

# 2019 Project Schedule Milestone Update

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**Robb Pike**

Director, Market Design & Product Management

**Budget and Priorities Working Group**

May 29<sup>th</sup>, 2019 - Krey Corporate Center

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# Project Milestone and Status Definitions

# Milestone Definitions

| Milestone                         | Definition   |
|-----------------------------------|--|
| Market Design<br>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<br>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<br>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.             |

# 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.   |

# 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 2019 project budget |
| NP   | New project to address emerging business needs              |

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# 2019 Project Milestones

| Project Name  | Type | Qtr | Project Commitment | Commitment Status       |
|---|------|-----|--------------------|-------------------------|
| <b><i>Business and Finance Products</i></b>                   |      |     |                    |                         |
| Enterprise Information Management – Data Integration Phase IV | KP   | Q2  | Deployment         | <b>At Risk /Delayed</b> |
| S&P Credit Ratings Platform Change                            | MP   | Q1  | Deployment         | <b>Complete</b>         |
| Rate Schedule 12 Settlement                                   | MP   | Q2  | Deployment         | On Schedule             |
| Financial Risk Assessment and Scoring Enhancement             | MP   | Q3  | FRS                | Not Started             |
| Oracle Financials Upgrade                                     | MP   | Q3  | ADS                | On Schedule             |
| Finance Systems Strategic Vision Planning                     | MP   | Q3  | Study Complete     | On Schedule             |

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# 2019 Project Milestones

| Project Name   | Type | Qtr | Project Commitment | Commitment Status  |
|--|------|-----|--------------------|--------------------|
| <i><b>Business and Finance Products (continued...)</b></i> |      |     |                    |                    |
| FERC Form1 Redesign  | AP   | Q4  | Deployment         | Not Started        |
| Vendor Management Tool                                     | AP   | Q2  | SDS                | On Schedule        |
| Position Control System                                    | AP   | Q4  | FRS                | <b>On Schedule</b> |

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# 2019 Project Milestones

| Project Name                                     | Type | Qtr | Project Commitment             | Commitment Status       |
|--|------|-----|--------------------------------|-------------------------|
| <b>Capacity Market Products</b>                  |      |     |                                |                         |
| Enhancing Fuel and Energy Security               | KP   | Q2  | Study Complete                 | <b>At Risk /Delayed</b> |
| Competitive Entry Exemption for Increased CRIS   | MP   | Q3  | Market Design Complete         | On Schedule             |
| BSM Repowering                                   | MP   | Q3  | Market Design Complete         | On Schedule             |
| Tailored Availability Metric                     | MP   | Q3  | Market Design Concept Proposed | On Schedule             |
| Demand Curve Reset                               | MP   | Q4  | Study Defined                  | On Schedule             |
| CRIS for External - ROS Transmission Investments | AP   | Q3  | Deployment                     | On Schedule             |

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# 2019 Project Milestones

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|--|------|-----|------------------------|-------------------------|
| <i>Capacity Market Products (continued...)</i>         |      |     |                        |                         |
| <b>External Capacity Performance &amp; Obligations</b> | AP   | Q3  | Market Design Complete | <b>At Risk /Delayed</b> |
| ICAP AMS Redesign Phase III                            | AP   | Q4  | Deployment             | On Schedule             |

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# 2019 Project Milestones

| Project Name                  | Type | Qtr | Project Commitment     | Commitment Status |
|-------------------------------|------|-----|------------------------|-------------------|
| <i>DER Products</i>           |      |     |                        |                   |
| DER Participation Model       | NP   | Q1  | Market Design Complete | <b>Complete</b>   |
|                               | MP   | Q4  | FRS                    | At Risk/Delayed   |
| Enabling Technologies for DER | AP   | Q2  | Study Complete         | At Risk/Delayed   |
| NYISO Pilot Framework         | AP   | Q4  | Study Complete         | On Schedule       |

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# 2019 Project Milestones

| Project Name                                | Type | Qtr | Project Commitment     | Commitment Status  |
|---|------|-----|------------------------|--------------------|
| <i>Energy Market Products</i>               |      |     |                        |                    |
| Carbon Pricing                              | KP   | Q2  | Market Design Complete | On Schedule        |
| More Granular Operating Reserves (SOM)      | KP   | Q3  | Market Design Complete | On Schedule        |
| ESR Participation Model (SOM)               | KP   | Q4  | Development Complete   | At Risk/Delayed    |
| Automated Default Mitigation Implementation | MP   | Q3  | SDS                    | On Schedule        |
| Ancillary Services Shortage Pricing (SOM)   | MP   | Q4  | Study Complete         | <b>On Schedule</b> |
| Enhanced Fast Start Pricing                 | AP   | Q3  | FRS                    | <b>On Schedule</b> |

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# 2019 Project Milestones

| Project Name  | Type | Qtr | Project Commitment             | Commitment Status |
|---|------|-----|--------------------------------|-------------------|
| <i>Energy Market Products (continued...)</i>            |      |     |                                |                   |
| Constraint Specific Transmission Shortage Pricing (SOM) | AP   | Q2  | Market Design Complete         | At Risk/Delayed   |
| <b>Reserve for Resource Flexibility</b>                 | AP   | Q3  | Market Design Concept Proposed | On Schedule       |

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# 2019 Project Milestones

| Project Name                                | Type | Qtr | Project Commitment | Commitment Status |
|---|------|-----|--------------------|-------------------|
| <b><i>Enterprise Products</i></b>           |      |     |                    |                   |
| Microsoft Systems Upgrade                   | MP   | Q4  | Deployment         | On Schedule       |
| Network Infrastructure Upgrade              | MP   | Q4  | Deployment         | On Schedule       |
| Database Platform Upgrade -2019             | MP   | Q4  | Deployment         | On Schedule       |
| Application Platform Upgrade Phase - 2019   | MP   | Q4  | Deployment         | On Schedule       |
| Identity and Access Management (IAM) - 2019 | AP   | Q3  | Deployment         | On Schedule       |
| IT Infrastructure Automation                | AP   | Q4  | Deployment         | On Schedule       |

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# 2019 Project Milestones

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|---|------|-----|----------------------|-------------------|
| <b><i>Operations &amp; Reliability Products</i></b> |      |     |                      |                   |
| EMS/BMS System Upgrade                              | KP   | Q4  | Deployment           | At Risk/Delayed   |
| EMS/BMS Workstation Upgrade                         | KP   | Q4  | Deployment           | At Risk/Delayed   |
| PI System Upgrade                                   | KP   | Q4  | Deployment           | At Risk/Delayed   |
| Gurobi (MIP) Refresh                                | MP   | Q4  | Deployment           | On Schedule       |
| TOA Platform Upgrade Phase III                      | AP   | Q4  | Development Complete | On Schedule       |

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# 2019 Project Milestones

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|---|-----------|-----------|------------------------|--------------------|
| <i>Planning Products</i>                                  |           |           |                        |                    |
| Interconnection Project Queue (or Portal) Automation      | MP        | Q3        | Deployment             | On Schedule        |
| <b>Comprehensive System Planning Process Review</b>       | MP        | Q3        | Market Design Complete | On Schedule        |
| <b>Climate Change Impact and Resilience Study</b>         | MP        | Q4        | Study Complete         | On Schedule        |
| <b>Deliverability and Interconnexion Process Redesign</b> | <b>NP</b> | <b>Q4</b> | <b>Study Complete</b>  | <b>On Schedule</b> |

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



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