

# 2020 Year End Project Schedule Milestone Update

---

**Michael DeSocio**

DIRECTOR, MARKET DESIGN

**Diane Peluso**

SENIOR MANAGER, PRODUCT MANAGEMENT

**Budget and Priorities Working Group:**

January 19<sup>th</sup> 2021 – [WebEx: https://nyiso.webex.com](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
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

# 2020 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Capacity Market Products</i>				
BSM Renewables Exemption Study	MP	Q4	Study Complete	<b>Critical/Overdue</b>
Demand Curve Reset	KP	Q4	Study Complete	<b>Complete</b>
Comprehensive Mitigation Review	KP	Q4	Market Design Complete	<b>Complete</b>
CRIS Tracking	AP	Q4	FRS	<b>Complete</b>
Enhanced BSM Mitigation Study Period	AP	Q3	Market Design Complete	Complete
Enhancing Fuel and Energy Security	AP	Q4	Market Design Concept Proposed	<b>Complete</b>

**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
<i>Capacity Market Products (continued...)</i>				
Locational Marginal Pricing of Capacity (SOM)	AP	Q3	Issue Discovery	Complete
Tailored Availability Metric	AP	Q2	Market Design Complete	Complete
<i>DER Products</i>				
NYISO Pilot Framework	AP	Q4	Study Complete	<b>Complete</b>
<i>TCC Products</i>				
Reserving Capacity for TCC Balance-of-Period (BOP) Auctions	MP	Q3	Market Design Complete	<b>Complete</b>

**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
<i>Energy Market Products</i>				
Carbon Pricing	KP	Q2	FRS	Complete
<b>5 Minute Transaction Scheduling</b>	AP	Q2	Study Complete	<b>Complete</b>
<b>Ancillary Services Shortage Pricing (SOM)</b>	MP	Q2	Market Design Complete	<b>Complete</b>
<b>Grid in Transition Discussion</b>	MP	Q4	Issue Discovery	<b>Complete</b>
<b>Hybrid Storage Model</b>	KP	Q3	Market Design Complete	<b>Complete</b>
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.

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

# 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	<b>Reprioritized</b>
Enterprise Information Management - Data Integration PIV	MP	Q4	Development Complete	<b>Complete</b>
Financial Risk Assessment and Scoring Enhancement	MP	Q4	Deployment	<b>Complete</b>
Oracle Financials Upgrade	MP	Q4	Deployment	<b>Complete</b>
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.

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

# 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	Complete
<i>Energy Market Products</i>				
<b>Enhanced Fast Start Pricing</b>	MP	Q4	Deployment	<b>Complete</b>
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.

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

# 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	<b>Complete</b>
Dual Participation	MP	Q2	Deployment	Complete
<b>Expanding Capacity Eligibility</b>	KP	Q4	Development Complete	<b>Complete</b>

**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
<i>Enterprise Products</i>				
Application Platform Upgrade – 2020	MP	Q4	Deployment	<b>Complete</b>
Database Upgrade and Platform Migration	MP	Q4	Deployment	Complete
IT Infrastructure Automation	MP	Q4	Deployment	Complete
Network Infrastructure Upgrade	MP	Q4	Deployment	<b>Complete</b>
ACC Control Room Renovations	MP	Q4	Deployment	Complete
Access Management	AP	Q4	Deployment	<b>Complete</b>
E-Tagging Refresh and Performance Improvements	AP	Q3	Deployment	Critical/Overdue

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

**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><i>Operations &amp; Reliability Products</i></b>				
Transmission and Generation Scheduling System (TAGSS)	AP	Q4	Development Complete	<b>Critical/Overdue</b>
EMS/BMS Operational Enhancements	MP	Q4	Deployment	<b>Complete</b>
<b><i>Planning Products</i></b>				
Climate Change Impact and Resilience Study	MP	Q4	Study Complete	Complete

**Red** text indicates status update since last presentation.

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



# 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?