

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

Final Report | October 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.

Integrated Energy Data Resource (IEDR) Program Quarterly Report through September 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 |
| IEDR Order | Order Implementing an Integrated Energy Data Resource |
| IEDR Phase 2 Order | Order Approving Integrated Energy Data Resource Phase 2 Budgets |
| 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 |
| RFP | Request for Proposals |
| 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 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 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 (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

Q3 2024 IEDR Program activity encompassed Phase 2 process alignment and implementation, including a revised organizational approach to use case discovery activities (defined in section 1.1.1), and other ongoing platform development efforts. The revised organizational approach to use case discovery included a transition from performing use case discovery activities one use case at a time, to the thematic grouping of multiple use cases within discovery activities. IEDR platform development efforts centered around performing use case discovery activities, updating and improving platform features, functionality, and a variety of technical items, as well as continuing to prepare for the Green Button Connect (GBC) launch which will enable the availability of Joint Utilities (JU) customer data within the IEDR.

1.1 Use Case Development

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 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 [IEDR Detailed Roadmap](#). Full descriptions of projected Phase 2 use cases can be found in Appendix C of the [IEDR Phase 2 Proposal](#) or in [this reference document](#).

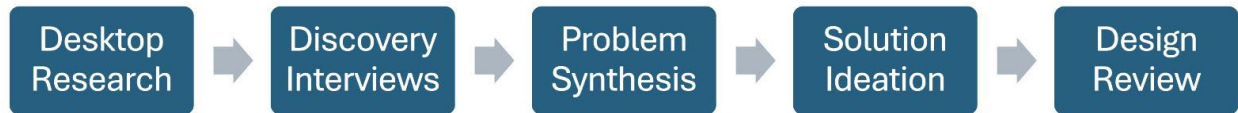
1.1.1 Defining the Use Case Discovery Process

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 Advisory Group (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



Q3 2024 IEDR use case discovery status is detailed in Tables 1 and 2.

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

| Phase 2 Use Case | Status of Discovery Process | Expected Release Timeframe |
|--|-----------------------------|----------------------------|
| Rate Plan Data Access | In Design Review | Phase 2—TBA |
| Accessible DER Interconnection Information | Completed Design Review | |
| Determine Customer Site Hosting Capacity | Completed Design Review | |
| Accelerated DER Siting | In Problem Definition | |
| DER Registry | In Problem Definition | |
| State of DER Dashboard | In Problem Definition | |
| Whole Building Energy Consumption Analysis (Themed Grouping) | In Desktop Research | |
| Community Energy Planning (Themed Grouping) | In Desktop Research | |

1.1.2 Thematic Use Case Discovery

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 Whole Building Energy Consumption Analysis thematic group (as seen in Table 2) 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 emergent thematic groups will be made available in future Quarterly Reports.

As seen in Table 2, two thematic use case groupings have been identified and will continue to go through the discovery process in Q4 2024.

Table 2. Fourth Quarter 2024 Thematically Grouped Draft Phase 2 Use Cases in Discovery Process

| Thematic Group | Use Cases | Expected Release Timeframe |
|--|---|----------------------------|
| Whole Building Energy Consumption Analysis | Enable Whole Building Energy Consumption Analysis | Phase 2—TBA |
| | Building Electrification Site Identification | |
| | Customer Meter Data Access Upon Enrollment in Demand Response (DR) and Distributed Energy Resource (DER) Programs | |
| | Enhanced Community Distributed Generation (CDG) Customer Data Coordination | |
| | Improving Access to Customer Data for DERs | |
| Community Energy Planning | Supplying Data for Community Energy Planning ^{6,7} | Phase 2—TBA |
| | Enhanced Community Distributed Generation (CDG) Customer Data Coordination | |
| | Developing and Implementing More Effective Clean Energy Strategies and Programs | |

1.1.3 Customer Data and Green Button Connect Preparation

In preparation for the full launch of the GBC tool, and the enablement of other use cases that will employ the use of utility customer data, the IEDR Development Team continued to receive and prepare JU customer data deposits for platform use. As a prerequisite to launching the GBC tool and allowing registered Energy Service Entities (ESE) the ability to request utility customer data, the IEDR Development Team has planned phased testing of the GBC tool. GBC testing is intended to achieve GBC Certification and validate the tool’s intended functionality and required standards. Once the IEDR User Agreements⁸ have been approved for use by the Commission, GBC testing is completed, and GBC Certification has been achieved, the GBC tool will be fully launched, and utility customer data will be available to be requested by registered ESEs. Current tentative timeline projections anticipate GBC

1.2 Phase 2 Milestones

Initial Phase 2 planning projections account for two Phase 2 program milestones. The IEDR Phase 2 Order⁹ 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 Order¹⁰ 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.

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

Key IEDR Program stakeholder inputs continue to be informed by regularly occurring stakeholder engagements. Q3 2024 stakeholder engagement expanded to include new avenues for program stakeholder input through internal NYSERDA and external stakeholder working group activities.

2.2.1 Internal NYSERDA Working Group

On August 8, 2024, the IEDR Program Team convened the Internal NYSERDA Working Group. The primary goal of this working group focused on leveraging the Authority's broad expertise and project portfolio to identify efficiencies, additional stakeholders, and new collaborative opportunities to accelerate IEDR platform development and value delivery. The meeting agenda included aligning on the objectives of the working group, reviewing Phase 1 program accomplishments, performing a demo of the IEDR platform, and summarizing Phase 2 program status to date. The IEDR Program Team also collected valuable feedback from the group on Phase 2 use cases, reviewed Tier 2 AG function, and solicited Tier 2 AG referrals from the group. Internal NYSERDA Working Group meetings will be held on a quarterly basis for the remainder of Phase 2.

2.2.2 IEDR Environmental Justice Stakeholder Working Group

During Q3 2024, the IEDR Program Team engaged in planning efforts to form the IEDR Environmental Justice Stakeholder Working Group. Planning efforts included scoping and procuring contracting services from individual contractors within the NYSERDA Disadvantaged Communities Stakeholder Services Pool and preparing content for upcoming working group sessions. Forming the IEDR Environmental Justice Stakeholder Working Group will create the dedicated space and time necessary for representatives of environmental justice and frontline communities to directly engage with the IEDR Program and

provide feedback that will inform IEDR platform development, the end use of which is intended to direct benefits to environmental justice and frontline communities. The first two IEDR Environmental Justice Stakeholder Working Group sessions are planned to take place in Q4 2024 and a third is planned to take place in early 2025. Subsequent ad hoc feedback engagements with individual members of the IEDR Environmental Justice Stakeholder Working Group will take place throughout the remainder of Phase 2. More information on the outcomes of the first and second working group sessions will be made available in the Q4 2024 Quarterly Report.

2.2.3 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 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
- Advocacy
- Community-based Organization (CBO)
- Distributed Energy Resource (DER) Developer
- Distributed Generation (DG)
- Electric Vehicle (EV) Charging
- Energy Service Entity (ESE)
- Government
- Utility

2.2.3.1 Record of Advisory Group Sessions as of September 30, 2024

Tier 1 Advisory Group

Quarterly Tier 1 Advisory Group Meeting | July 25, 2024

Q3 2024 Tier 1 AG meeting activities included alignment on meeting objectives, review of program updates such as past platform releases, stakeholder meeting schedules, recap of the 2024 General Stakeholder Event (GSE), and a summary of Tier 2 AG activities. Phase 2 discovery outputs, including discovery activities, and current pain points and solution ideas were also reviewed to validate end user prioritization. Additional time was reserved for Q&A discussion, review of next steps for the group, and discussion about Tier 2 recommendations.

Tier 2 Advisory Group

Ad Hoc Tier 2 Advisory Group Meetings | Multiple Dates

Individual ad hoc Tier 2 AG use case discovery and working group sessions were held throughout Q3 2024. Each session followed the format of facilitating team introductions, defining the purpose and goal of the interview, and then conducting the discovery interview. Tier 2 discovery interview questions seek to understand current processes, tools, and datasets that persona-specific potential IEDR end users currently rely on to meet their needs. Results of persona-specific discovery interviews yielded progress in defining IEDR use case requirements for development based on end user needs and current solution approaches.

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. These future T2 AG activities will be detailed in future Quarterly Reports. Table 4 details Tier 2 AG use case discovery sessions that took place in Q3 2024.

Table 4. Quarter 3 2024 Tier 2 Advisory Group Use Case Discovery Sessions

| Phase 2 Use Case | Tier 2 AG Session Type | Date |
|------------------------|------------------------|----------------------------------|
| Rate Plan Data | Discovery Interviews | July, August, and September 2024 |
| Accelerated DER Siting | Discovery Interviews | July and August 2024 |
| DER Registry | Discovery Interviews | August 2024 |
| State of DER Dashboard | Discovery Interviews | August 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 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).

2.3.1 Record of Weekly IEDR Utility Coordination Group Meetings as of September 30, 2024

Utility Coordination Group Meeting | July 23, 2024

Agenda topics at this UCG meeting included milestone updates on use case discovery, data quality and reporting, rate plan specification (V003) development, and production GBC. Discovery updates were provided for the Accessible DER Interconnection Information and Determine Site Hosting Capacity use cases. Topics submitted by the Joint Utilities on July 18 were also discussed. Agenda for the next UCG was reviewed and additional time was reserved for open discussion and Q&A.

August 6, 2024 | Utility Coordination Group Meeting

Agenda topics at this UCG meeting included milestone updates on use case discovery, data quality and reporting, rate plan specification (V003) development, and production GBC. Field discrepancies across network data layers, including examples of field values differing across layers and the associated user challenges, and a request for the utilities to report back was also discussed. Agenda topics for the next UCG were reviewed and additional time was reserved for open discussion and Q&A.

August 20, 2024 | Utility Coordination Group Meeting

Agenda topics at this UCG meeting included milestone updates on Development Team activities. The proposed GBC testing plan was also summarized and follow up discussion on field discrepancies across network data layers was discussed. The new approach toward discovery, including the recontextualized approach to discovery and UCG engagement was also reviewed. Additional time was reserved for discussion on JU proposed questions.

September 3, 2024 | Utility Coordination Group Meeting

Agenda topics at this UCG meeting included milestone updates on use case discovery, data quality and reporting, rate plan specification (V003) development, and production GBC. Ongoing program coordination, including continued discussion about nodal data and the GBC authorized user validation process was also discussed. IEDR use case contextualization was also reviewed, including introducing the next tranche of discovery for the community energy, whole building, and regulatory discovery activities. Additional time was reserved for open discussion and Q&A.

September 17, 2024 | Utility Coordination Group Meeting

Agenda topics at this UCG meeting included milestone updates on use case discovery, data quality and reporting, rate plan specification (V003) development, and production GBC. Conversation about a unified network model that would improve data consistency throughout the JU was introduced to the group, and data feasibility requests were also discussed. Topics submitted for discussion on behalf of the JU were also reviewed. Additional time was reserved for open discussion and Q&A.

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 detailed in Table 5.¹¹

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 September 30, 2024.

Table 6. IEDR Cumulative Budget Allocation for Phase 2

Integrated Energy Data Resources (a)(b)
 Approved Budget and Itemized Expenses
 September 30, 2024

Table 1: Cumulative Activity through September 30, 2024

| Phase 1 + Phase 2 | Cumulative Approved | | Expended + Encumbered (d) | Expended + Encumbered | Expended + Encumbered as a % of Total | | Pre-encumbered Contracts (e) | Pre-encumbered Solicitations (e) | Expended + Encumbered + Pre-encumbered | Expended + Encumbered + Pre-encumbered as a % of Total | |
|---|---------------------|-------------------|---------------------------|-----------------------|---------------------------------------|------------|------------------------------|----------------------------------|--|--|-------------|
| | Budget | Expended (c) | | | Budget | % of Total | | | | Budget | Uncommitted |
| Administration Costs as Project Sponsor | 4,791,442 | 1,488,217 | 725,877 | 2,214,094 | 46.2% | - | - | 2,214,094 | 46.2% | 2,577,348 | |
| Procured Resources | 45,094,750 | 15,221,044 | 26,860,461 | 42,081,505 | 93.3% | - | - | 42,081,505 | 93.3% | 3,013,245 | |
| Total | 49,886,192 | 16,709,261 | 27,586,338 | 44,295,599 | 88.8% | - | - | 44,295,599 | 88.8% | 5,590,593 | |

- (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)¹² and IEDR Phase 2 Order.¹³

4 Program Plans for 2024

During the remainder of 2024, the IEDR Program Team will continue to focus on transitioning discovery activities from one-at-a-time use case discovery to themed use case discovery, while simultaneously continuing to prioritize and refine the use case back log for development. Stakeholder engagement for the remainder of 2024 encompasses continuing to work with Tier 1 and Tier 2 AG to inform discovery outputs, including ad hoc Tier 2 sessions throughout Q4 and a quarterly Tier 1 meeting in October. In Q4 2024, the IEDR Program Team will host the first and second Environmental Justice Stakeholder Working Group meetings, and the first IEDR State Policy Working Group meeting.

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. Currently, there is one “high” severity risk identified.

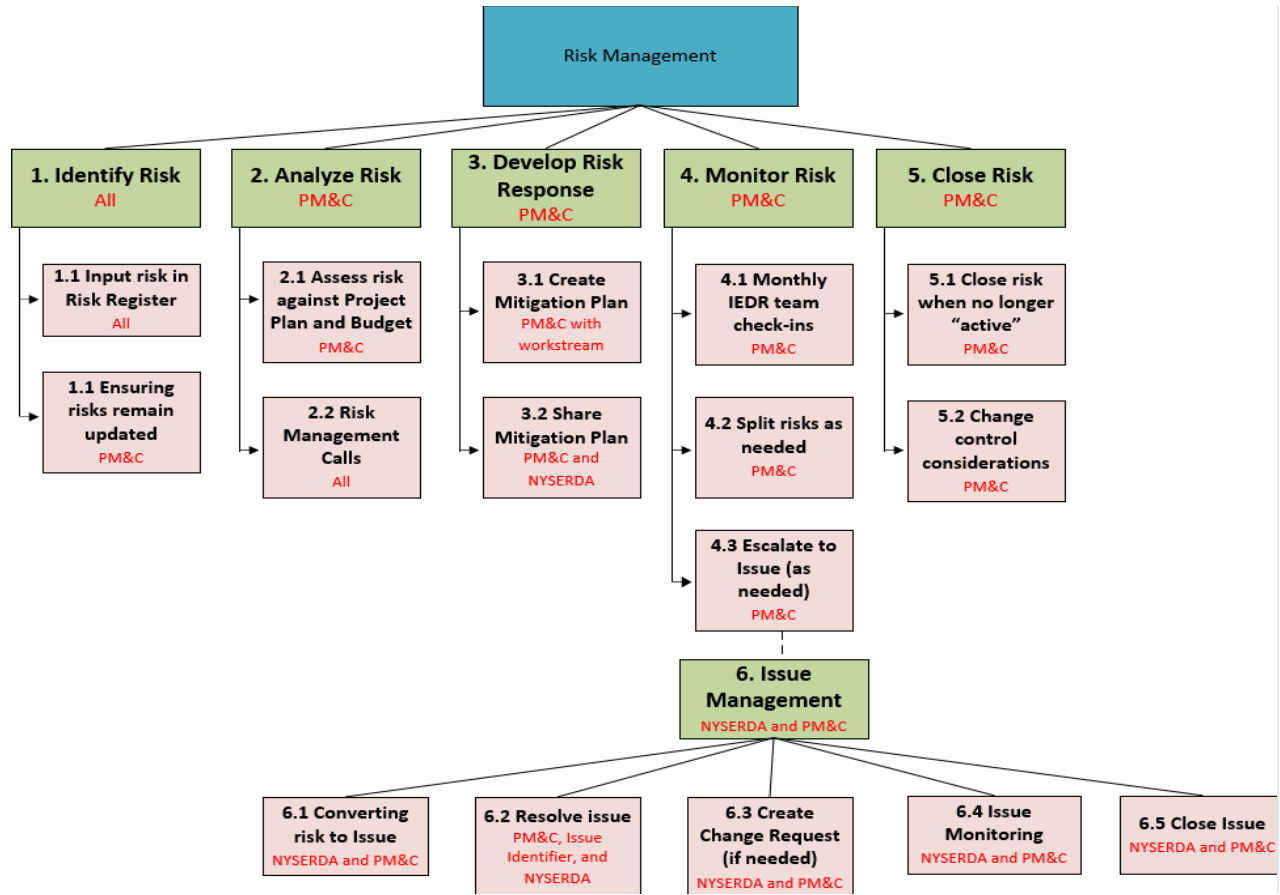
Table 7 provides an overview of the “high” IEDR program risk identified as of September 30, 2024.

Table 7. IEDR Program Risks as of September 30, 2024

| Risk Description | Impact Areas | Risk Severity | Mitigation Approach |
|---|--------------|---------------|--|
| The timeline of the Order in response to the IEDR User Agreements could lead to GBC implementation delays and new potential requirements that could impact the program. | Schedule | High | Monitor public comments and upcoming potential Commission agendas, compile statuses and outcomes for broader conversations as needed, while taking timeline supportive action in concert with the GBC implementation plan. |

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 September 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 This use case was not included in the list of draft use cases that were included in the Phase 2 Proposal.
- ⁷ High-level draft use case narrative: This use case will supply better aggregate electricity and natural gas consumption data to local governments for their planning and implementation of effective CCA programs. The aggregate consumption data is related to the jurisdictional boundaries of participating municipalities. Users will use the data to develop purchasing strategies for electric and natural gas supply. Users also need access to consented customer data to refine cost impact estimates for CCA.
- ⁸ Case 20-M-0082, NYSERDA IEDR User Agreement Petition, May 28, 2024. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={104CC08F-0000-C511-B61C-0BB05F44C967}>
- ⁹ 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}>
- ¹⁰ 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}>
- ¹¹ 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.
- ¹² 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, October 1, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={B9BC09C2-F8F1-43B4-8CF5-D90C10C6AD2C}>
- ¹³ 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-AA1DC44A88B299F0}>

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