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Three Empire State Plaza, Albany, NY 12223-1350  
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### **VIA ELECTRONIC MAIL**

July 1, 2019

Honorable Kathleen H. Burgess, Secretary  
New York State Department of Public Service  
Three Empire State Plaza  
Albany, NY 12223-1350

Re: Case 18-E-0130 – In the Matter of Energy Storage Deployment Program.

Dear Secretary Burgess,

On December 13, 2018, the Public Service Commission (Commission) issued the Order Establishing Energy Storage Goal and Deployment Policy (Energy Storage Deployment Order) in this proceeding. Among other things, the Energy Storage Deployment Order directed the Department of Public Service Staff (Staff) to lead coordination efforts with the New York State Energy Research and Development Authority (NYSERDA), the states electric investor owned utilities (IOUs), the Long Island Power Authority (LIPA), the New York Power Authority (NYPA) and other stakeholders to develop a Pilot Distributed Energy Resources Data Platform for a third-party to develop and implement. The Commission authorized and directed the IOUs to work with NYSERDA to conduct the Pilot DER Data Platform with qualified partners. Furthermore, the Commission required a report from Staff on or before July 1, 2019, regarding the progress and schedule of implementing the Pilot DER Data Platform with the goal of it being operational by December 31, 2019.

Staff compiled the following report in accordance with the Commission's Energy Storage Deployment Order directive. Staff looks forward to working with NYSERDA, the IOUs, LIPA NYPA, and the selected contractor to develop the Pilot DER Data Platform.

Regards,

\_\_\_\_\_/s/\_\_\_\_

Bridget M. Woebbe  
Assistant Counsel

CASE 18-E-0130

In the Matter of Energy Storage Deployment Program.

DEPARTMENT OF PUBLIC SERVICE STAFF REPORT  
ON THE STATUS OF THE PILOT DISTRIBUTED ENERGY RESOURCE DATA PLATFORM

July 1, 2019

## INTRODUCTION AND BACKGROUND

In its Order Establishing Energy Storage Goal and Deployment Policy (Energy Storage Deployment Order), issued December 13, 2018 in the above captioned proceeding, the Public Service Commission (Commission) directed New York's electric investor-owned utilities (IOUs), to work with the New York State Energy Research and Development Authority (NYSERDA) and an appropriate third-party to develop the Pilot Distributed Energy Resource Data Platform (Pilot DER Data Platform). The Commission further directed the Department of Public Service Staff (Staff) to submit a report on or before July 1, 2019, on the progress and schedule of implementing the Pilot Platform with the goal of it being operational by December 31, 2019. Since issuance of the Energy Storage Deployment Order, Staff has lead coordination efforts with the IOUs, NYSERDA, the Long Island Power Authority (LIPA), the New York Power Authority (NYPA), and other stakeholders to develop and implement the Pilot DER Platform.

## PROGRESS OF PILOT PLATFORM

### Scope of Work

NYSERDA and Staff initiated the project by first defining the Pilot DER Data Platform's functional objectives and then establishing the scope of work. Those initial efforts determined that the Pilot DER Data Platform, its associated operating processes, and its associated interactions with users and data sources shall provide the means and methods to:

- enable complex, developer-designed, select queries across all categories of customer and system data stored in the database;
- prevent unauthorized identification of customers and system elements;
- comply with appropriate cyber security protections such as potential Data Security Agreements;
- enable automatic consent requests or data transfers if consent is previously received; and,
- allow for evolution of data sets within the Pilot DER Platform, including updating data over time, adding categories of data, and reformatting data masking protocols if needed.

### NYPA New York Energy Manager

By the Energy Storage Deployment Order, the Commission suggested exploring the

possibility of using the NYPA New York Energy Manager (NYEM) or other available applications during initial development of the Pilot Platform.<sup>1</sup> Staff and NYSERDA met with NYPA in February of 2019 and mutually determined that it would not be practical to use the NYEM as the Pilot DER Platform, although consideration could be given to NYEM in the future for a broader platform rollout. NYEM does not presently have the necessary operating functions to provide the means and methods identified by Staff, and would need to be substantially modified to function as the Pilot DER Data Platform.

#### IOU Participation in the Pilot DER Platform

Staff and NYSERDA determined that an IOU participating in the Pilot DER Data Platform must currently collect and store most of the desired data types identified below, serve an area with active DER development, have the necessary information technology capabilities in place, and be willing to process and transfer the necessary data sets. Based on those criteria, Staff and NYSERDA selected Orange and Rockland Utilities, Inc. (O&R) to be the participating IOU. O&R's service territory has many of the necessary characteristics to contribute to a successful Pilot DER Platform, including: operations in a downstate New York Independent System Operator (NYISO) zone where energy storage and other DER may have more value; deployment of Advanced Metering Infrastructure (AMI); and, diverse demographics.

#### Potential Datasets

Based on insights gained through extensive developer interactions during development of the New York State Energy Storage Roadmap and DPS/NYSERDA Staff Recommendations (the Roadmap),<sup>2</sup> NYSERDA and Staff determined that the types of interrelated customer and electric system data useful to DER developers should include:

- utility territory;
- NYISO zone;
- NYISO transmission node;

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<sup>1</sup> Case 18-E-0130, In the Matter of Energy Storage Deployment Program, Order Establishing Energy Storage Goal and Deployment Policy (issued December 13, 2018), (Energy Storage Deployment Order), p 84.

<sup>2</sup> Case 18-E-0130, supra, New York State Energy Storage Roadmap and DPS / NYSERDA Recommendations (the Roadmap) (filed June 21, 2018).

- substation attributes;
  - proxy substation ID
  - other data from utility DSIP filings (i.e. 8760 load)
- circuit attributes;
  - proxy circuit ID
  - voltage
  - average load
  - average peak
  - peak times
  - load factor
  - hosting capacity at beginning and end of line
- service and load attributes;
  - proxy customer ID
  - current tariff/program enrollment
  - North American Industry Classification System code
  - voltage
  - number of phases
  - average load
  - average peak
  - peak times
  - load factor
  - hosting capacity at service location
  - site attributes
    - zoning classification
    - building type(s)
    - building size(s)
  - installed DER attributes
    - type
    - size
  - electric vehicle (EV) charging
    - number of EVs
    - type(s) of EVs
    - number of chargers by type (Level 1, Level 2, Direct Current Fast Chargers)

For the Pilot DER Data Platform, the dataset may be limited to reduce complexity and streamline development and testing. The participating utility and the selected contractor will work together to determine the initial dataset. DER developers will be consulted for input throughout the process, as well as to test and evaluate the functionality and usefulness of the Pilot DER Platform's capabilities.

#### Contractor Solicitation

Based on the functional objectives and Scope of Work, NYSERDA and Staff developed and issued a solicitation for a third-party to develop, implement, and maintain the Pilot DER Data Platform. In accordance with its procurement practices, NYSERDA issued a Minibid solicitation pursuant to Request for Qualifications (RFQL) 3711, which had previously pre-qualified contractors in four distinct categories to support NYSERDA's efforts around Market Characterization.<sup>3</sup> Pre-qualified contractors from Category D: Development of web-based data sharing and application development platforms and data analytics that can be applied to clean energy markets of RFQL 3711 were eligible to bid. Responses to the solicitation were due by April 23, 2019. NYSERDA received three proposal submissions, and NYSERDA and Staff reviewed and scored each proposal before selecting a winner.

#### Selected Contractor

Based on a combination of technical and commercial considerations, NYSERDA and Staff selected Trove Predictive Data Science, LLC (Trove) as the best contractor for the Pilot DER Data Platform project. Pursuant to the solicitation, Trove shall perform the following tasks.

##### Task 1: Project Management and Reporting

This task covers the management and reporting requirements of the Pilot DER Data Platform project, which is anticipated to include project check-ins, calls, and other written materials memorializing the progress of the project. Trove will provide NYSERDA with monthly status reports and bi-weekly check-ins by phone or email.

##### Task 2: Pilot DER Platform Design and Buildout

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<sup>3</sup> RFQL 3711 is designed to create a pool of contractors to provide strategy, design, and support for innovative programs and initiatives across NYSERDA's Market Development teams, especially those with smaller staffs or more complicated initiatives.

Trove will design and build the Pilot DER Data Platform as described in the Energy Storage Deployment Order. Deliverables will include written documents, manuals, and the operational Pilot DER Platform, delivered to the NYSERDA Project Manager and appropriate Staff by December 31, 2019.

#### Task 3: Data Science Services

If approved by the NYSERDA Project Manager, Trove will develop more advanced analyses of DER market potential and impacts to increase functionality of the Pilot DER Data Platform. Deliverables will include an updated Pilot DER Data Platform with additional data science capabilities.

#### Task 4: Pilot DER Platform Testing and Workshop

Trove will assist NYSERDA with testing the Pilot DER Data Platform with external reviewers. This Task shall also include the completion of a series of workshops to train NYSERDA and Staff on the Pilot DER Data Platform and test outputs with developers. Deliverables will include a final summary manual and slides for workshops.

#### Task 5: Ongoing Support

If granted approval by the NYSERDA Project Manager, Trove shall provide ongoing support, which may involve reporting on results of the Pilot DER Data Platform or additional engagement with NYSERDA on potential next steps for the Pilot DER Data Platform. Deliverables will include additional documentation as requested by the NYSERDA Project Manager.

#### SCHEDULE OF PILOT PLATFORM IMPLEMENTATION

Below is the already completed, and target future schedule for the Pilot DER Platform:

February 22:	NYSERDA and Staff met with NYPA to discuss NYEM.
February 27:	NYSERDA and Staff completed the project scope.
February 28:	Scope delivered to leadership.
Early March:	NYSERDA and Staff met with database/platform providers to share scope material.
March:	Staff and NYSERDA developed required participating IOU criteria and selected the participating utility, O&R.



Late March: NYSERDA and Staff finalized scope and budget for minibid.  
April: Minibid webinar completed.  
Late April: Minibid proposals received and reviewed.  
May: Selected contractor, Trove, designated and Task Work Order finalized.  
June: NYSERDA and Staff held kickoff meeting with O&R and Trove.  
June-July: Pilot Platform implementation begins.  
July 1: Staff to submit report detailing progress/ implementation schedule.  
July-August: O&R and Trove to finalize vendor security approval process and compile inventory of utility-sourced data; O&R to transfer data to Trove.  
August-Sept: Pilot Platform to be designed and built.  
October: Meet with DER developers to evaluate functionality and usefulness of Pilot Platform capabilities.  
November: Trove to host Pilot Platform testing and workshops.  
December 31: Pilot Platform becomes operational.

### CONCLUSION

Staff believes that the Pilot DER Data Platform implementation is progressing as anticipated, and expects it to be operational by December 31, 2019, as is required by the Energy Storage Deployment Order.