



conEdison

Summary of Con Edison Straw Proposal for Streamlined Queue Management

Electric Vehicles Infrastructure Interconnecting Working Group (EVIIWG)

April 4, 2024

Straw proposal’s best-practice methods for queue management are underpinned by guiding principles

Straw Proposal Objective:

“Con Edison to submit a **straw proposal describing the efforts put forth in streamlining their queue management system for consideration and further development by the EVIIWG** by March 15, 2024. Once the EVIIWG determines that the proposal is final, Staff will submit the proposal for public notice and comment...”

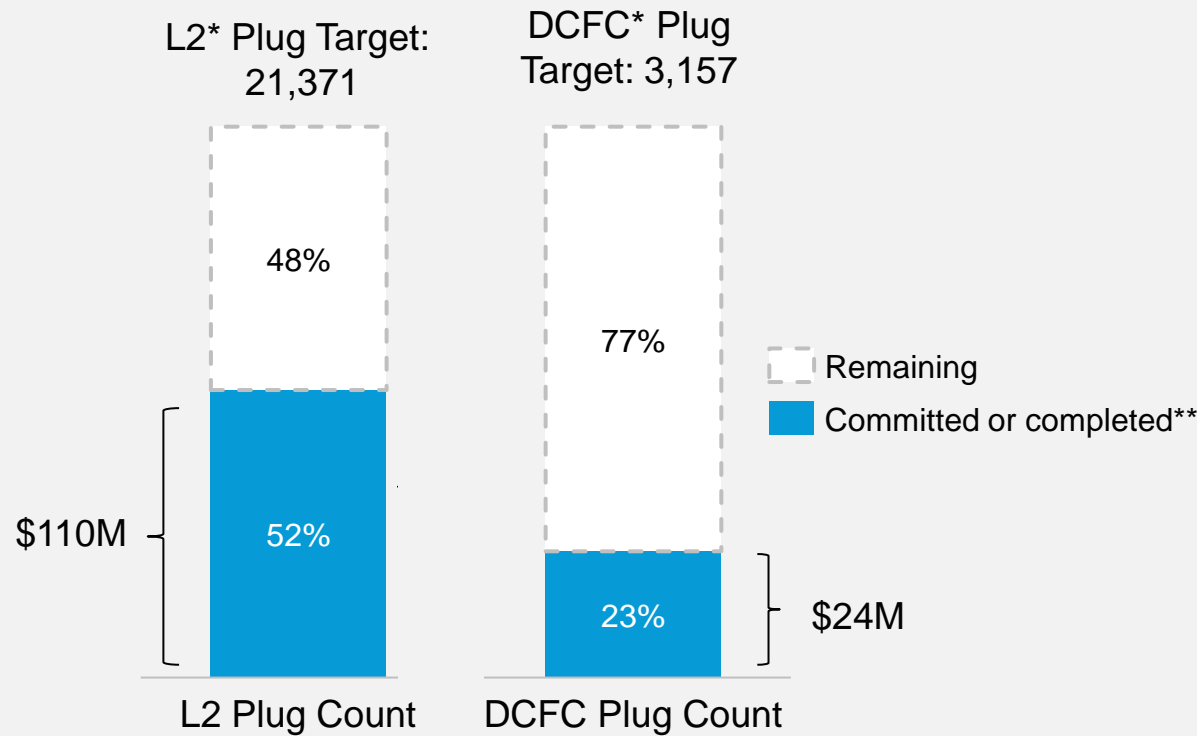
Straw Proposal Content Overview

Queue management methods

Guiding principles for continuous improvement				
Speed to goal	Flexibility & innovation	Fair process	Participant experience	Transparency
1. Operations measures (e.g., batching, Participant full portfolio review, cancellation policies)				
2. Participant informational tools for pre-engagement, planning, and project management (e.g., participant portal, hosting capacity map)				
3. Participant communication strategies (e.g., plug and budget tracker, webinars, deadline communication)				
4. Utility-enterprise alignment				

Con Edison best practices have supported successful PowerReady program implementation

Con Edison Plug Achievement To Date



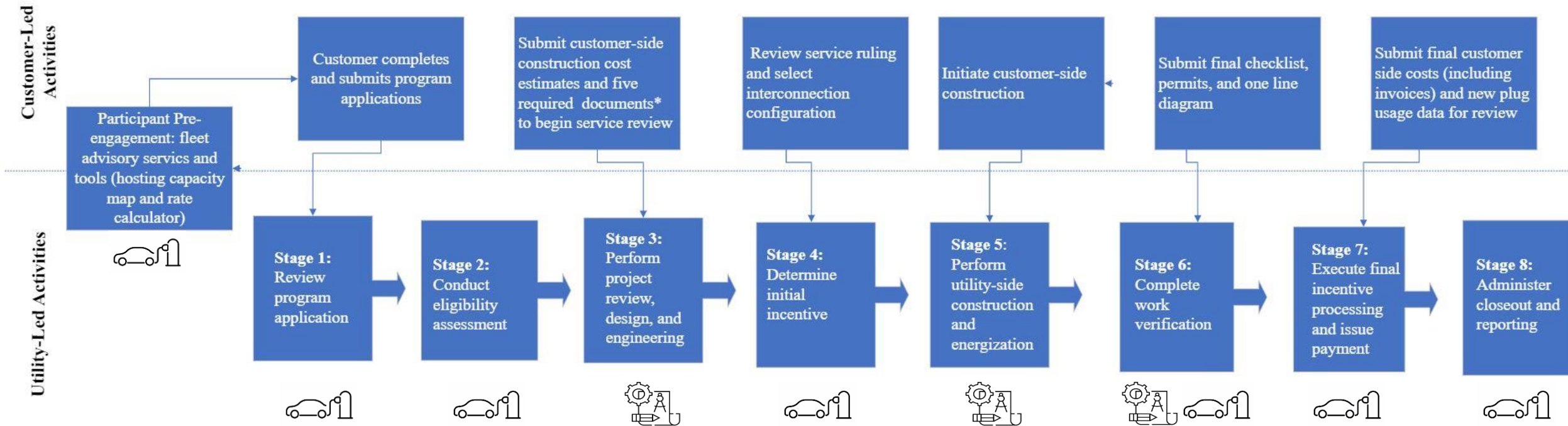
*L2 is Level 2 and DCFC in Direct Current Fast Charging

**Committed or Completed plugs = plugs that are under contract or installed and paid out

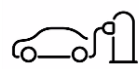
Select Program Milestones

- Jul. 2020 Make-Ready Program established by PSC Order
- Late 2021 Con Edison experiences a waitlist
- 2022 Con Edison implements new queue management and incentive strategies
- Nov. 2023 Mid-Point Order establishes new targets and budgets and calls for straw proposal
- Mar. 15, 2024 Con Edison files straw proposal on queue management
- Apr. 4, 2024 First EVIIWG meeting

Incentive, interconnection project flow at Con Edison



Legend



EV Program Team-Led

- Includes fleet advisory services
- Separate from DG** work; DG study required only for V2X**



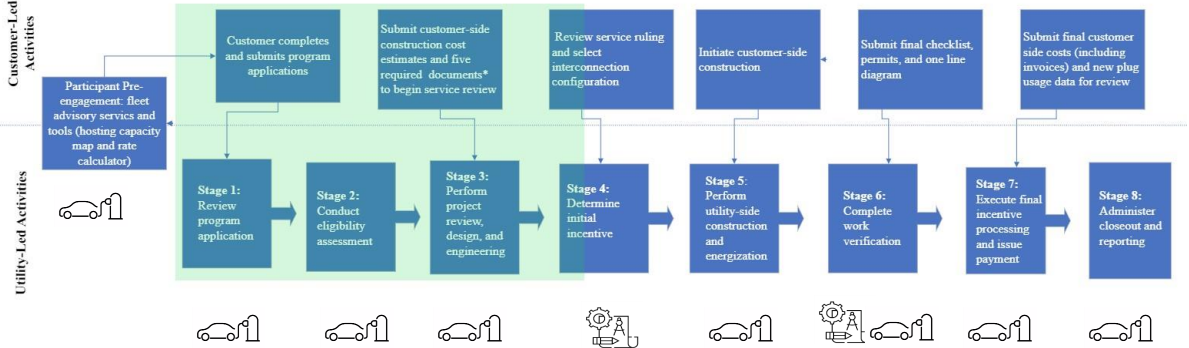
Service Determination Teams-Led

- Energy Services, Customer Engineering at Con Edison
- Collaborates with EV Program Team throughout
- Separate from DG work; DG study required only for V2X

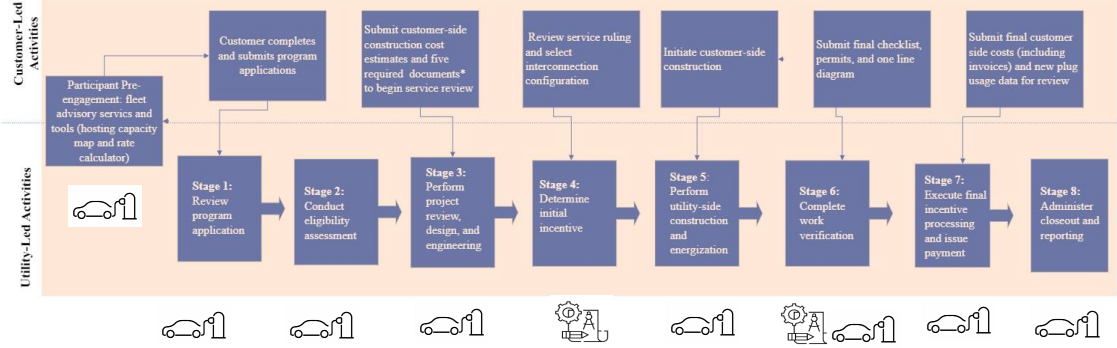
*Note: The 5 key documents referenced in the flow diagram are available on the [PowerReady Website](#)
 ** DG refers to distributed generation. V2X refers to vehicle-to-everything, including V2G or vehicle-to-grid

Four best-practice methods correspond to various stages across the project flow at Con Edison

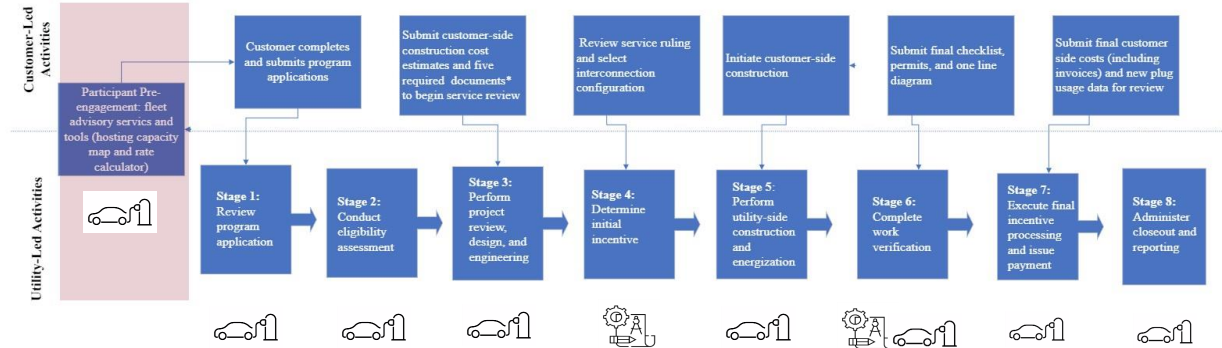
1. Operations Measures



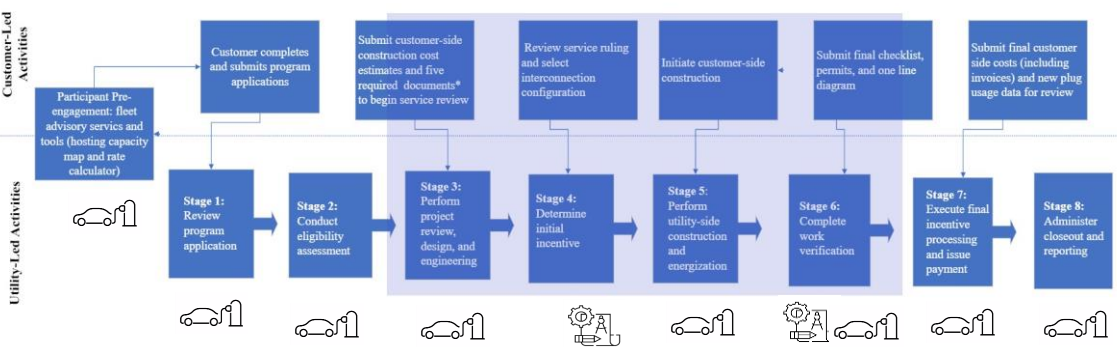
3. Participant communication



2. Participant informational tools for pre-engagement, planning, and project management



4. Utility-enterprise alignment



Agenda

1. Operations Measures

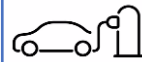
2. Participant informational tools for pre-engagement, planning, and project management

3. Participant communication

4. Utility-enterprise alignment

Operations Measures

Legend



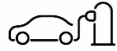
Indicates EV Program Team-Led



Indicates Service
Determination Teams-
Led

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✓ Already JU
implemented

Indicates the JU has
implemented this best
practice as of 4/4/24



Determine sequencing of incentive eligibility review

- Weigh date of application, policy priorities, and other operational factors
- Example: review for eligibility on first-come, first-served basis



High volume of apps? Batch projects for incentive review and service determination

- Participants and Program Team can track a group of projects with same milestones and deadlines
- Send a group of projects ready for document review to Energy Services Team at same time, triggering a service review sprint (vs. sending projects one at a time)



Innovate to match Participants' pace and offer flexibility across a portfolio where possible

- Semi-automated screening tool (auto-rule) that allows service adequate projects to go through an automated service determination
- Within a Participant portfolio, offer to prioritize shovel-ready projects, as long as projects are part of the same batch

In contrast, mandated timelines shift focus away from innovation and toward a compliance mindset



Use temporary pauses, initiated by Utility or Participant

- Allows projects to pause temporarily if Participant must secure financing or permitting or finalize an agreement with the site host
- Avoids canceling, which can create redundant work for both the Participant and the Utility to reinitiate the application process if/when the project resumes



Establish a cancellation policy

Cancellations may apply...

- (a) when projects are “on hold” beyond a defined timeframe
- (b) when a Participant is non-responsive
- (c) when Participant decides to not move forward
- (d) when a committed project has not been completed after a defined period of time



Robust and transparent records and project platforms

- Save and standardize documentation of Participant correspondence
- Share changes in project status with Participants
- These practices support future program review and help the Program Team communicate to a Participant whether a project is waiting on Participant-provided material
- Allow Utility teams and Participants to work from the same information in managing the project

Participant informational tools for pre-engagement, planning, and project management

Legend



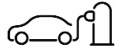
Indicates *EV Program Team-Led*



Indicates *Service Determination Teams-Led*

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✓ **Already JU implemented**

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Promote fleet advisory services

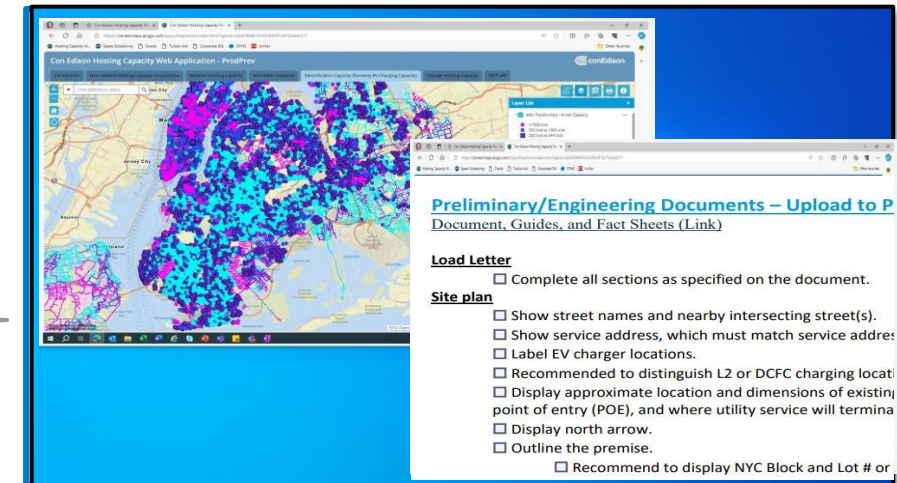
- Supports Participants as they prepare required documents
- Saves times and educates and Participants through site assessments, which:
 - Provide a preliminary review of grid capacity and can help participants determine site viability before investing resources
 - Prepare Participant for Service Determination, thereby improving speed to goal



Build self-service tools

- A publicly available list of required documents, with clear guidance on what constitutes an acceptable document, helps the Participant prepare to move quickly through the process.
 - ✓ **Already JU implemented:** A hosting capacity map...
 - an EV charging rate calculator...
 - ...help the Participant plan for their projects.
 - ...are most effective if reviewed with the Program Team.

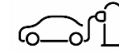
Illustration of hosting capacity map, required document checklist





Improve application logic

- Application logic minimizes errors by automatically preventing submission of an application for service determination without all required documents.



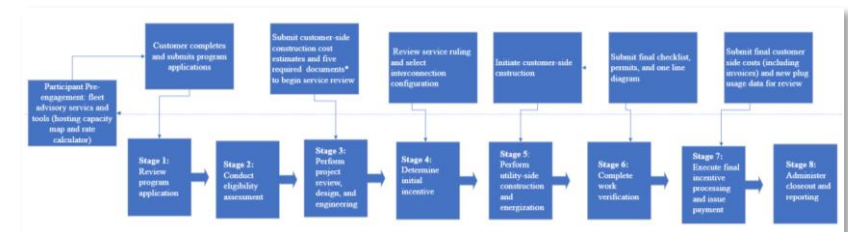
Develop a Participant portal where Participants can view project status

- ✓ **Already JU implemented:** Make-Ready Program (MRP) portal allows the Participant transparency in project history and incentive status
- At Con Edison and O&R, portal shows whether the Utility or Participant is the “owner” of each stage, and what’s required to move projects forward to the next step



Publish a flow diagram showing program process

- Indicates which steps are owned by the Participant versus Utility
- Promotes transparency and positive Participant experience
- See Appendix A of filing for example (illustration below)



Participant Communication

Legend



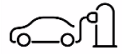
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Publish remaining make-ready program (MRP) incentive funds

- Con Edison and all JU members publish a refreshed budget and plug tracker on an informational website
- Gives Participants a transparent view into the remaining incentive budget
- Helps Participants plan their business decisions

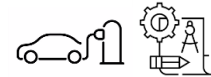
✓ Already JU implemented



Host Participant webinars

- Share MRP updates, including eligibility requirements, process improvements, and the status of remaining incentive funds
- Especially important for new Participants to the MRP
- Provides scheduled time for Participants to ask questions

✓ Already JU implemented



Highlight Participant-dependencies

- Explain where and by when Participants must take action during service determination
- Deadlines, customized by Utility, should also include a defined, unpublished grace period and consider removing the grace period in waitlist scenarios.





Communicate an *estimated* timeline range for utility upgrades

- Communicate only as applicable
- Emphasize that the timeline estimate is specific to the individual project and the scope studied in the service determination
- Explain that request modifications made by the Participant may extend the deadline

Utility- enterprise alignment

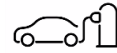
Legend

	Indicates EV Program Team-Led	<<grey text>>	Indicates the JU has implemented this best practice as of 4/4/24
	Indicates Service Determination Teams-Led	✓ Already JU implemented	



Define if, when, and how to accept project scope changes that impact service determination

- Make a plan because changes require new engineering analysis, a valuable resource
- Allow for some flexibility while discouraging changes and maintaining fairness
- Sample options: (1) complete a new service determination but incentive application remains valid or (2) submit a new incentive application and re-start service determination



Forecast for internal teams

- Estimate the volume of cases across various stages of the pipeline for internal stakeholders like Service Determination Teams
- If batch size is determined collaboratively across enterprise, then batching can help the Program Team forecast a transparent ceiling of expected inflow to Service Determination Teams



Positive performance incentives drive innovation, enterprise alignment, commitment, transparency

- Earning Adjustment Mechanisms (EAMs) promote an innovative mindset
- EAMs drive towards excellence, rather than a compliance mindset seeking to meet the lowest common denominator.
- EAMs encourage utility-wide alignment
- EAMs are filed publicly in relevant proceedings
- ✓ **JU implemented: plug targets EAM**
- ✓ **Con Edison implemented for EV interconnection EAM**

Appendix

Definitions

- **Participant:** An entity, including its subsidiary or affiliate, that applies for and/or receives the incentives available through the Make-Ready Program. This includes:
 - **Developer:** an entity responsible for designing, constructing, and commissioning an EV charger site. This entity may also be responsible for owning, managing, and operating the chargers. Developers tend to take on multiple plug deployment projects at once, constituting a portfolio of projects.
 - **Equipment Owner:** the entity that purchases and owns or controls the EV charging equipment once it is installed.
 - **Site Host:** the electric account owner of the site on which the EV charging equipment is installed. The Site Host may or may not be the Equipment Owner.
 - **Customer:** an entity taking service from Con Edison.
- **Program Agreement:** a contract in the Make-Ready Program where the Participant agrees to the service connection layout, the initial incentive offer, and other terms provided by the Utility, before the Participant starts construction.
- **Program Team:** utility employees involved in managing the administration of Make-Ready Program incentives, including prospective Participant outreach, evaluation of a project's eligibility, and shepherding the project from application to incentive payout.
- **Service Determination Teams:** the technical Utility teams that conduct the analysis to determine whether the service to a site is sufficient to serve the Participant's requested capacity expansion; if insufficient, the Service Determination Team outlines the scope of work for utility grid upgrades to serve the new load.
- **Utility:** single member utility of the Joint Utilities (JU).