

# Draft Engagement Strategy – Presentation to Stakeholder Advisory Committee

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# Introduction

- The traditional stakeholder base in Ontario's electricity sector is changing as the sector evolves to a more distributed system with increasing opportunities for new participants, including consumers
- As such, the IESO's engagement efforts need to reach beyond its traditional stakeholder base in ways that meet the needs of those stakeholders and communities
- As this trend continues, we must ensure our engagements are inclusive, transparent and have adequate representation
- In doing so, the IESO can build capability and knowledge on electricity matters, enhancing the ability of others to contribute to needed electricity sector decisions through a transparent and consistent process

# Introduction cont'd

- Different perspectives that are brought forward will inform the IESO's decision-making, while our established set of principles will continue to guide engagement in a consistent and transparent manner
- The following presentation seeks SAC input that will be used to help develop the IESO's proposed approach to an engagement strategy that addresses the above needs

# Input being sought from SAC

- Are the identified stakeholder groups the right groups to focus on?
- Do we need to, and if so, how can we increase the participation of low volume consumers?
- Are new methods required to engage the IESO's traditional stakeholders?
- How do we build on our existing efforts with Indigenous communities?
- How can the IESO build capability of municipalities so that they can more effectively contribute to addressing their own energy needs?
- In addition to the training the IESO offers, are there other approaches that the IESO can use to increase the capability of new market participants to participate in the market?
- Will our proposed efforts to improve our existing processes address stakeholder feedback?

# What have we heard

- Two studies were used to inform the proposed Strategy:
  - 2017 annual stakeholder satisfaction and Local Advisory Committee surveys yielded 400+ (more with LAC) responses from across stakeholder groups
  - 2018 engagement review focus groups with six groups of active participants including generators, distributors, consumers, energy services

# What we have heard

- While the IESO engagement process is generally viewed as performing well, several opportunities for improvement were identified in the research:
  - reducing stakeholder fatigue
  - increasing transparency of decision-making
  - increasing breadth of participation
  - having greater commitment to the engagement process by IESO staff
  - setting clearer expectations about opportunities for feedback

# What we have heard

- In search of a better outcome and more efficient use of time during engagements, **participants want to work with the IESO to** hone in on opportunities for collaboration versus information provision
- In terms of **inclusiveness**, the IESO might consider a method of reaching out to smaller loads and the mass market to complete its cross section of the market

# New audiences

- The IESO's stakeholder base is changing as the industry evolves, in addition to traditional stakeholders (e.g. Generators, Distributors, Energy Services, Large Consumers), we plan to focus our efforts on the following groups:
  - First Nation and Métis communities
  - Municipal officials and broader community representatives
  - New market participants
  - Low volume consumer representatives



# First Nation and Métis Communities

- The IESO is committed to working with First Nations and Métis to enable them to participate more fully in Ontario's energy sector
- Ongoing relationship-building:
  - Increasing capacity to participate in IESO initiatives
  - Creating forums to share information amongst communities
- Tailored engagement practices:
  - Indigenous Community Energy Symposium
  - Regional Forums
  - FNMR Newsletter

# Municipal officials and broader community representatives

- The IESO will seek to broaden and enhance relationships across Ontario in order to inform and build capacity to identify and address the energy needs on both a regional and local basis:
  - Increase transparency and broaden opportunities for engagement in regional planning efforts
  - Build education capacity in electricity matters to equip municipal and community representatives to provide local input on electricity planning
  - Establish a method for continuous dialogue with municipalities
- In doing so the IESO will work with communities to address the effectiveness of existing forums such as the Local Advisory Committees, create new opportunities for local engagement and establish new engagement forums that help address needs from a regional perspective

# New Market Participants

- As a result of initiatives including the Market Renewal Program, technology advancements, policy initiatives and LTEP Implementation Plan, new participants will be entering the marketplace
- As such, there is a need to ensure that these new market participants are able to both effectively participate in and contribute to the continued evolution of Ontario's electricity sector
- The IESO is exploring a variety of training methods to provide flexibility for participants beyond traditional instructor-led training (e.g. web-based)

# Effectively Manage the Process

Actions	Deliverables	Success Measures
Enhance the toolbox of tactics and techniques for engagement	<ul style="list-style-type: none"> <li>Additional approaches are made available for use by Q4 2018 (e.g. web-based)</li> </ul>	<ul style="list-style-type: none"> <li>Approaches and tactics are tailored to the desired level of participation and outcome and audience</li> </ul>
Continue with implementation of an engagement training program to build expertise in the discipline of engagement within the team	<ul style="list-style-type: none"> <li>Training strategy fully implemented in Q2 2018 leveraging the International Association for Public Participation (IAP2) Certificate</li> </ul>	<ul style="list-style-type: none"> <li>Common terms, definitions and tools used by staff (e.g. approach to developing engagement plans)</li> </ul>
Implement new approaches to address barriers to participation	<ul style="list-style-type: none"> <li>Review research conducted and identify barriers to target</li> </ul>	<ul style="list-style-type: none"> <li>Diversity in participation realized</li> <li>Fatigue minimized</li> </ul>
Build capacity with stakeholders and communities to enable effective participation	<ul style="list-style-type: none"> <li>Provide background educational material for each engagement</li> <li>Annual delivery of Summit and Forums</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholders express increased satisfaction with their preparation</li> <li>Increase in informed responses to engagements</li> </ul>

# Respond to Stakeholders & Communities

Actions	Deliverables	Success Measures
Standardize the format for responses to feedback dependant on the approach	<ul style="list-style-type: none"> <li>• Templates developed for responding to feedback by Q3 2018</li> </ul>	<ul style="list-style-type: none"> <li>• Consistent experience for stakeholders and communities</li> </ul>
Implement standard timeframes for responses to feedback	<ul style="list-style-type: none"> <li>• Communicate when a response to feedback will be received</li> </ul>	<ul style="list-style-type: none"> <li>• Stakeholders and communities will know when they will receive a response</li> </ul>
Include rationale in all responses to feedback	<ul style="list-style-type: none"> <li>• The question “why” can be answered in all responses to feedback</li> </ul>	<ul style="list-style-type: none"> <li>• Stakeholders and communities understand how their feedback was considered</li> </ul>
Create summary reports for all engagements	<ul style="list-style-type: none"> <li>• Template developed for summary report by Q3 2018</li> </ul>	<ul style="list-style-type: none"> <li>• Record exists of each engagement and its outcome</li> </ul>

# Commit to Evaluation & Continuous Improvement

Actions	Deliverables	Success Measures
Evaluate all individual engagement activities to understand what worked well and what can be improved	<ul style="list-style-type: none"> <li>All individual engagement activities are evaluated beginning in Q4 2018</li> </ul>	<ul style="list-style-type: none"> <li>Evaluations demonstrate adherence to the principles and process and where this is not noted, action is taken</li> </ul>
Continue to conduct an annual engagement survey with a baseline to measure improvement	<ul style="list-style-type: none"> <li>Revise and administer a survey annually in the fall</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholders and communities will have a regular opportunity to provide feedback on their overall experience throughout the year</li> <li>Corporate Performance Metrics are met</li> </ul>
Report back to stakeholders and communities on results of evaluations	<ul style="list-style-type: none"> <li>Evaluation reports posted for public</li> </ul>	<ul style="list-style-type: none"> <li>Increased overall satisfaction with transparency of engagement efforts</li> </ul>
Refine toolbox and tactics over time based on feedback and innovation	<ul style="list-style-type: none"> <li>Toolbox is updated and necessary training completed</li> </ul>	<ul style="list-style-type: none"> <li>Tools are introduced and/or modified as necessary</li> </ul>

# Questions for Consideration

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