



JOINT UTILITIES OF NEW YORK

JU Stakeholder Engagement Webinar

April 21, 2017

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Agenda for April 21st 9:00AM – 10:30AM EDT

- The April 21st agenda will include presentations and Q&A sessions on the following topics:
 - **Overview and Introductions**
 - *Matt Robison (ICF)*
 - **ISO-DSP and Q&A**
 - *Joseph Farella (National Grid), Deidre Altobell (Con Edison)*
 - **Monitoring and Control and Q&A**
 - *Joseph Farella (National Grid)*
 - **Hosting Capacity and Q&A**
 - *Dom Fuda (National Grid)*
 - **Forecasting and Q&A**
 - *Tom Mimmagh (Con Edison)*
 - **Interconnection and Q&A**
 - *Heather Adams (Central Hudson)*

2017 JU Stakeholder Conferences

- The intent of the stakeholder conference webinars is two-fold:
 - Provide an opportunity for the Joint Utilities (JU) to inform stakeholders on the 2017 plans and progress of the nine JU implementation teams
 - Solicit feedback and recommendations from stakeholders through Q&A sessions
- Questions can be submitted via the 'chat function' on the webinar interface
- Webinars are open to the public and recordings will be posted following the webinar on the Joint Utilities website: www.jointutilitiesofny.org
- Please contact info@jointutilitiesofny.org if you have any additional questions following the webinar



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2016 JU Stakeholder Engagement Overview

- Joint Utilities established an Advisory Group in April 2016 that met monthly and provided guidance on the Joint Utilities' 2016 stakeholder engagement efforts.
- The Advisory Group will continue to meet in 2017. It is comprised of approximately 15 organizations representative of the breadth of stakeholders that are a party to the proceeding.
- The Joint Utilities facilitated 9 Engagement Groups and two conferences held via webinar in 2016 to help inform the filing of the Supplemental Distribution System Implementation Plan (SDSIP) under REV.



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2016 JU Stakeholder Engagement Overview

- 2016 stakeholder engagement goals included:
 - Achieve a shared understanding of complex issues
 - Establish collaboration and create progress on the most challenging issues
 - Identify points of consensus
- Stakeholder webinars were held in July, August and September, open to participation by all stakeholders, for the JU to share updates in their development of the SDSIP and to solicit feedback from stakeholders
- The Joint Utilities filed the SDSIP on November 1, 2016. The Filing incorporated input from stakeholders in the Advisory Group and Engagement Groups
- 2016 was focused on forming a plan. Stakeholder engagement in turn was designed to inform that plan through mutual education, sharing of views, and facilitating feedback on proposals.



2017 JU Stakeholder Engagement Purpose & Goals

- In 2017, the Joint Utilities are transitioning to implementation based on commitments in the SDSIP and individual DSIPs.
- Stakeholder feedback on the filing raised a number of detailed suggestions on approach, many of which the JU can work on addressing in ongoing stakeholder engagement.
- 2017 stakeholder engagement goals include:
 - Inform stakeholders of implementation progress
 - Solicit feedback on implementation progress and achieve alignment for moving forward
 - Incorporate stakeholder input into implementation plans where applicable

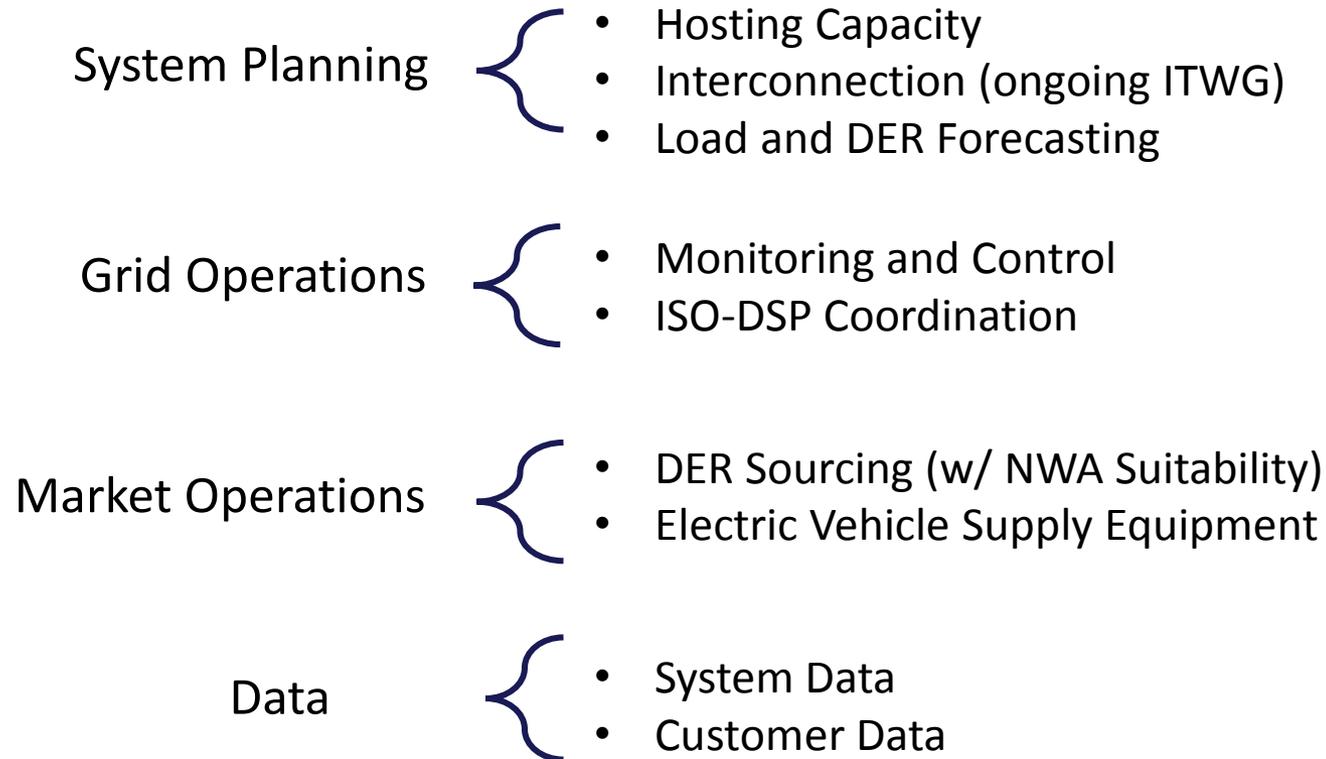


2017 JU Stakeholder Engagement Approach

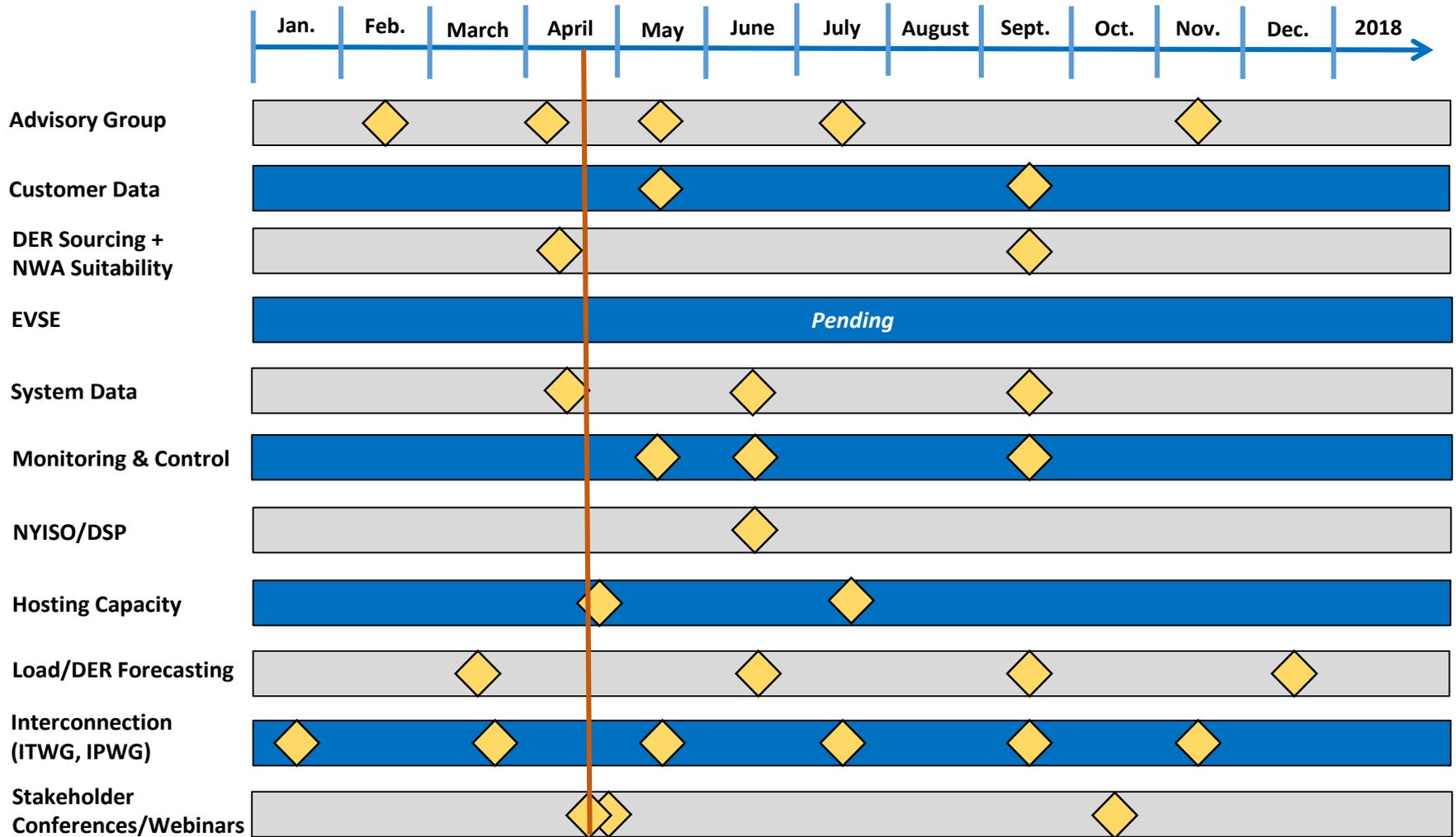
- Rather than an intensive meeting series in one time period as in 2016, the JU are pursuing more focused, periodic meetings spaced throughout the year to allow time for implementation progress
- This will continue to include in-person meetings with virtual capabilities, some virtual meetings, and two stakeholder conferences during the course of the year
- Meetings with implementation teams will continue to be technical and intended for stakeholders with specific interest within the 9 identified areas
 - All stakeholders continue to be welcomed to attend, and the JU particularly hopes to hear from stakeholder subject matter experts

2017 JU Stakeholder Engagement Approach Proposal

- The JU have formed 9 implementation teams:



2017 SDSIP Proposed Engagement Plan



Source: Adapted from the Joint Utilities Supplemental Distributed Implementation Plan, November 2016

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Implementation Team Overviews

ISO-DSP Coordination

Deidre Altobell, Con Edison
Joseph Farella, National Grid



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2016 Stakeholder Input on ISO-DSP Coordination

- There was stakeholder support for collaboration between the JU and the NYISO on the NYISO DER Roadmap
- Stakeholders understand both utility and ISO needs for monitoring and control capabilities and expressed a desire for requirements to consider economics
- Stakeholders requested that the JU host informational sessions describing coordination between NYISO and JU



ISO-DSP 2017 Implementation Plan

- Engage with NYISO on a regular basis to discuss issues on topics such as:
 - Coordination between the NYISO, utility, and aggregator
 - Operating procedures to monitor and control the dispatch of DER
 - Address utility distribution system constraints that impact DER dispatch
 - Requirements for situational awareness, such as monitoring, data types and granularity
 - Information exchanges between the NYISO, utility, and aggregator including content, format, timing, and communication method
 - Standard market jurisdiction and operations interface development between utilities and NYISO
 - Forecasting (long- and short-term)

ISO-DSP 2017 Stakeholder Engagement

- There will be a stakeholder session focused on the utilities' DSP requirements for individual DER and/or aggregators
- Objectives will include:
 - Discussing operational coordination needed to facilitate DER participation in wholesale markets
 - Aggregator registration
 - DER dispatch
 - Coordination of communications requirements for NYISO and the DSP



ISO-DSP Coordination -- Q&A Session



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Monitoring and Control

Joseph Farella, National Grid



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2016 Stakeholder Input on Monitoring and Control

- As described earlier, stakeholders understood utility needs for M&C and expressed an interest to ensure that requirements be implemented with economics in mind
- Stakeholders and JU agree that vision should align integration of emerging technologies that can be utilized by DERs and aggregators
- Stakeholders advise the JU to provide clarity on the policy instruments and implementation timeline for M&C standards

Monitoring and Control 2017 Implementation Plan

- Incorporate M&C standards into utility interconnection requirements documents as outlined in the SDSIP
- Solicit input on prioritization of pilots for testing and adoption of emerging technologies (communication protocols, inverter technology capabilities, etc.)
 - Pilots will be leveraged across working groups to maximize benefits



Monitoring and Control 2017 Stakeholder Engagement

- Summer Stakeholder Meeting
 - Inform and engage stakeholders on M&C standards. The standards will be reflective of individual utilities M&C filings on their respective IDSIP and SDSIP
 - Solicit input on technology pilots and their relative priority for testing and adoption
- End of Q2 / Early Q3 – Meeting #2
 - Discuss updates on M&C pilots. Follow-up on emerging protocols (i.e. communication protocol and inverter technologies capabilities) and adoption through various demonstration and pilot projects
 - Discuss updates on various team co-ordinations (i.e. ISO-DSP, JU IWG)
- End of Q3/ Early Q4 – Meeting #3 (Tentative)
 - Follow-up on emerging protocols (i.e. communication protocol and inverter technologies capabilities) and adoption through various demonstration and pilot projects
 - Preview further implementation efforts going into 2018. This will give the JU a clear line of sight into future projects and how the M&C standards and guidelines are being implemented through these pilot projects.



Monitoring & Control -- Q&A Session



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Hosting Capacity

Domenico Fuda, National Grid



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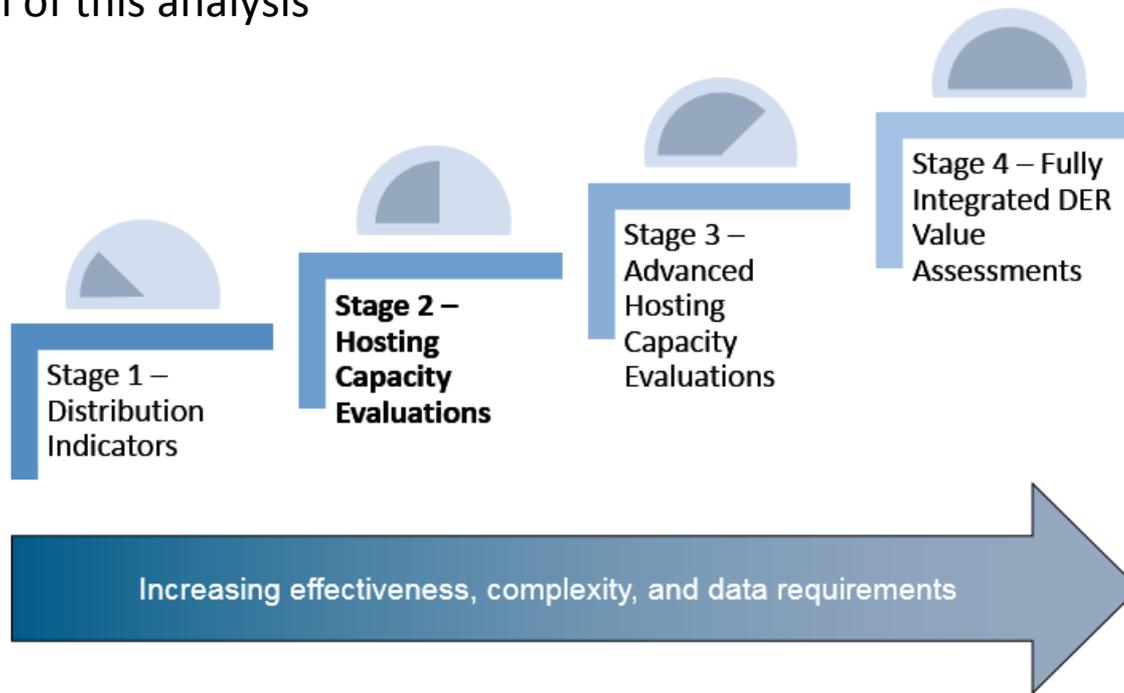
2016 Stakeholder Input on Hosting Capacity

- Stakeholders sought to gain insight into the timeframes and data requirements for the development of each of the four stages of hosting capacity analysis. The JU worked with stakeholders to provide insight into each of the stages in the hosting capacity roadmap.
- Stakeholders and utilities agreed it would be beneficial to determine a consistent approach in NYS for hosting capacity analysis.
- Stakeholders reviewed the relative merits of a streamlined approach vs. other approaches to hosting capacity analysis and discussed the relative computational demands and scalability of various approaches.
- Stakeholders expressed an interest in leveraging hosting capacity analysis in the context of interconnection and urged the JU to explore use cases for this analysis that could enhance and further expedite the interconnection process.
- Stakeholders expressed a desire for the inclusion and implementation of innovative approaches for the increase of hosting capacity and described the merits of several technologies.



Hosting Capacity 2017 Implementation Plan

- March 9th DSIP Commission Order: *submit a filing by October 1, 2017, in Case 16-M-0411, documenting that the hosting capacity analysis for all distribution circuits at and above 12kV has been completed*
- The JU acknowledge that elements of hosting capacity analysis will evolve and continued stakeholder engagement will provide a forum for collaboration on future progression of this analysis



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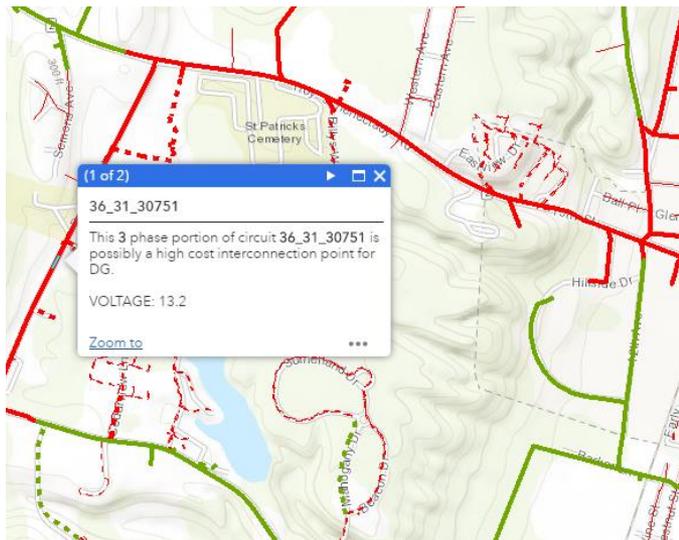
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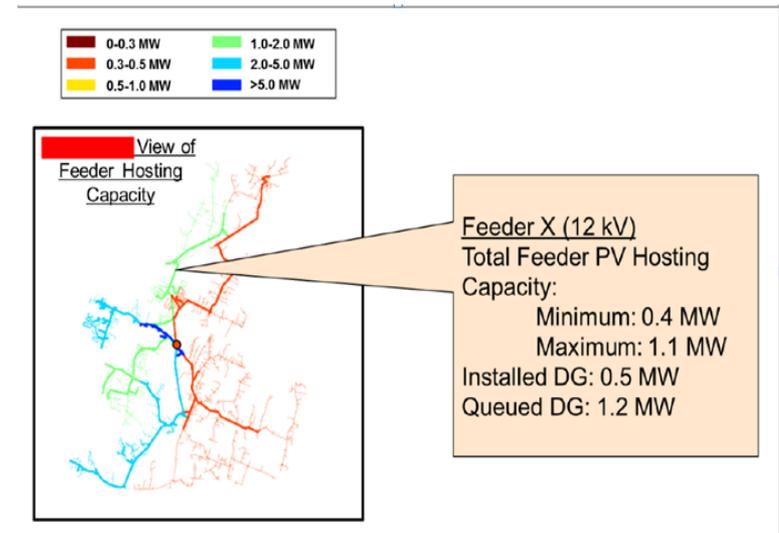
Hosting Capacity 2017 Implementation Plan

- The JU are calculating Hosting Capacity using EPRI's DRIVE tool and will be presenting that information on their ESRI maps
- The JU will use a common ESRI visualization platform to help standardize; color schemes, consistency, drop downs etc.
- Updated indicator maps (Stage 1) with additional data and improved consistency have been released in early 2017

Stage 1 Indicator Maps



Stage 2 Hosting Capacity Maps



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Hosting Capacity 2017 Stakeholder Engagement

- JU would like to continue stakeholder discussion on the following:
 - Continued evolution of hosting capacity tools to enable advanced hosting capacity analysis
 - Lessons learned from hosting capacity analysis in New York
- The utilities will include an overview of progress toward carrying out hosting capacity analyses for the production of the stage 2 maps to stakeholders
- Utilities will provide updates on the work done thus far and update stakeholders on the continued development of the JU hosting capacity analysis roadmap and progress toward undertaking advanced hosting capacity analysis
- An engagement meeting is scheduled for April 28th between 9:00 AM – 11:00 AM to solicit stakeholder input on the visualization platform of the Stage 2 Hosting Capacity displays
- The stakeholder engagement group will hold additional stakeholder engagement sessions later in the year to solicit feedback on their Stage 2 Hosting Capacity displays prior to their release by October 1st 2017



Hosting Capacity -- Q&A Session



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Load and DER Forecasting

Thomas Mimmagh, Con Edison



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Load & DER Forecasting 2017 Implementation Plan

- The Joint Utilities Supplemental DSIP filing in November 2016 identified an expected approach to Load and DER Forecasting for 2017
- Host several stakeholder engagement sessions during 2017 with interested parties on aspects of long-term forecasting of load and DER in the context of distribution system planning
- Actively engage interested stakeholders and solicit additional feedback on the continued evolution of utility forecasting capabilities, the incorporation of new information and stakeholder use cases for forecast data

**Inform Current
Forecasting Efforts**

**Ongoing Stakeholders
Engagement**

**Improvements and
Evolution**



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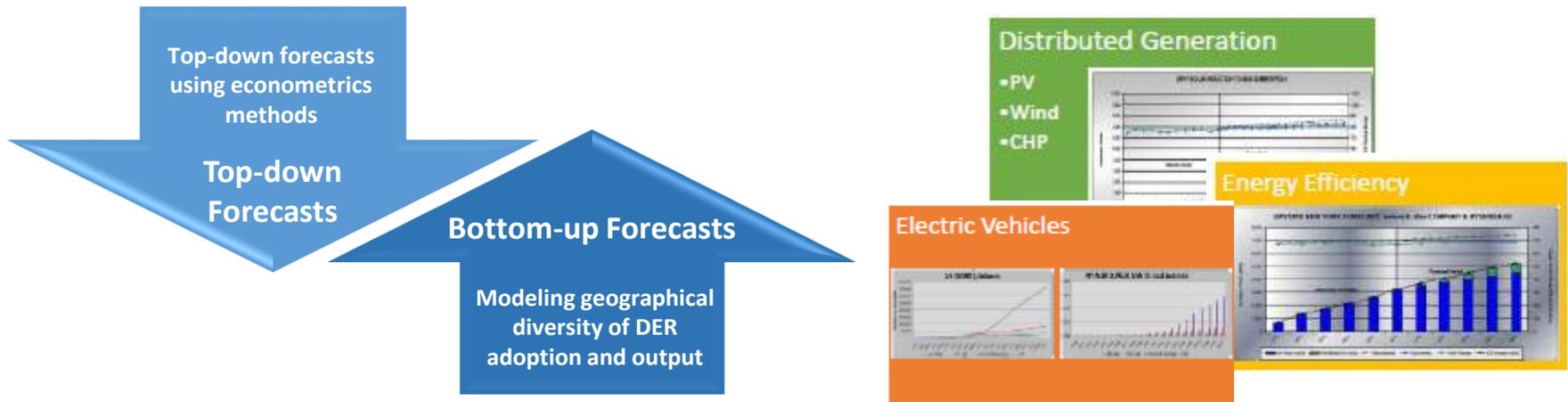
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Load & DER Forecasting 2017 Implementation Plan

- The stakeholder engagement sessions to be hosted during 2017 aim to:
 - Establish an ongoing process that encourages stakeholder input on long-term forecasting topics
 - Provide an overview of current progress on long-term load and DER forecasting
 - Understand how stakeholders currently use forecast data and the specific use cases stakeholders envision moving forward for long-term load and DER forecasts
 - Explore how utility forecasts could be further informed by additional inputs
 - Identify opportunities to provide value for utility evolution and stakeholder needs



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Load & DER Forecasting 2017 Stakeholder Engagement

- The JU hosted a stakeholder conference in September 2016 which provided a preview of the Supplemental DSIP filing on each utility's practices and progress for long-term load and DER forecasting
- First engagement session on long-term load and DER forecasting took place on 3/27
 - JU and NYISO discussed existing load and DER forecasting approaches
- Stakeholders expressed additional interest in:
 - Using some examples to talk through more detailed approaches
 - Developing mechanisms to benchmark forecast performance
 - Understanding more fully the various use cases for utility forecast data
 - Identifying how utility forecasts could incorporate new inputs
 - The development of probabilistic inputs and outputs
- The JU will continue working with stakeholders to identify additional topics for future stakeholder EG meetings, including any interest in stakeholder presentations
- The next stakeholder engagement session is tentatively scheduled for late June



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Load & DER Forecasting -- Q&A Session



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Interconnection

Heather Adams, Central Hudson



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2016 Stakeholder Input on Interconnection

- The Interconnection Technical Working Group met every 2 months in 2016. Three key ways the JU responded to stakeholder feedback was by:
 - Updating their anti-islanding protection review process to allow developers to request a Risk of Islanding study in many cases
 - Updating their anti-islanding requirements to allow for lower cost alternatives to requiring DTT
 - Developing pilot projects and alternatives to requiring 3V0 upgrades
- The Interconnection Policy Working Group met monthly. Key items addressed were the:
 - Queue management and cost sharing proposal
 - Interconnection queue posting updates



Interconnection 2017 Implementation Plan

- Continue to present positions, reach consensus, and determine a path forward on key technical and policy issues:
 - ITWG meetings every two months. YTD agenda items have been:
 - Monitoring and Control
 - 3V0
 - Screening and CESIR updates
 - IPWG meetings monthly. YTD agenda items have been:
 - Reclose block restudies
 - Queue Management and VDER implementation
 - Insurance Requirements
- Align with other JU working groups (i.e. ISO-DSP, Monitoring and Control, Hosting Capacity)



Interconnection Updates

- March 9th DSIP Commission Order *submit a filing by October 1, 2017, in Case 16-M-0411, documenting that Phase 1 of the Interconnection Portals has been fully implemented, as discussed in the body of this order.*
 - All utilities currently on track to substantially meet Phase 1
 - Phase 2 to be completed following the update of the Screening criteria



Interconnection -- Q&A Session

Wrap – up

Stakeholder Engagement Webinar Wrap-Up

- The next stakeholder webinar is on April 27th and will cover:
 - System Data
 - Customer Data
 - DER Sourcing
 - Electric Vehicle Supply Equipment (EVSE)
- Please fill out the short survey after the webinar if you have any additional questions or feedback regarding the material or engagement process
- More information and registration can be found online:
jointutilitiesofny.org/engagement/
- Please email info@jointutilitiesofny.org with any additional questions



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Appendix: Supplemental DSIP Commitments



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ISO-DSP – JU SDSIP Commitments

Page	SDSIP Commitments
92	The stakeholders agreed that the near- to medium-term coordination areas identified by the Joint Utilities, which include standardization of communication protocols, increased information sharing on net-metered type of resources, and enhanced forecasting capabilities, are steps in the right direction to improve efficiency of current coordination.
93	The stakeholders were supportive of quarterly discussions between NYISO and the Joint Utilities. Stakeholders also expressed their interest in receiving annual updates on the NYISO and Joint Utilities discussions.
135	<p>The Joint Utilities propose to engage with NYISO on a quarterly basis to discuss upcoming coordination issues. Proposed topics for regular discussion will include:</p> <ul style="list-style-type: none"> • Information exchanges between the utility and NYISO on content, format, and timing, and communication method; • Short-term forecasting (for operational purposes including real-time, day-ahead, week-ahead) of net load and autonomous DER behavior; • Long-term forecasting for planning purposes as highlighted in the “Continued Coordination with NYISO” discussion under the <i>Load and DER Forecasting</i> section; • Ability to forecast system impacts of NYISO dispatches of DER (<i>i.e.</i>, “feasibility” of NYISO dispatches); • Standard market jurisdiction and operations interface development between utilities and NYISO; and • Situational awareness, such as monitoring, data types and granularity, and methods of communication. Operating procedures to monitor and control the dispatch of DER in normal and emergency conditions (real time and contingent).



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Source: Joint Utilities Supplemental Distributed Implementation Plan, November 2016

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Monitoring and Control – JU SDSIP Commitments

Page	SDSIP Commitments
83	As a part of this continued collaboration and beginning in January 2017, the Joint Utilities will meet every two months discuss important issues, such as the adoption of emerging protocols, an implementation timeline for the monitoring and control standards, and enforcement procedures.
83	Stakeholders identified and raised several points in the initial engagement sessions that warrant further discussion and consideration. These topic areas include communication protocols, inverter technology capabilities, and visibility into the development of monitoring and control standards. Conversations with stakeholders will be part of an overall continuing engagement process envisioned to cut across multiple areas.



Hosting Capacity – JU SDSIP Commitments

Source: Joint Utilities Supplemental Distributed Implementation Plan, November 2016

Page	SDSIP Commitments
61	The Joint Utilities have begun an interim step that provides additional data and improved consistency in the indicator maps. The updated indicator maps will be released by early 2017 with an expanded set of data and greater alignment on the methodology and approach.
64	All utilities will have completed an analysis of hosting capacity at the feeder level for at least 50 percent of the circuits on their system and will publish the results of these analyses on their respective websites by the end of 2017. The selection of target circuits for this milestone will be based on the availability of data and circuit models needed to carry out the analysis and the level of solar PV developer interest in the corresponding areas of each utility's territory.
65	The move to advanced hosting capacity analysis is tentatively scheduled to begin in late 2017, but that timeframe is contingent on the resolution of queue management issues and the development of an enhanced version of the EPRI DRIVE tool that is capable of incorporating the impacts of interconnected DER into sub-feeder-level hosting capacity calculations. EPRI expects to have this enhanced tool available by mid-2017.
71	The Joint Utilities will continue to advance efforts toward implementing a streamlined approach for calculating hosting capacity. Future efforts for advancing hosting capacity analysis will occur both among the utilities and through stakeholder engagement.
71	The Joint Utilities have agreed to continue stakeholder engagement efforts by hosting at least one meeting annually. The Joint Utilities acknowledge that elements of hosting capacity analysis will evolve and continued stakeholder engagement will provide a forum for collaboration on future progression of this analysis. In particular, the Joint Utilities have initially identified three areas for further discussion: 1) further identification and evaluation of solutions for increasing hosting capacity; 2) potential additional use cases for hosting capacity; 3) cost allocation structure for future efforts to increase hosting capacity.



Load and DER Forecasting – JU SDSIP Commitments

Page	SDSIP Commitments
39	Moving forward, the Joint Utilities will coordinate both internally and externally to facilitate efforts in enhancing the forecasts and the distribution planning processes.
46	NYISO and the Joint Utilities have established a task force that will meet at least quarterly to identify changes that need to be made to existing coordination processes and establish a process for information sharing and protocols. These enhanced coordination efforts between NYISO and utilities will help maintain the consistency of load forecasting results so that the impact of DER on net load will be better reflected in NYISO's zonal forecasts and its related planning processes.
46	The Joint Utilities will validate and benchmark the developer forecasts to further inform their views on market trends related to the rate and locations of DER adoption.
47	To engage with stakeholders in further enhancing forecasts, the Joint Utilities commit to host six engagement group meetings by the middle of 2018 and then annually from 2019 to 2021 to focus on the utilities' roadmaps for the continued development of long-term load and DER forecasts. Stakeholder input will facilitate efforts by the utilities to align on common objectives and outcomes for forecasting. Additionally, the Joint Utilities will solicit input from stakeholders on potential use cases for 8760 forecast data.
47	The Joint Utilities will maintain the ongoing communication & coordination with NYISO to evaluate the possibility of pursuing scenario analysis by identifying possible approaches for the development of DER and load growth scenarios and exploring the potential value of such an approach.

Source: Joint Utilities Supplemental Distributed Implementation Plan, November 2016

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Interconnection – JU SDSIP Commitments

Page	SDSIP Commitments
75	The Joint Utilities are committed to working in parallel to achieve automation of the various components of the interconnection process in the timeframes outlined in the IOAP roadmap.
75	The Joint Utilities are committed to working in parallel to achieve automation of the various components of the interconnection process in the timeframes outlined in the IOAP roadmap.
76	The Joint Utilities will work closely with IPWG to develop future interconnection plans, including any changes to the interconnection process. The IPWG’s goal is to explore non-technical issues related to the processes and policies relevant to the interconnection of DG in New York. Specifically, it has developed proposals for interconnection queue management of DG and associated cost sharing mechanisms.
76	The Joint Utilities will work closely with ITWG to develop future interconnection plans, including any changes to the interconnection process. The ITWG seeks to maintain a collaborative approach among the utilities, Staff, NYSERDA, and developers in addressing the technical components of the DG interconnection process while also providing reliability and safety.
83	The Joint Utilities will meet every two months to discuss important issues related to Monitoring & Control standards, which requires collaboration with the ITWG and other Joint Utilities' working groups to maintain consistency. The coordination shall entail reviews of technical standards, as well as to identify implementation instruments, and to develop a timeline to amend and revise these identified instruments to enforce the expanded monitoring and control framework. It is anticipated that reviews with the ITWG will be on a quarterly basis beginning the second quarter of 2017. Updates regarding the discussions will be provided in the subsequent DSIP filings by the utilities.



System Data – JU SDSIP Commitments

Page	SDSIP Commitments <i>Source: Joint Utilities Supplemental Distributed Implementation Plan, November 2016</i>
135	<p>Within the next 12 months, the Joint Utilities envision the following three-step process to enhance the ability to utilize available data:</p> <ul style="list-style-type: none"> • Step 1: The Joint Utilities will provide a comprehensive comparison of data available in static filings, such as rate proceedings and capital investment plans to interested stakeholders. The comparison will show each utility’s available data sets and include a description of the location, format, and frequency of such data. The Joint Utilities will suggest common formats for the common data elements identified. • Step 2: The Joint Utilities will seek stakeholder input on the data formats and their priority for development of the data suggested in Step 1. The Joint Utilities will also seek stakeholder input on priority elements desired by stakeholders in their business development efforts. • Step 3: The Joint Utilities will provide a final sample format for data elements accounting for comments received in Step 2. The Joint Utilities will also provide a schedule for provision of new data series in the format as per comments received in Step 2.
135 - 136	<p>In the medium- to long term, the Joint Utilities propose an ongoing, annual needs assessment that will seek stakeholder feedback on their portals, quality of data supplied, ease of access to information, and other aspects of the stakeholder experience. The feedback received will be used to determine areas where further accessibility and transparency may benefit future data and information release. The feedback would also provide valuable input into future DSIP filings.</p>
135	<p>Classifying system data based on sensitivity of the information, both as a stand-alone data item and packaged with additional information</p>
135	<p>Defining value-added and basic data including developing potential fee based structures for data services</p>

Customer Data – JU SDSIP Commitments

Page	SDSIP Commitments
147	The Joint Utilities will form a Customer Data working group, which will meet periodically to share outcomes from utility-specific projects and initiatives, as well as to report on its findings to stakeholders and Staff. This group will consult with and include as necessary utility representatives from the Grid Operations and Distribution System Planning functions for consistency.
147	Monitor and evolve the anonymity standard for aggregated data, and engage periodically with stakeholders to share ideas and gather input
147	Develop a common process for tracking aggregated data requests and responses. This will allow the group to identify, define, prioritize, and schedule for implementation requests for non-standard aggregations that are of high value to stakeholders
145	The Joint Utilities commit to work together to develop specifications for transmitting any additional data fields beyond what is provided through the current Green Button Connect standard. Current and future stakeholder input will help to inform the Joint Utilities' consideration of additional data sets.
147	Share learnings from individual utility REV and other demonstration projects
147	The Joint Utilities will continue to participate in the EDI Collaborative working group.



DER Sourcing – JU SDSIP Commitments

Page	SDSIP Commitments
108	Specifically, the Joint Utilities will form an NWA procurement working group that will implement the proposed actions and further develop standardized practices over time (where appropriate)
107 - 108	The Joint Utilities will also pursue opportunities to present NWA opportunities at a centralized location, such as the REV Connect portal
108	Develop standard data sets for short-term and longer-term NWA procurements
108	Implement bidder pre-qualification requirements and standards, where applicable
108	Implement commercial and operational performance standards
108	The working group will meet with stakeholders at least once a year to share Joint Utilities' plans and solicit input and feedback
108 - 109	The Joint Utilities plan to progress toward enabling low-income customer access to DER by engaging with these customers and testing the resulting findings in a demonstration project environment



EVSE – JU SDSIP Commitments

Page	SDSIP Commitments
115	The Joint Utilities will develop a joint EV Readiness Framework, which will inform subsequent individual utility initiatives, within 12 months of completion of the comment process for this Supplemental DSIP filing
117	The utilities will continue to support the identification and implementation of EV demonstration and pilot projects
118	The Joint Utilities commit to forming a utility working group to collaborate on EV and EVSE issues in New York. This group will meet with stakeholders on a periodic basis to share and inform utility plans, beginning with the development of the EV Readiness Framework.
118	Finally, the utilities will design and conduct individual utility engagement activities with local governments and municipalities.
118	At the regional level, the utilities will continue to participate in groups such as the East Coast Utility EV Initiative.

