2023 Project Schedule Milestone Update

Shaun Johnson

DIRECTOR, MARKET DESIGN

Kevin Pytel

SENIOR MANAGER, PRODUCT MANAGEMENT

Budget and Priorities Working Group:

September 27th, 2023– **WebEx:** https://nyiso.webex.com

Project Milestones & Status Definitions

New York ISO

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 2023 project budget
NP	New project to address emerging business needs

New York ISO

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 such that the proposal can be presented for a vote at the BIC, OC, 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.
Projects with the following Milestones will generally be proposed as Continuing in future years, subject to Stakeholder input	
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.

New York ISO

Status Definitions

Status	Definition
Complete	Requirements for delivery have been satisfied.
Delayed	The project milestone may not be met by the targeted quarter, but the NYISO expects it will be met by the end of the year.
At Risk	The project is at risk for not meeting the project milestone by the end of the 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	The project is not projected to meet the project milestone by the end of the year.
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.

New York ISO

DRAFT – FOR DISCUSSION PURPOSES ONLY

Design Projects

DRAFT – FOR DISCUSSION PURPOSES ONLY

New York ISO

2023 Project Milestones

Project Name	Type	Qtr.	Project Commitment	Commitment Status
Capacity Market Products				
Demand Curve Reset	KP	Q3	Study Defined	**Delayed**
Improving Capacity Accreditation (SOM)	KP	Q4	Deploy	**At Risk**
LCR Optimizer Enhancements	MP	Q3	MDC	**At Risk**
CRIS Expiration Evaluation	AP	Q4	FRS	**Completed**
New Resource Integration				
Internal Controllable Lines	KP	Q4	MDC	On Schedule
Engaging the Demand Side	MP	Q4	ID	On Schedule
FERC Order 2222 Compliance	MP	Q4	MDCP	**On Schedule**
On-Boarding of New Resources	AP	Q4	Study Complete	On Schedule
Storage as Transmission	AP	Q4	ID	On Schedule

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

2023 Project Milestones

Project Name	Type	Qtr.	Project Commitment	Commitment Status
Energy Market Products				
Dynamic Reserves (SOM)	KP	Q3	MDC	**At Risk**
Balancing Intermittency (SOM)	KP	Q4	MDCP	**At Risk**
Enhancing Fuel & Energy Security Refresh Study	MP	Q4	Study Complete	On Schedule
Long Mountain PAR Operating Protocol with ISO-NE	AP	Q4	MDC	**On Schedule**
Emissions Transparency	MP	Q4	FRS	**At Risk**
Planning Products				
Interconnection Process Enhancements	KP	Q4	MDC	**At Risk**
Coordinated Grid Planning Process (CGPP) Support	MP	Q4	ID	On Schedule

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

Implementation Projects

DRAFT – FOR DISCUSSION PURPOSES ONLY

New York ISO

2023 Project Milestones

Project Name	Type	Qtr.	Project Commitment	Commitment Status
Business & Finance Products				
Credit Price Spread Updates Virtual & External Transactions	MP	Q2	Deploy	**Complete**
CMS and ConInvoice Data Integration	MP	Q4	Deploy	On Schedule
Meter Services System	MP	Q4	Deploy	On Schedule
Ongoing TCC Collateral Coverage Assessment Tool	AP	Q4	FRS	**Complete**
BSS and BillSim Upgrade	AP	Q4	Deploy	On Schedule

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Capacity Market Products				
Modeling Improvements for Capacity Accreditation (SOM)	MP	Q4	FRS	**At Risk**
Market Validation, Reporting and Penalty Enhancements	AP	Q4	SDS	On Schedule
New Resource				
DER Participation Model	KP	Q3	Deploy	Delayed
Hybrid Aggregation Model	MP	Q3	SDS	**Delayed**
DER Operational Enhancements	AP	Q4	Deploy	**At Risk**

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Enterprise Products				
Network Infrastructure Upgrade	KP	Q4	Deploy	On Schedule
UPS Replacement	MP	Q3	Deploy	**Complete**
IT Infrastructure Automation	MP	Q4	Deploy	On Schedule
Application Platform Upgrade	MP	Q4	Deploy	On Schedule
Windows System Upgrade	MP	Q4	Deploy	On Schedule
Krey Control Room A/V Replacement	MP	Q4	Deploy	On Schedule
Microsoft 365	MP	Q4	Deploy	On Schedule
ITSM Security Enhancements	MP	Q4	Deploy	On Schedule

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

DRAFT – FOR DISCUSSION PURPOSES ONLY

2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Enterprise Products				
Block Storage Refresh	MP	Q4	Deploy	On Schedule
Network Manager Cicso Refresh	MP	Q4	Dev. Complete	On Schedule
Modernizing ASIS	MP	Q4	Deploy	On Schedule
Access Management Platform Upgrade	MP	Q4	Deploy	On Schedule
Building Management System (BMS) Controls Upgrade	MP	Q4	Deploy	On Schedule
Database Upgrade	AP	Q4	Deploy	Complete
Smart Grid Upgrade	AP	Q4	Deploy	On Schedule
Next Gen Security Architecture	AP	Q4	Study Complete	On Schedule
OASIS Reliability Upgrade	AP	Q4	Study Complete	On Schedule

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Energy Market Products				
Constraint Specific Transmission Shortage Pricing (SOM)	MP	Q4	Deploy	On Schedule
Ambient Adjusted Transmission Lines Rating	MP	Q4	FRS	On Schedule
Emissions Transparency	MP	Q4	FRS	**At Risk**
Evolving Financial Transaction Capabilities - Bilateral Transactions	MP	Q4	SDS	On Schedule
Secure Communication Channel with MPs	AP	Q4	Deploy	**Critical**

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Operations & Reliability Products				
EMS/BMS Operational Enhancements	MP	Q4	Deploy	**Complete**
OMS Enhancements	MP	Q4	Deploy	**Complete**
Contingency Analysis Results for TO Situational Awareness	AP	Q3	Deploy	**Complete**
Planning Products				
BTM Solar Demand Forecasting Product Enhancements	MP	Q4	Deploy	On Schedule
Demand Forecasting Operational Reporting Enhancements	MP	Q4	FRS	On Schedule
LFDR Upgrade and Enhancements	AP	Q4	Deploy	**Critical**
Generator Modeling Database Enhancements	AP	Q4	Deploy	On Schedule

Bold Red text indicates status update since last presentation.
Bold Blue text indicates projects under stakeholder discussions through the end of Q3.

New York ISO

Quarterly Priority Discussion

New York ISO

Quarterly Discussion on Project Priorities

■ **The NYISO encourages feedback from its stakeholders on project priorities and asks stakeholders to raise ideas or concerns as they arise**

- This discussion can include any idea or concern and is not limited to just project discussions

New York ISO

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

New York ISO

Questions?

DRAFT – FOR DISCUSSION PURPOSES ONLY

New York ISO