



NYSERDA

Integrated Energy Data Resource Program Manager RFP Overview

June 2, 2021

Webinar Logistics

- All attendees are muted
- Submit questions through the Q&A feature
 - **If submitting a question, send “To Host”**
- Slides will be posted this week on IEDR webpage

IEDR Background

Scope

- **PSC Order¹ 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.**

1. <http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>

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 additional 30 – 36 months**

Program Manager RFP Overview

Solicitation Key Dates

The deadline for Bid Proposals is July 1, 2021, at 3:00 p.m.

| Event | Date |
|-------------------------------------|---|
| Solicitation Launch | Monday, May 24, 2021 |
| Proposers' Webinar | Wednesday, June 2, 2021 |
| Deadline – Intent to Propose | Monday, June 7, 2021 (5pm EST) |
| Deadline – Bid Proposals Due | Thursday, July 1, 2021 (3pm EST) |
| NYSERDA Notifies Awarded Proposers | July/August 2021 |

Requested Services of the Program Manager

Administrative Oversight, Management, and Leadership

- Support the work of the Steering Committee, Advisory Group, and Utility Coordination Group
- Stakeholder Engagement and Communication
- Develop & Manage the Project Schedule
- Develop & Manage the Project Budget
- Coordinate Work Performed by Program Contributors
- Manage Program Risks
- Program Reporting

Requirements Development and Tracking

- Identify & Characterize Beneficial IEDR Use Cases
- Requirements Development & Documentation
- Evaluate & Document Utility Systems for IEDR Integration

Procurement Assistance

- Procurement & Management of Professional Services
- Support IEDR Component Procurements

Proposal Requirements

- **The selected Program Manager will be engaged to provide services through both Phase 1 and 2 (~5-year engagement).**
 - **NYSERDA will reserve the right to accept or reject the proposed scope of work, teaming arrangements, technologies, etc. described in each proposal.**
 - **Phase 2 funding (years 3 through 5) is contingent on the availability of funding and may be expanded or otherwise impacted by future Commission approvals or directives under the IEDR proceeding.**
- **Teaming arrangements are allowed with the proper documentation.**
- **The entity/entities awarded under this RFP will not be eligible to bid for future competitive procurements issued for IEDR services.**

Additional Requirements

- **Security Requirements - The successful proposer, the providers of all services and technologies, and all components of the IEDR will be required to comply with the appropriate data and system security policies described in the RFP**
- **Procurement Requirements - NYSERDA will be the entity directly managing procurements and executing contracts for services and technology required to complete the planning, designing, building, administering, and operating of the IEDR, in line with NYSERDA's procurement rules (unless otherwise requested). This should be reflected in the assumptions for all budget and timeline estimates.**

Proposal Evaluation Process

- > Proposals will be reviewed by a scoring committee composed of NYSERDA and DPS staff using a pre-formulated and impartial scoring rubric
- > Proposals will be evaluated based on the following criteria:
 - Services Requested- Program Management and Requirements Gathering
 - Proposer Qualifications
 - Schedule/Work Plan
 - Proposal Cost and Value
 - Program Policy Factors
- > NYSERDA may request an interview with proposers starting the week of July 5
- > NYSERDA will notify proposers of a decision on or about the week of July 26

Public Record

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

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

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

IEDR@nyserda.ny.gov

Questions?

Please send questions via the Q&A feature of WebEx

Following the webinar, Proposers may submit questions to iedr@nyserda.ny.gov

All RFP information available at <https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Standard/Important-Orders-Reports-and-Filings/Integrated-Energy-Data-Resource>

