Cases

NEW YORK STATE OF OPPORTUNITY. | NYSERDA

New York State Energy Research and Development Authority

Integrated Energy Data Resource (IEDR) Invitation to Stakeholders to Provide Comments Addressing the Identification and Prioritization of Use Cases

Section 1 – For Your Information

All interested stakeholders are invited to participate in a process initiated by the New York State Energy Research and Development Authority (NYSERDA) in its role as Program Sponsor of the [Integrated Energy Data Resource (IEDR) Program](#) to identify, characterize, and prioritize IEDR use cases. **NYSERDA will conduct the first virtual workshop on June 4, 2021 at 10:30 a.m. ET** to provide stakeholders with an opportunity to ask questions regarding the process and to set expectations for stakeholder engagement. Stakeholders wishing to participate must register in advance using details provided later in this email.

Background

On February 11, 2021, the New York Public Service Commission (Commission) issued an Order directing the implementation of an IEDR to securely collect, integrate and provide authorized users with access to large and diverse sets of useful energy-related information on one statewide data platform. The work associated with the first phase of the IEDR Program will culminate in July 2023 with the IDER having the capability to support approximately five to ten use cases. The collaborative work of the IEDR Program Manager and Solution Architect, along with stakeholders and others, is essential to the design and implementation of the first phase of the IEDR. NYSERDA will be initiating the procurement of the services of a Program Manager. In its Order, the Commission directed NYSERDA, as Program Sponsor, to initiate a near-term process to solicit stakeholder comments addressing, at a minimum, initial use case prioritization. This near-term stakeholder outreach is the start of a robust process of stakeholder

engagement that will continue with the commencement of work by the Program Manager and will continue through the life of the IEDR. This near-term initiative is intended to provide a compilation of responses to questions addressing the definition and prioritization of use cases. This compilation will provide a starting point for the in-depth stakeholder engagement on use case definition and prioritization, which will ultimately inform the implementation of the IEDR Program.

Invitation to Stakeholders

All IEDR stakeholders are invited to participate in a series of activities to identify and define elements of a use case, develop an inventory of use cases, a preliminary list of criteria to prioritize use cases, and an illustrative, but not conclusive, application of the criteria to the identified use cases. These activities will include a virtual workshop for stakeholders, the opportunity for small group discussions with members of the Program Sponsor team, and the submission of written comments. These activities are planned to conclude in late August 2021 with NYSERDA's publication of a report of the comments and recommendations presented by the written comments. This report will be provided to the Program Manager, Solution Architect, Advisory Group, and will be available to all stakeholders as a framework for further development of the IEDR.

Defining and Identifying Use Cases

The development of the IEDR requires clearly defined use cases that include an identification of needed data elements. Without shared and accepted definitions, the scope and breadth of use cases, and the underlying data elements, can be an obstacle to developing the IEDR efficiently and effectively. The breadth and scope of the universe of possible use cases is illustrated by documents and comments that have been provided in the Commission's IEDR proceeding. Although informative, collectively these do not represent a comprehensive inventory of use cases that all stakeholders would consider important to implement within the first two phases of the IEDR. Some examples of uses cases referenced in the filed comments are:

- The DPS Staff Whitepaper includes a partial list of seven user categories and over 50 potential use cases, see section 5.6;

- The DPS Staff Whitepaper noted that the New Hampshire Office of Consumer Advocacy described six core use case data sets; and

- The [Distributed Energy Resource Market Enablement Data Needs Summary Report](#) presented three strategic use cases.

Additionally, processes for identifying use cases have been used in other New York proceedings including the development of DSIPs. These past processes may represent valuable experiences that can be shared through the comments filed in response to this invitation.

It is important to be able to distinguish between an individual use case and a category comprising a number of related use cases. Similarly, it is important to be able to distinguish between a use case and the functions supporting a use case.

NYSERDA recognizes that the process of identifying and characterizing IEDR use cases can be made more manageable by stakeholder contributions to the development of definitions that will be adopted for the IEDR Program.

Prioritizing Use Cases

The DPS Staff IEDR Whitepaper generally describes the activities and sequence of tasks that will follow the development of an inventory of use cases. In a process led by the Program Manager and Solution Architect, the system requirements for each use case will be developed by considering the identity and character of the IEDR functions, data source(s), data types, data attributes, data relationships, data access controls, system components, system attributes, system interfaces, technical processes, business processes, and people needed to enable each use case. In addition to describing the system requirements, the process must identify and characterize the policy, security regulatory, statutory, and governance conditions needed to enable each use case. These activities will then enable an assessment of the feasibility and priority of each use case.

The IEDR Order provides initial guidance for developing criteria to be applied as part of the prioritization process. The IEDR Order articulates a guiding principle 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 REV and CLCPA objectives." On its own, that principle does not encompass the complete range of use cases that may be appropriate for inclusion in Phase 1 or 2 of IEDR

implementation. Other additional criteria are the availability of data as well as the cost and time to develop and implement access through the IEDR.

Selection of the initial IEDR use cases will be the result of a holistic consideration of criteria. For example, data that support a suggested use case may be widely available from all utilities but does not address a priority application identified by stakeholders and therefore does not meet the guiding principle referenced above from the IEDR Order. Or, while necessary data is presently available in less than all the utilities, the inclusion of the use case in Phase 1 may be compelling based on the markets that can be initially affected thereby satisfying the guiding principle's objective of "facilitating faster fulfillment of one or more of New York State's REV and CLCPA objectives."

The process described herein is intended to provide stakeholders with the opportunity to contribute an initial inventory of use cases, required data elements and prioritization criteria that will be available as a resource for all stakeholders and the Program Manager in August of 2021.

Section 2 – Future Opportunities to Participate

Stakeholders are invited to provide initial recommendations addressing the identification and prioritization of use cases. **To facilitate the preparation and review of stakeholder comments, NYSERDA will provide a template for use in responding to the specific questions presented below. The template will be available at or before the stakeholder workshop described below.** The template will enable stakeholders to provide comments in a common format that will facilitate the compilation of responses. The following is a list of broad categories of information that at a minimum, will be addressed through this process:

- How to define a use case?

- How is a use case distinguished from the description of a category of use cases or distinguished between a use case and the functions supporting the use case?

- Listing of a limited number of use cases that meet the suggested definition.

- Data elements required to enable the use case.

- Criteria for prioritizing use cases.

- The prioritization of the identified use cases by applying the suggested criteria.

Stakeholders may submit comments individually or as a member of a group. **The deadline for the submission of written comments is July 23, 2021**. Comments must be submitted using the use case template and emailed to NYSERDA at iedr@nyserda.ny.gov.

Workshops for Stakeholders

The Program Sponsor will conduct an initial virtual workshop for stakeholders on June 4, 2021 at 10:30am. The purpose of the workshop is to provide stakeholders with an opportunity to ask questions addressing this invitation to provide comments. Registration is required for stakeholders wishing to participate.

Section 3 – June 4 Webinar

IEDR Stakeholder Workshop

Date: Friday, June 4, 2021
Time: 10:30 a.m. - 12:30 p.m. ET

Register for Webinar

In addition to the initial workshop described above, representatives of the Program Sponsor and DPS will be conducting sector-specific workshops for groups of stakeholders and/or organizations to assist them in the preparation of responses to the questions presented for comment. These sessions will provide an opportunity for focused discussions addressing use cases related to specific industry sectors or group of stakeholders. The discussions conducted during these sector-specific workshops are not a substitute for written comments and will not be formally included in the compilation of comments by NYSERDA. The workshops will be conducted between June 21, 2021 and June 25, 2021. Please email iedr@nyserda.ny.gov to request and sign-up for a meeting time.

Thank you,
NYSERDA's IEDR Team

About NYSERDA

NYSERDA, a public benefit corporation, offers objective information and analysis, innovative programs, technical expertise, and support to help New Yorkers increase energy efficiency, save money, use renewable energy, and reduce reliance on fossil fuels. NYSERDA professionals work to protect the environment and create clean energy jobs. NYSERDA has been developing partnerships to advance innovative energy solutions in New York State since 1975. To learn more about NYSERDA's programs, visit nyserda.ny.gov or follow us on Twitter, Facebook, YouTube, or Instagram.