2019 California ISO Stakeholder Process Survey Results

The California ISO conducted a Stakeholder Process Survey in August 2019 in which we received valuable customer input and feedback that will help us to continually improve our stakeholder process. We appreciate the time and effort of stakeholders who participated in the survey. Approximately 500 stakeholders were surveyed with 20% of the recipients responding. We were very pleased with the positive feedback on our stakeholder process and appreciate the constructive comments on how we can improve.

Below are the results from each survey question and a response to comments received for each question.

Q1 The ISO notifies stakeholders in advance of meetings and deadlines to adequately plan for participation.

Stakeholders expressed that it is important for the ISO to give as much advance notice as possible of meetings and deadlines for planning purposes and to minimize late notices or last minute changes to meeting dates. The ISO’s general practice is to communicate in-person meeting dates three weeks in advance via a market notice and one week in advance for webinar meetings. A tentative meeting schedule which provides further advance notice can be found in our Stakeholder Initiatives Milestones document, or our soon to be launched stakeholder process landing page. Despite circumstances that occasionally arise which require us to deviate from this practice, we will make every effort possible to announce meeting dates in advance, minimize late changes and avoid overlapping meeting conflicts.
Stakeholders indicated advance posting of initiative documents and other meeting materials allow them to better prepare for meetings and contribute to a robust discussion with positions that have been vetted within their own organizations beforehand. The ISO’s general practice is to post papers seven calendar days in advance of a meeting and presentations two business days prior to a meeting. At times, we post papers further in advance in order to provide stakeholders more time to review the material. However, there are sometimes circumstances which cause us to miss this general practice. We have implemented internal processes and metrics to help bring awareness to the importance of posting documents on time and anticipate greater due diligence in meeting our guidelines.
Generally, we received positive feedback in this area and were pleased with stakeholder comments. Stakeholders have asked for more context on the purpose of the initiative, the intended outcome that is hoped to be achieved and what is being asked of them in terms of commentary. Based on this feedback, we will strive to seek ways to ensure we provide more context as to what each initiative is intended to accomplish and what exactly we are seeking for stakeholder feedback and engagement. We are also committed to the development of our staff’s writing skills through composition training to provide increased clarity in our published papers.
Another general theme is that stakeholders appreciate when other stakeholders have the opportunity to present their positions. There are a few comments that indicate stakeholders are not afforded sufficient time to discuss their ideas equally across different perspectives. Through improved facilitation and time management, the ISO will be more cognizant in allowing equal time to discuss ideas from stakeholders.
Stakeholders generally feel the ISOs facilities provide an effective meeting venue. If there are any technical issues, they are addressed promptly, whether it’s with the on-site equipment or with webinar software. We received very positive feedback regarding recording of meetings which provide the ability to replay important discussions.
This is an area in which stakeholders expressed the ISO has improved, but can do better. The ISO continues to work at standardizing how stakeholder feedback is incorporated into the next iteration of an initiative proposal. The general practice is to highlight common themes of the comments we have received, how we are addressing those comments, and the reason for incorporating or not incorporating those comments into a proposal. We are preparing the roll out of a new comments tool that will further improve our process for managing stakeholder comments.
Q7 The ISO’s online resources, including initiative webpages and comments submission form, allow stakeholders to effectively engage in the stakeholder process.

Stakeholders showed general appreciation for our comments template and find our website user-friendly. The ISO will be making further improvements to its stakeholder initiative web pages so stakeholders can easily track the status of an initiative and more easily submit comments via an online tool we anticipate implementing in early 2020.
The majority of the survey responders indicate overall satisfaction with the ISO's Stakeholder Process and agree that it is an effective vehicle for providing input into the ISO's market and infrastructure policy development. The ISO is pleased with the positive response, however, one area where improvements can be made is within our Annual Policy Roadmap Process. The ISO worked with stakeholders in 2017 to improve this process, but is committed to continuous improvement and will seek opportunities to streamline the process as we recognize its importance to stakeholders for planning purposes.

Overall, the ISO is pleased with the response rate of the survey and appreciates the constructive feedback from stakeholders.

We would like to thank those who took the time to take our survey and provide feedback, and to all stakeholders who actively engage in our Stakeholder Process as it is essential to the success of new policy initiatives.