May 2024 General Stakeholder Event (GSE)

May 17, 2024

NEW YORK STATE | NYSERDA

May GSE Agenda

Agenda

Meeting Duration: 60 min

Agenda Topic	Estimated Duration	Description
Welcome and Overview	5 min	• Review agenda
Phase 1 Status	5 min	• Review Phase 1 status
MVP Overview and Demos	29 min	• Review descriptions of IEDR MVP tools • View IEDR demo • View Ideas Portal Demo
Phase 2 Status	9 min	• Review Phase 2 status
Q&A/Feedback Collection	10 min	• Submit questions to be answered live • Review answers to pre-submitted questions
Next Steps/Closing	2 min	• Review next steps and additional avenues to submit feedback and questions following the meeting

GSE Feedback Session 1

The IEDR Program Team values your feedback. Please take the time to respond to the polls on your screen.

1. **Have you visited the IEDR platform (iedr.nyserda.ny.gov)?**
   a) Yes
   b) No

2. **Which of the MVP IEDR tools have you explored (can select multiple answer choices)?**
   a) Electrical Infrastructure Assessment Tool (EIAT)
   b) Rate Plan Browser
   c) Green Button Connect (Sandbox Environment)
   d) None ☹

3. **What is your initial impression of the MVP IEDR tools?**
   a) Positive ☺
   b) Somewhat positive
   c) Neutral
   d) Somewhat negative
   e) Negative ☹
   f) I have not had the chance to explore the latest updates to the IEDR platform

Phase 1 Recap

From the IEDR Order: "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...Phase 1 shall be completed in 24 – 30 months."

We Successfully…

- **Established a core Program Team**, with clear and distinct responsibilities for each member
- **Established the IEDR Steering Committee, Utility Coordination Group (UCG), and Advisory Group (AG)** to guide the IEDR Program's activities
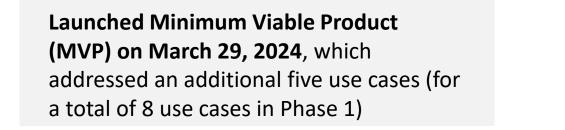- **Conducted all project activities within the PSC budget** established by the IEDR Order

To Develop…

Initial Public Version (IPV)	Minimum Viable Product (MVP)
Launched Initial Public Version on March 31, 2023, which addressed three priority use cases	**Launched Minimum Viable Product (MVP) on March 29, 2024**, which addressed an additional five use cases (for a total of 8 use cases in Phase 1)

Overview of Phase 1 IEDR Tools

During Phase 1, NYSERDA launched the IEDR IPV and MVP. Phase 1 included the integration of eight (8) use cases aligned with Phase 1 objectives and IEDR Order.

	EIAT	Rate Plan Browser	Green Button (Sandbox)
Description	Detailed energy-related data sets to help plan and site new distributed energy resources – solar, battery, energy storage, EV charging stations.	Central repository of structured, machine-readable data from participating IEDR utilities that is in a standardized form for populating analytical tools used for rate plan modeling.	Tool allows users to digitally access mock customer utility data sets in the Sandbox environment to explore the functionality and value of the use case without having to complete the full IEDR Green Button Connect registration process.
Use Case	**IPV:** • Consolidated Hosting Capacity Maps • Installed Distributed Energy Resources (DERs) • Planned Distributed Energy Resources (DERs) **MVP:** • DER Siting – Environmental, Community, Terrain, Land, and Property Assessment • EIAT Hosting Capacity & DER Map Enhancement	**MVP:** • Access to Basic Rate Plan Details • Filterable and Accessible Rate Plans Across NYS IOU Utilities	**MVP:** • Efficient and Effective Access to Existing Customer Billing Data (Sandbox)
Value to NYS Stakeholders	Speed up the process of site identification, permitting and viewing of planned DER projects, helping to deploy capital faster, improve interconnection times and increase the amount of clean energy available.	Optimizes rate plan data access for users who gather and utilize electric, gas, and steam rate plan data to make informed recommendations.	Allows stakeholders to explore functionality and submit comments and suggestion to the Ideas Portal without having to complete the full IEDR Green Button Connect registration process. The full rollout of this feature in 2024 as part of Phase 2 will allow utility customers to share their actual customer data with approved third-party energy companies.

IEDR DEMO

IEDR MVP tools include EIAT, Rate Plan Browser, and Green Button (Sandbox)

GSE Feedback Session 2

The IEDR Program Team values your feedback. Please take the time to respond to the poll on your screen.

1. **Following the demo, are there specific tools that you believe directly apply to your line of work (can select more than one answer)?**
   a) Yes, Electrical Infrastructure Assessment Tool (EIAT).
   b) Yes, Rate Plan Browser.
   c) Yes, Green Button Connect (Sandbox Environment).
   d) The current IEDR tools are not applicable to me and/or my line of work.

Phase 2 Objectives

Phase 2 of IEDR implementation will span 30-36 months and focus on expanding Phase 1 success and accelerating climate action through advancing IEDR capabilities. Phase 2 began April 1, 2024.

> **Phase 2 Vision Statement:** *To support the development of a fully featured and fully operational platform, Phase 2 of IEDR should **prioritize the accelerated acquisition/transfer of all data** identified by program stakeholders as necessary across remaining use cases. Incorporation of this data into the IEDR platform will adhere to **standardized data quality and integrity specifications and follow all privacy and security requirements** contained in the DAF as adopted by the PSC.*
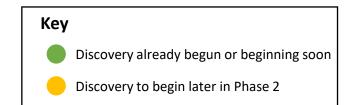
Key Objectives

- *Continue growing Phase 1 momentum by building on existing successes and providing expansive, powerful solutions to a wider audience*
- *Create solutions that accelerate climate action and address extensive and complex challenges reported by stakeholders*
- *Develop advanced capabilities within New York State that solve longstanding barriers to equitable stakeholder energy data access*

Status of Phase 2 Proposal Use Cases

The table below indicates whether discovery for the use cases included in the Phase 2 Proposal began or is set to begin between now and June 2024 or if discovery will occur later in Phase 2. Please note that use case prioritization is subject to change.

Use Case		Use Case		Use Case	
Rate plan data*	🟢	Community Energy Planning (simplification and rebrand of the Community Choice Aggregation use case in Phase 2 Proposal)	🟢	Unlocking and operating flexible DR programs at scale	🟡
Accessible DER interconnection (hosting capacity) information	🟢	Informing and enhancing utility programs to support disadvantaged communities (DACs)	🟡	Performance evaluation of DERs	🟡
Determine customer site hosting capacity	🟢	Reducing energy cost burden for LMI households	🟡	Facilitate IEDR wholesale services	🟡
Developing and implementing more effective clean energy strategies and programs	🟢	Enhancing the implementation of customer time-of-use plans for electric vehicle (EV) charging	🟡	Efficient and effective access to existing customer billing data	🟡
Accelerated DER siting	🟢	Improving reliability benchmarking for utility operational performance	🟡	Enhance identification of heating, ventilation, and air conditioning (HVAC) energy efficiency opportunities	🟡
State of DER dashboard	🟢	Metrics to establish renewable gas program	🟡	Aggregated customer data analysis for improved energy efficiency (EE) programs	🟡
DER registry	🟢	Enhanced community distributed generation (CDG) customer data coordination	🟡	Building electrification site identification	🟡
Improving access to customer data for DERs	🟢	Identifying and engaging new customers for DERs	🟡	Accelerate DER/commodity installation implementations	🟡
Electricity emissions data for improvement of GHG regulation	🟢	Accelerating EV charger siting and program opportunities	🟡		
Enable Whole Building Energy Consumption Analysis	🟢	Customer meter data access upon enrollment in DR and DER programs	🟡		

Please note that this use case name has been updated; it was previously referred to as "rate / tariff data access"

Support Structure for Use Case Discovery and Development

In Phase 2, the IEDR Program Team will engage with the tiered Advisory Groups to gather feedback and support IEDR development.

Advisory Group Role:

- *Advisory Group members represent utilities, industry associations/SMEs, state and federal agencies, etc.*
- *Tier 1 & Tier 2*

- Participate in both broad and use case targeted conversations
- Provide feedback on IEDR development and overall program
- Provide feedback on platform releases (MVP) and use case development priorities (Phase 2 roadmap)

- Voice the broad user experience
- Socialize program updates with networks

Advisory Group members will provide insight into the following user segments for the use cases shown on slide 10 in the coming months:

Initial User Segments

- Federal, state, and local government / government agencies
- Building / property managers
- DER developers
- DER aggregators
- DER owners
- DER operators

- Energy service companies (ESCOs)
- Energy service entities (ESEs)
- Trade associations
- Utility customers
- Utilities
- Independent system operators

Q & A

Please utilize the Q&A option at the bottom of the Zoom window.

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Next Steps

Please find next steps following this meeting below.

- Navigate to the IEDR platform website and explore the MVP tools, features, and functionality
  - An "Intro to IEDR" video can be found here. Video tutorials of each tool will also be uploaded to the IEDR YouTube playlist in the coming weeks so stay tuned!
  - If you need support while using the platform or if you need to report bugs or data gaps, please contact: iedr-support@esource.com

- Navigate to the Ideas Portal to provide feedback on ways to improve existing features or to recommend new feature ideas

- When sharing the IEDR platform with your networks, please clarify this is an early version of the platform and the IEDR Program Team encourages users to submit feedback through avenues outlined above to further develop the platform.

- To receive information related to the Integrated Energy Data Resource (IEDR), please join our mailing list!

- Check out our additional resources: NYSERDA YouTube channel and social media accounts (LinkedIn, [X](X), Facebook)