



Priority Action Plan (PAP) Creation Form

Save this form, complete it and rename it with a unique file name, and send to sgip-pmo@lists.sgip.org

If you have questions about completing this form, please contact Susan Hoyler at 941.321.3027 or shoyler@sgip.org

ABSTRACT STATUS: *(Provide draft abstract)*

SGIP should be active in the development of the XBRL Extension Construction Energy Transportation (XBRL-CET) to promote interoperability with financial services for building the nation's Smart Grid.

The initial Green Button established a formally adopted a *Smart Meter* Data Set that prompted the development of a wide range of new applications to perform analytics on energy usage to better manage consumption. XBRL-CET is designed to promote the same level of innovation in application development by demonstrating the potential of XBRL for building the *Smart Grid*, and letting multiple industry system developers know about the effort to establish XBRL-CET to enable interoperability for use by energy related entities, public and private.

Building the nation's energy infrastructure will involve numerous stakeholders. Each has their own systems designed for their specific industry or need, and most systems cannot efficiently exchange data creating lost productivity and increased costs. The need for common standards and interoperability is well recognized and the government has lead the effort with the 2009 "Interactive Data to Improve Financial Reporting" legislation that created the XBRL standard for financial reporting to the SEC, the 2007 Energy Independence Act which established the Smart Grid Interoperability Panel and regulations such as the Data Act that requires all federally funded projects to utilize open standards for financial reporting.

Those government actions provide the foundation for interoperability, but without implementation will not archive their intended purpose.

The prototype Dashboard is part of the AGC Surety Connection Project at CSU Chico and represents a collaboration with Associated General Contractors of America (AGC), XBRL US along with many public and private entities.

New applications created by interoperability are only enabled when data standards are universally adopted and implemented, and that takes a catalyst like the Green Button Data Set, or the *Next* Green Button Data Set – XBRL-CET.

KEY QUESTION TO CONSIDER: *(What are the principal issues?)*

The mission of the SGIP is to promote interoperability and best business practices, however it has not extended its influence beyond manufacturers, and governmental policy and procedures.

By expanding SGIP influence to include financial services provided by banks and other lenders along with surety companies and insurance companies the increased efficiency in building the nation's energy infrastructure would be greatly improved for all stakeholders.

Key Question: Does building the nation's Smart Grid involve financial services, and are the current members of SGIP impacted by the Data ACT thereby required to provide financial reporting using open standards. If so then SGIP working with XBRL will enable interoperability and compliance with the Data Act for SGIP member's private companies and public agencies.

DELIVERABLES:

| D# | Deliverable |
|----|---|
| D1 | XBRL-CET An open standards based XBRL extension specifically for Construction, Energy and Transportation to enable interoperability between stakeholders. |
| D2 | Prototype Construction Performance Measurement Dashboard using XBRL Extension Construction Energy Transportation (XBRL-CET) to DOE App's for Energy contest – Data By Design. |
| D3 | Work with CALISO to have their publicly posted excel spreadsheet properly tagged with XBRL-CET. |
| D4 | Develop a national standardized interconnection payment bond that can be electronically delivered to any utility consistent with FERC regulations. |
| D5 | IEP XML as part of XBRL-CET |

SUCCESS CRITERIA: *(List anticipated tasks)*

| T# | Task | Planned Date | Responsible | D# |
|----|--|--------------|----------------|----|
| | Have XBRL US schedule a session at their national conference to introduce the PAP to the XBRL community. | 9/16/2014 | K Dixon Wright | |
| | Submit the Prototype Construction Performance Measurement Dashboard using XBRL Extension Construction | 7/16/14 | K Dixon Wright | D2 |

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|--|--|----------------|--|--|
| | Energy Transportation (XBRL-CET) to the DOE Apps for Energy Contest – Data By Design | | | |
| | Work with CALISO to have their publicly posted excel spreadsheet properly tagged with XBRL. | August 2014 | | |
| | Have the utilities accept a national standardized interconnection payment bond that can be electronically delivered to any utility consistent with FERC regulations. | October 2014 | | |
| | Incorporate IEP XML into XBRL-CET | First Qtr 2015 | | |
| | | | | |
| | <i>[insert additional rows, as needed]</i> | | | |

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| DESCRIPTION OF ARCHITECTURE ISSUES: |
| (1) Conceptual Model: <i>How does this PAP map to the Conceptual Model Domains?</i> |
| N/A |
| (2) SGAC Stack: <i>Describe the relationship of this proposed PAP to elements of the SGAC Stack (including cross-cutting issues)</i> |
| N/A |

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| TESTABILITY AND CERTIFICATION ISSUES: |
| N/A |

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| CYBERSECURITY ISSUES: |
| XBRL-CET only establishes the data tagging for creating a file that can be shared and/or exchanged. How it gets shared is beyond its scope. |

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| OTHER TECHNICAL ISSUES: |
| |

What is the relationship of this PAP to the current PAPs?

None

Are there any overlaps/conflicts with other PAPs?

None

What is the impact to industry if this PAP is not fulfilled?

Failure to coordinate with XBRL will deny SGIP members from the benefit a relationship would bring.

Failure of financial services firms becoming members of SGIP and adding their contributions on behalf of SGIP members.

Continued inefficiency and wasted funding for energy related design, procurement and construction.

Continued development of Smart Grid systems and applications that do not support interoperability because there is no universally accepted standard to adopt or implement.

Inability to generate data analytics that could have produced better outcomes in design, procurement and construction for Smart Grid projects.

Inability to implement contractor default risk management techniques on Smart Grid Projects.

Higher construction costs and lower efficiency on Smart Grid Projects.

Additional information or considerations regarding PAP Proposal:

SGIP 2.0 should look to expand its value add to the energy industry beyond just standards for manufacturing along with policies and procedures.

Expanding the membership base to include entities that finance, insure and bond activity related to construction of the nation's energy infrastructure will allow SGIP to make significant contributions to improving efficiency, reducing costs and promoting innovation for even great advances.

| STAKEHOLDERS | Organization | Name of Person | Email |
|--|---|-------------------|--|
| Project Team Lead: | Wells Fargo | K. Dixon Wright | Dixon.Wright@wellsfargo.com |
| SGAC Liaison: | | | |
| SGCC Liaison: | | | |
| SGTCC Liaison: | | | |
| SGIMC Liaison: | | | |
| NIST Liaison: | | | |
| Coordinating SSO(s) or User Groups Designated in Action Plan | XBRL US | Michelle Savage | michelle.savage@xbrl.us |
| Coordinating SSO(s) or User Groups Designated in Action Plan | Association of General Contractors (AGC) of America | Fara Francis | rancisc@agc.org |
| | CSU Chico | Jerry Hight | jhight@csuchico.edu |
| | SunSpec Alliance | John Nunneley | john@sunspec.org |
| Other organizations identified, which members have suggested or committed to participation in the Action Plan | | | |
| Surety Fidelity Association of America | | Rob Duke | rduke@surety.org |
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| Date: | July 16, 2014 |