Priority Action Plan (PAP) Creation Form

ABSTRACT STATUS: *(Provide draft abstract)*

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

XBRL is a financial reporting data that all publicly traded companies use to provide standardized financial reporting to the Securities and Exchange using XBRL, utilizing established "Data Sets". The XBRL data standard, and "Data Sets" are specifically designed for business, can be expanded through the use of extensions to accommodate industry needs and can synergize with other standards like Acord for insurance and agcXML for construction and IEP XML for solar energy.

How the Construction Energy Transportation extension to XBRL will be developed, and how it will respond to the energy industry, is the topic at the upcoming XBRL convention on September 16th, followed by a presentation at the SGIP convention September 18th.

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 (California State University Chico) and represents 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	Establish XBRL-CET An open standards based XBRL extension specifically for **C**onstruction, **E**nergy and **T**ransportation to enable interoperability between stakeholders.
D2	Create a prototype Construction Performance Measurement Dashboard using the XBRL -CET. On September 126th we have submitted the Dashboard to DOE App's for Energy contest – Data By Design
D3	CALISO currently publishes online an excel worksheet that provides status updates to stakeholders on all projects in queue. We will offer to work with CALISO to have their publicly posted excel spreadsheet properly tagged with XBRL-CET so that stakeholders can better utilize and/or import the information provided.
D4	There are over 3,600 utilities that implement the single FERC regulation for interconnection security, and understandably there are numerous versions of surety bond forms, each with their own interpretation of the security obligations. This unnecessarily complicates the ability of the surety industry to develop consistent underwriting policies and procedures and undermines the reliability and predictability of the surety claims handling process. We will work to develop a national standardized interconnection payment bond that can be electronically delivered to any utility consistent with FERC regulations.
D5	Solar Nexus, the developer of the Integrated Energy Project Model (IEP XML) recently received a grant from the DOE to continue its development of IEP XML to establishing data standards for the solar industry. We will work with IEP XML so that it synergizes and harmonizes with 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	D1
	Submit the Prototype Construction Performance Measurement Dashboard using XBRL Extension Construction Energy Transportation (XBRL-CET) to the DOE Apps for Energy Contest – Data By Design	7/16/14	K Dixon Wright	D2
	Work with CAISO to have their publicly posted excel spreadsheet properly tagged with XBRL. Provide more background for the novice.	November 2014		
	Have the utilities accept a national standardized interconnection payment bond that can be electronically delivered to any utility consistent with FERC regulations. Explain relationship of data act/DoE/utility			
	Incorporate IEP XML (Solar) into XBRL-CET			
	[insert additional rows, as needed]			

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

TESTABILITY AND CERTIFICATION ISSUES:
N/A Dixon will reference XBRL models, etc

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.

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. 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:

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
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