Integrated Energy Data Resource (IEDR) Program Quarterly Report through December 31, 2024

NEW YORK STATE

NYSERDA
New York State Energy Research
and Development Authority

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 December 31, 2024

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Integrated Energy Data Resource (IEDR) Program Quarterly Report through December 31, 2024

Final Report

Prepared by:

New York State Energy Research and Development Authority

Albany, NY

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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

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Acronyms and Abbreviations

AG	Advisory Group
API	Application Programming Interface
CBO	Community-based Organization
CCA	Community Choice Aggregation
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	Disadvantaged 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
ICAP	Installed Market Capacity
IEDR	Integrated Energy Data Resource
IEDR EJWG	IEDR Environmental Justice Stakeholder Working Group
IEDR Order	Order Implementing an Integrated Energy Data Resource
IEDR Phase 2 Order	Order Approving Integrated Energy Data Resource Phase 2 Budgets
IOUs	Investor-Owned Utilities
JU	Joint Utilities
Liberty	Liberty Utilities
LIPA	Long Island Power Authority
MVP	Minimum Viable Product
MWh	Megawatt Hours
National Fuel	National Fuel Gas Company
NYPA	New York Power Authority
NYSEG	New York State Electric and Gas
O&R	Orange & Rockland Utilities, Inc.
PSEG LI	Public Service Enterprise Group Long Island
PM&C	Program Management and Control
PSC	New York State Public Service Commission
PSIP	Program Sponsor Implementation Plan
Q&A	Question and Answer
RFP	Request for Proposals
RG&E	Rochester Gas and Electric Corporation
SMEs	Subject-Matter Experts
UCG	Utility Coordination Group
UAT	User Acceptance Testing
UER	Utility Energy Registry

1   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. Such program guiding principles included involving stakeholders to accelerate implementation timelines, reducing initiative costs and risks, and protecting 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 Phases 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 for 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 10 or more could be 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 (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.

1.1   Stakeholder Engagement Background

The IEDR Order[6] articulates policy objectives and establishes venues and processes that are intended to ensure 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 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.

1.1.1 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, which was launched on March 31, 2023, and which 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.

1.1.2 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.

1.2 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 19, 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 led 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 Disadvantaged 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 the sole discretion of the Secretary, the deadlines set forth in the latest Order may be extended.

1.3 Phase 2 Milestones

Initial Phase 2 planning projections account for two Phase 2 program milestones. The IEDR Phase 2 Order[7] 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 1. 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

1.4 Phase 2 Use Case Development Background

Phase 2 use cases are currently in draft status. As use cases progress through the discovery and 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 IEDR Program 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 as use case development scope and the related timelines are further defined. 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 are made available on the <u>IEDR Detailed Roadmap</u>.[8] Full descriptions of projected Phase 2 use cases can be found in Appendix C of the <u>IEDR Phase 2 Proposal</u>[9] or in <u>this reference document</u>.[10]

1.4.1 Defining the Use Case Discovery Process

Use case discovery activities inform the foundational requirements for use case development. These activities include performing desktop research, conducting discovery interviews, defining problem statements, ideating solutions, and performing design review. Once the design review activity is completed, use cases are scoped and prioritized for development. Discovery user interviews are performed by engaging with members of the Tier 2 AG; information about Tier 2 AG activities can be found in the Stakeholder Engagement section (section 2) of this Quarterly Report.

Discovery process definitions:

- **Desktop Research:** Gather information and insights that will inform development.
- **Discovery Interviews:** Conduct interviews to understand user needs and pain points.
- **Problem Synthesis:** Synthesize information from desktop research and user interviews to define and understand problems.
- **Solution Ideation:** Create draft solutions to the given set of defined problems.
- **Design Review:** Iteratively draft and review solution prototypes.

Figure 1. Use Case Discovery Process Flow
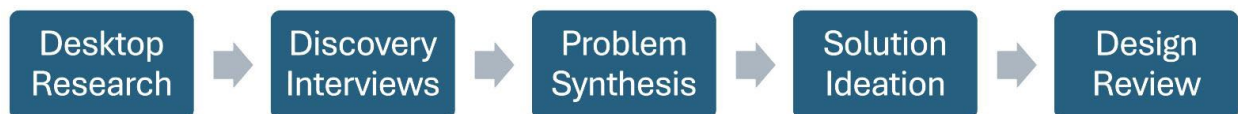
1.4.2 Thematic Use Case Discovery

Previously in Q3 2024, the IEDR Program Team established a new organizational approach to discovery activities that aims to improve discovery completion timelines, referred to as thematic use case discovery. Moving forward, use cases will be thematically grouped for discovery by consolidating user interviews among personas that span multiple use cases. For example, a building and/or energy manager (persona) may be able to provide insights into multiple use cases within the Comprehensive Whole Building Energy Consumption Analysis thematic group during a single interview.

This approach to consolidating efforts related to preparing for, scheduling, and conducting individual discovery interviews is projected to reduce time and resource expenditures throughout the discovery process. As they are performed, discovery activities will validate thematic use case groupings; as such, themed grouping of use cases are mutable and subject to evolve throughout time. More information on thematic groups and the associated use cases will be made available in future Quarterly Reports.

1.4.3 Identified Themes

Table 2 indicates identified use case themes. As discovery activities continue to progress and thematic use case associations are validated, Phase 2 use cases will be mapped to the identified themes below and documented in future Quarterly Reports.

Table 2. Identified Use Case Themes

Use Case Themes
Community Energy Planning
Comprehensive Whole Building Energy Analysis[a]
Cross-Cutting Platform Capabilities
Customer Data Access and Privacy Management
Data-Driven Clean Energy Strategy
DER and Renewable Integration
DER Customer Engagement
DER Market Expansion and Installation Efficiency
Inclusive Energy Access and Equity
Integrated EV and Building Electrification
Utility and Market Operations
Utility Rate Plan Access

[a]   In previous quarterly reports, this theme was referred to as "Whole Building Energy Analysis"; the current name of this theme is reflected here.

2 Current Program Status

Q4 2024 IEDR Program activity included thematic discovery activities for the Comprehensive Whole Building Energy Analysis and Community Energy Planning thematic use case groups, and development and preparation for the testing and release of Green Button Connect (GBC) functionality. Additionally, the Order Approving Transition of Utility Reported Community-Scale Energy Usage Data[11] was issued on December 20, 2024. This Order adopted the DPS Staff Proposal on the Transition of Utility Reported Community-Scale Energy Usage Data[12] and establishes expectations for the launch of an IEDR Community Energy Planning use case.

2.1 Thematic Use Case Discovery Status

In Q4 2024 the IEDR Program Team focused on closing out discovery activities for the thematic use case groups in Table 3. The remainder of discovery activities for the themes below include continuing to align on solution ideation and development scope and reengaging with Tier 2 AG members for validation and, eventually, testing. The next round of thematic use case groupings is now being evaluated for integration into the discovery process. More information about upcoming discovery activities, including the next thematic group to proceed through discovery, will be available in the Q1 2025 report.

Table 3. Fourth Quarter 2024 Status of Thematically Grouped Draft Phase 2 Use Cases in the Discovery Process

Thematic Group	Status of Discovery Process	Expected Release Timeframe
Utility Rate Plan Access	Completed Design Review—in Scoping for Development	Phase 2—TBA
DER and Renewable Integration	Completed Design Review—in Scoping for Development	Phase 2—TBA
Comprehensive Whole Building Energy Analysis	In Problem Synthesis and Solution Ideation	Phase 2—TBA
Community Energy Planning	In Problem Synthesis and Solution Ideation	Phase 2—TBA

2.2 Green Button Connect Preparation

In Q4 2024 the IEDR Development Team continued to receive and prepare utility customer data deposits for platform use, plan for GBC testing and GBC certification, and the launch of production (i.e., non-sandbox) GBC functionality. Phased testing of the GBC tool will begin in Q1 2025 per utility and is intended to achieve GBC certification, validate the tool's functionality, and required standards, and collect valuable feedback from platform testers. The Green Button Alliance will perform and complete the GBC certification.[13] Once the IEDR User Agreements[14] have been approved for use by the PSC (as required by the DAF), and GBC certification has been achieved, the GBC tool will be launched per utility.

Rather than testing, certifying, and launching GBC functionality at the same time for all participating utilities, the GBC deployment project plan details tranched testing, certification, and public releases of GBC functionality per utility through summer and fall 2025. Current tentative and conditional projections forecast GBC deployment for Con Edison/Orange and Rockland, National Grid, and National Fuel to be completed in Q3 2025, with GBC functionality for Liberty, Central Hudson, and Avangrid anticipated in late Q3 to early Q4 2025. The timeline for the availability of GBC functionality for PSEG Long Island (PSEG LI) is currently in development; more information about the developing timeline will be made available in future Quarterly Reports.

2.3 Order Approving Transition of Utility-Reported Community-Scale Energy Usage Data

As reiterated in the IEDR Matters Order, the Investor-Owned Utilities (IOUs) are responsible for reporting the defined customer energy usage data fields to the IEDR for facilitation of the IEDR use cases, including for support of any forthcoming Community Energy Planning use cases. On December 20, 2024, the PSC ordered the IOUs to discontinue reporting aggregated community data to the Utility Energy Registry (UER) and instead report all data fields for which these utilities are currently responsible for producing in compliance with the UER data protocol directly to NYSERDA until notified to stop. During the transitional period, IOUs will continue to report their data to NYSERDA, and that NYSERDA will remain responsible for collecting and providing public access to the data through Open NY. Once the IEDR publishes the use case that integrates the community-scale energy usage data on the statewide centralized platform, NYSERDA is directed to notify the IOU(s) to stop reporting their UER reporting directly to NYSERDA, which at that time concludes the IOU's UER compliance requirements. After the data has been transferred and stored

to the IEDR, the IEDR – as a data custodian - will be responsible for ensuring the data is compiled and provided in conformance with Community Energy Planning use cases' aggregation privacy screens and standards. The PSC also noted that the IEDR should not be required to replicate the existing UER platform or UER protocol. Rather, the IEDR will implement a Community Energy Planning use case, which includes community-scale energy usage data outputs that, like the community-level aggregated data accessible by means of the UER, are consistently used by municipalities for their community energy planning needs.[15]

In alignment with the existing IEDR stakeholder engagement process, the IEDR Program will continue to engage with stakeholders throughout Phase 2, obtain feedback required to prioritize and expand relevant data access on the IEDR, and help to determine which aggregated data points, such as Community Choice Aggregation (CCA) opt-out eligible load, Installed Market Capacity (ICAP) tags, and DER generation data, are provided by the IEDR in the future.[16]

3 Stakeholder Engagement

3.1 Stakeholder Engagement Meetings

Key IEDR Program stakeholder inputs continue to be informed by regularly occurring stakeholder engagements. In Q4 2024, the IEDR Program Team conducted two inaugural stakeholder group meetings: the first and second sessions of the IEDR Environmental Justice Stakeholder Working Group (IEDR EJWG), and the first session of the IEDR State Policy Working Group. Additionally, the IEDR Program Team continued hosting ongoing stakeholder engagements, including Tier 1 and Tier 2 AG and UCG meetings.

3.1.1 IEDR Environmental Justice Stakeholder Working Group

Session 1: Level-Setting | October 21, 2024

On October 21, 2024, the IEDR Program Team hosted the inaugural IEDR EJWG session. This first session was designed to facilitate level-setting about the IEDR Program among the group and familiarize members with the IEDR Program, platform, and program progress made to date. Following the first session, a post session survey was distributed to capture feedback on Phase 2 use case priorities and identify net new use cases. The survey remained open for one month, closing at 12:00 a.m. (midnight), on November 21, 2024.

Session 2: Midpoint of Intentional Collaboration | November 21, 2024

On November 21, 2024, the IEDR Program Team hosted the second IEDR EJWG session, marking the midpoint of intentional collaboration between the IEDR Program Team and IEDR EJWG members. With the goal of intentionally collaborating on the survey experience and ensuring that feedback was adequately captured, the working group discussed the survey experience and additional feedback that may not have been captured in the survey. The group also discussed high-level use case prioritization concepts in the context of working group member goals.

Anticipated Session 3: Reporting Back | Q1 2025

The IEDR Program Team is projected to host the third IEDR EJWG session in Q1 2025, on March 13, 2025. During this session, the IEDR Program Team will report back to the IEDR EJWG members on how their feedback—gathered from the survey, the initial two sessions, the Ideas Portal, and any other captured conversation—was interpreted and incorporated into Phase 2 development

planning. The IEDR Program Team will specifically outline the projected next steps for feedback identified as feasible, feedback that requires more work to determine feasibility, and what (if any) IEDR EJWG identified priorities, newly identified use cases, data sets, or functionalities are currently infeasible. Additional time during the session will be dedicated to elevating working group members' reactions and gathering further suggestions regarding the IEDR Program Team's interpretation of the survey results.

Projected Ad Hoc Sessions | Q1 2025 through Q4 2026

Starting in Q1 2025, the IEDR Program Team will begin scheduling ad hoc sessions with individual members of the IEDR EJWG. These sessions will consist of discovery interviews and User Acceptance Testing (UAT) sessions with individual IEDR EJWG members. Discovery sessions and UAT sessions with IEDR EJWG members will function in the same way that individual discovery sessions and UAT sessions currently function with non–IEDR EJWG members.

3.1.2 State Policy Working Group

Session 1 | October 29, 2024

On October 29, 2024, the IEDR Program Team hosted the inaugural IEDR State Policy Working Group meeting. This collaborative forum brings together stakeholders from NYSERDA, DPS, and, as necessary in the future, other New York State agencies to provide insights relevant to New York State policy for the IEDR Platform and to support efforts to streamline State data collection. The input and feedback from this working group aim to enhance the integration and accessibility of relevant energy data on the IEDR Platform.

The agenda for the first meeting included a review of the results of a previously distributed State policy and programs survey and a discussion about data availability and quality issues affecting the development of certain IEDR use cases. The group examined how these data challenges relate to New York State policy and discussed potential pathways to resolutions. Time was reserved for open discussion and a review of next steps and action items identified during the meeting.

3.1.3 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 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
- Advocacy
- Community-based Organization (CBO)
- Distributed Energy Resource (DER) Developer
- Distributed Generation (DG)
- Electric Vehicle (EV) Charging
- Energy Service Entity (ESE)
- Government
- Utility

3.1.4 Record of Advisory Group Sessions as of December 31, 2024

Tier 1 Advisory Group

Quarterly Tier 1 Advisory Group Meeting | October 24, 2024

Q4 2024 Tier 1 AG meeting activities included alignment on meeting objectives, and a review of program updates such as past releases, upcoming releases, and stakeholder meetings. The IEDR Program Team also facilitated a discussion of solution ideas to challenges identified by stakeholders in Q3 2024. Tier 2 AG activity was also reviewed, including a recap of Q3 discovery activities and engagement. The group also discussed the status of Tier 2 AG referrals. Additional time was reserved for open discussion and an overview of next steps for the Tier 1 AG.

Tier 2 Advisory Group

Ad Hoc Tier 2 Advisory Group Meetings | Multiple Dates

Throughout Q4 2024, the IEDR Program Team conducted individual ad hoc Tier 2 AG use case discovery and working group sessions. Each session followed the format of facilitating team introductions, defining the purpose and goal of the interview, and then conducting the discovery interview. Discovery interview questions focused on understanding the current processes, tools,

and datasets that persona specific potential IEDR end users rely on to meet their needs. The results of these persona-specific discovery interviews yielded progress in defining IEDR use case requirements based on end-user needs and existing solution approaches.

Additional Tier 2 AG sessions, including more discovery activities, working group sessions, individual interviews, and UAT, will continue throughout Phase 2. These activities will be detailed in future Quarterly Reports.

Table 4 details Tier 2 AG use case discovery sessions conducted in Q4 2024.

Table 4. Fourth Quarter 2024 Tier 2 Advisory Group Use Case Discovery Sessions

Use Case Theme	Tier 2 AG Session Type	Timeframe
Comprehensive Whole Building Analysis	Discovery Interviews	October 2024
Community Energy Planning	Discovery Interviews	October 2024

3.2   Utility Coordination Group

NYSERDA regularly convenes a 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 in the IEDR Order. Beginning in Q4 2022, the UCG meeting engagement schedule was structured to include 30- to 60-minute biweekly UCG meetings, followed up by targeted meetings with individual utilities and specific subject matter experts (SMEs).

3.2.1   Record of Biweekly IEDR Utility Coordination Group Meetings as of December 31, 2024

Utility Coordination Group Meeting | October 1, 2024

Agenda topics at this UCG included updates on milestone progress and ongoing program coordination, follow-up to confirm JU responses to the vintage data and service address spreadsheet requests from the September 17, 2024, UCG meeting. The IEDR Development Team facilitated conversation soliciting

proposals from the UCG on the best use of the UCG for discovery efforts. Topics submitted via email on behalf of the JU on August 30, 2024, and September 13, 2024, were reviewed. The meeting also included proposed agenda topics for the next UCG and a request for a deep dive into customer class mappings. Time was reserved for open discussion.

Utility Coordination Group Meeting | October 15, 2024

Agenda topics at this UCG included updates to milestone progress and ongoing program coordination, including data quality assurance and reporting, rate plan V0.99 specification development, and GBC production planning. UER aggregation methodologies, EIA 861/FERC 1 reporting, and challenges related to the 4/50 privacy screen were also discussed. Issues with identifying a consistent building identifier or "Premise ID" among existing utility data fields for use in the IEDR was discussed. Specifically, what has been provided by the utilities within the "service point to meter" and "building to service point" files were discussed. Follow-up conversation was had on the status of the vintage feasibility request and acknowledgement of JU position on "UserID". Proposed topics for the next UCG were reviewed and time was reserved for open discussion.

Utility Coordination Group Meeting | October 29, 2024

Agenda topics at this UCG included updates to milestone progress and ongoing program coordination, including data quality assurance and reporting, GBC production planning, and rate plan specification development. Follow-up discussions focused on UER aggregation methodologies, anonymization and the 4/50 privacy screen, and hosting capacity map traffic statistics. The group also discussed JU readiness for GBC Alpha testing, the JU's role in discovery, and the UCG schedule for the remainder of 2024. Proposed agenda topics for the next UCG was reviewed and time was reserved for open discussion.

Utility Coordination Group Meeting | December 10, 2024

Agenda topics at this UCG included updates to milestone progress and ongoing program coordination, and follow-up conversation including acknowledgement of JU feedback regarding participation in discovery. A status update on JU readiness for GBC Alpha testing and instant deposit feedback were also discussed. Agenda for the next UCG was reviewed and time was reserved for open discussion.

4 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 detailed in Table 5.[17]

On October 31, 2024, the JU filed a petition[18] (Petition) seeking clarification on the PSC's IEDR
Phase 2 Order.[19] On December 20, 2024, in response to the Petition, the PSC issued the Order
Clarifying Integrated Energy Data Resource Phase 2 Cost Collections.[20]

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 December 31, 2024.

Table 6. IEDR Cumulative Budget Allocation for Phase 2 Through December 31, 2024

Phase 1 + Phase 2	Cumulative Approved Budget	Expended (c)	Encumbered (d)	Expended + Encumbered	Expended + Encumbered as a % of Total Budget	Expended + Encumbered + Pre-encumbered	Expended + Encumbered + Pre-encumbered as a % of Total Budget	Uncommitted
Administration Costs as Project Sponsor	4,791,442	1,710,413	662,438	2,372,851	49.5%	2,372,851	49.5%	2,418,591
Procured Resources	45,094,750	18,264,219	23,817,287	42,081,505	93.3%	42,081,505	93.3%	3,013,245
Total	49,886,192	19,974,631	24,479,725	44,454,356	89.1%	44,454,356	89.1%	5,431,836

(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.

(a) 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 Program Sponsor Implementation Plan (PSIP)[21] and IEDR Phase 2 Order.[22]

5 Program Plans for 2025

In 2025, the IEDR Program Team will focus on key areas of platform development, including advancing efforts toward launching the GBC tool. Key development activities will also include thematic use case discovery, as well as validating thematic use case associations and advancing the development of the broader Phase 2 use case catalog to meet Phase 2 regulatory mandates.

Quality and timely stakeholder engagement continues to be a prime driver for developing the IEDR and its use cases. Accordingly, the IEDR Program Team continues to plan for engagement with the program's established stakeholder groups, including the AG (Tier 1 and Tier 2), UCG, IEDR EJWG, State Policy Working Group, and the NYSERDA Internal Working Group.

6   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. Currently, there are two "high" severity risks identified.

Table 7 provides an overview of the "high" IEDR program risks identified as of December 31, 2024.

Table 7. IEDR Program Risks as of December 31, 2024

Risk Description	Impact Areas	Risk Severity	Mitigation Approach
Use cases that rely on hosting capacity data may not achieve consistent statewide deployment without the initial input of statewide consistent data.	Technical	High	Continue to engage in conversations that support establishing data quality consensus, the identification of workable resolutions, and pathways forward with key stakeholder groups, including the IEDR Steering Committee, DPS, IEDR State Policy Working Group members, and the UCG.
Uncertainty surrounding the logistics of identifying, requesting, and receiving community energy data may impact the scope, schedule, and related regulatory directives related the to the Community Energy Planning use case.	Functional	High	Continue to engage in conversations that support the identification and resolution of logistical blockers.

Figure 2 provides 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 2. IEDR Risk Management Plan Overview
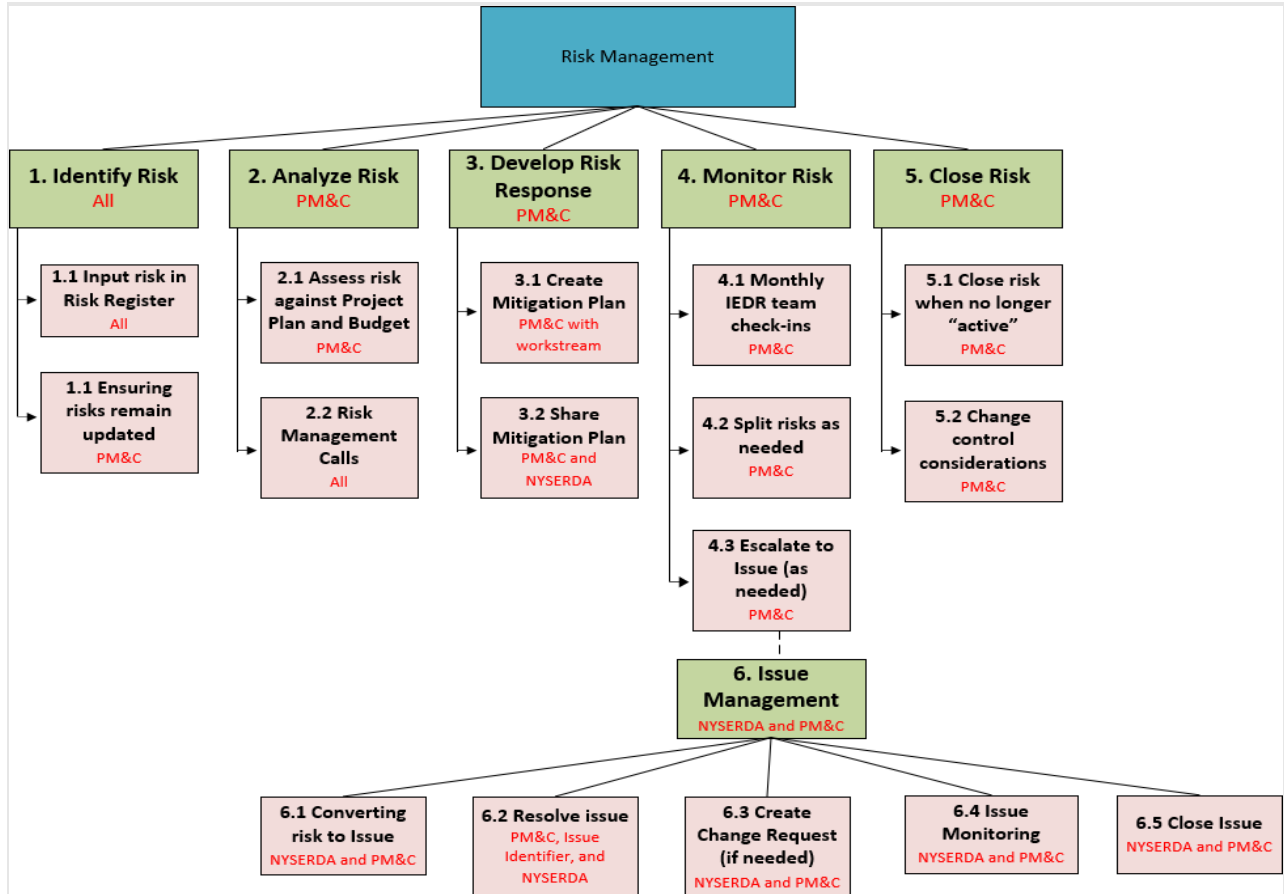
Appendix A. Completed Milestones to Date

Table A-1. Completed Milestones as of December 31, 2024

Milestone	Program Topic	Date Completed
Program Manager RFP response submission deadline.	Program Manager	July 1, 2021
Program Charter adopted by UCC.	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 AG.	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 PSIP 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 AG.	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, 2020. http://documents.dps.ny.gov/public/Common/YiewDoc.aspx?DocRetld={43298F6A-3CA4-435F- BC9D-6DEF6F575836}

3   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}

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, issued and effective 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, 2020. http://documents.dps.ny.gov/public/Common/YiewDoc.aspx?DocRetld={43298F6A-3CA4-435F- BC9D-6DEF6F575836}

6   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}

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   https://iedr.ideas.aha.io/sections/7216419530855529789

9   Case 20-M-0082, Integrated Energy Data Resource (IEDR) Program Phase 2 Proposal, Filed May 12, 2023, https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId=%7b409A1188-0000-C633-8139-1F4115003AC9%7d

10 https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Programs/IEDR/Draft-Phase-2-Use-Cases.pdf

11 Case 17-M-0315, In the Matter of the Utility Energy Registry, Issued and Effective December 20, 2024, https://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=17-M-0315

12 Case 17-M-0315, In the Matter of the Utility Energy Registry, Department of Public Service Staff Proposal on the Transition of Utility Reported Community-Scale Energy Usage Data, Filed November 8, 2023, https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A070B08B-0000-CA36-B20D-8C2E55BEF4C4}

13 https://www.greenbuttonalliance.org/

14 Case 20-M-0082, NYSERDA IEDR User Agreement Petition, Filed May 28, 2024, https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={104CC08F-0000-C511-B61C0BB05F44C967}

15 Case 17-M-0315, In the Matter of the Utility Energy Registry, Issued and Effective December 20, 2024, https://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=17-M-0315

16 Case 17-M-0315, In the Matter of the Utility Energy Registry, Issued and Effective December 20, 2024, https://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=17-M-0315

17   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.

18   Case 20-M-0082, Proceeding on Motion of the Commission regarding Strategic Use of Energy Data, JU IEDR Phase 2 Cost Recovery Petition, Filed October 31, 2024, https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={203DE492-0000-C92D-A7FF-B75E3F7B512B}

19   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, https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1D-C44A88B299F0}

20   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, , Issued and Effective April 15, 2021. https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A228D385-3E0E-41BC-A433-8ABD62F8A6E4}

21   Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Integrated Energy Data Resource Updated Program Sponsor Implementation Plan, Issued and Effective October 1, 2021. https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={B9BC09C2-F8F1-43B4-8CF5-D90C10C6AD2C}

22   Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets, Issued and Effective January 19, 2024. https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1DC44A88B299F0}

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