

2020 Project Schedule Milestone Update

Michael DeSocio Diane Peluso

DIRECTOR, MARKET DESIGN SENIOR MANAGER, PRODUCT MANAGEMENT

Budget and Priorities Working Group:

September 23rd 2020 – WebEx: <u>https://nyiso.webex.com</u>

©COPYRIGHT NYISO 2020. ALL RIGHTS RESERVED

Project Milestones & Status Definitions



Project Types

Туре	Definition
KP	Key project as identified in corporate incentive goal #6b
MP	Major project as identified in corporate incentive goal #6a
AP	Other approved project as identified in 2020 project budget
NP	New project to address emerging business needs



Milestone Definitions

Milestone	Definition
Market Design Concept Proposed	NYISO has initiated, or furthered discussions with stakeholders that explore potential concepts to address opportunities for market efficiency or administration improvements.
Market Design Complete	NYISO has developed with stakeholders, a market design concept such that the proposal can be presented for a vote at the BIC or MC to define further action on the proposal.
Architectural Design	The architectural design document is complete and software development is ready to begin.
Functional Requirements	NYISO has completed documentation of the functional requirements and the Business Owner has approved.
Software Design	The software design document is complete and software development is ready to begin.
Development Complete	Development has been completed, packaged and approved by the Supervisor.
Deployment	Required software changes to support commitment have been integrated into the production environment.
Study Complete	Scope of work to be performed has been completed; results and recommendations have been presented to the appropriate Business Owners and stakeholders.
Study Defined	The scope of work for the study has been presented to stakeholders, including a discussion on the necessary input(s), assumption(s) and objective(s) of the study.
Issue Discovery	NYISO has facilitated education session(s) for stakeholder knowledge development of problem/issue, conducted stakeholder solicitation of potential solutions to address problem/issue, and summarized findings at a working group meeting for potential ranking and future project identification.



Status Definitions

Status	Definition
Complete	Requirements for delivery have been satisfied.
At Risk/Delayed	Progress continues but project challenges may require moving the delivery date later in the same calendar year.
Not Started	NYISO is not actively working on the project but expects the delivery can still be met based on scope of deliverable and time left to deliver.
On Schedule	Project is proceeding according to the project plan with expectations of meeting the required delivery by its target date.
Critical/Overdue	Project is in progress but project challenges may require moving the delivery date to the next calendar year or beyond the date specified in corporate incentive goals.
Reprioritized	Project has been reprioritized; resources have been reallocated to address emerging business needs which may delay the delivery date to the next calendar year or beyond the date specified in corporate incentive goals.
Cancelled	Project has been cancelled; resources have been reallocated to other efforts and there are no plans to pursue this project any further.



Design Projects



Project Name	Туре	Qtr	Project Commitment	Commitment Status				
Capacity Market Products								
BSM Renewables Exemption Study	MP	Q4	Study Complete	On Schedule				
Demand Curve Reset	KP	Q4	Study Complete	On Schedule				
Comprehensive Mitigation Review	KP	Q4	Market Design Complete	On Schedule				
CRIS Tracking	AP	Q4	FRS	On Schedule				
Enhanced BSM Mitigation Study Period	AP	Q3	Market Design Complete	Complete				
Enhancing Fuel and Energy Security	AP	Q4	Market Design Concept Proposed	On Schedule				

Bold red text indicates status update since last presentation.



Project Name	Туре	Qtr	Project Commitment	Commitment Status				
Capacity Market Products (continued)								
Locational Marginal Pricing of Capacity (SOM)	AP	Q3	Issue Discovery	Complete				
Tailored Availability Metric	AP	Q2	Market Design Complete	Complete				
	DER P	roducts						
NYISO Pilot Framework	AP	Q4	Study Complete	On Schedule				
TCC Products								
Reserving Capacity for TCC Balance-of-Period (BOP) Auctions	MP	Q3	Market Design Complete	At Risk/Delayed				

Bold red text indicates status update since last presentation.



Project Name	Туре	Qtr	Project Commitment	Commitment Status				
Energy Market Products								
Carbon Pricing	KP	Q2	FRS	Complete				
5 Minute Transaction Scheduling	AP	Q2	Study Complete	At Risk/Delayed				
Ancillary Services Shortage Pricing (SOM)	MP	Q2	Market Design Complete	At Risk/Delayed				
Grid in Transition Discussion	MP	Q4	Issue Discovery	On Schedule				
Hybrid Storage Model	KP	Q3	Market Design Complete	At Risk/Delayed				
Mitigation Thresholds Review	AP	Q4	Market Design Concept Proposed	Cancelled				
Reserves for Resource Flexibility	MP	Q2	Market Design Complete	Complete				

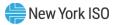
Bold red text indicates status update since last presentation.

Implementation Projects



Project Name	Туре	Qtr	Project Commitment	Commitment Status					
Business	Business and Finance Products								
FERC Form1 Redesign	AP	Q3	Deployment	At Risk/Delayed					
Enterprise Information Management - Data Integration PIV	MP	Q4	Development Complete	On Schedule					
Financial Risk Assessment and Scoring Enhancement	MP	Q4	Deployment	On Schedule					
Oracle Financials Upgrade	MP	Q4	Deployment	On Schedule					
Rate Schedule 12 Settlement	MP	Q2	Deployment	Complete					
CMS Minimum Participation Criteria Enhancements	MP	Q1	Deployment	Complete					

Bold red text indicates status update since last presentation.



Project Name	Туре	Qtr	Project Commitment	Commitment Status
Business and Fil	nance I	Products	(continued)	
Customer Relationship Management (Salesforce CRM) Enhancements	AP	Q4	Deployment	Complete
Transactions Modifications and Confirmation Tool	AP	Q3	FRS	Complete
Energ	iy Mark	et Produc	cts	
Enhanced Fast Start Pricing	MP	Q4	Deployment	At Risk/Delayed
ESR Participation Model	KP	Q3	Deployment	Complete
DAM Congestion Settlement Re-Allocation	AP	Q4	Development Complete	Reprioritized

Bold red text indicates status update since last presentation.



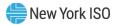
Project Name	Туре	Qtr	Project Commitment	Commitment Status				
Energy Market Products (continued)								
Relocating the IESO Proxy Bus	MP	Q2	Deployment	Complete				
	DER Pr	oducts						
DER Participation Model	KP	Q3	SDS	At Risk/Delayed				
Dual Participation	MP	Q2	Deployment	Complete				
Expanding Capacity Eligibility	KP	Q4	Development Complete	On Schedule				

Bold red text indicates status update since last presentation.



Project Name	Туре	Qtr	Project Commitment	Commitment Status
Ente	erprise	Produ	cts	
Application Platform Upgrade – 2020	MP	Q4	Deployment	On Schedule
Database Upgrade and Platform Migration	MP	Q4	Deployment	On Schedule
IT Infrastructure Automation	MP	Q4	Deployment	On Schedule
Network Infrastructure Upgrade	MP	Q4	Deployment	On Schedule
ACC Control Room Renovations	MP	Q4	Deployment	On Schedule
Access Management	AP	Q4	Deployment	On Schedule
E-Tagging Refresh and Performance Improvements	AP	Q3	Deployment	Critical/Overdue

Bold red text indicates status update since last presentation.



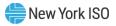
Project Name	Туре	Qtr	Project Commitment	Commitment Status
Enterprise Prod	ucts (c	ontinue	ed)	
GFER Upgrade	MP	Q2	Deployment	Complete
IT Service Management Improvements	AP	Q4	Deployment	On Schedule
Operations & Re	eliabilit	ty P rod	lucts	
NextEra Transmission Owner Integration	MP	Q2	Study Complete	Complete
Automated Default Bid Mitigation	MP	Q4	Development Complete	On Schedule
EMS/BMS System Upgrade	KP	Q1	Deployment	Complete

Bold red text indicates status update since last presentation.



Project Name	Туре	Qtr	Project Commitment	Commitment Status	
Operations & R	eliabili	ty Pro	ducts		
Transmission and Generation Scheduling System (TAGSS)	AP	Q4	Development Complete	On Schedule	
EMS/BMS Operational Enhancements	MP	Q4	Deployment	On Schedule	
Planning Products					
Climate Change Impact and Resilience Study	MP	Q4	Study Complete	On Schedule	

Bold red text indicates status update since last presentation.



Our mission, in collaboration with our stakeholders, is to serve the public interest and provide benefit to consumers by:

- Maintaining and enhancing regional reliability
- Operating open, fair and competitive wholesale electricity markets
- Planning the power system for the future
- Providing factual information to policymakers, stakeholders and investors in the power system





Questions?

