NYSERDA Integrated Energy Data Resource (IEDR) General Stakeholders Meeting

02/09/2023

NEW YORK STATE | NYSERDA

Agenda

TODAY'S AGENDA

TIME	MODULE	OBJECTIVES
3 min	Introduction and Ground Rules	Introduce session facilitators, align on the purpose and objectives of the session, and importance of collaboration in IEDR development
5 min	IEDR Phase 1 Update	Summarize major project milestones achieved for IEDR Phase 1
2 min	*Poll 1: Existing Phase 1 Progress Awareness*	Discuss existing knowledge/ awareness of IEDR Phase 1 progress
5 min	IEDR Phase 2 Background and Timeline	Provide a brief project background and context of Phase 2 and how the use cases are relevant for the session
2 min	*Poll 2: Prior Engagement With Phase 2 Survey*	Gain understanding of how many participants are aware of/ have submitted Phase 2 survey
8 min	Session 1: Reviewing Survey Results	Display survey results including impact and feasibility analyses and prioritization results
10 min	*Poll 3-5: Provide Insight On Conflicting Feasibility Results*	Discuss reasoning for conflicting feasibility results for 3 specific use cases
18 min	*Poll 6-8: Provide Additional Prioritization On Low Response Results*	Collect feedback on validity of results for use cases with 3 or less responses
5 min	BREAK	
8 min	Session 2: Reviewing Highest Priority Use Cases	Share 8 highest priority use cases and their prioritization scores
4 min	*Poll 9: Discuss Timeline Considerations For High Priority Use Cases*	Discuss dependencies within the 8 highest priority use cases
4 min	*Poll 10: Discuss Timeline Considerations For High Priority Use Cases*	Discuss grouping the use cases into themed releases
16 min	Closeout and Next Steps	Summarize key messages and understanding of path forward

Solicit participant feedback

Meeting Procedures

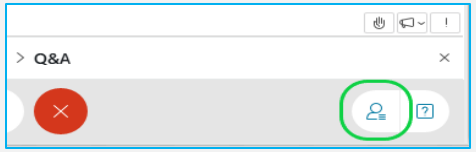
Participation for Members of the Public:

> Members of the public are muted upon entry.

> Questions and comments may be submitted in writing through the Q&A feature at any time during the event.

> Chat is disabled

You'll see when your microphone is muted



> Today's materials along with a recording of the webinar will be posted to the IEDR Program Documents and Resources page here: https://www.nyserda.ny.gov/All-Programs/Programs/Integrated-Energy-Data-Resource/IEDR-Resources

> If technical problems arise, please contact Sal.Graven@nyserda.ny.gov

Rules of the Road

Be Present

Unplug, Turn off, Tune in – limit distractions by saving emails and phone calls

Be Engaged

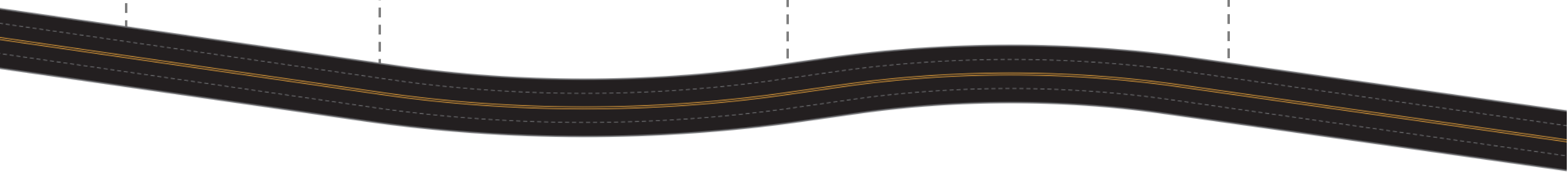
Actively participate in the discussion and make sure your opinion is stated and heard

Be Candid and Transparent

Speak openly, respectfully, and honestly – identify pain points and express frustrations where they exist

Be Interactive

Using the technology for each activity, engage with the content hands on



IEDR Phase 1 Update

IEDR Vision Statement

New York is transforming its energy system into one that is ***cleaner, more resilient, and more affordable****. Effective access to useful energy data will play a critical role in this transformation to inform* ***investment decisions****, identify* ***operational inefficiencies****, monitor the effectiveness of* ***policy objectives****, promote* ***innovation****, and* ***encourage new business models****.*

IEDR Milestone Roadmap

Poll 1 : Describe Current Understanding of Phase 1 Progress

1

How clear is your understanding of the progress completed so far in Phase 1?

1. Very clear – I do not have any questions
2. Pretty clear- I have more answers than questions
3. Not very clear – I have more questions than answers

(If so, please outline your main questions via the Q&A function)

4. Not yet clear

(If so, please outline your main questions via the Q&A function)

2

Which source(s) do you most use to stay up to date on IEDR Program progress? (select all that apply)

1. IEDR Website
2. IEDR posts on social media
3. IEDR communications from the IEDR mailing list
4. IEDR Quarterly Reports
5. Other (respond via the Q&A function)

IEDR Phase 2 Background and Timeline

IEDR Phase 2 Background

Building on the successful implementation of Phase 1, Phase 2 will expand and enhance the IEDR to enable a total of fifty or more use cases. Phase 2 will be completed 30 to 36 months after the completion of Phase 1, on or about August 11, 2026

The **Phase 2 Proposal**, that details the content and plan for this work and that will be submitted to NY Public Commission, has 4 pillars: **Phase 1 Recap, Use Case Roadmap, Core Program Costs, and Non-core Program Costs**.

Phase 2 Use Case Prioritization Survey

We gathered input from a broad range of key IEDR stakeholders, potential users, and subject-matter experts via the Phase 2 Use Case Prioritization Survey to inform IEDR Phase 2 use case prioritization and data requirements. The results of this survey will enable us to better understand use case impact and feasibility considerations. Key insights will then be incorporated into future plans for the IEDR, including the IEDR Phase 2 Proposal.

29 Use cases were included in the Phase 2 Use Case Prioritization Survey

8 Categories of stakeholders represented

These use cases represent the business functionality that will be prioritized and developed in Phase 2 of the IEDR Program.

51 Responses

41 Organizations

Tailored Survey Experience

- Survey participants can select multiple stakeholder group affiliations
- Based on the stakeholder group selected, use cases aligned to that stakeholder group display details about the user interfaces or display

Survey Questions Per Use Case

- How impactful is this use case in accelerating and improving NY's CLCPA Goals?
- Considering the use case's data and technical difficulty, business complexity , and required policy changes, how feasible is this use case to implement?
- Free response section for additional comments and notes

Poll 2 : Describe Prior Engagement with Phase 2 Survey

1

Have you taken the Phase 2 Survey?

1. No, this is my first time hearing of the survey
2. No, but I have heard of it and have received instructions on how to complete it
3. Yes, I have begun the survey but have not submitted my response
4. Yes, I have completed the survey and submitted my response

2

How clear is your understanding of the scope and progress of Phase 2 and the Phase 2 Proposal?

1. Very clear – I do not have any questions
2. Pretty clear- I have more answers than questions
3. Not very clear – I have more questions than answers

(If so, please outline your main questions via the Q&A function)

4. Not yet clear

(If so, please outline your main questions via the Q&A function)

Session 1: Reviewing Survey Results

Prioritization Mapping Per Question

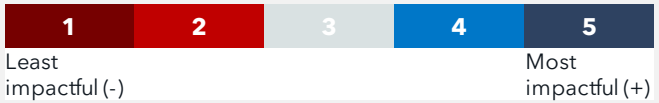
A question on impact and feasibility was posed per each use case in the Phase 2 survey. We mapped responses to a number 1-5 for both impact and feasibility.

The higher the number, the more impactful and feasible that use case is. Use cases with higher impact and feasibility scores are higher priority per this framework.

Impact

How impactful is this use case in accelerating and improving New York's CLCPA goals?

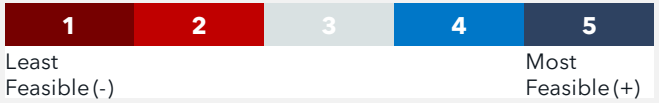
- This use case is not explicitly beneficial to these goals, but supports the end user in some capacity
- This use case has some impact on the speed, scale, OR cost of achieving at least 1 CLCPA goal
- This use case has some impact on the speed, scale, AND cost of achieving at least 1-2 CLCPA goals
- This use case significantly impacts the speed, scale, AND cost of achieving at least 1-2 CLCPA goals
- This use case significantly impacts the speed, scale, AND cost of achieving at least 3 or more CLCPA goals



Feasibility

Considering the use case's data and technical difficulty, business complexity, and required policy changes, how feasible is this use case to implement?

- The use case is feasible following resolution of technical, business, and/or policy **constraints that are significant but solvable**
- The use case is feasible following resolution of **moderate to significant** technical, business, and/or policy constraints
- The use case is feasible following resolution of **moderate** technical, business, and/or policy constraints
- This use case is **nearly feasible** and ready to implement, following resolution of small, technical, business, and/or policy constraints
- This use case is feasible and readily able to be implemented



Use Case Prioritization Framework

Use cases will be prioritized on a matrix that evaluates and scores use cases on their overall stakeholder impact and feasibility to implement.

The intersection point defines the average prioritization value (feasibility, impact) and the data was divided into quadrants based on this data point.

Use Case Prioritization Results

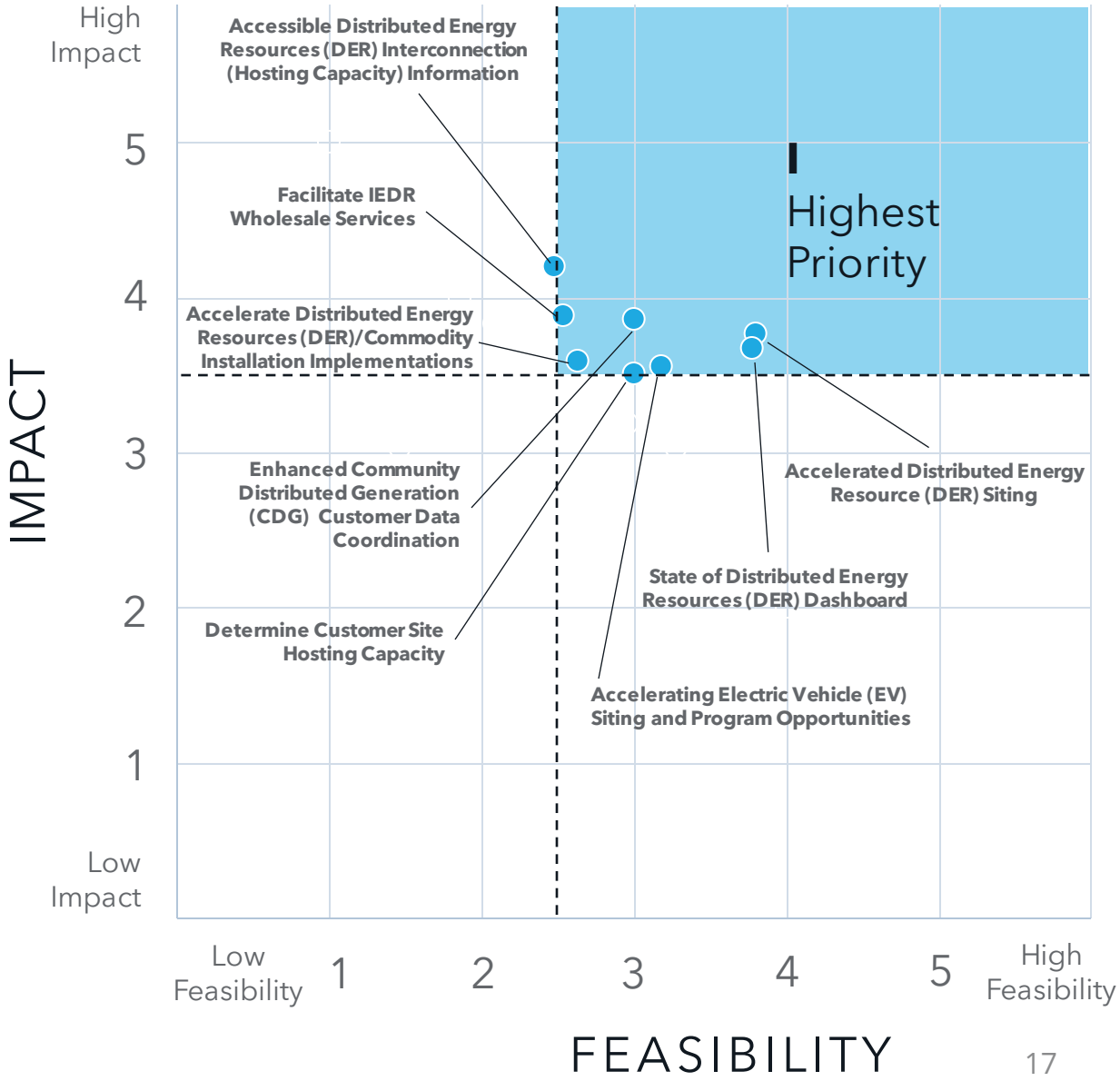
Mapping of all **28** use cases represented in the Phase 2 survey against impact and feasibility prioritization results.

Results have been normalized; all stakeholder group responses have been weighted equally.

Use Case Prioritization Results: Highest Priority

8 Highest Priority use cases based on impact and feasibility scores.

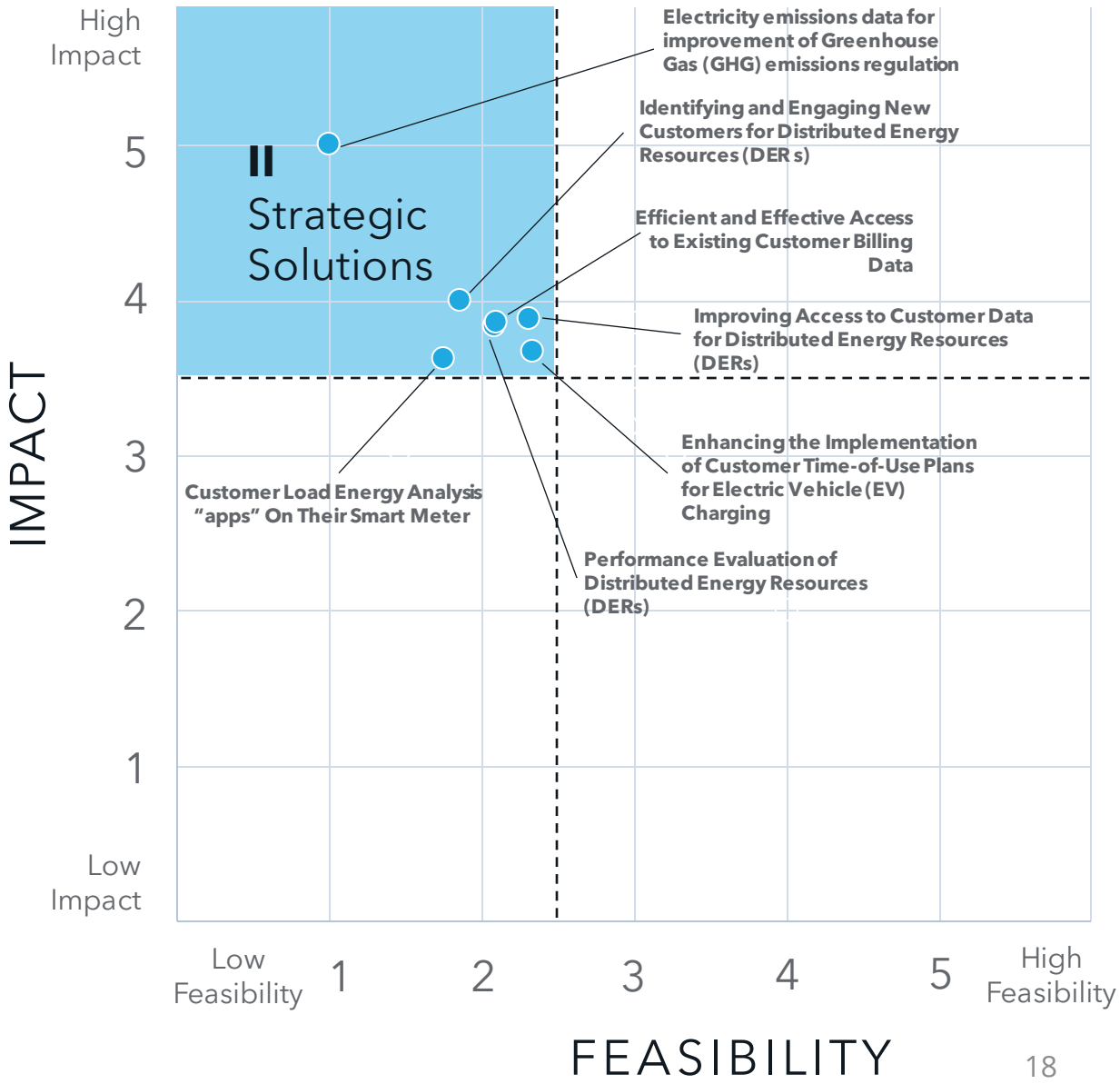
This represents the business functionality that would be built first during Phase 2 of the IEDR Program.



Use Case Prioritization Results: Strategic Solutions

7 Strategic Solution use cases based on impact and feasibility scores.

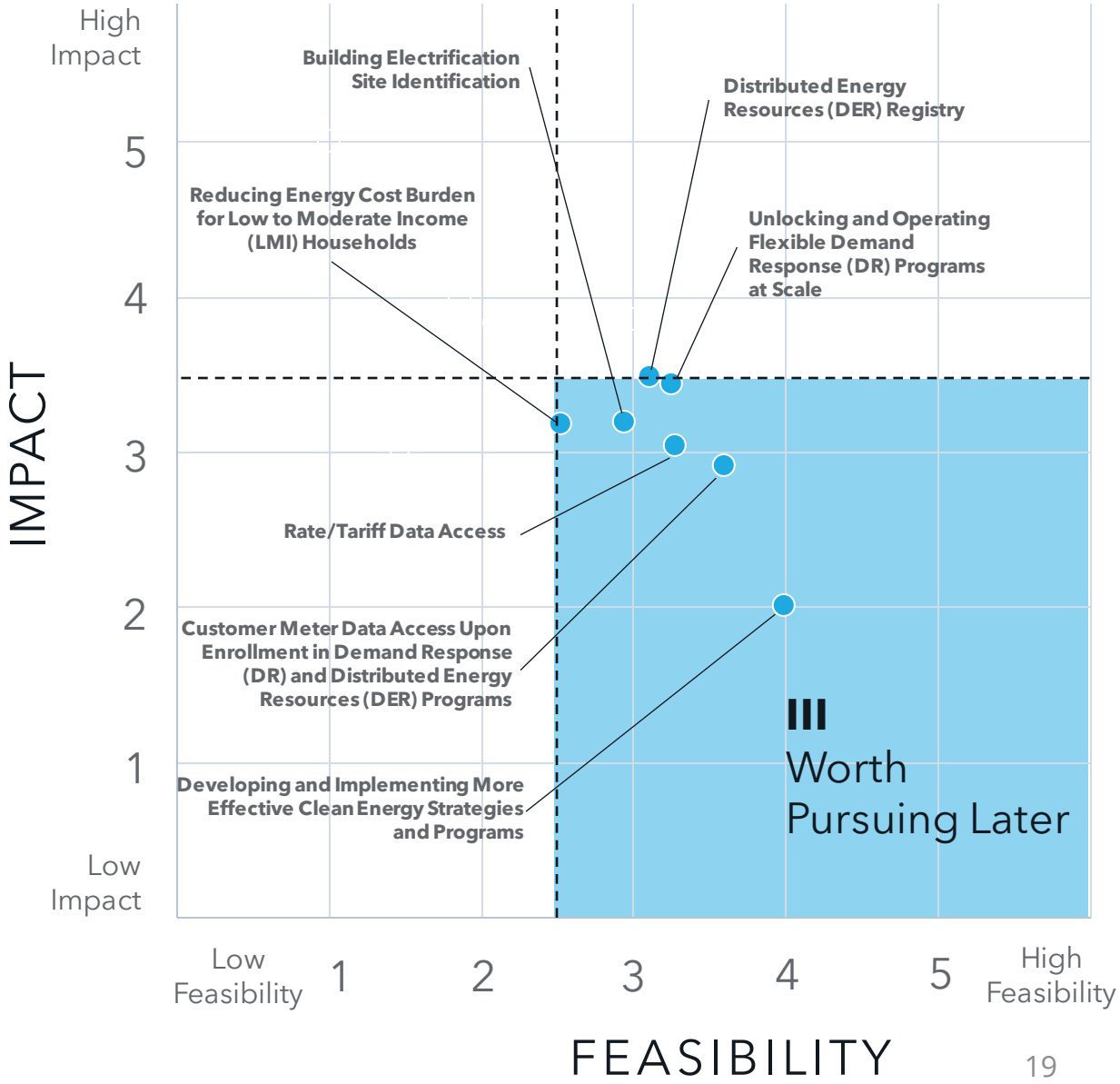
This represents the business functionality that has high impact, but also has feasibility concerns.



Use Case Prioritization Results: Worth Pursuing Later

7 Worth Pursuing Later use cases based on impact and feasibility scores.

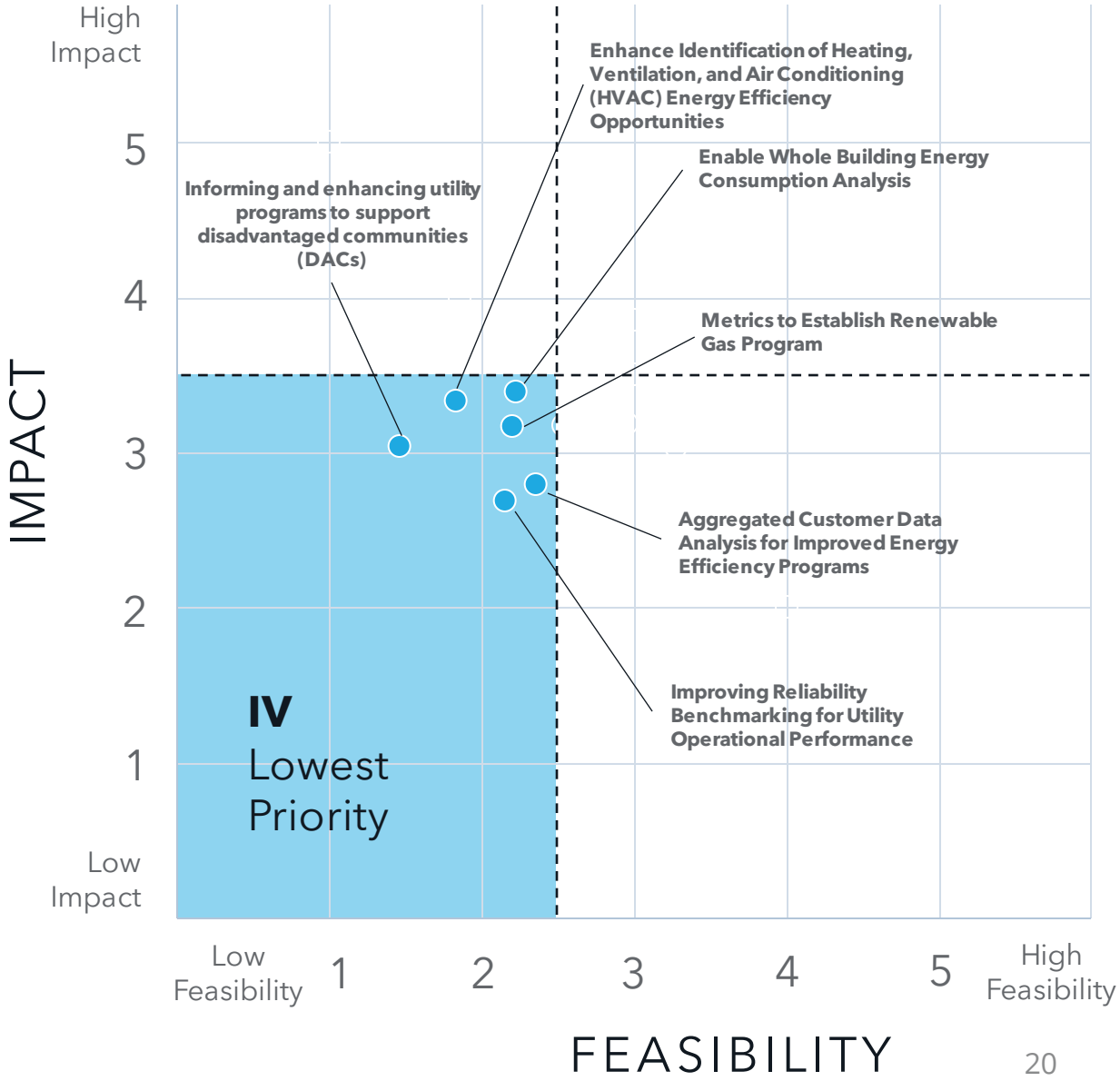
This represents the business functionality that still holds value to develop, but lower impact and feasibility scores mean they are lower priority.



Use Case Prioritization Results: Lowest Priority

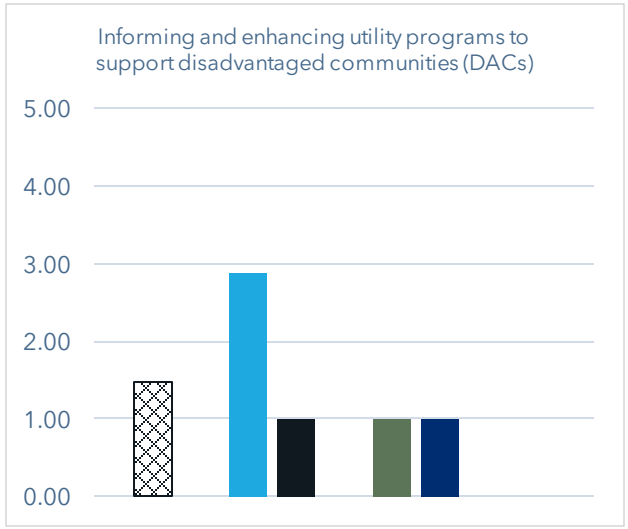
6 Lowest Priority use cases based on impact and feasibility scores.

This represents the business functionality that would be build last during Phase 2 of the IEDR Program and most likely requires solutioning regarding feasibility challenges.



Deep Dive into Select Use Case Feasibility Results

1



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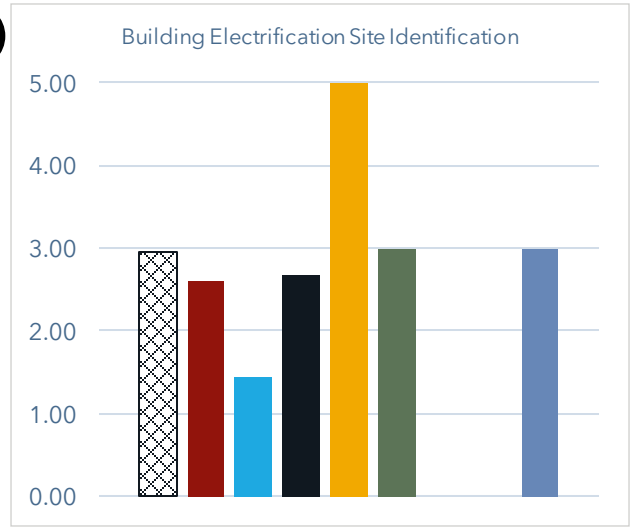

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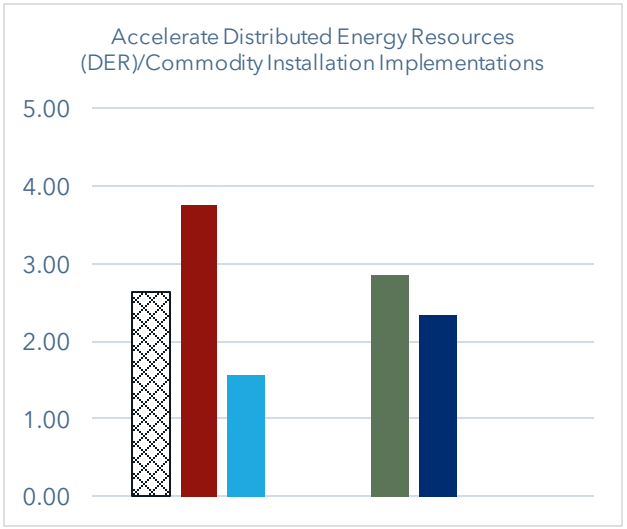


Normalized Feasibility Score
(all stakeholders inputs weighted equally)

Trade or Business Association

Utility (gas or electric)

State Agency

Local Government/Municipality

DER Developer

Energy Consulting

Federal Government

Local Community Organization

Poll 3: Provide Insight on Conflicting Feasibility Results

1

What could account for the utilities stakeholder group reporting a much higher feasibility score for use case 1 than the other stakeholder groups?

Please consider aspects such as data availability and stakeholder specific insights or understandings then type in your answer below.

1. Free Response section (1000 characters max. Please use the Q&A function if more space needed)

2

Do you believe the normalized feasibility score is the most accurate?

1. Strongly disagree
   (If so, please explain your answer further via the Q&A function.)
2. Disagree
   (If so, please explain your answer further via the Q&A function)
3. Agree
4. Strongly Agree

Poll 4: Provide Insight on Conflicting Feasibility Results

1

What could account for the local government/ municipality stakeholder group reporting a much higher feasibility score for use case 2 than the other stakeholder groups?

Please consider aspects such as data availability and stakeholder specific insights or understandings then type in your answer below.

1. Free Response section (1000 characters max. Please use the Q&A function if more space needed)

2

Do you believe the normalized feasibility score is the most accurate?

1. Strongly disagree
   (If so, please explain your answer further via the Q&A function.)
2. Disagree
   (If so, please explain your answer further via the Q&A function.)
3. Agree
4. Strongly Agree

Poll 5: Provide Insight on Conflicting Feasibility Results

1

What could account for the trade or business association stakeholder group reporting a higher feasibility score for use case 3 than the other stakeholder groups?

Please consider aspects such as data availability and stakeholder specific insights or understandings then type in your answer below.

1. Free Response section (1000 characters max. Please use the Q&A function if more space needed)

2

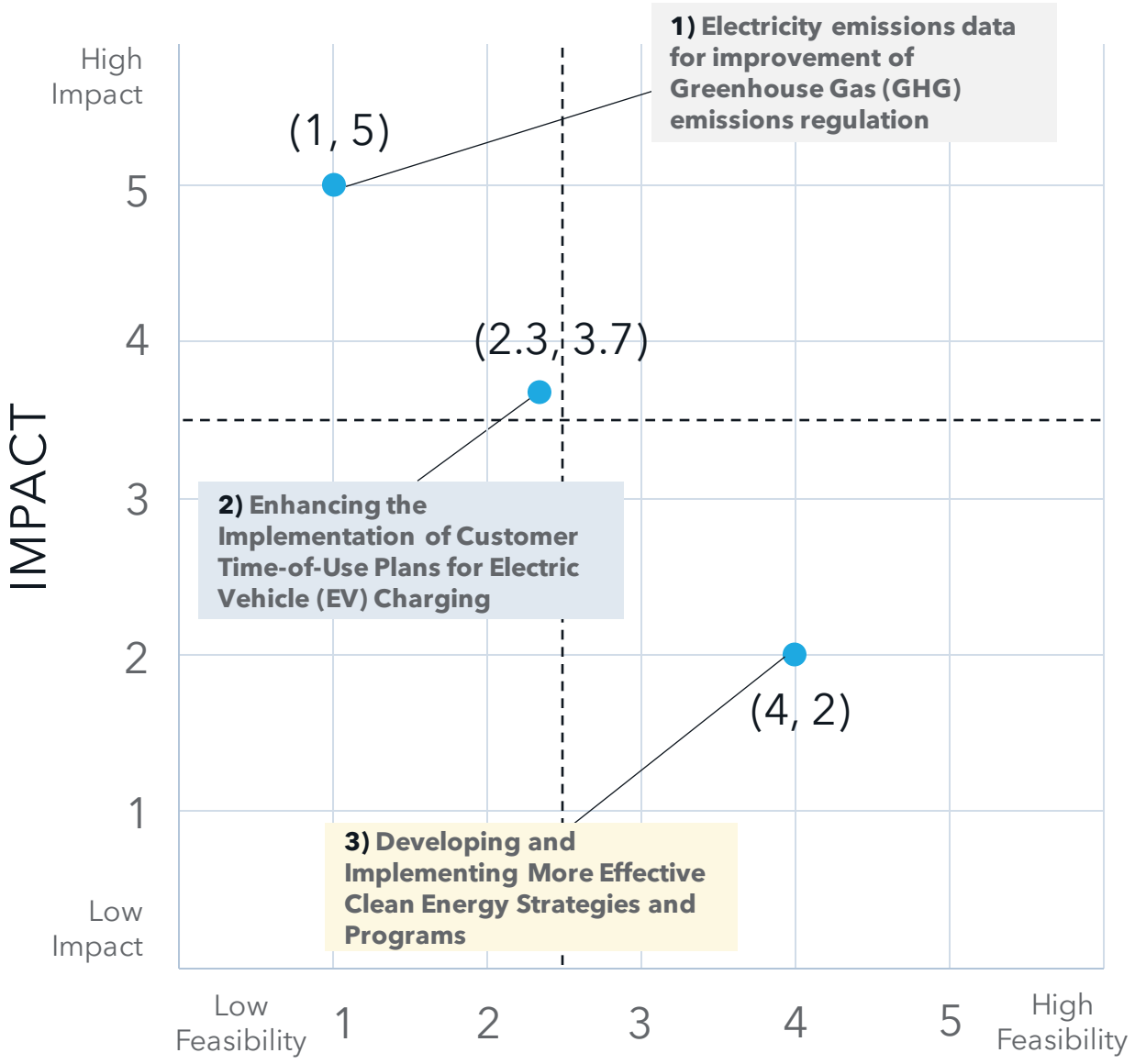
Do you believe the normalized feasibility score is the most accurate?

1. Strongly disagree
   (If so, please explain your answer further via the Q&A function.)
2. Disagree
   (If so, please explain your answer further via the Q&A function.)
3. Agree
4. Strongly Agree

Low Response Results

As these use cases have 3 or less responses per survey results, we are looking to the participants of the GSE to provide additional insight on the prioritization score and reasoning.

> Please take 1-2 minutes to refer to each use case summary for these use cases and then share your thoughts on the use case's impact and feasibility in the coming poll questions.



Electricity emissions data for improvement of Greenhouse Gas (GHG) emissions regulation

Summary

This use case will support regulatory and local NY government agencies' emission regulation efforts by providing information on historic and projected carbon intensity of the electric grid serving municipalities statewide at various time intervals. Access to this information and ability for end users to complete secondary analysis will allow for

- more precise quantification of GHG emissions
- greater compliance with the local laws (like Building Performance Standard)
- and greater compliance with the regulations of New York City and its climate goals.

End users could also use emissions data to weigh investments in specific energy efficiency, distributed energy resource (DER), electrification, and renewable energy projects.

Data Needs/Requirements

- Historic average and marginal CO2 intensity of the electricity serving each municipality over multiple time intervals
- Municipality zones
- NYISO zones
- Future projections of average CO2e intensity of electricity serving each municipality over multiple time intervals
- Additional data on seasonal and peak and off-peak emissions factors

Poll 6 : Provide Additional Prioritization on Low Response Results

1

What is the impact of this use case on accelerating and improving New York's CLCPA goals?

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5. *This use case significantly impacts the speed, scale, AND cost of achieving at least 3 or more CLCPA goals*
6. *Feel free to add comments on your ratings above for this use case or other considerations that can inform prioritization via the Q&A function.*

2

Considering the use case's data and technical difficulty, business complexity, and required policy changes, how feasible is this use case to implement?

1. The use case is feasible following resolution of technical, business, and/or policy **constraints that are significant but solvable**
2. The use case is feasible following resolution of **moderate to significant** technical, business, and/or policy constraints
3. *The use case is feasible following resolution of **moderate** technical, business, and/or policy constraints*
4. *This use case is **nearly feasible** and ready to implement, following resolution of small, technical, business, and/or policy constraints*
5. *This use case is feasible and readily able to be implemented*
6. *Feel free to add comments on your ratings above for this use case or other considerations that can inform prioritization via the Q&A function.*

Enhancing the Implementation of Customer Time-of-Use Plans for Electric Vehicle (EV) Charging

Summary

Energy service companies (ESCOs) will be able to utilize the IEDR to enhance and streamline the implementation of time-of-use rate plans for customer EV charging that will incentivize customers to charge their EVs during non-peak hours and help reduce stress on the grid during peak energy usage periods.

Data Needs/Requirements

- Anonymized 15-minute utility customer energy consumption data
- Utility customer and account data (including energy consumption and billing cost)
- EV charging patterns; EV adoption trends

Poll 7 : Provide Additional Prioritization on Low Response Results

1

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Developing and Implementing More Effective Clean Energy Strategies and Programs

Summary

Regulatory or government agencies (e.g., NYSERDA, City of New York, EPA) will be able to better understand customer energy use across sectors and various attributes or characteristics to

- conduct measurement and verification of program savings
- assess market baselines
- monitor market progress, and
- assess clean energy potential.

This will enable end users to design the most effective strategy and programs.

Data Needs/Requirements

- Identification of disadvantaged communities
- Anonymized utility customer and account data (including energy consumption and billing cost)
- Installed, queued, and forecasted distributed energy resources (DERs)
- Existing buildings
- Forecasted new buildings
- Forecasted building modifications
- Fuel type

Poll 8 : Provide Additional Prioritization on Low Response Results

1

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6. *Feel free to add comments on your ratings above for this use case or other considerations that can inform prioritization via the Q&A function.*

5 MINUTE BREAK

Tips to Refresh

- Get up and stretch
- Jam out to some music!

Session 2: Reviewing Highest Priority Use Cases

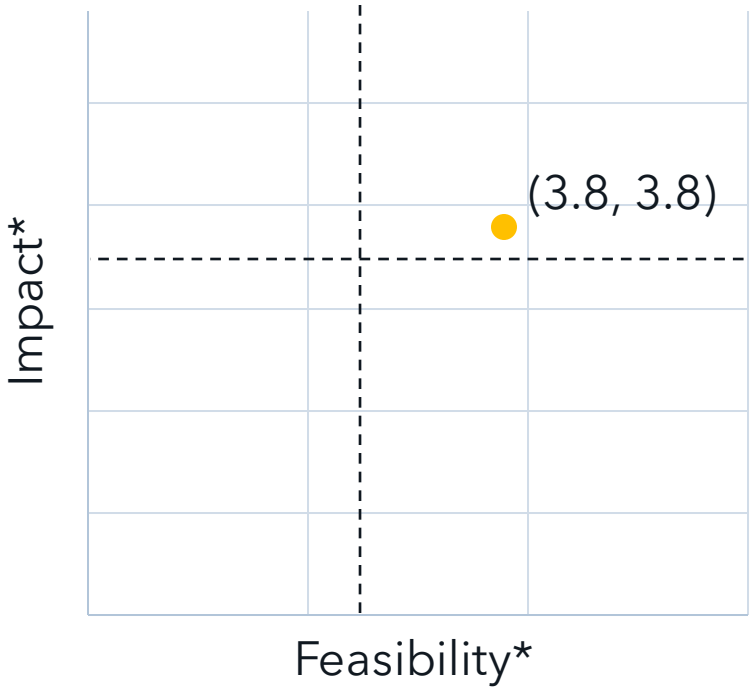
Accelerated Distributed Energy Resource (DER) Siting

Use Case Description*

This use case will support local governments and community solar developers who want to accelerate the process for identifying, selecting, and negotiating site agreements for community solar projects in order to deploy available capital more quickly and increase the amount of clean energy available to NY electricity customers. In addition to electrical infrastructure information, these end users need environmental, community, and property data to be able to reliably identify feasible sites for solar development.

Note: This use case directly builds off functionality in Phase 1. Within Phase 1 we plan to enhance the DER siting tools launched in the IPV, streamline access and enable more efficient analysis of critical DER siting information by consolidating electrical infrastructure data and non-utility environmental, community, and property data and investigate the incorporation of energy storage and electric vehicle charging capacity data

Use Case Prioritization



*Weighted Averages

*For full use case description please refer to the Phase 2 survey use case aggregation document.

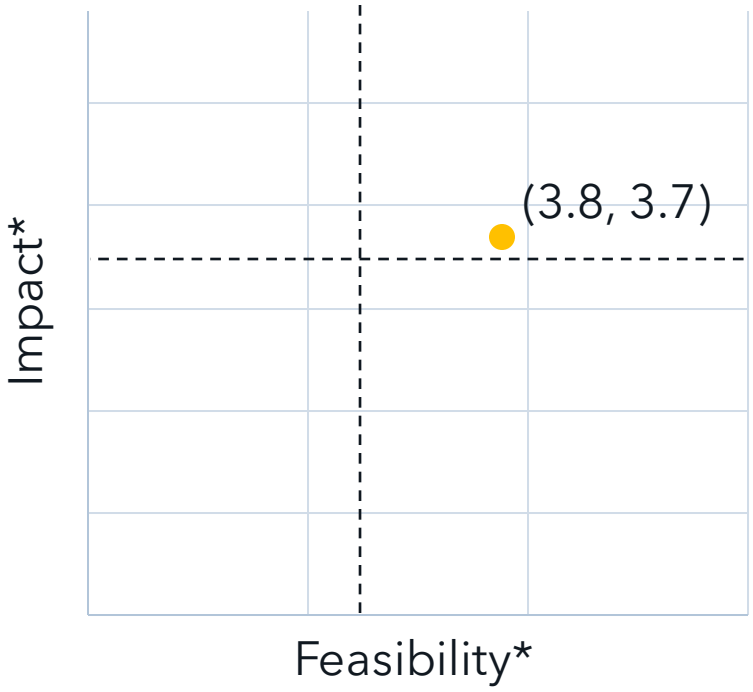
State of Distributed Energy Resources (DER) Dashboard

Use Case Description*

This use case will support trade associations and state agencies to better understand key areas of distributed energy resources (DER) concern, trends, rates of change, etc. Insights will inform and influence how and where to focus collective efforts as interconnection challenges become more and more frequent. Disadvantaged communities (DAC) data could be incorporated to better understand and forecast potential disparities in equitable access to clean, renewable, and affordable energy—and monitor progress towards achieving Climate Leadership and Community Protection Act (CLCPA) goals.

Note: This use case directly builds off functionality in Phase 1. Within Phase 1 we plan to enhance the DER siting tools launched in the IPV, streamline access and enable more efficient analysis of critical DER siting information by consolidating electrical infrastructure data and non-utility environmental, community, and property data and investigate the incorporation of energy storage and electric vehicle charging capacity data

Use Case Prioritization



*Weighted Averages

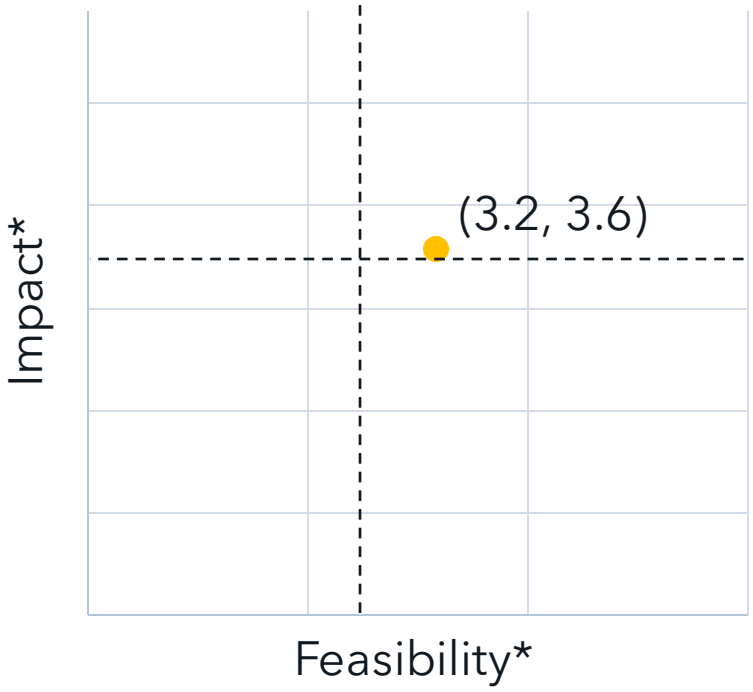
*For full use case descriptions please refer to the Phase 2 survey use case aggregation document.

Accelerating Electric Vehicle (EV) Siting and Program Opportunities

Use Case Description*

This use case will enable Utilities, EV Charger Infrastructure Providers, Government Agencies, or Community Organizations, to accelerate and scale the process for identifying sites/opportunities for development of a variety of EV Charger offerings and programs. For instance providing data on insights on consumer buying patterns of EVs, models of consumer driving/recharging patterns, real estate (land/ multi-family housing (MFH)) information, building energy use (if MFH), and feeders with the greatest EV capacity allow government agencies and community organizations to target and site needed electric vehicle supply equipment (EVSE) in the low and moderate income (LMI) and disadvantaged community (DAC) areas, deploy available capital more quickly and increase the charging infrastructure in NY state and achieve policy goals (e.g., ensuring access for DACs and LMI Customers).

Use Case Prioritization



*Weighted Averages

*For full use case description please refer to the Phase 2 survey use case aggregation document.

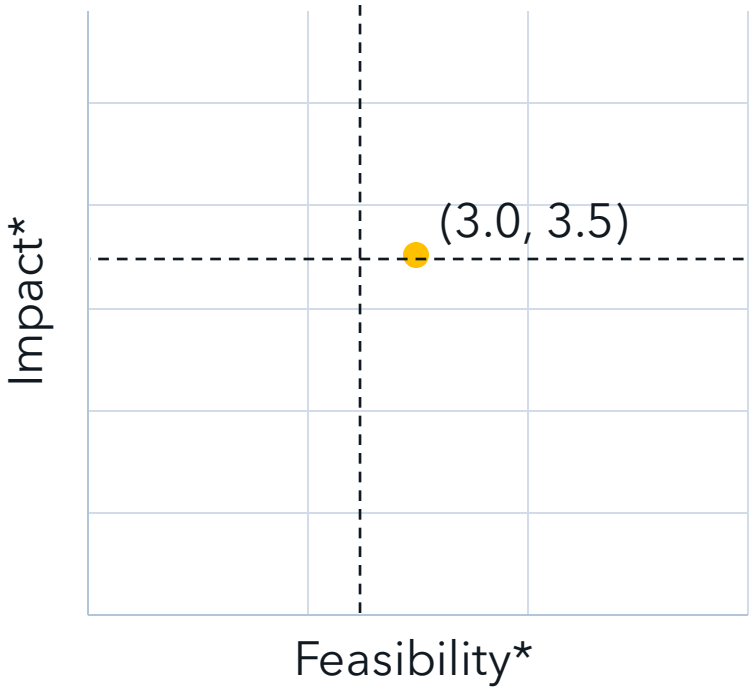
Determine Customer Site Hosting Capacity

Use Case Description*

The use case will provide state agencies with customer site load and hosting capacity data that can be used in conjunction with existing data from IEDR Phase 1 release (substation, feeder level hosting capacity, and planned and installed distributed energy resources (DER) data) to plan and evaluate potential DER sites more efficiently and effectively. By using existing data in IEDR system from IEDR Phase 1 in addition to data mentioned above, end users should be able to dynamically view, and query estimated hosting/load capacities for customer sites, circuits, and substations whereby estimated hosting capacity is provided for all service points and all relevant levels of aggregation.

Note: This use case directly builds off functionality in Phase 1. Within Phase 1 we plan to create a foundational one stop shop for all hosting capacity data including installed and queued DERs to accelerate DER Siting and system planning.

Use Case Prioritization



*Weighted Averages

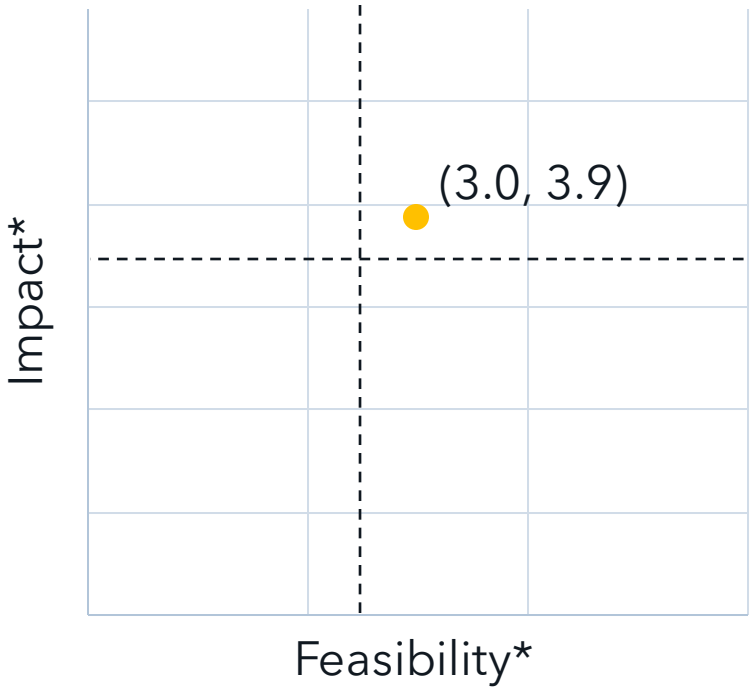
*For full use case description please refer to the Phase 2 survey use case aggregation document.

Enhanced Community Distributed Generation (CDG) Customer Data Coordination

Use Case Description*

This use case will enhance the coordination between distributed energy resource (DER) providers and their customers by streamlining access to their established customers' consumption and billing data, as well as CDG-specific utility account activity. DER providers will be able to: review and maintain site allocations to maximize savings and CDG benefits for subscribers, audit account-level CDG activity to ensure proper CDG program management, properly bill the subscriber for CDG-related products, and maintain subscriber's insight into benefits and savings CDG participation.

Use Case Prioritization



*Weighted Averages

*For full use case description please refer to the Phase 2 survey use case aggregation document.

Accelerate Distributed Energy Resources (DER)/Commodity Installation Implementations

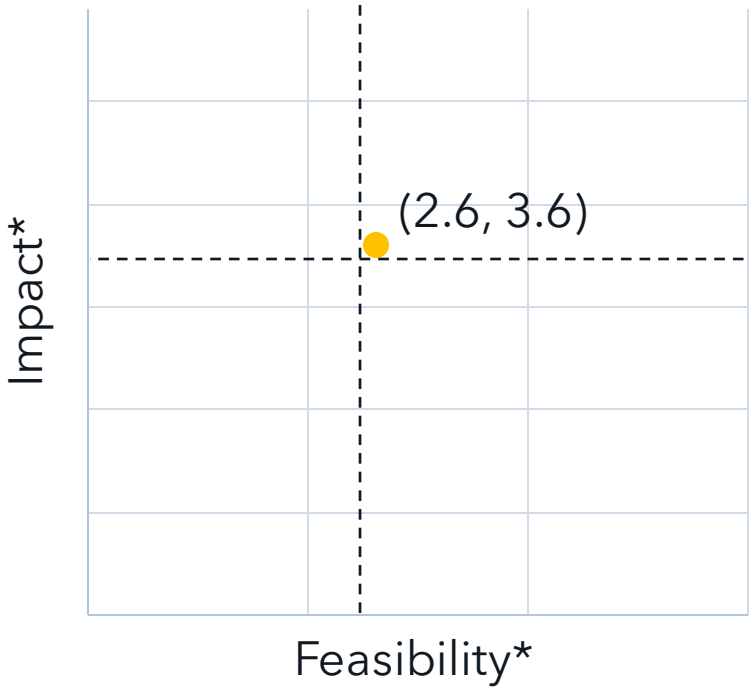
Use Case Description*

This use case supports DER developers, DER owners, utilities, organizations that site DERs (e.g., land trust) and energy service companies (ESCOs) to validate data requirements for the successful scoping and implementation of an economically viable commodity and DER combination project under the Value of Distributed Energy Resources (VDER) tariffs within NYS. In addition, this use case will provide end users with information to evaluate pricing structures. For instance, ESCOs require the following information: electric service point details, NYISO market details, utility tariff details. End users will also have information on the value difference between the current installed capacity (ICAP) tags and the previous year and the future value in order to properly bill and administer the product. Electronic Data Interchange (EDI) transactions would provide clarity to the type of data being provided by using a meter type/or data type identifier.

Note: This use case directly builds off functionality in Phase 1. Within Phase 1 we plan to enhance the DER siting tools launched in the IPV, streamline access and enable more efficient analysis of critical DER siting information by consolidating electrical infrastructure data and non-utility environmental, community, and property data and investigate the incorporation of energy storage and electric vehicle charging capacity data

*For full use case description please refer to the Phase 2 survey use case aggregation document.

Use Case Prioritization



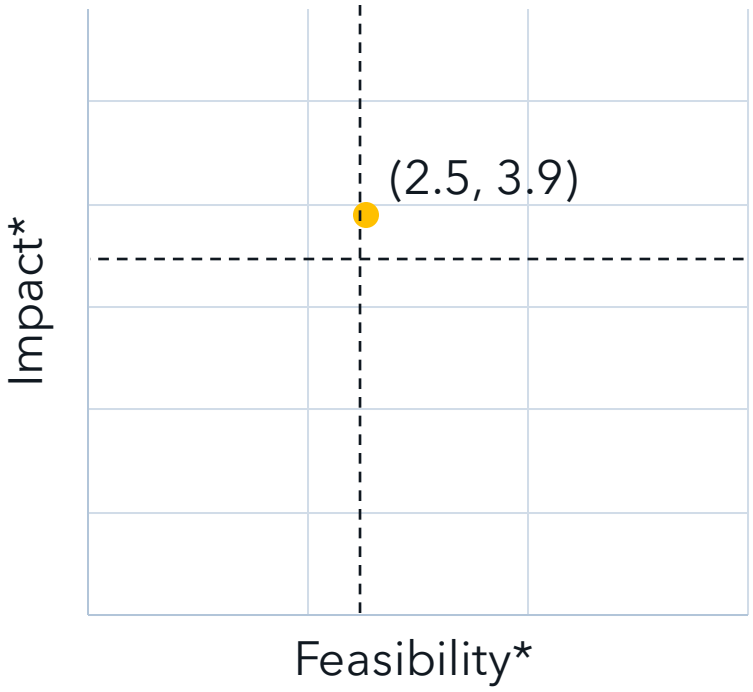
*Weighted Averages

Facilitate IEDR Wholesale Services

Use Case Description*

This use case will support service providers in their efforts to facilitate registration with NYISO for participating in existing and planned wholesale market participation models, as well as updating this information (ex. Transmission Node applicable to a customer's location) on an as needed basis (NYISO intends to update this information annually). The service provider will use the billing quality data provided to comply with NYISO settlement requirements and avoid the need to install duplicative private metering to supply the data. The service provider will be able to obtain interval data for each account registered with NYISO as part of an aggregation for submission by the service provider to the NYISO to comply with settlement data submission requirements.

Use Case Prioritization



*Weighted Averages

*For full use case description please refer to the Phase 2 survey use case aggregation document.

Accessible Distributed Energy Resources (DER) Interconnection (Hosting Capacity) Information

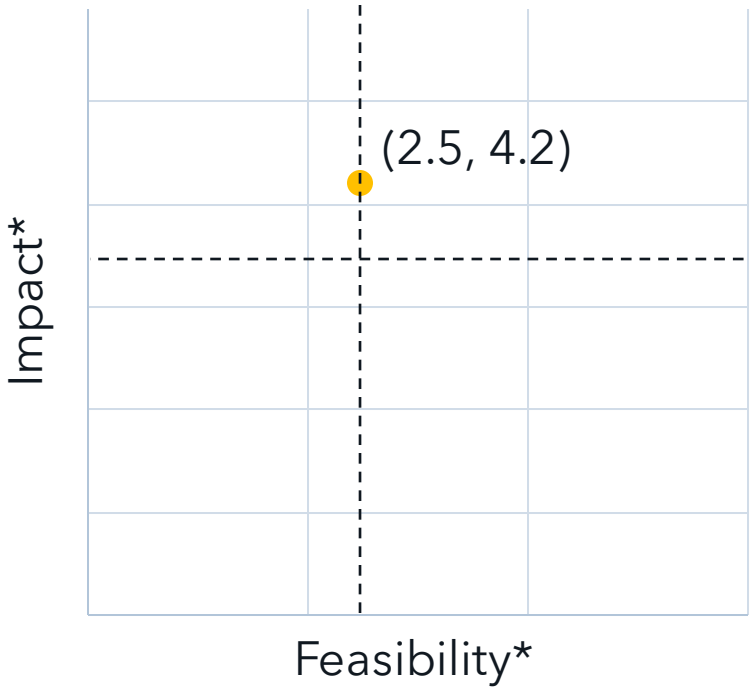
Use Case Description*

This use case will support DER developers, DER owners and utilities to better understand and accelerate the interconnection approval process for planned / installed DER systems, so that DER projects can deliver clean energy to customers as soon as possible. Accelerating the interconnection process also includes a clearer understanding and evaluation of the process of siting the location of a DER installation. These goals could be achieved by enhancing existing hosting capacity maps through standardization, the addition of interconnection approval time and interconnection cost information, and the inclusion of utility upgrade project information, and corresponding forecast of hosting capacity updates.

Note: This use case directly builds off functionality in Phase 1. Within Phase 1 we plan to enhance the DER siting tools launched in the IPV, streamline access and enable more efficient analysis of critical DER siting information by consolidating electrical infrastructure data and non-utility environmental, community, and property data and investigate the incorporation of energy storage and electric vehicle charging capacity data. In addition, within Phase 1 we plan to create a foundational one stop shop for all hosting capacity data including installed and queued DERs to accelerate DER Siting and system planning.

*For full use case description please refer to the Phase 2 survey use case aggregation document.

Use Case Prioritization



*Weighted Averages

Poll 9: Discuss Timeline Considerations for High Priority Use Cases

1

After reviewing the 8 highest priority use cases, select the 2 that are most dependent on each other and explain your reasoning.

A. *Accelerated Distributed Energy Resource (DER) Siting*
B. *State of Distributed Energy Resources (DER) Dashboard*
C. *Accelerating Electric Vehicle (EV) Siting and Program Opportunities*
D. *Determine Customer Site Hosting Capacity*
E. *Enhanced Community Distributed Generation (CDG) Customer Data Coordination*
F. *Accelerate Distributed Energy Resources (DER)/Commodity Installation Implementations*
G. *Facilitate IEDR Wholesale Services*
H. *Accessible Distributed Energy Resources (DER) Interconnection (Hosting Capacity) Information*

Poll 10: Discuss timeline considerations for high priority use cases

1

Of the 8 highest priority use cases:

- Choose the 4 that you would group together for the first themed release of high priority use cases in Phase 2

A. *Accelerated Distributed Energy Resource (DER) Siting*
B. *State of Distributed Energy Resources (DER) Dashboard*
C. *Accelerating Electric Vehicle (EV) Siting and Program Opportunities*
D. *Determine Customer Site Hosting Capacity*
E. *Enhanced Community Distributed Generation (CDG) Customer Data Coordination*
F. *Accelerate Distributed Energy Resources (DER)/Commodity Installation Implementations*
G. *Facilitate IEDR Wholesale Services*
H. *Accessible Distributed Energy Resources (DER) Interconnection (Hosting Capacity) Information*

2

Please explain your reasoning for the theme and grouping selected in question 1

1. Free Response section (1000 characters max. Please use the Q&A function if more space needed)

Closeout & Next Steps

Immediate Next Steps

Share meeting outcomes with your organization and network to spread IEDR awareness and outreach.

Submit any additional thoughts or comments not already expressed during the GSE.

*To **get involved,** ask any outstanding questions, or share any additional feedback, please contact us at IEDR@nyserda.ny.gov. To **stay up to date**, please join the IEDR mailing list and visit the IEDR public dashboard for up-to-date information and upcoming events!*

Thank you!