

# Project Prioritization Process Recommendations

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Mike DeSocio

DIRECTOR OF MARKET DESIGN

**Budget and Priorities Working Group**

January 18, 2022, Webex

# Agenda

- **Summary of Feedback**
- **Recommendations**
- **Project Prioritization Timeline**
- **Next Steps**
- **Appendix – Project Milestone Definitions**

# Stakeholder Feedback

# Summary of Feedback from Stakeholders

- **Scoring** – The NYISO has received feedback that scoring should be reviewed and possibly simplified. Additionally, stakeholders request specific review of the sector weighting method
- **Project Dependencies** – Stakeholders requested that the NYISO identify early in the process projects that could not be done if other projects were prioritized.
- **Identify and Discuss Urgent Projects Early** – Stakeholders asked that the NYISO identify projects that are important to work on due to existing concerns early in the process and specifically before stakeholder scoring is completed.
- **Periodic Discussion of Project Priorities** – Stakeholders requested an opportunity to discuss current priorities on a quarterly basis.
- **Scope** – Stakeholders raised concerns about changes to project milestones after project scoring is complete
- **Continuing** – Stakeholders would like to revisit how to treat this category

# Recommendations

# Scoring

- **The NYISO recommends:**
  - Revisiting NYISO scoring categories and simplifying the score calculation
  - Potentially providing this revised NYISO scoring to stakeholders prior to the survey completion
  - Considering ways to improve the use of the sector weighting method while ensuring the process remains inclusive of all stakeholders
- **The NYISO is not prepared to discuss specifics today, but will return with more detail at the January 31, 2022 BPWG**

# Project Dependencies & Urgent Projects

- **The NYISO recommends:**
  - Sharing the NYISO project priorities earlier in the process as part of the revised and simplified NYISO scoring
  - Present urgent projects at BPWG for discussion
- **The NYISO has considered whether and how it can identify interchangeable project resource constraints and does not support such an approach**
  - This type of approach would undermine the purpose of the prioritization process and is not readily administrable
    - There can be dozens of combinations of projects that can or cannot be done based resources, costs, and interest
    - The NYISO believes that by sharing its project priorities earlier in the process stakeholders will be better informed on conflicts earlier to allow for discussion about options both before and after project scoring

# Periodic Discussion of Priorities

- **The NYISO encourages feedback from its stakeholders and asks stakeholders to raise ideas or concerns as they arise**
- **The NYISO also recommends including a discussion on priorities quarterly as part of the quarterly project status discussions for BPWG**
  - This discussion can include any idea or concern and is not limited to just project discussions

# Project Scope

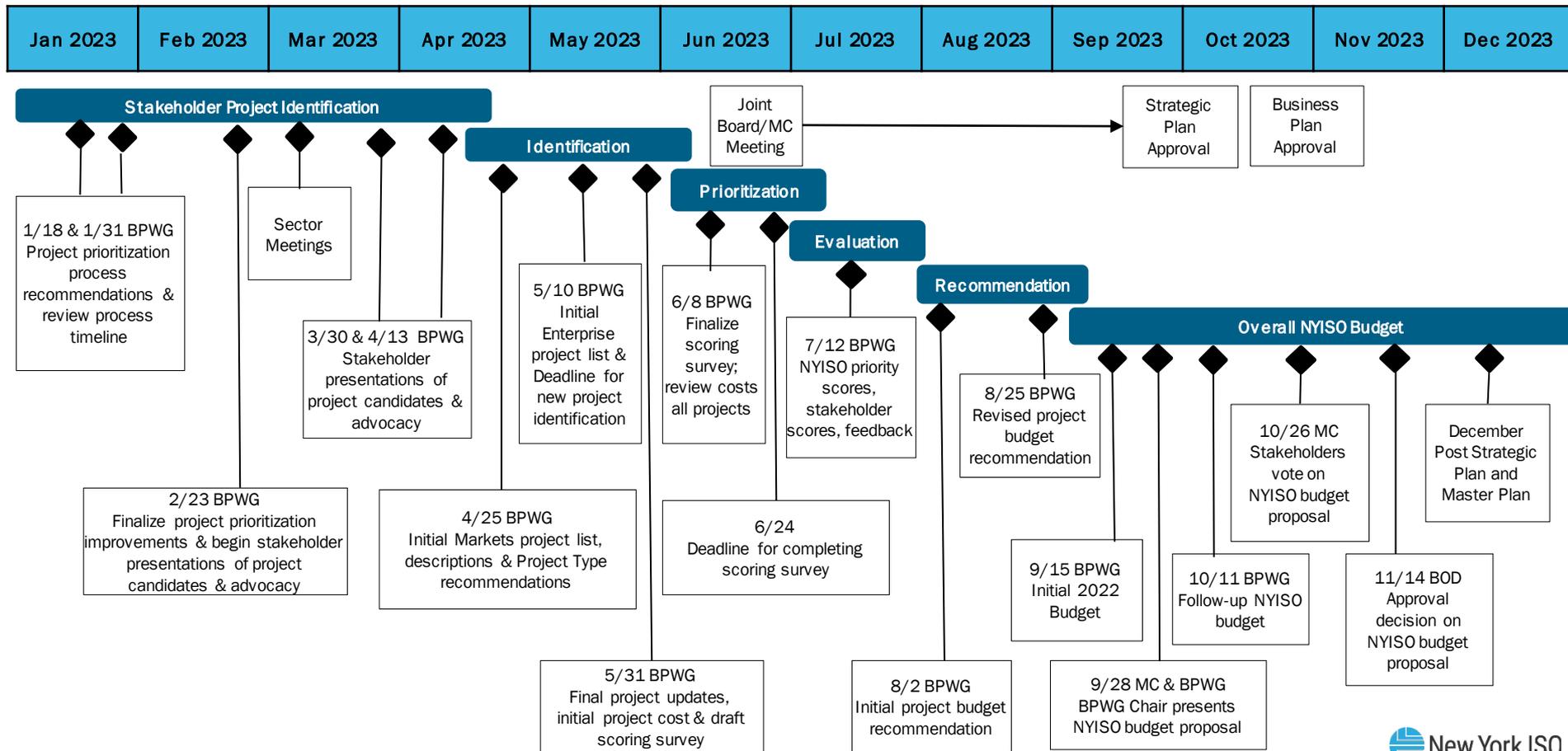
- **The NYISO may modify project scope and/or project milestones before stakeholder scoring begins**
- **The NYISO proposes to facilitate discussions with stakeholders before making any changes to project scope or project milestones after stakeholder scoring has completed**
  - To allow added time in the current process for having these discussions, the NYISO is considering moving up the survey completion date by one to two weeks
  - The NYISO believes that some flexibility is important with the project prioritization process and is committed to working with stakeholders on potential options for managing project constraints before the NYISO issues its final project recommendation list

# Continuing Projects

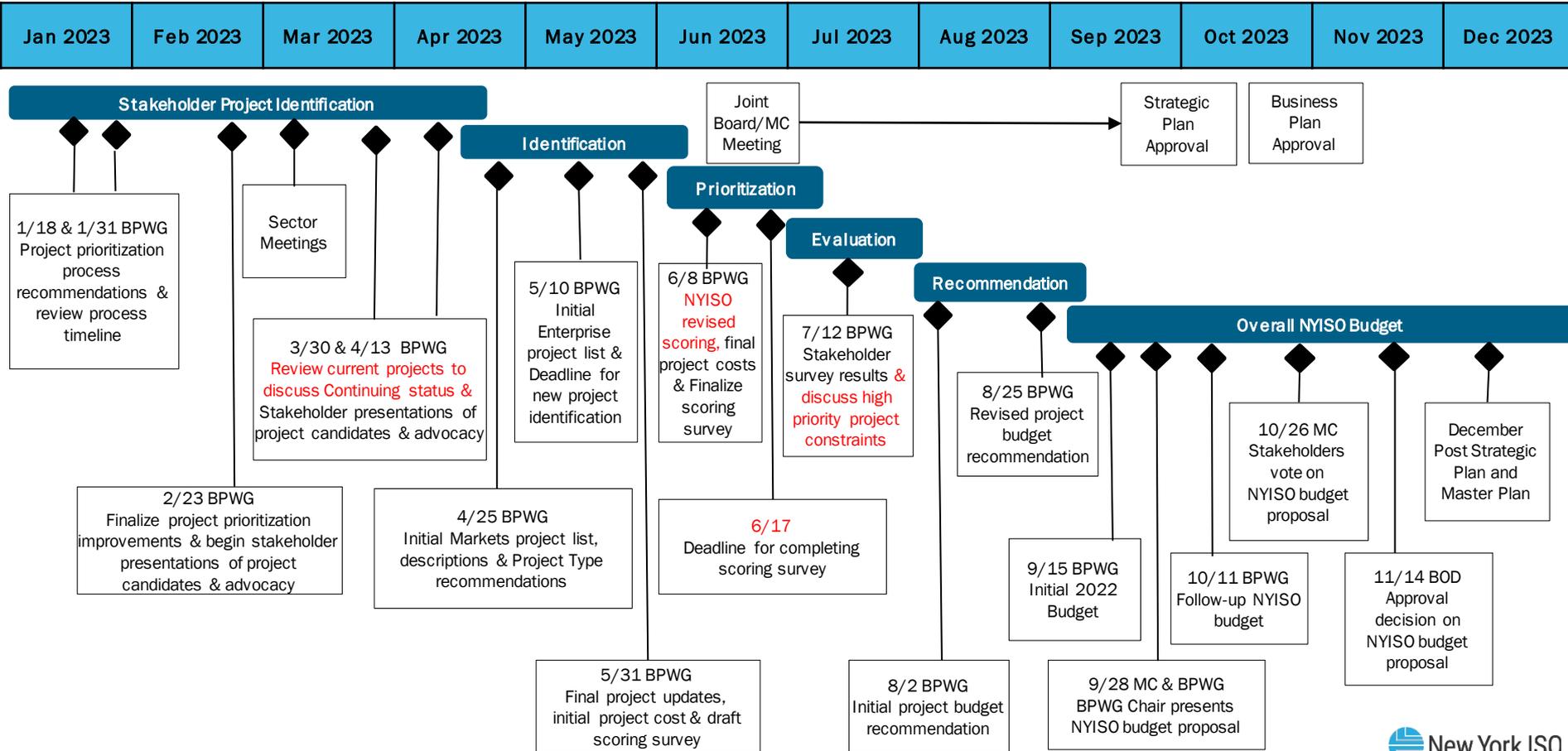
- **The NYISO appreciates the concerns raised regarding scoring projects multiple years in a row**
- **The NYISO also believes that priorities can change from year-to-year and disagrees that projects previously prioritized should be automatically included in future years**
- **The NYISO also recommends retaining the current qualification for establishing continuing projects**
  - The NYISO will establish a discussion with BPWG regarding continuing status of prior-year approved projects that do not otherwise qualify as continuing early in the project prioritization process
  - The NYISO will consider requests to designate a project as continuing on a case-by-case basis

# Project Prioritization Timeline

# 2023 Proposed Project Prioritization Timeline (original)



# 2023 Proposed Project Prioritization Timeline (revised)



# Next Steps

# Prioritization Process Recommendations

## ■ BPWG - January 31, 2022

- Bring more details on scoring recommendation
- Discuss any updates to the recommendation based on feedback at the January 18, 2022 meeting

## ■ BPWG - February 23, 2022

- Finalize 2023 Project Prioritization Process and Kickoff 2023 Project Prioritization

# Our Mission & Vision



## Mission

Ensure power system reliability and competitive markets for New York in a clean energy future



## Vision

Working together with stakeholders to build the cleanest, most reliable electric system in the nation

# Questions?

# Appendix – Milestone Definitions

# Milestone Definitions

Milestone	Definition
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.
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.
Study Complete	Scope of work to be performed has been completed; results and recommendations have been presented to the appropriate Business Owners and stakeholders.
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.
Functional Requirements	NYISO has completed documentation of the functional requirements and the Business Owner has approved.
Architectural Design	The architectural design document is complete and software development is ready to begin.
<b>Projects with the following Milestones will generally be proposed as Continuing in future years, subject to Stakeholder input</b>	
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.