

# 2020 Project Schedule Milestone Update

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

# Project Milestones & Status Definitions

# Project Types

Type	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
<b>Market Design Concept Proposed</b>	NYISO has initiated, or furthered discussions with stakeholders that explore potential concepts to address opportunities for market efficiency or administration improvements.
<b>Market Design Complete</b>	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.
<b>Architectural Design</b>	The architectural design document is complete and software development is ready to begin.
<b>Functional Requirements</b>	NYISO has completed documentation of the functional requirements and the Business Owner has approved.
<b>Software Design</b>	The software design document is complete and software development is ready to begin.
<b>Development Complete</b>	Development has been completed, packaged and approved by the Supervisor.
<b>Deployment</b>	Required software changes to support commitment have been integrated into the production environment.
<b>Study Complete</b>	Scope of work to be performed has been completed; results and recommendations have been presented to the appropriate Business Owners and stakeholders.
<b>Study Defined</b>	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.
<b>Issue Discovery</b>	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
<b>Complete</b>	Requirements for delivery have been satisfied.
<b>At Risk/Delayed</b>	Progress continues but project challenges may require moving the delivery date later in the same calendar year.
<b>Not Started</b>	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.
<b>On Schedule</b>	Project is proceeding according to the project plan with expectations of meeting the required delivery by its target date.
<b>Critical/Overdue</b>	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.
<b>Reprioritized</b>	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.
<b>Cancelled</b>	Project has been cancelled; resources have been reallocated to other efforts and there are no plans to pursue this project any further.

# Design Projects

# 2020 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Capacity Market Products</i>				
<b>BSM Renewables Exemption Study</b>	MP	Q4	Study Complete	On Schedule
<b>Demand Curve Reset</b>	KP	Q4	Study Complete	On Schedule
<b>Comprehensive Mitigation Review</b>	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
<b>Enhancing Fuel and Energy Security</b>	AP	Q4	Market Design Concept Proposed	On Schedule

**Bold red** text indicates status update since last presentation.

**Bold blue** text indicates projects under stakeholder discussions through the end of Q4.

# 2020 Project Milestones

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

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# 2020 Project Milestones

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

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# Implementation Projects

# 2020 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Business and Finance Products</i>				
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

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# 2020 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Business and Finance Products (continued...)</i>				
Customer Relationship Management (Salesforce CRM) Enhancements	AP	Q4	Deployment	Complete
Transactions Modifications and Confirmation Tool	AP	Q3	FRS	<b>Complete</b>
<i>Energy Market Products</i>				
<b>Enhanced Fast Start Pricing</b>	MP	Q4	Deployment	At Risk/Delayed
ESR Participation Model	KP	Q3	Deployment	<b>Complete</b>
DAM Congestion Settlement Re-Allocation	AP	Q4	Development Complete	<b>Reprioritized</b>

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# 2020 Project Milestones

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

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# 2020 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Enterprise Products</i>				
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	<b>Critical/Overdue</b>

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# 2020 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Enterprise Products (continued...)</i>				
GFER Upgrade	MP	Q2	Deployment	<b>Complete</b>
IT Service Management Improvements	AP	Q4	Deployment	On Schedule
<i>Operations &amp; Reliability Products</i>				
NextEra Transmission Owner Integration	MP	Q2	Study Complete	Complete
<b>Automated Default Bid Mitigation</b>	MP	Q4	Development Complete	On Schedule
EMS/BMS System Upgrade	KP	Q1	Deployment	Complete

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# 2020 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<b><i>Operations &amp; Reliability Products</i></b>				
Transmission and Generation Scheduling System (TAGSS)	AP	Q4	Development Complete	On Schedule
EMS/BMS Operational Enhancements	MP	Q4	Deployment	On Schedule
<b><i>Planning Products</i></b>				
<b>Climate Change Impact and Resilience Study</b>	MP	Q4	Study Complete	On Schedule

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# 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?