

Integrated Energy Data Resource (IEDR) Program Quarterly Report through June 30, 2024

Final Report | June 2024



NYSERDA

NYSERDA's Promise to New Yorkers:

NYSERDA provides resources, expertise, and objective information so New Yorkers can make confident, informed energy decisions.

Our Vision:

New York is a global climate leader building a healthier future with thriving communities; homes and businesses powered by clean energy; and economic opportunities accessible to all New Yorkers.

Our Mission:

Advance clean energy innovation and investments to combat climate change, improving the health, resiliency, and prosperity of New Yorkers and delivering benefits equitably to all.

NYSERDA Record of Revision

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Integrated Energy Data Resource (IEDR) Program Quarterly Report through June 30, 2024

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Integrated Energy Data Resource (IEDR) Program Quarterly Report through June 30, 2024

Final Report

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Abstract

The Integrated Energy Data Resource (IEDR) Program Quarterly Report is intended to inform the Public Service Commission (PSC), market participants, and additional parties interested in the progress of the IEDR Program. More specifically, this report provides information on progress made in achieving the IEDR Program's stated goals and objectives.

Keywords

Integrated Energy Data Resource, IEDR, use case, IEDR Advisory Group, IEDR Steering Committee, Utility Coordination Group

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Acronyms and Abbreviations

AG	Advisory Group
API	Application Programming Interface
CBO	Community-Based Organization
CDG	Community Distributed Generation
Central Hudson	Central Hudson Gas & Electric Corporation
Climate Act	Climate Leadership and Community Protection Act
Con Edison	Consolidated Edison, Inc.
DAC	Disadvantage Community
DAF	Data Access Framework
DER	Distributed Energy Resource
DG	Distributed Generation
DPS	New York State Department of Public Service
DR	Demand Response
EE	Energy Efficiency
ESE	Energy Service Entity
EV	Electric Vehicle
EV	Electric Vehicle Supply Equipment
GBC	Green Button Connect
GHG	Greenhouse Gas
GSE	General Stakeholder Event
HEAP	Home Energy Assistance Program
HVAC	Heating, Ventilation, and Air Conditioning
IEDR	Integrated Energy Data Resource
JU	Joint Utilities
LIPA	Long Island Power Authority
MVP	Minimum Viable Product
MWh	Megawatt Hours
NYSEG	New York State Electric and Gas
O&R	Orange & Rockland Utilities
PM&C	Program Management and Control
PSC	Public Service Commission
PSIP	Program Sponsor Implementation Plan
Q&A	Question and Answer
RG&E	Rochester Gas and Electric Corporation
SMEs	Subject-Matter Experts
UCG	Utility Coordination Group

Background

Through changes in its energy policy, New York State is transforming its electricity system into one that is cleaner, more resilient, and affordable. However, effective access to useful energy-related data is required to achieve these goals. The urgency of providing this data has increased with the State's enactment of the Climate Leadership and Community Protection Act (Climate Act).

On February 11, 2021, the New York State Public Service Commission (PSC) issued its Order Implementing an Integrated Energy Data Resource (IEDR Order)¹ and directed the implementation of an IEDR to securely collect, integrate, and provide broad and appropriate access to large and diverse sets of useful energy-related information on one statewide data platform. The IEDR Order designated the New York State Energy Research and Development Authority (NYSERDA) as the IEDR Program Sponsor responsible for defining, initiating, overseeing, and facilitating the IEDR Program on behalf of New York State.

The IEDR Order directs NYSERDA to file quarterly reports in this proceeding, with reports filed at the end of April, July, October, and January for the prior quarter, including information from the Program Manager's monthly reports, addressing all aspects of the IEDR Program. As directed, these program reports will—in the context of the schedule and budget—describe and explain (where necessary) the program's accomplishments and expenditures to date, current work and expenditures in progress, the latest program risk assessment and mitigation plan, and upcoming work and expenditures.

In issuing the IEDR Order, the PSC adopted the detailed approach and plan for the establishment of an IEDR presented in a whitepaper published by the Staff of the New York State Department of Public Service (DPS) in May 2020.²

The IEDR Order articulated the foundational principles for the development of the IEDR through the entire life cycle of the initiative and stated that the IEDR will be guided by the policy of obtaining the best overall value for New York State. This involved stakeholders to accelerate implementation timelines, reduce initiative costs and risks, and protect the agreed-upon scope by partnering with high-quality service providers aligning with the State's values.³

NYSERDA, as the Program Sponsor, has established a process that is based on three commitments:

1. Effective and 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.

On April 15, 2021, the PSC issued an order to establish a uniform and comprehensive Data Access Framework (DAF) to govern the means and methods for accessing and protecting all types of energy-related information.⁴ This order was based on DPS Staff recommendations.⁵ Accordingly, all aspects of designing and operating the IEDR will comply with any such framework that the PSC may establish.

The IEDR Order designated NYSERDA to assume the role of the IEDR Program Sponsor and assigned responsibility for defining, initiating, overseeing, and facilitating the IEDR Program on behalf of the State. The Program Sponsor's principal duties include the following:

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

The IEDR Order establishes the regulatory expectation that the IEDR will enable approximately 50 use cases over Phase 1 and 2 and specific deadlines for achieving minimum performance capabilities. This approach enables the development, implementation, and operation of the IEDR in meaningful and achievable segments. Specifically, the PSC established a two-phase schedule of the development and operation of the IEDR:

- Phase 1: The initial IEDR implementation will enable at least five of the highest priority use cases with an expectation that there could be 10 or more achieved. Phase 1 will be completed within 24–30 months of the work's commencement by the Program Manager (on or about April 1, 2024).

- Phase 2: The initial IEDR will expand and enhance approximately 40 additional use cases, building on the successful implementation and operation of Phase 1. Phase 2 will be completed 30–36 months after the completion of Phase 1 (on or about October 1, 2026–April 1, 2027).

The IEDR Order further recognizes that details—associated with the development, design, and implementation of each phase of the IEDR Program—must be preceded by specific activities requiring planning that will impact the scheduling of subsequent activities and the establishment of milestones.

These activities include obtaining:

- Advice and recommendations of stakeholders through workshops and technical conferences.
- The services of a Program Manager, Solution Architect, and other professional resources as described in the IEDR Order.
- A workplan and budget from the Program Manager for both Phase 1 and Phase 2.
- Recommendations of the AG.

The Transition from Phase 1 to Phase 2 of the IEDR Program

On May 12, 2023, NYSERDA submitted a proposal for the structure and funding of Phase 2 of the IEDR Program. In response to the Phase 2 Proposal, on January 18, 2024, the PSC issued their Order Approving Integrated Energy Data Resource Phase 2 Budgets (IEDR Phase 2 Order).

The IEDR Phase 2 Order approved funding for Phase 2 of the IEDR Program, which officially began on April 1, 2024. Phase 2 funding will support the established regulatory expectations that the IEDR will leverage the accomplishment of Phase 1 to enable approximately 40 additional use cases by the end of Phase 2.

The IEDR Phase 2 Order acknowledged the continuation of established program participant roles of the Program Sponsor (NYSERDA), the Program Manager (currently Deloitte Consulting LLP), the Development Team (currently lead by E Source Companies LLC), and the Utility Data Advisor (currently Pecan Street, Inc.). The Order also acknowledged that Phase 2 funding includes dedicated administrative funds, as requested in the Phase 2 Proposal, for contracting with or reimbursing organizations that support Disadvantage Communities (DACs), to ensure that DAC use cases and functionality are prioritized. The IEDR Phase 2 Order further directed NYSERDA to file a Phase 2 Status and Summary Report, on or before April 1, 2026, and acknowledged that based on sole discretion of the Secretary, the deadlines set forth in the latest Order may be extended.

1 Program Status

Building on Phase 1 accomplishments that established the IEDR and the first 8 use cases, Phase 2 of the IEDR Program is now focused on the additional development of approximately 40 use cases. Previously in Phase 1, the IEDR Program relied on a series of program milestones as established by the Program Sponsor Implementation Plan (PSIP) to track program progress and initial use case development. The transition from Phase 1 to Phase 2 of program operations contained a shift in program progress tracking from monitoring a series of foundational program milestones to tracking IEDR platform and use case development activity. Moving forward, IEDR Program Quarterly Reports will report on Phase 2 platform and use case development status, which encompasses the development and release of Phase 2 use cases and their projected release timeframes.

1.1 Platform Development

In Q2 2024, the IEDR Program Team focused platform development efforts on initial Phase 2 use case discovery activities. Use case discovery activities inform the foundational requirements for use case development; these activities include performing desktop research, conducting user interviews, defining problem statements, ideating solutions, and prototyping. Discovery user interviews are performed by engaging with members of the Tier 2 AG; information about Tier 2 AG activities is located in the Stakeholder Engagement section (section 2) of this Quarterly Report. As Phase 2 use cases are developed, use case features and functionality will be incrementally released within the IEDR. More information about the timing of upcoming IEDR platform releases and the specific features and functionality contained within releases is made available on the [IEDR Detailed Roadmap](#).

Additionally, to facilitate an improved user experience and IEDR value offerings to all stakeholders, Q2 2024 IEDR platform development efforts also included development work to update and improve platform features and functionality and a variety of technical items.

Phase 2 use cases are currently in draft status; as use cases progress through the development process use cases may be updated to reflect newly discovered requirements, more accurate summations and/or labeling, or other changes in use case scope that are not currently defined. Future Quarterly Reports will detail any potential updates to Phase 2 use case scope. Phase 2 use case release timeframes will be updated as IEDR platform development progresses and use case development scope and the related timelines are further defined. Full descriptions of projected Phase 2 use cases can be found in the [IEDR Phase 2 Proposal](#).⁶ Q2 2024 IEDR use case development statuses are detailed in the following tables.

Table 1. Q2 2024 Status of Draft Phase 2 Use Cases in the Discovery Process

Use Case Discovery Activities Initiated in Q2 2024	Status of Tier 2 AG User Interview(s)	Expected Release Timeframe
Rate plan data	Completed in Q2	Phase 2—TBA
Accessible Distributed Energy Resource (DER) interconnection (hosting capacity) Information	Completed in Q2	Phase 2—TBA
Determine Customer Site Hosting Capacity	Completed in Q2	Phase 2—TBA
Accelerated Distributed Energy Resource (DER) siting	Planned for Q3	Phase 2—TBA
Enable Whole Building Energy Consumption Analysis	Planned for Q3	Phase 2—TBA
Developing and Implementing More Effective Clean Energy Strategies and Programs	Planned for Q3	Phase 2—TBA
State of Distributed Energy Resources (DER) Dashboard	Planned for Q3	Phase 2—TBA
Distributed Energy Resources (DER) registry	Planned for Q3	Phase 2—TBA

Table 2. Draft Phase 2 Use Cases to Begin the Discovery Process Later in Phase 2

Use Case Discovery to be Initiated Later in Phase 2	Expected Release Timeframe
Improving Access to Customer Data for Distributed Energy Resources (DERs)	Phase 2—TBA
Electricity Emissions Data for Improvement of Greenhouse Gas (GHG) Regulation	Phase 2—TBA
Community Energy Planning (simplification and rebrand of the Community Choice Aggregation Use Case in Phase 2 Proposal)	Phase 2—TBA
Informing and Enhancing Utility Programs to Support Disadvantage Communities (DACs)	Phase 2—TBA
Reducing Energy Cost Burden for Low-to-Moderate Income (LMI) households	Phase 2—TBA
Enhancing the Implementation of Customer Time-of-Use Plans for Electrical Vehicle (EV) Charging	Phase 2—TBA
Improving Reliability Benchmarking for Utility Operational Performance	Phase 2—TBA
Metrics to Establish Renewable Gas Program	Phase 2—TBA
Enhanced Community Distributed Generation (CDG) customer data coordination	Phase 2—TBA
Identifying and Engaging New Customers for Distributed Energy Resources (DERs)	Phase 2—TBA
Accelerating Electrical Vehicle (EV) Charger Siting and Program Opportunities	Phase 2—TBA
Customer Meter Data Access Upon Enrollment in Demand Response (DR) and Distributed Energy Resource (DER) programs	Phase 2—TBA
Performance Evaluation of Distributed Energy Resources (DERs)	Phase 2—TBA
Facilitate Distributed Energy Data (DER) Wholesale Services	Phase 2—TBA
Efficient and Effective Access to Existing Customer Billing Data	Phase 2—TBA
Enhance Identification of Heating, Ventilations, and air Conditioning (HVAC) Energy Efficiency (EE) opportunities	Phase 2—TBA
Aggregated Customer Data Analysis for Improved Energy Efficiency (EE) Programs	Phase 2—TBA
Building Electrification Site Identification	Phase 2—TBA
Accelerate DER/Commodity Installation Implementations	Phase 2—TBA

1.2 Phase 2 Milestones

Initial Phase 2 planning projections account for two Phase 2 program milestones. The IEDR Phase 2 Order⁷ established one additional IEDR Program milestone, the Phase 2 Status and Summary Report milestone, which is anticipated to be filed on or before April 1, 2026. The previous Phase 1 program milestone Platform User Conference was determined to be more suited as a Phase 2 program activity and is now being tracked accordingly. Additional information on these two milestones and any potential emergent Phase 2 program milestones will be reflected in future Quarterly Reports.

Table 3. Phase 2 Milestone Status

Milestone	Program Topic	Date Expected	Status
Phase 2 Status and Summary Report	Reporting	On or before April 1, 2026	Not Started
Platform User Conference	Stakeholder Engagement	TBD within Phase 2	Not Started

2 Stakeholder Engagement

2.1 Stakeholder Engagement Background

The IEDR Order⁸ articulates policy objectives and establishes venues and processes that are intended to assure the broadest possible opportunity for stakeholder contributions throughout the entire life cycle of the IEDR initiative. Robust stakeholder engagement is required to ensure the centralized platform provided by the IEDR will be a trusted resource that all interested parties and stakeholders can use to efficiently access and analyze pertinent elements of the State’s energy system and customer information. Furthermore, stakeholder engagement will play a critical role in defining and prioritizing the many use cases anticipated by the IEDR Order. The IEDR Order provides for the establishment of an Advisory Group (AG) that will bring together a broad spectrum of stakeholder perspectives to inform the design and operation of the IEDR. The Program Sponsor will organize, convene, and facilitate the work of the AG.

Achieving the breadth and depth of stakeholder participation envisioned by the IEDR Order requires meaningful opportunities for broad stakeholder engagement that complements and contributes to the AG’s work. To that end, the Program Sponsor will continue to provide all interested stakeholders with meaningful opportunities to contribute to the development of the IEDR through a robust schedule of workshops, technical conferences, periodic reports, and other formats.

These activities are and will continue to be designed in consultation with stakeholders, the AG, Steering Committee, and Program Manager. Overall responsibility and accountability for stakeholder engagement reside with the Program Sponsor who will continue to collaborate with and call upon the Program Manager to facilitate stakeholder engagement activities.

2.1.1 The Ideas Portal

During Phase 1 of program operations, direct engagement between the IEDR user community and the Development Team was enabled in the form of an Ideas Portal, that was launched on March 31, 2023, and continues to facilitate conversations between the IEDR Program Team and IEDR users. The Ideas Portal (<https://iedr.ideas.aha.io/>) allows IEDR users to provide asynchronous feedback regarding feature improvements and requests for new data sets. IEDR support (iedr-support@esource.com) is also available for users to report bugs or other issues they may experience while navigating the platform.

2.1.2 IEDR YouTube Playlist

In Q2 2024, the IEDR Program Team developed and published five IEDR demonstration videos on NYSERDA's YouTube channel. These initial videos provide high level demonstrations of what the IEDR is and IEDR tool functionality. These videos are intended to provide an accessible educational resource for the IEDR's general stakeholder community, that drives users to the IEDR and promotes the effective use of the IEDR among the IEDR stakeholder community. Throughout Phase 2, new videos will be developed and published to coincide with major platform releases and/or new platform modules. The initial five videos and future IEDR YouTube content can be accessed through NYSERDA's YouTube channel in the dedicated [IEDR playlist](#).

2.2 Stakeholder Engagement Meetings

2.2.1 General Stakeholder Event

On May 17, 2024, the IEDR Program Team hosted the first General Stakeholder Event (GSE) of Phase 2, which was attended by 88 individuals representing various industry organizations, utilities, local governments, clean energy industry entities, and others. The meeting presentation included reviewing a summary of Phase 1 accomplishments, performing a demonstration of the IEDR platform and the IEDR Ideas Portal, and reviewing the current state of the IEDR Program, including Phase 2 status, objectives, use cases, and current AG purpose and function. Attendees also contributed to live survey prompts and participated in a question-and-answer (Q&A) session with the IEDR Program Team. A follow-up communication was sent to attendees, containing follow up answers to questions that were not answered during the GSE, and providing instructions on how to access the IEDR platform and further engage with the IEDR Program.

2.2.2 Advisory Group

As of September 2023, the AG was restructured to meet changing program needs. A key component of the restructured AG is the distinction between the two tiers, which bifurcate membership participation. Tier 1 AG meetings consist of a cross-cutting, representative group of program stakeholders who attend quarterly meetings focused on broad program conversations, updates, and the collection of directional feedback. Tier 2 AG meetings consist of small, persona-specific groups of individuals and organizations

that represent the working interests of end users for a subset of IEDR features. As seen in the bulleted list below, IEDR personas represent specific user segments. Tier 2 AG meetings are scheduled per the platform development schedule and are focused on reviewing prioritized use cases to ensure critical user input is continuously collected.

AG persona categories include:

- Academia
- Back-end user
- Community-Based Organization (CBO)
- Distributed Generation (DG)
- Electric Vehicle Supply Equipment (EVSE)
- Energy Service Entity (ESE)
- Government
- Investors
- Legal
- Utility

2.2.2.1 Record of Advisory Group Sessions as of June 30, 2024

Tier 1 Advisory Group

Quarterly Tier 1 Advisory Group Meeting | April 11, 2024

During this inaugural Phase 2 AG meeting, the IEDR Program Team reviewed the purpose of the renewed AG structure, the expectations for AG Tier 1 and Tier 2 roles, Phase 1 accomplishments, and Phase 2 objectives, roadmap, stakeholder meetings, and strategic priorities. Tier 1 AG members introduced themselves to the broader group, engaged in smaller breakout groups, and participated in an open Q&A session.

Tier 2 Advisory Group

Ad Hoc Tier 2 AG Meetings | Multiple Dates

Individual ad hoc Tier 2 AG use case discovery and working group sessions were held throughout Q2 2024. Each session followed the format of facilitating team introductions, defining the purpose and goal of the interview, and then conducting the interview. The results of the discovery interviews yielded progress in defining use case requirements for development based on end user needs. The format of the working group session included recapping rate plan browser Phase 1 deliverables and Phase 2 objectives, then receiving feedback on the rate plan browser, including user pain points and preferences.

Additional Tier 2 AG sessions, including more discovery, working group sessions, individual interviews, and use case testing, will take place throughout the remainder of Phase 2 and these activities will be detailed in future Quarterly Reports. Table 4 details Tier 2 AG use case discovery sessions that took place in Q2 2024.

Table 4. Q2 2024 Tier 2 AG Use Case Discovery Sessions

Phase 2 Use Case	Tier 2 AG Session Type	Date
Accessible DER Interconnection (Hosting Capacity) Information	Discovery Interview	May and June 2024
Determine Customer Site Hosting Capacity	Discovery Interview	May and June 2024
Rate Plan Data	Working Group Session	May 2024

2.3 Utility Coordination Group

NYSERDA regularly convenes a Utility Coordination Group (UCG) as established by the IEDR Order. The UCG provides a venue for collaboration, coordination, and oversight of utility activities related to the design and implementation of the IEDR and alignment with the schedules and activities of the DAF. The UCG is comprised of members of the Steering Committee or their designees, NYSERDA, the Program Manager, and the senior-level leader of each utility IEDR implementation team, as required the IEDR Order.

Beginning in Q4 2022, the approach to UCG meetings transitioned to focus on engagement levels between the IEDR Program Team and the UCG. The subsequent UCG meeting engagement strategy evolved to include a 30- to 60-minute bi-weekly UCG meeting, followed up by targeted meetings with individual utilities and specific subject matter experts (SMEs).

2.3.1 Record of Weekly IEDR UCG Meetings as of June 30, 2024

April 2, 2024 | Utility Coordination Group Meeting

During this UCG meeting, the IEDR Program Team reviewed upcoming platform releases and utility data related milestones. Summer and winter loading layers in hosting capacity electrification maps were reviewed by Con Edison, and the IEDR Development Team discussed charges and credits data, such as the Home Energy Assistance Program (HEAP) in rate plan data. Additional time was reserved for open discussion and a Q&A session

April 16, 2024 | Utility Coordination Group Meeting

During this UCG meeting, the IEDR Program Team addressed the upcoming IEDR development schedule and discussed logging tickets for support when discrepancies in data were found within the IEDR. Additional time was reserved for open discussion and a Q&A session.

April 30, 2024 | Utility Coordination Group Meeting

During this UCG meeting, the IEDR Program Team reviewed the rate plan data schedule and set joint working session dates. Additional time was reserved for open discussion and a Q&A session.

May 28, 2024 | Utility Coordination Group Meeting

During this UCG meeting, the IEDR Program Team reviewed progress toward improved tracking of data deposits and quality assurance. Discussion items that were proposed by the JU, including customer authentication process for third party requests, upcoming rate plan workshops, and requests for more visibility into data status beyond utility data deposits were also reviewed. Additional time was reserved for open discussion and a Q&A session.

June 11, 2024 | Utility Coordination Group Meeting

During this UCG meeting, the IEDR Program Team reviewed IEDR platform use metrics, discussion items that were proposed by the JU, including rate plan deliverables and the feasibility of utilizing Application Programming Interfaces (APIs) for pulling hosting capacity data from utility sites. The rate plan data deposit email list was also discussed, and additional time was reserved for open discussion and a Q&A session.

June 25, 2024 | Utility Coordination Group Meeting

During this UCG meeting, the IEDR Program Team provided updates on Development Team activities, such as use case discovery, data quality assurance and reporting, production Green Button Connect (GBC), and rate plan V003 specification development. Additional time was reserved for open discussion and a Q&A session.

3 Use and Status of Funding

The IEDR Phase 2 Order established a budget of \$36,386,193 for NYSERDA’s Phase 2 efforts. The Phase 2 Order directed recovery of these costs in proportion to the total electric load for 2022 among Long Island Power Authority (LIPA) and jurisdictional utilities, with the costs allocated among jurisdictional utilities in the same manner as costs allocated and collected through the Bill-As-You-Go Agreements. Based upon load values provided by the IEDR Phase 2 Order, costs will be allocated in the following apportionment.⁹

Table 5. IEDR Phase 2 Cost Allocation

Utility	2022 Annual Delivery Service Load (MWh)	MWh Load Ratio Share
Central Hudson	5,038,524	3.7%
Con Edison	53,290,877	38.6%
NYSEG	16,170,214	11.7%
National Grid	33,248,701	24.1%
O&R	4,211,186	3.1%
RG&E	7,271,949	5.3%
LIPA	18,743,000	13.6%
Total	137,974,451	100.0%

Table 6 summarizes the approved budget and cumulative activity through June 30, 2024.

Table 6. IEDR Cumulative Budget Allocation for Phase 2

Integrated Energy Data Resources (a)(b) Approved Budget and Itemized Expenses June 30, 2024										
Table 1: Cumulative Activity through June 30, 2024										
	Cumulative Approved Budget	Expended (c)	Encumbered (d)	Expended + Encumbered	Expended + Encumbered as a % of Total Budget	Pre-encumbered Contracts (e)	Pre-encumbered Solicitations (e)	Expended + Encumbered + Pre-encumbered	Expended + Encumbered + Pre-encumbered as a % of Total Budget	Uncommitted
Phase 1 + Phase 2										
Administration Costs as Project Sponsor	4,791,442	1,273,287	653,022	1,926,309	40.2%	-	-	1,926,309	40.2%	2,865,133
Procured Resources	45,094,750	12,766,476	28,844,329	41,610,805	92.3%	-	-	41,610,805	92.3%	3,483,945
Total	49,886,192	14,039,763	29,497,351	43,537,114	87.3%	-	-	43,537,114	87.3%	6,349,078

(a) Case 20-M-0082: Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data. Order Implementing an Integrated Energy Data Resource, issued and effective February 11, 2021.
 (b) Case 20-M-0082: Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data. Order Approving Integrated Energy Data Resource Phase 2 Budgets, issued and effective January 19, 2024.
 (c) Expended funds include contractor invoices processed for payment by NYSERDA.
 (d) Encumbered funds include remaining funds obligated under a contract or purchase order.
 (e) Pre-Encumbered funds include planned funding for contracts awarded and under negotiation; and planned funding under active development through open solicitations with upcoming proposal due dates.

All IEDR program-related expenditures are and will be managed by the Program Sponsor in compliance with NYSERDA’s budget and accounting policies and principles. For a full overview of the projected costs of the IEDR, please refer to the Updated PSIP and IEDR Phase 2 Order.

4 Program Plans for 2024

Stakeholder engagement that informs Phase 2 development is central to program plans for the remainder of 2024. A scheduled series of quarterly Tier 1 AG meetings is forthcoming and Tier 2 AG sessions will continue to be scheduled in concert with the Phase 2 use case development roadmap. Phase 2 use case functionality will be released incrementally throughout Phase 2. Details regarding the timing of upcoming IEDR platform releases, as well as the specific features and functionality contained within each release, are available on the [IEDR Detailed Roadmap](#). The IEDR Program Team is also developing specialized stakeholder working groups that will focus on gaining deeper working knowledge from SMEs that relate to the development and use of the IEDR. Additional information on the outcomes of initial SME working group planning efforts will be included in future Quarterly Reports.

Internally, the IEDR Program Team continues to refine strategies, processes, and approaches to more efficiently develop and publicly deliver approximately 40 use cases by the end of Phase 2, as required by the IEDR Order.

5 Program Risk Assessment and Mitigation Plan

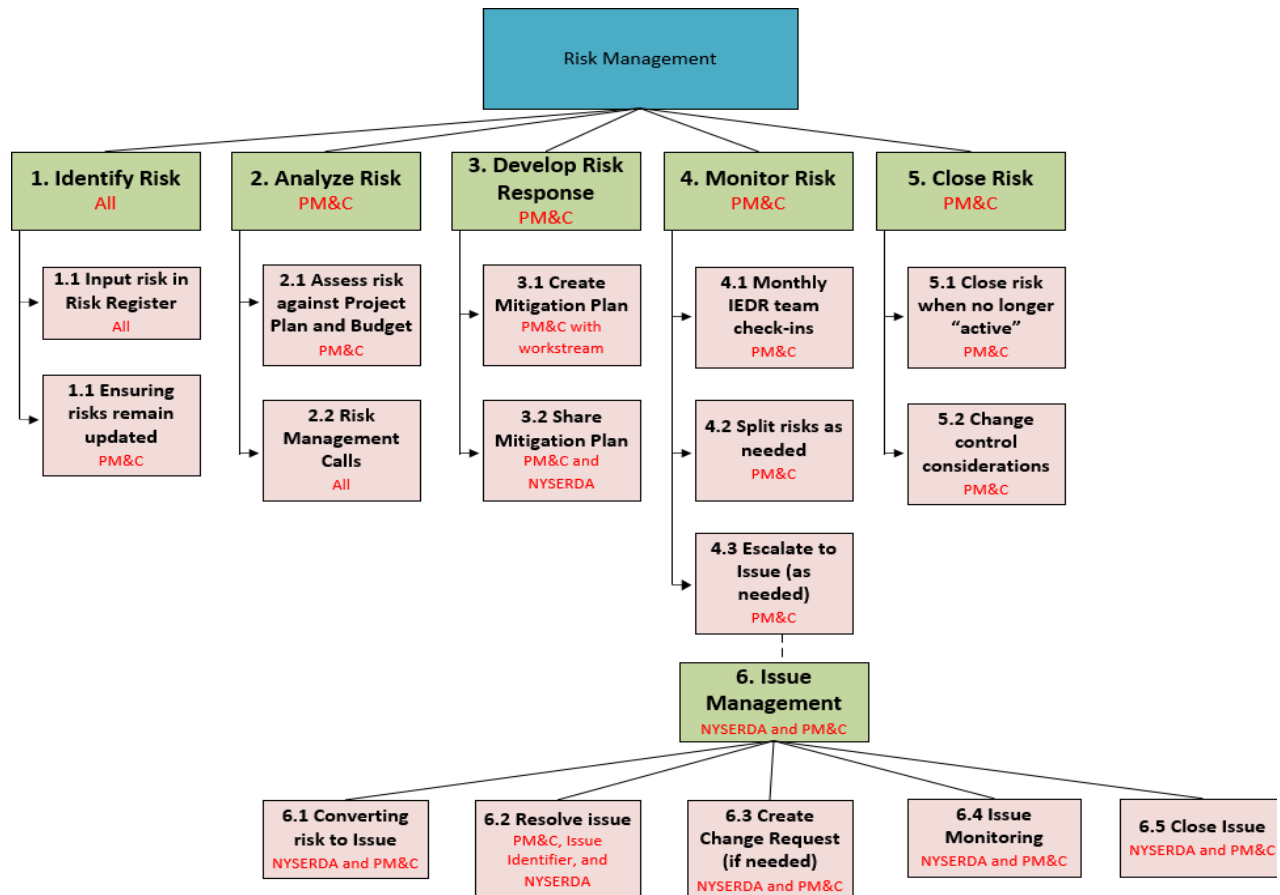
As stated in the PSIP and as outlined in section 5.5 of the IEDR Whitepaper:

The Program Manager will organize and conduct the activities—including regular consultations with NYSERDA—needed to facilitate the timely anticipation, identification, and mitigation of risks that could hinder or prevent successful IEDR implementation and provide the approach to enable NYSERDA to provide timely communication of risks with the Steering Committee.

With the commencement of Phase 1, a comprehensive risk assessment and mitigation plan with extensive tracking has commenced and will continue to be employed throughout Phase 2 of program operations. The Program Manager is actively coordinating with all external partners to capture and mitigate risks in accordance with the Risk Management Plan.

Figure 1 depicts an overview of the Risk Management Plan. Within the context of Figure 1, PM&C is defined as Program Management and Control as performed by the Program Manager.

Figure 1. IEDR Risk Management Plan Overview



Appendix A. Completed Milestones to Date

Table A-1. Completed Milestones as of June 30, 2024

Milestone	Program Topic	Date Completed
Program Manager RFP response submission deadline.	Program Manager	July 1, 2021
Program Charter adopted by Utility Coordination Group.	Charter	July 12, 2021
Initial use case comments from stakeholder response deadline.	Stakeholder Engagement	July 23, 2021
Program Charter adopted by IEDR Steering Committee.	Charter	August 6, 2021
Initial meeting of the Advisory Group.	Advisory Group	August 17, 2021
Program Manager contract executed, and work commenced.	Program Manager	September 28, 2021
Utility Data Advisor contract executed, and work commenced.	Utility Data Advisor	September 30, 2021
Updated Program Sponsor Implementation Plan filed.	Reporting	October 1, 2021
IEDR Program Dashboard operational.	Reporting	October 31, 2021
First quarterly report filed.	Reporting	October 21, 2021
Program Charter to be adopted by the Advisory Group.	Charter	October 21, 2021
General Stakeholder Engagement Meeting (virtual use case stakeholder event).	Stakeholder Engagement	November 15, 2021
Stakeholder Engagement and Communication Plan drafted and finalized.	Stakeholder Engagement	October 29, 2021
Outreach to organizations that submitted use cases and may be aligned with prioritized use cases.	Stakeholder Engagement	Started Q4, 2021, as anticipated.
Use case interviews to assist in user story and user journey development.	Stakeholder Engagement	Started Q4, 2021, as anticipated.
Workshops/focus groups for each use case to validate user stories and user journeys.	Stakeholder Engagement	Started Q4, 2021, as anticipated.
Develop draft procurement documentation for IEDR Development Team.	Solution Architect + Development RFP	December 31, 2021
IEDR Utility Data Assessment completed.	Utility Coordination Group	December 2021
Issue RFP for Solution Architect + Development Contractor teaming arrangement and related services.	Solution Architect + Development RFP	March 25, 2022
Contract with Solution Architect + Development Team executed, and work commences.	Solution Architect + Development RFP	Q4 2022—Deviation (Originally anticipated Q2 2022).
Sprint cycles focused on converting user stories/journeys for 3–5 use cases into functional IEDR prototypes.	Public Iterations of IEDR	Q1 2023—Deviation (Originally anticipated Q4 2022).
Final round of data access/security review and User Acceptance Testing of the IEDR's first public iteration.	Public Iterations of IEDR	Q1 2023—Deviation (Originally anticipated Q4 2022).
First public iteration of the IEDR released.	Public Iterations of IEDR	Q1 2023— Deviation (Originally anticipated Q4 2022).
Phase 2 proposal filed.	Reporting	May 12, 2023—Deviation (Originally anticipated January 15, 2023).
Sprint cycles focused on converting user stories/journeys for an additional 2–5 use cases into functional IEDR prototypes.	Public Iterations of IEDR	Q4 2023
Steering Committee reviews and approves declaration of IEDR MVP	Public Iterations of the IEDR	February 2024—Deviation (Originally anticipated Q4 2023).
IEDR MVP declared (5–10 use cases deployed) and end of Phase 1	Public Iterations of the IEDR	March 27, 2024—Deviation (Originally anticipated Q4 2023).

Endnotes

- ¹ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, issued and effective February 11, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>
- ² Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Whitepaper Recommendation to implement an integrated Energy Data Resource, May 29, 2021. <http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={43298F6A-3CA4-435F-BC9D-6DEF6F575836}>
- ³ The IEDR Order, P. 33.
- ⁴ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Adopting a Data Access Framework and Establishing Further Process, April 15, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A228D385-3E0E-41BC-A433-8ABD62F8A6E4}>
- ⁵ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Staff Whitepaper Regarding a Data Access Framework, May 29, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={0375BBDD-5F71-44E0-A897-9BE2AD5F2A0E}>
- ⁶ Case 20-M-0082, Integrated Energy Data Resource (IEDR) Program Phase 2 Proposal, May 12, 2023. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={409A1188-0000-C633-8139-1F4115003AC9}>
- ⁷ Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets, January 18, 2024, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1D-C44A88B299F0}>
- ⁸ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, issued and effective February 11, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>
- ⁹ These numbers differ from those originally published in the Integrated Energy Data Resource Initial Program Sponsor Implementation Plan. The update reflected here and in the Updated Program Sponsor Implementation Plan disaggregates NYPA load from the loads of the investor-owned utilities and presents the adjusted Bill-As-You-Go allocation. Phase 2 implementation is subject to the commission's adoption of the Phase 2 Proposal.

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