

**NORTHSTAR**  
Fearless Intellect™



# Stakeholder Satisfaction Research

2017: Report of Findings

August 21<sup>st</sup>, 2017

# Introduction

Research Background, Objectives and Our Framework



# Background

With the continuing evolution of the IESO, the organization engages with a diverse set of stakeholders ranging from generators to local distribution companies to non-government organizations.

While diverse in nature, there is a need to understand and measure the performance of the customer/stakeholder initiatives and track those results over time. As such, the IESO has commissioned Northstar as its research partner to engage with relevant customers/stakeholders and inform internal executives over the course of the contract.

To action against this brief, Northstar has designed a multi-phased, multi-modal approach, a combination of quantitative and qualitative engagements with IESO customers/stakeholders.

This quantitative research in 2017 sampled 413 customers/stakeholders across five key customer groups - Generators, Distributors/Transmitters, Importers/Exporters, Large Consumers and a mixed sub-group of 'Other' Interested Stakeholders - to compare with the 2016 baseline.

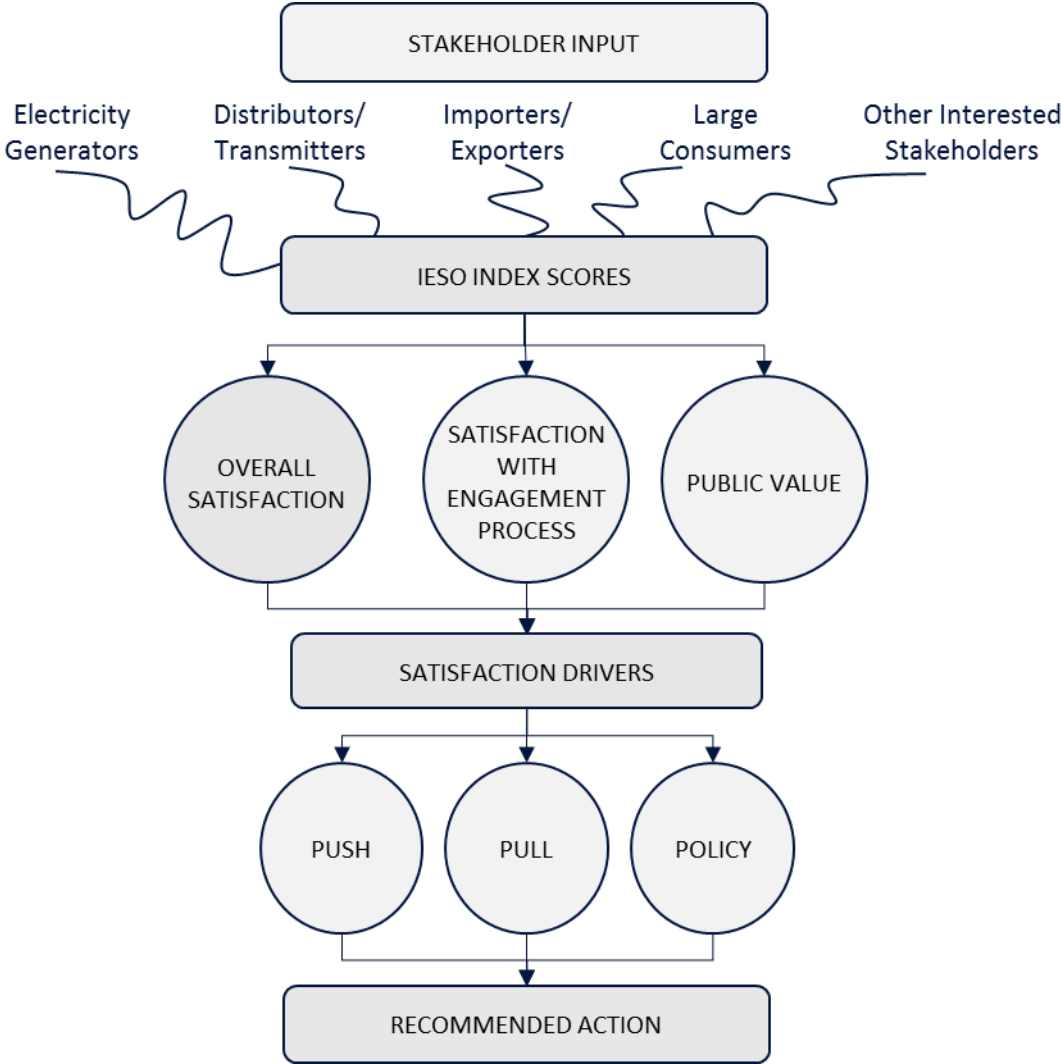


# Our Index Framework

We have approached the index design with the following underpinning: The index must be sufficiently stable to be tracked over time and sufficiently customized across the five target customer/stakeholder groups.

The graphic adjacent represents the steps we have taken in our data analysis in this report:

- 1. IESO Index Scores
- 2. Satisfaction Drivers
- 3. Recommended Actions



# Research Objectives

More specifically, this 2017 research was designed to:

- Track a number of metrics (including three index scores) critical to the IESO organization including:
  - Satisfaction with the IESO;
  - Satisfaction with the IESO's engagement process;
    - Relevance of the IESO's engagement process;
    - Performance on each of the IESO's engagement process objectives;
  - Public Value Assessment
  - IESO's communication channel awareness, use and effectiveness;
- Measure satisfaction as per the index based on the key drivers to satisfaction that can be tracked over time;
- Understand the unique drivers of satisfaction and specific recommended actions for each stakeholder group.



# Methodology

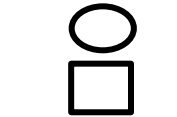




- In order to maximize response rates, we employed a telephone methodology and conducted interviews with customers/stakeholders from **June 21<sup>st</sup> to July 31<sup>st</sup>, 2017.**
  - The average interview length was 23 minutes.
- All study participants were sourced from IESO customer lists, each of which had been in recent contact with the IESO.
  - Sample quotas were set and structured to be representative of available records in the customer lists provided.
- Within the identified field period, we were able to achieve the following number of completes across the five customer groups:

	<b>TOTAL</b>	Electricity Generators	Distributors/ Transmitters	Importers/ Exporters	Large Consumers	Other Interested Stakeholders
<b>Total Completes</b>	<b>401</b>	<b>103</b>	<b>91</b>	<b>20</b>	<b>43</b>	<b>144</b>
Sample Quota	600	240	100	60	60	140
Total Usable Records	970	257	178	63	116	356
Response Rate (# of Completes/Total Records)	41%	40%	51%	32%	37%	40%

\*NOTE: For the full disposition report of fieldwork, please see appendix.

# Reporting Perspective

Circles and squares have been used to distinguish results which are statistically or directionally significant this year, with arrows depicting statistical significance between 2016-17.

-  = findings which are statistically higher (calculated at a 95% confidence level) among stakeholder target groups vs. the total sample.
-  = findings which are statistically lower (calculated at a 95% confidence level) among stakeholder target groups vs. the total sample.
-  = findings which are directionally higher/lower (calculated at a 80-90% confidence level) among stakeholder target groups vs. the total sample.
-  = findings which are statistically higher/lower (calculated at a 95% confidence level) compared to 2016.
-  = findings which are directionally higher/lower (calculated at a 80-90% confidence level) compared to 2016.

Confidence Intervals	TOTAL	Electricity Generators	Distributors/ Transmitters	Importers/ Exporters	Large Consumers	Other Interested Stakeholders
Total Completes	401	103	91	20	43	144
+/- % shown = 95% confidence interval	4.8	9.7	10.3	21.9	14.9	8.2

Results are shown among the total sample and profiled across the five groups of stakeholders included. Due to a small base size (n=<20), results reported among the following stakeholder group should be interpreted as directional only:

- Importers/Exporters (n=20)
  - All derived correlations (key drivers of satisfaction) not included in the main report can be found in the appendix.
  - Due to small base size (n=<30), we have not conducted derived analysis on the following group:
- Importers/Exporters (n=20)

# Executive Summary

Distillation of Findings & Implications for IESO



# Areas of Investigation: Key Findings



- Nearly half of stakeholders (49%) are very satisfied with the IESO's performance overall –consistent across stakeholder groups and on par with 2016.
- There is a strong relationship across the three metrics shown above meaning that:
  - ✓ Increasing satisfaction with the engagement process will also increase overall satisfaction with the IESO.
  - ✓ Appropriately delivering on the organization's list of value objectives will also result in an increase in overall satisfaction.

- 3/4 stakeholders continue to believe in the importance of engagement for the IESO to achieve its mandate.
- 2 in 3 believe engagement is relevant to their business or sector needs
- 3 in 4 report the IESO is meeting their expectations.
- The majority of stakeholders continue to view engagement as allowing them to advance their business interests as well as learn about/from others.
- 58% stakeholders report a positive interaction with the IESO in terms of commitment to engagement.
- Stakeholders continue to view the process as a valuable vehicle for change in their sector and the industry generally.
- Awareness and usage of IESO communications channels remain largely unchanged since 2016, except a notable increase in the use of working groups.
- Perceived effectiveness of communication channels varies, with a rating range from 58% to 19%. Direct e-mails and working groups are most highly rated, while social media remains lowest.

- The IESO corporate metric measuring the composite rating of satisfaction, relevance, meeting expectations & staff commitments remains stable at 67%.
- 75% believe the IESO is allocating appropriate resources to its business objectives – unchanged since 2016. Year over year decline tended to be in the areas of providing a sustainable electricity future and competitively procuring resources.
- Areas which stakeholders believed under resourced related to transparency, sharing of relevant and valued information and acting on input.
- The IESO continues to demonstrate values such as respect, honesty, sincerity and accessibility (>50%), but lags in transparency, sharing of information/expertise, clear communication and timeliness (<50% rate 8-10)
- "Pull" values (what the IESO takes from stakeholders) receive overall lower ratings than the "Push" (what the IESO delivers to stakeholders), there is little change in the past year. There has been a slight increase in being seen to be consultative but a ratings decline in areas such as effective facilitation and being balanced in decision making.
- Ratings for "Policy" or positioning values are unchanged over 2016. At 72%, reliability is rated strongest, with promoting conservation at 46% and resource planning at 44%. The lowest rating went to being innovative at 30% and competitively procuring resources at 31%.



# Going Forward

*As the IESO looks ahead, some key observations:*

- While sustaining its image of being trustworthy, honest, and sincere, the organization needs to strengthen the relevance and usefulness of its information to stakeholders and its transparency.
- In terms of its interaction with stakeholders, the IESO has an opportunity to build on its image of fairness, inclusivity and understanding but be more demonstrable on how it acts on stakeholder/community input.
- With respect to sector positioning, the IESO is well established in its reliability domain (both in terms of being an operator and an organization). Stakeholders expect increased attention to be focused on the sustainability of the system, its conservation lead, sustainability generally, shaping the future market including the creation/fostering of innovation.

*With regards to the Engagement Process:*

- The IESO needs to reinforce its performance on timely and effective communication while enhancing its responsiveness, relevancy and sharing of information, market insights and transparency.
- In terms of its interaction with stakeholders, the IESO needs to continue to be judged as fair, consultative and willing to seek out opportunities for stakeholder engagement. In doing so, it needs to strive in its efforts to be transparent, open and inclusive. The latter involves reaching out to a wide range of interests and being seen to act on input as well as explaining the decision making process to stakeholders, particularly where they provided input.
- Transparency is identified as a concern by all stakeholder groups. This is defined as the IESO's opacity regarding changes to the system, policy, as well as in decision making– whereby stakeholders are not apprised of the reasoning behind why certain decisions are taken.



# Composite Satisfaction Score

A composite IESO satisfaction score was created in 2016, calculated through a combination of individual scores on process satisfaction, business relevance, expectations management and culture change:

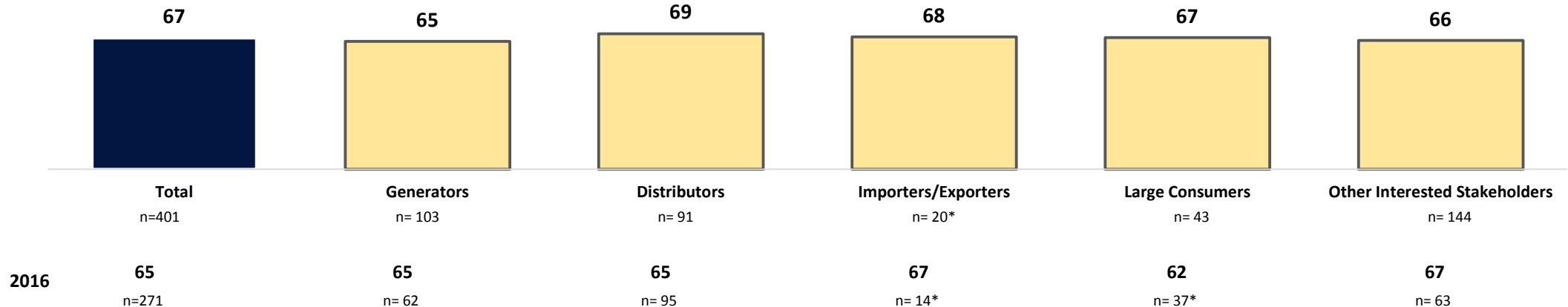
1. Satisfaction with the engagement process
2. Relevance to stakeholders' business/sector
3. Satisfaction with IESO meeting stakeholder expectations
4. The IESO's perceived commitment to the engagement process as evidenced by interactions with staff

Based on 2017 results, the IESO's overall Composite Satisfaction **average** score is **67**.

Satisfaction is highest among Distributors and Large Consumers over 2016.

## Composite Satisfaction Scores

Base: Total Sample (n=401)



2b. Has your experience with the IESO exceeded, met or fallen below your expectations?

6a. As a participant, how satisfied are you with the IESO's engagement process?

7. As a participant, how relevant has the IESO's engagement process been to your business or sector needs? Please consider all of your interactions with the IESO and the various communication channels, programs and initiatives you have engaged with in your answer. Please provide a rating on a 10-point scale where 1 means their processes have not been relevant at all and 10 means they are very relevant. **CHECK ONE ONLY**

10. How well is the IESO's commitment to the engagement process reflected in the staff interactions you have had? Please provide a rating on a 10-point where 1 means this commitment has not at all been reflected and 10 means the commitment has been reflected very well.

# The Relationship Between Satisfaction, Engagement & Public Value Scores

- This year's composite score for satisfaction is consistent with the 2016 figure.
- 29% report high satisfaction with the IESO, high satisfaction with engagement and a high rating for the IESO devoting the right amount of resources to objectives.

## SCORE A = HIGH OVERALL SATISFACTION SCORE

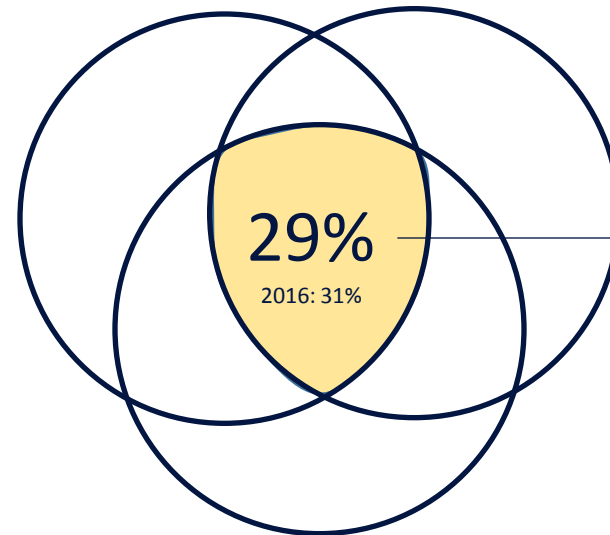
•(Stakeholders who rated their overall satisfaction the IESO's performance an 8 to 10 on a 10-point scale)

## SCORE B = HIGH ENGAGEMENT PROCESS SATISFACTION SCORE

•(Stakeholders who rated their satisfaction with the stakeholder engagement process an 8 to 10 on a 10-point scale)

## SCORE C = HIGH PUBLIC VALUE COMPOSITE SCORE

•(Stakeholders who believe that the IESO is putting an appropriate amount of effort/resources behind their objectives)



**A + B + C**

Most frequently, stakeholders give high scores across each metric - identifying the critical need to deliver on all three areas.

NOTE: For detailed scores at each intersection, please see Appendix I.

2a. Based on your experience, how satisfied are you with the IESO's overall performance? Please use a 10-point scale where 1 means you are not at all satisfied and 10 means you are very satisfied with the IESO.

3b. Please identify how you feel about the IESO's current effort and resource allocation against each of the following objectives. READ LIST, CHECK ONE PER STATEMENT

6a. As a participant, how satisfied are you with the IESO's engagement process?



# Areas to Focus On: Push, Pull, Policy

- Our analysis has revealed that the IESO's interactions with stakeholders fall under three broad categories:

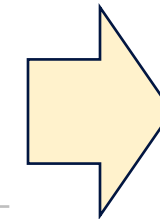


## AREAS TO MAINTAIN

- Honesty
- Trustworthiness
- Sincere
- Effective communications with stakeholders

- Being fair
- Being inclusive
- Being understanding

- Being a reliable organization
- Ensuring a reliable electricity future for Ontario



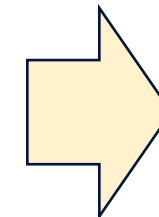
**These are critical drivers of satisfaction and the IESO should continue to perform strongly in each area.**

## AREAS WHERE IMPROVED PERFORMANCE WILL INCREASE SATISFACTION

- Transparent
- Providing relevant, meaningful information
- Operating and shaping the electricity system and market in a transparent manner

- Being open – sharing knowledge and information about how decisions are made
- Acting on the input from communities, customers and stakeholders

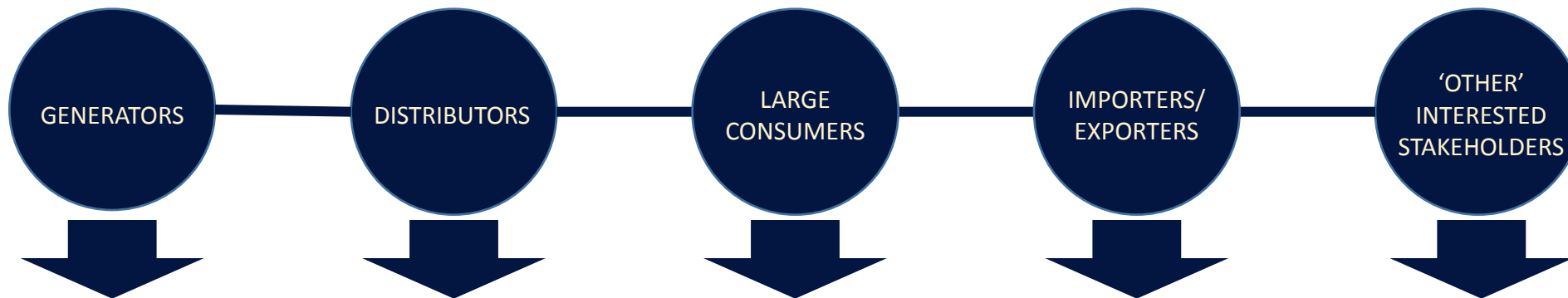
- Being sustainable
- Leading the creation of a culture of conservation
- Providing a sustainable electricity future for Ontario
- Operating and shaping the electricity system and market in an effective manner
- Enabling innovation in the electricity sector



**These are critical drivers of satisfaction and the IESO should aim to perform better in each area.**



# Keep In Mind: Stakeholder Context



- Main challenges revolve around cost, resource management & business operations as well as policy concerns.
- Most suggestions centre around communications, as well as transparency, along with more specialized engagement methods.

*“I think that **greater transparency** particularly around the **recommendations** of government and **willingness to incorporate.**”*

*“More active **notification** of **opportunities to engage** over and about the IESO role and market”*

*“To **listen** and **act on** the generators **input.** The **transparency could improve a lot.**”*

- Relationship with IESO centres around conservation and operational concerns with some policy input.
- Most feedback relates largely to transparency, responsiveness, and customer service.

*“A **better understanding what our customer needs**, for example some of the changes that are on going, and more interaction.”*

*“More **information** about **how stakeholdering and engagement is informing** their **decision making** process”*

*“Each **key contact has been changing** and when we get someone good then they move into the new role. I **want to see some stability in that role**”*

- Primarily concerned with transparency, communication and interaction with stakeholders.
- This group also wants more open and responsive interactions with the IESO.

*“They need to **start their engagement with the customers sooner.** In my experience they **already had information and a plan** of where they wanted out of the engagement as opposed to asking for actual opinions..”*

*“Just being more **transparent with information** and being more **proactive in soliciting information** with stakeholders.”*

*“**More of what they are doing now** more events, specific working groups and more energy manager events.”*

- Focus areas with the IESO for this group are largely operational, with IT concerns.
- Risk factors concerning this group largely centre around price and operational reliability.

*“The **timing of the decisions** that the IESO makes and the **way they communicate** with the information.”*

*“**Lack of transparency, lack of governance** and lack of **competition.**”*

*“**Compliance** with the market rules and **outage planning.**”*

- Most focused on conservation and the market – including price, demand management, renewables and policy development.
- Some feel stakeholder input is undervalued and transparency and clear communication is lacking, particularly regarding policy.

*“To **show ways** in which **stakeholders feedback** has **helped** in shaping the **electricity system.**”*

*“**Longer decision making** processes and more opportunities for **consultation.**”*

*“They have to open up the **cost** and give **honest accounting.** They have to teach people how to evaluate their own energy sources, to **keep it competitive.**”*



# Detailed Findings





# IESO's Overall Satisfaction

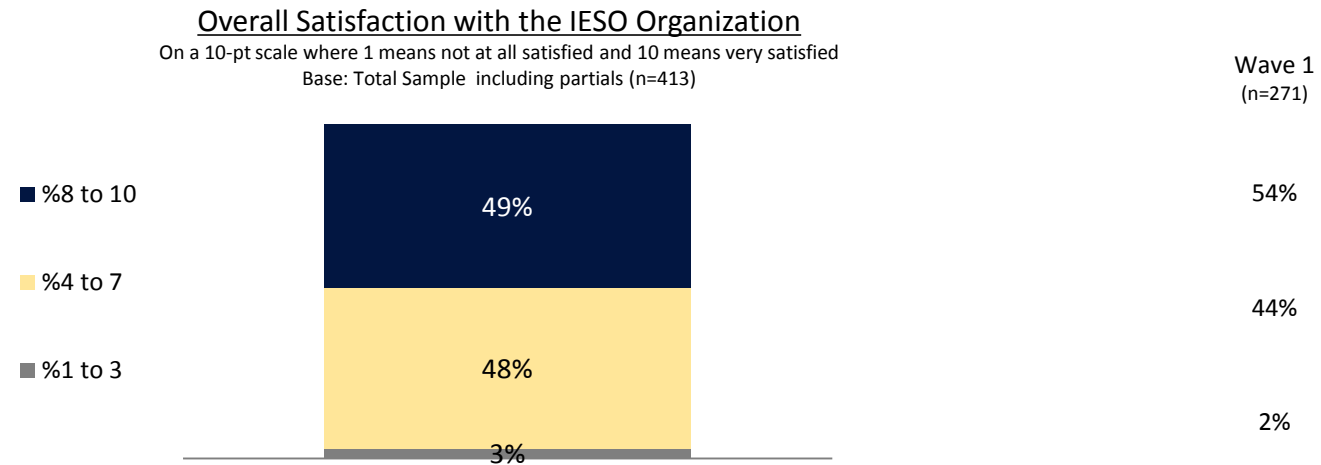
How satisfied are stakeholders with IESO's performance overall?



# Satisfaction Score

(Dependent Variables)

- Satisfaction with the IESO remains stable over the last year, with just under half of stakeholders rating it between 8-10. There was some decline among generators and distributors which was offset by a slight increase among importers/exporters.



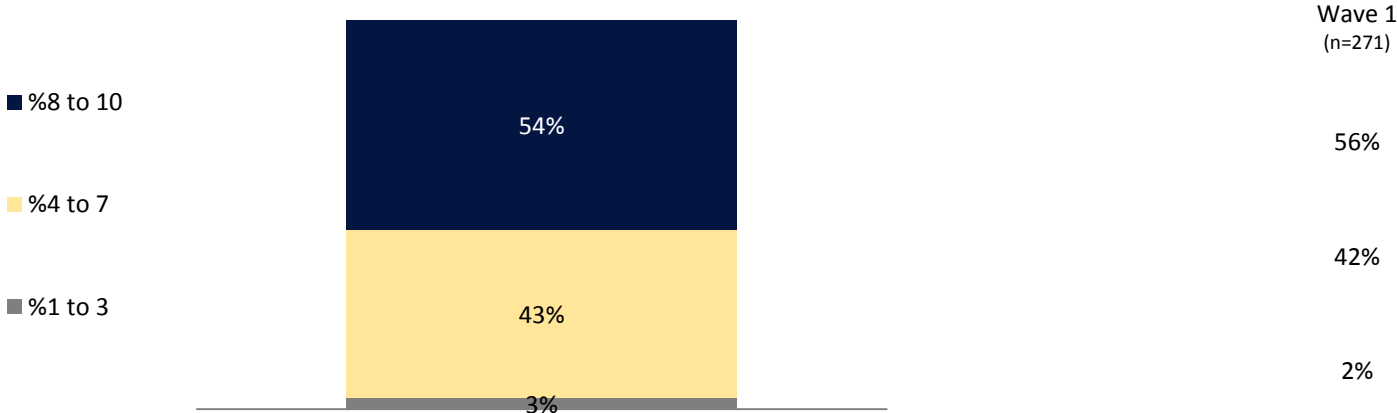
	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
<i>Base n=</i>	106	62	91	95	20*	14*	46	37*	149	63
%8 to 10	43	48	54	61	62	50	52	54	47	51

2a. Based on your experience, how satisfied are you with the IESO's overall performance? Please use a 10-point scale where 1 means you are not at all satisfied and 10 means you are very satisfied with the IESO.

# Organization Favourability

- Just over half of stakeholders hold a very favourable opinion of the IESO, on par with 2016 results. Of all stakeholder groups, Generators show the lowest satisfaction levels.

**Overall Favourability of IESO Organization**  
 On a 10-pt scale where 1 means not at all favourable and 10 means very favourable  
 Base: Total Sample including partials (n=413)



	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
Base n=	106	62	91	95	20*	14*	46	37*	149	63
%8 to 10	46	53	59	60	67	50	61	54	52	56

\*NOTE: Extremely small sample size, should be interpreted as directional only.

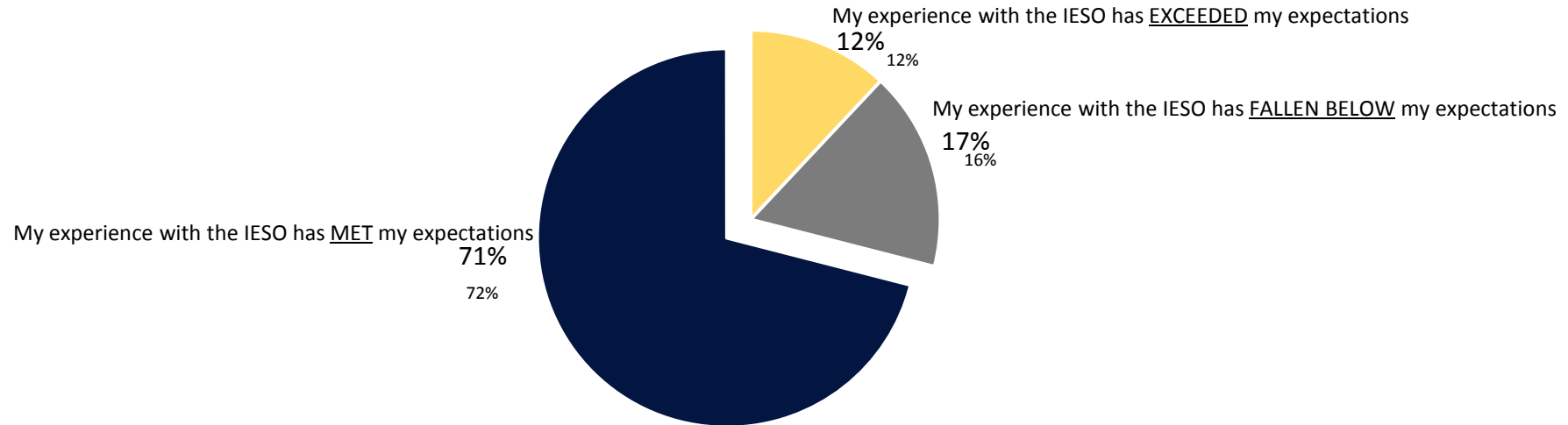
1. To begin, how favourable is your opinion of the IESO's as an organization? Please use a 10-point scale where 1 means not at all favourable and 10 means very favourable. **CHECK 1 ONLY**

# Stakeholder Expectations: IESO Overall

- For the majority of stakeholders, experiences with the IESO have met expectations.
  - Generators report the lowest incidence of the IESO exceeding expectations.

Incidence of IESO Exceeding/Meeting & Falling Short of Stakeholder Expectations

Base: Total Sample (n=401)



	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
Base n=	103	62	91	95	20*	14*	43	37*	144	63
% EXCEEDED Expectations	9	5	11	11	25	29	16	14	11	17
% MET Expectations	76	77	76	74	50	50	67	64	69	73
% FALLEN BELOW Expectations	16	18	13	15	25	21	16	22	20↑	10

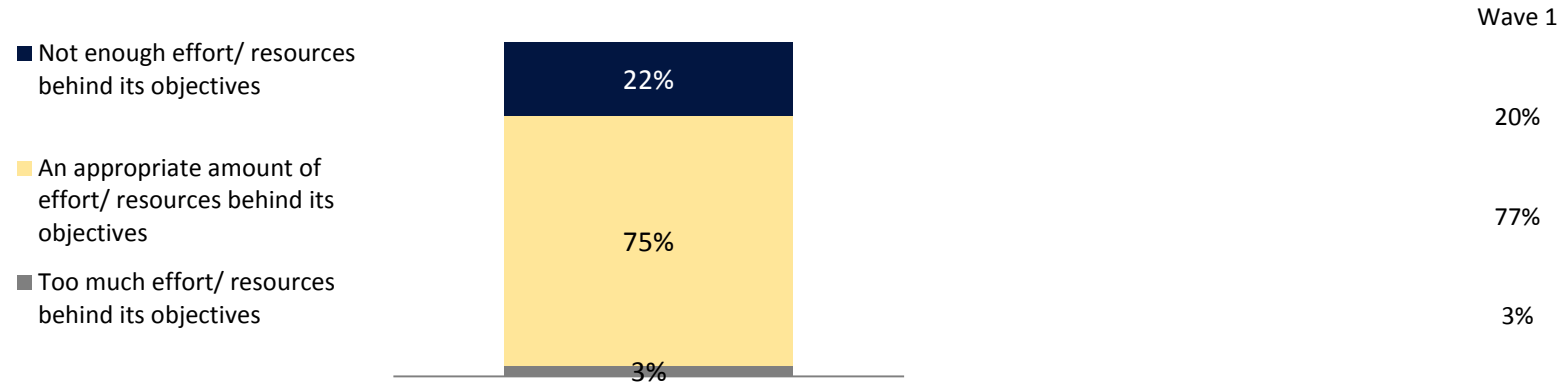
\*NOTE: Extremely small sample size, should be interpreted as directional only.

2b. Has your experience with the IESO exceeded, met or fallen below your expectations? CHECK 1 ONLY

# Public Value Composite Score

- Three quarters of stakeholders continue to believe the IESO is putting an appropriate amount of effort behind its objectives.

**Public Value Composite Score**  
 Based on a composite score of all public value objectives shown to stakeholders  
 Base: Total Sample (n=401)



%8 to 10	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
<i>Base n=</i>	103	62	91	95	20*	14*	43	37*	144	63
Not enough effort/ resources behind its objectives	23	18	15	16	24	22	27	25	24	22
An appropriate amount of effort/ resources behind its objectives	74	78	81	80	75	74	69	73	74	75
Too much effort/ resources behind its objectives	3	4	3	4	1	4	4	2	2	3

3b. Please identify how you feel about the IESO's current effort and resource allocation against each of the following objectives. READ LIST, CHECK ONE PER STATEMENT

# Stakeholder Commentary

- To compare the conversation among stakeholders between 2016 & 2017, we created word clouds which show the most frequently used phrases, with the size of the word/phrase reflective of frequency.
- While there is an overall improvement in attitudes towards engagement, some concerns come through across all stakeholder groups. Communication as well as listening to input from stakeholders remain pain points, with all groups commenting on the IESO's willingness to hear feedback without actioning it or providing the reasoning behind their decision making processes.

**2016**

Seeking input/listen to stakeholders  
Good engagement process

Other negative miscellaneous mentions

Doing good job

Decisions had been pre made

Should be focusing on reducing price

Good Communication

Seeking input from customers/stakeholders

Happy/satisfied with them

More customer/ stakeholder engagements

Providing timely service/information

Effective communication

Poor/inconsistent communication

Lack of information

Room for improvement

Prompt /quick/timely response

Leading a culture of conservation

Provide lots of information

Operating the system transparently

Don't act on stakeholders feedback

**2017**

Easy to find information

Don't act on stakeholders feedback

Leading a culture of conservation

Good engagement process

Difficult to navigate

Difficult to find information

Good/like it

Looks good

Better than the previous one

Easy to use

Difficult to use

Satisfied with them

Provide lots of information

Operating and shaping the electricity system and market in a transparent manner

Room for improvement

Not familiar

Took long time to response/implement actions

Seeking input/listen to stakeholders

Took some time to get used to



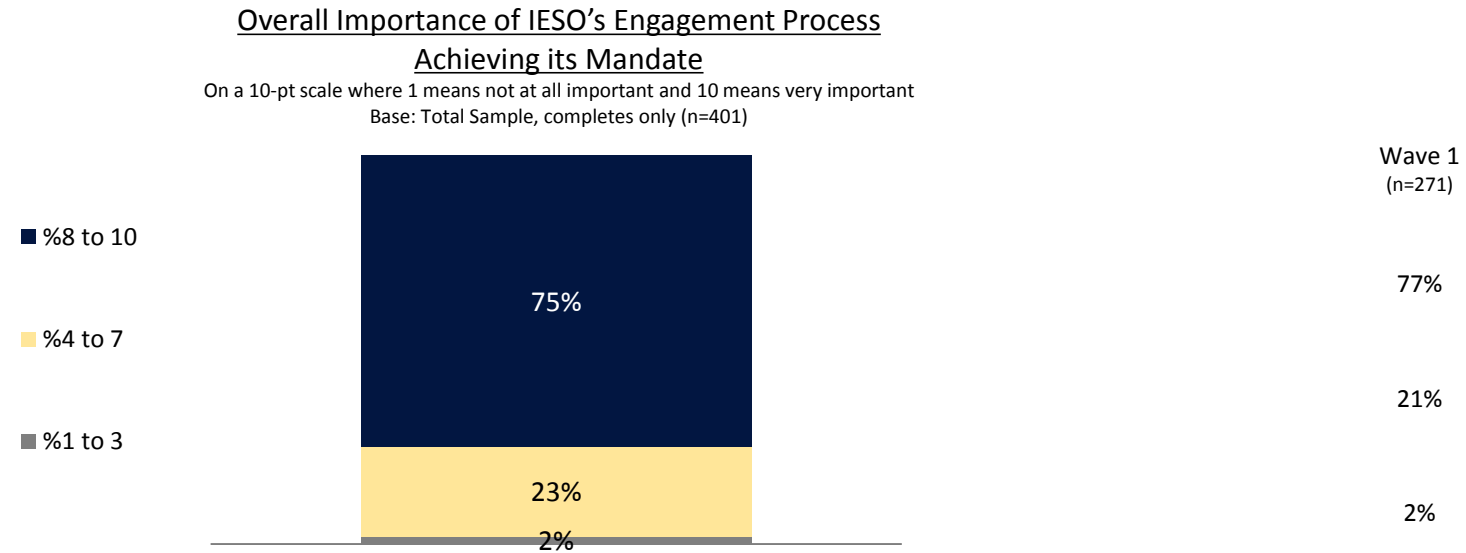


# IESO's Engagement Process

How relevant is this initiative according to stakeholder business/sector needs? And, how satisfied are stakeholders with the process overall?

# Importance of the Initiative's Success

- Three quarters believe the success of the IESO's Engagement Process is very important for achieving its mandate, a number that shows a significant increase of 15% among the Importer/Exporter group this year.



	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
<i>Base n=</i>	103	62	91	95	20*	14*	43	37*	144	63
%8 to 10	74	82	69	74	75 ↑	50	81	78	78	83

\*NOTE: Extremely small sample size, should be interpreted as directional only.

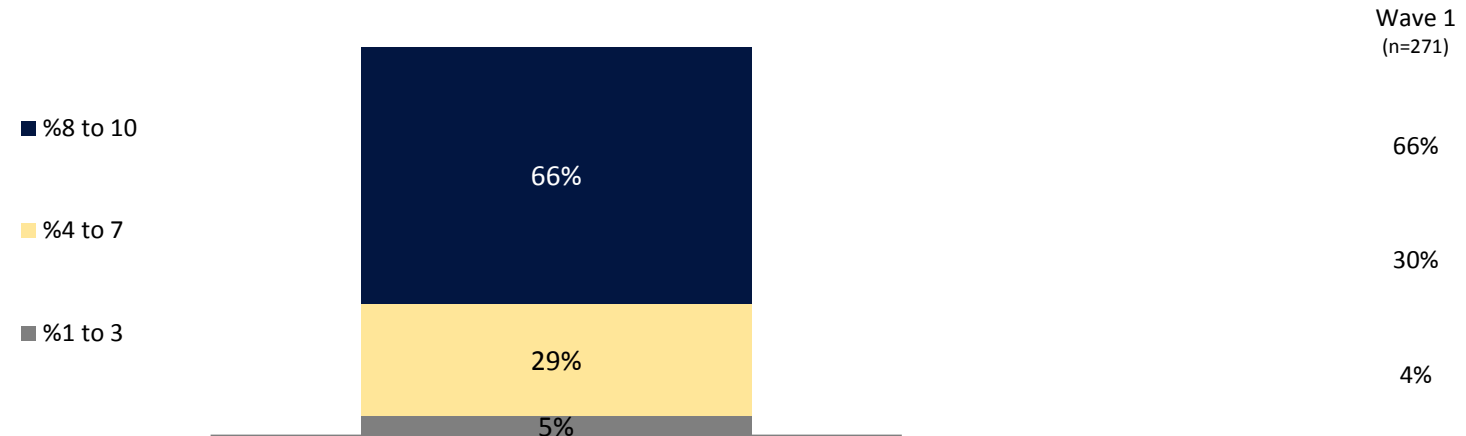
5a. How important is the engagement process to the IESO achieving its overall mandate/objectives? Please provide a rating on a 10-point scale where 1 means not at all important and 10 means very important. CHECK ONE ONLY

# Initiative's Relevance

- Over two thirds of participants believe the current engagement process is relevant to their business/sector needs, on par with last year.
  - Distributors are most supportive, whilst Other Stakeholders are least supportive of the process.
  - With a 16% increase in approval ratings from 2016, large consumers are significantly more likely to find the engagement process relevant to their business sector/needs.

## Overall Relevance of the IESO's Engagement Process To Business Sector/Needs

On a 10-pt scale where 1 means not at all relevant and 10 means very relevant  
Base: Total Sample (n=401)



	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
Base n=	103	62	91	95	20*	14*	43	37*	144	63
%8 to 10	67	71	77	72	60	50	70↑	54	58	64

\*NOTE: Extremely small sample size, should be interpreted as directional only.

7. And, as a participant, how relevant has the IESO's engagement process been to your business or sector needs? Please consider all of your interactions with the IESO and the various communication channels, programs and initiatives you have engaged with in your answer. Please provide a rating on a 10-point scale where 1 means their processes have not been relevant at all and 10 means they are very relevant. **CHECK ONE ONLY**

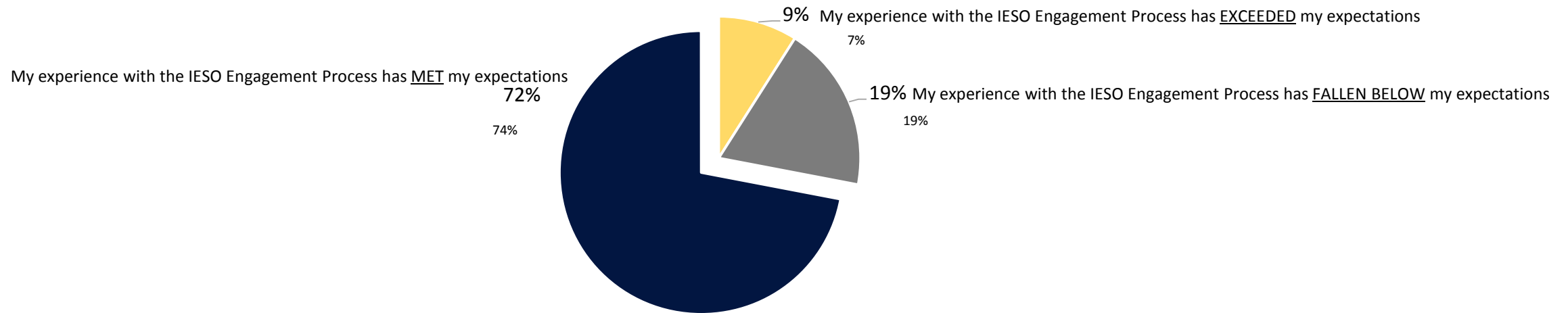


# Stakeholder Expectations: Engagement Process

- The number of stakeholders reporting an experience which exceeded expectations has increased slightly, with a significant percentage of distributors stating the process met their expectations.
- Large consumers show a 9% increase in 'exceeded expectations' over the previous year.

## Incidence of IESO Exceeding/Meeting & Falling Short of Stakeholder Expectations Based on Their Experience with the Engagement Process

Base: Total Sample (n=401)



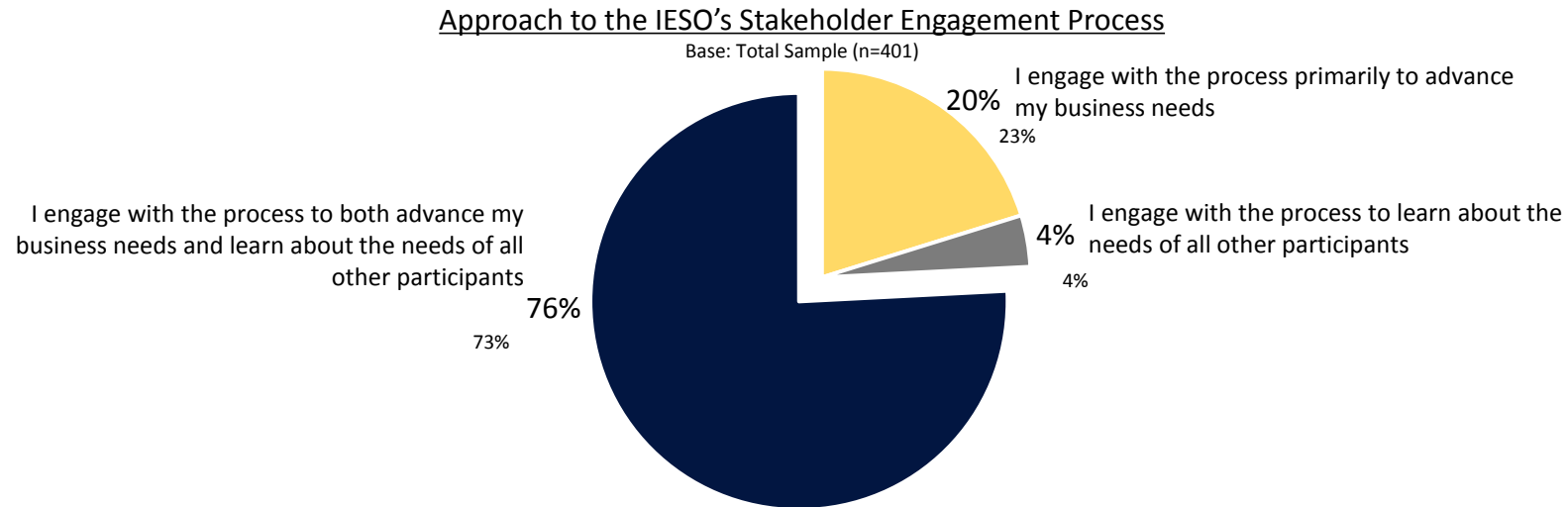
	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
<i>Base n=</i>	103	62	91	95	20*	14*	43	37*	144	63
% EXCEEDED Expectations	6	8	7	7	5	-	14 ↑	3	11	11
% MET Expectations	72	73	80	78	75	79	63	70	69	71
% FALLEN BELOW Expectations	22	19	13	15	20	21	23	27	19	18

\*NOTE: Extremely small sample size, should be interpreted as directional only.

11. Which of the following statements best reflects your experience with the IESO's engagement process overall? CHECK ONE ONLY

# Approach to Engagement

- This continues to be driven largely by stakeholders' needs, with 96% engaging with the IESO to advance their business needs.
- Large Consumers are most likely to engage with the process for their own needs, and while Other Stakeholders are less likely to do so for this reason, it is a higher proportion than in 2016.



	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
<i>Base n=</i>	103	62	91	95	20*	14*	43	37*	144	63
Engage with the process to BOTH advance my needs and learn about the needs of others	70	69	79	74	75	64	67	54	81 ↓	89
Engage with the process primarily to advance my business needs	26	29	17	22	20	29	(30)	41	[15] ↑	6
Engage with the process to learn about the needs of all others	4	2	4	4	5	7	2	5	4	5

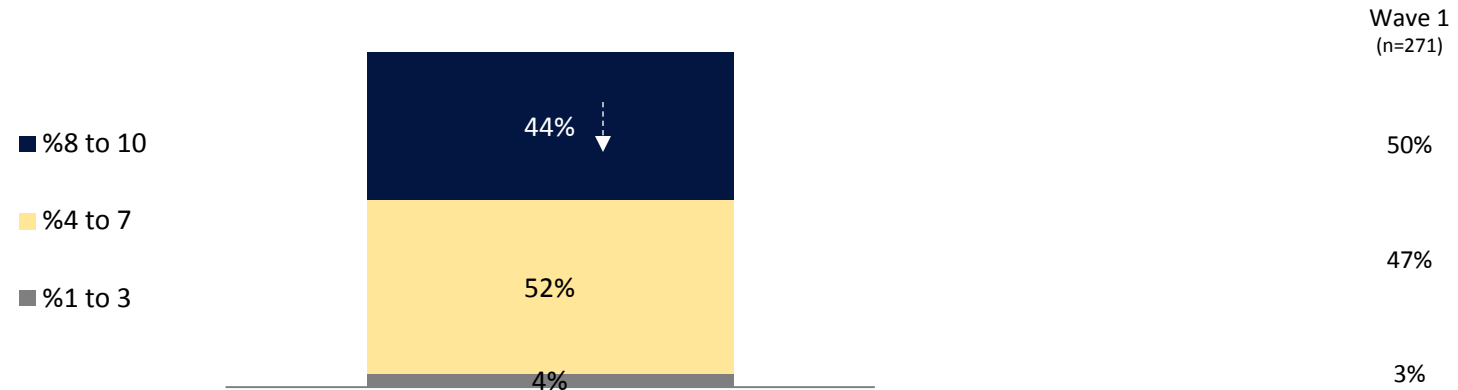
\*NOTE: Extremely small sample size, should be interpreted as directional only.

5b. Which of the following best reflects your approach to the IESO's engagement process?

# Satisfaction with Engagement Process

- Satisfaction with IESO's engagement process shows a decline this year, driven in large part by Generators, who report a 19% decrease in satisfaction this year.
- Distributors are more satisfied with the process than in 2016, with a 5% increase over last year.

**Overall Satisfaction with IESO's Engagement Process**  
 On a 10-pt scale where 1 means not at all satisfied and 10 means very satisfied  
 Base: Total Sample (n=401)



	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
<i>Base n=</i>	103	62	91	95	20*	14*	43	37*	144	63
%8 to 10	36↓	55	57	52	45	36	44	43	41	49
%4 to 7	57↑	44	42	44	50	64	49	51	56↑	46
%1 to 3	7↑	2	1↓	4	5	-	7	5	4	5

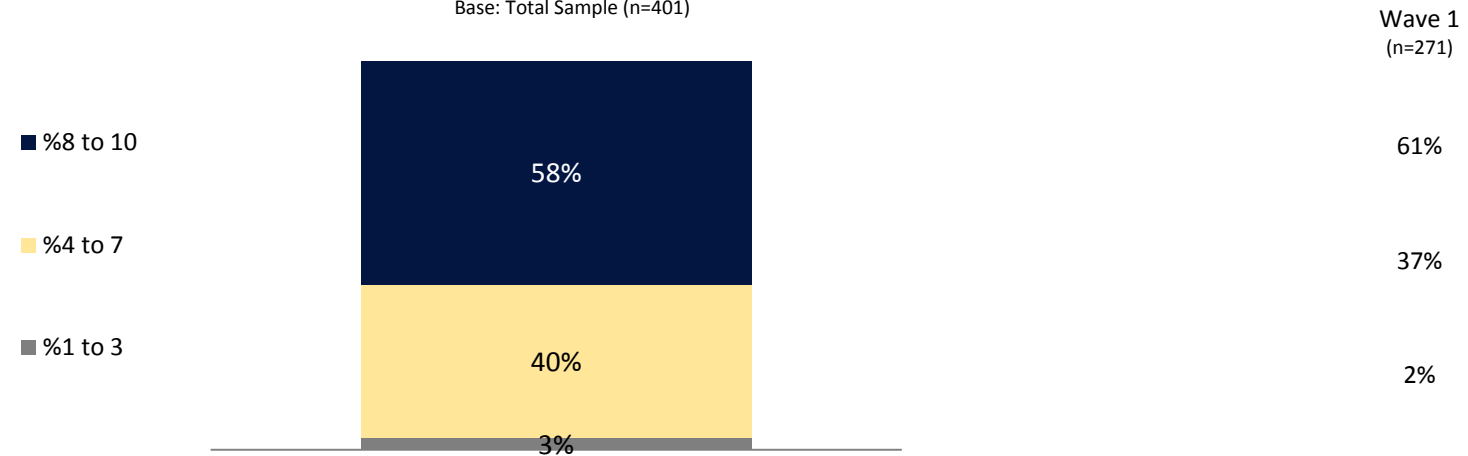
6a. As a participant, how satisfied are you with the IESO's engagement process?

# Perceived Commitment

- Nearly two thirds of stakeholders believe the IESO staff interactions they have experienced very much reflect an organization committed to the Engagement Process. Findings remain consistent with last year.
- Other Stakeholders show a 10% decline in satisfaction with the IESO’s perceived commitment to the process compared to last year.

## Level of Perceived Commitment to IESO Engagement Process Based on Interactions with IESO Staff

On a 10-pt scale where 1 means the IESO’s commitment is not at all reflected and 10 means the IESO’s commitment is very much reflected  
Base: Total Sample (n=401)



	Generators		Distributors		Importers/ Exporters		Large Consumers		Other Interested Stakeholders	
	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1
Base n=	103	62	91	95	20*	14*	43	37*	144	63
%8 to 10	58	58	60	63	55	50	61	60	55↓	65

\*NOTE: Extremely small sample size, should be interpreted as directional only.

10. How well is the IESO’s commitment to the engagement process reflected in the staff interactions you have had? Please provide a rating on a 10-point where 1 means this commitment has not at all been reflected and 10 means the commitment has been reflected very well.

# Perceived Impact of Process

- The vast majority of stakeholders agree to some degree that the IESO's Engagement Process has enabled effective change both for individual participants and the electricity sector overall.
- Generators are less likely to 'strongly agree' that the Engagement Process leads to effective change for the sector overall.
- Importers and Other Stakeholders are more likely to 'somewhat agree' that the process creates effective change for the sector overall, and less likely to 'somewhat agree' that it creates effective change for participants.

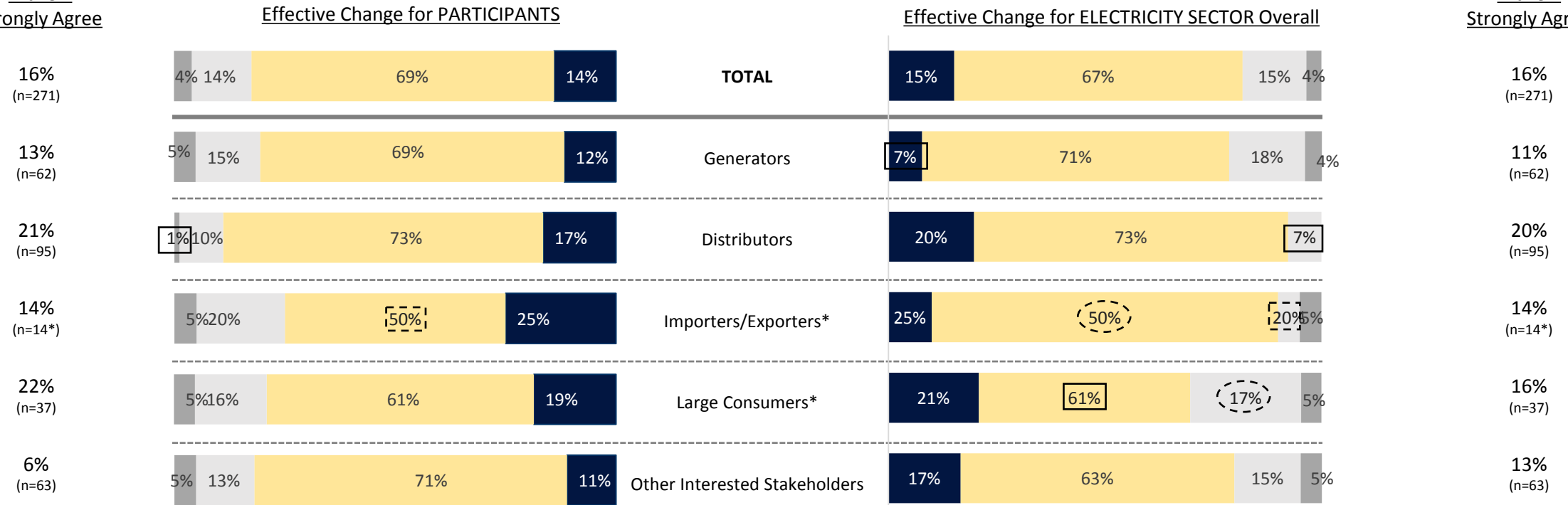
## Belief that IESO's Engagement Process Led to ...

% Selecting Each Agreement Level  
Base: Total Sample (n=401)

■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree

Wave 1  
Strongly Agree

Wave 1  
Strongly Agree

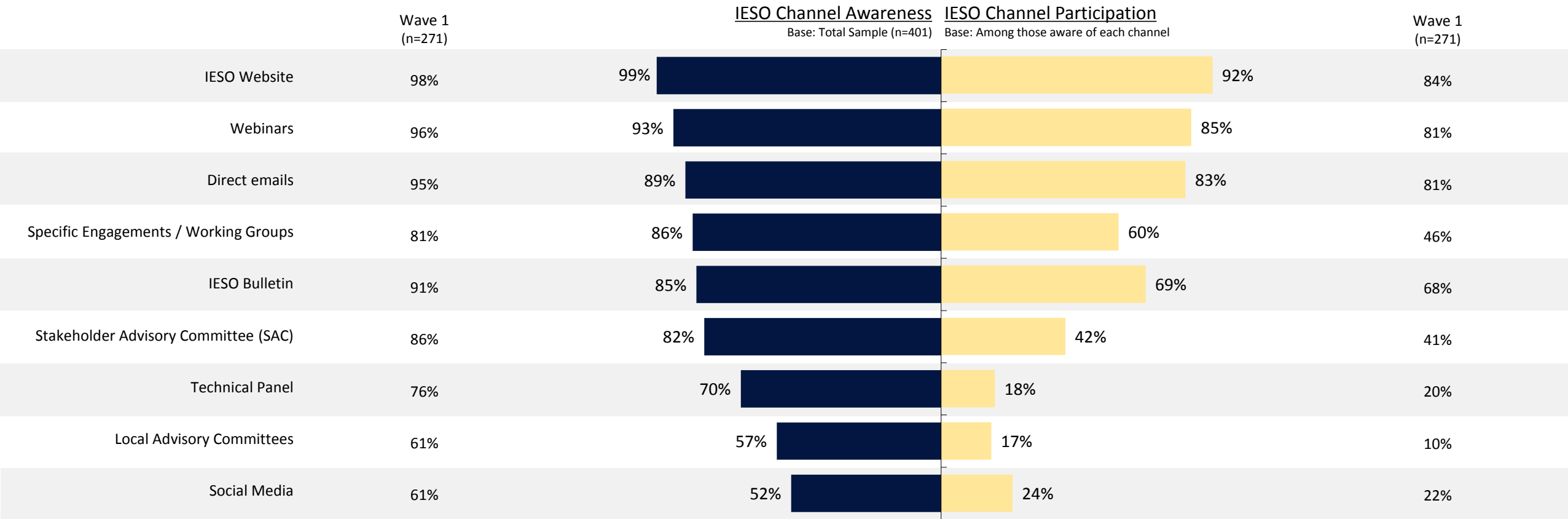


\*NOTE: Extremely small sample size, should be interpreted as directional only.

14. To what extent do you agree or disagree with the following statements? CHECK ONE ONLY PER STATEMENT

# Channel Engagement

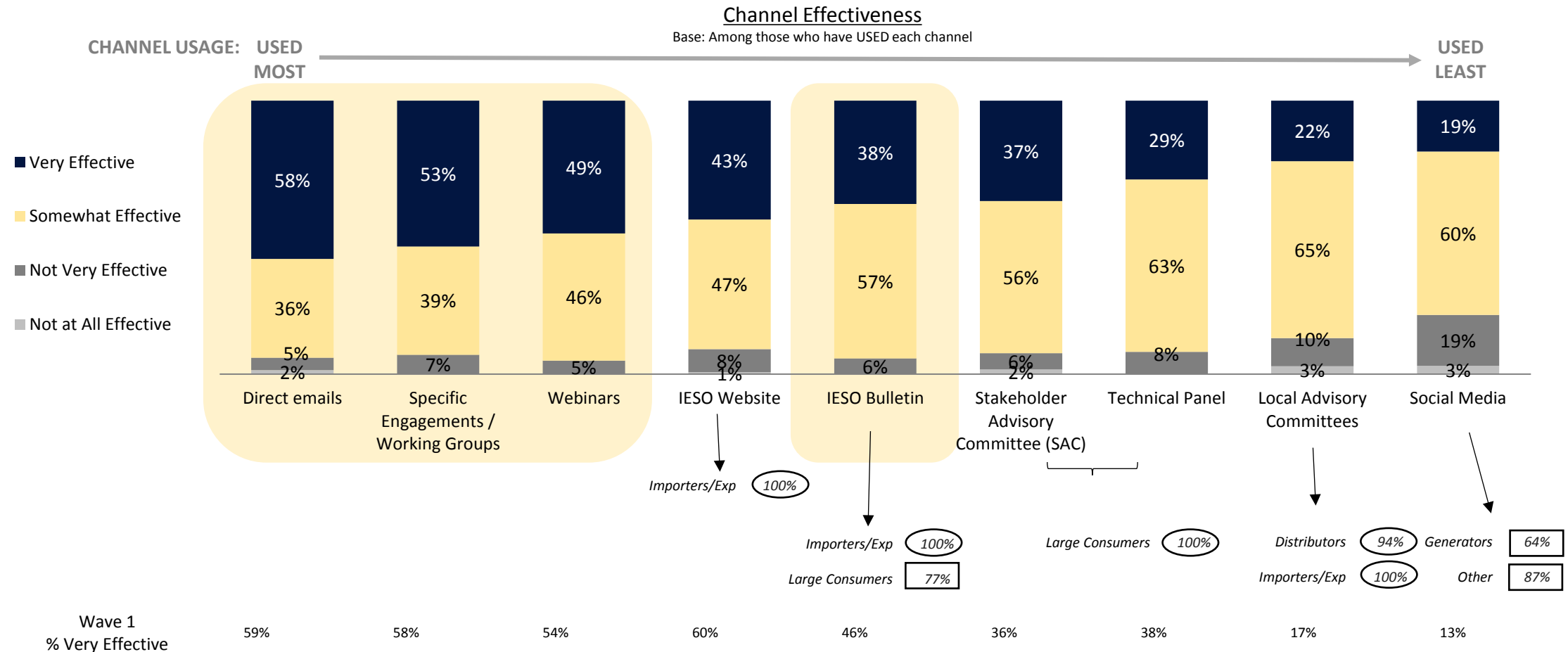
- Channel awareness and participation remain on par with last year. The IESO website, Working Groups and LACs show the largest increase in participation since 2016. This evidences greater engagement among those aware of the IESO's channels, showing that the channels need promotion, but are otherwise on track to foster engagement.



4a. I'm going to read you a list of possible channels and programs that the IESO uses to enable engagement with stakeholders like yourself. Please indicate which of the following channels/programs you have heard of before today. READ LIST, CHECK ALL THAT APPLY  
 4b. FOR EACH CHANNEL MENTIONED AT 4a: Which of these channels/programs have you used and/or participated in? READ LIST, CHECK ALL THAT APPLY

# Channel Effectiveness

- Most channels are perceived as being at least somewhat effective by the majority of stakeholders sampled.
  - Direct emails as well as more involved activities such as Specific Engagements/Working Groups and Webinars are considered more effective engagement mechanisms.



4c. FOR EACH CHANNEL USED AT 4b ASK: How effective are each of the following channels/programs in enabling you to engage with the IESO in a relevant manner? Please provide a rating on the following scale - 'very', 'somewhat', 'not very' or 'not at all' effective for each channel/program listed. READ LIST, CHECK ALL THAT APPLY