



Stakeholder Comments Tool for Stakeholder Initiatives Update & Demo

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Stakeholder comments process

- For every stakeholder initiative the ISO receives comments
- The comments process is valuable for stakeholders and for the ISO in shaping and setting policy initiative direction
- A word doc template is provided to stakeholders to standardize and streamline the process
- Through a stakeholder process survey many provided positive feedback on the use of the template

Stakeholder comments process

- Stakeholders submit comments to the ISO via email
- Majority of stakeholders use the existing comments template
- All Stakeholder comments received are posted to the web
- We post approximately 700+ individual comment documents from stakeholders annually to the web

New web-based comments tool

- ISO has developed a new web-based tool for comments submission
- Evaluated various 3rd party tools
- Due to unique needs of stakeholders we modeled the new tool based on the existing word template
- Further streamlines and standardizes comment submission
- Replaces existing word document template with online version

New web based comments tool – key benefits

- Initial sign up process sets up stakeholder account and retains basic information
- Online template will be tailored for each initiative
- All templates will contain free form text boxes for stakeholders to comment on any aspect of initiative
- Tool has filtering capabilities for viewing comments by organization or question
- Improved security
- Documents can be uploaded through the submittal form
- Improved visibility into which initiatives are open for comments

Stakeholder engagement

- Majority of our stakeholders use the provided template today
- We received positive feedback about the use of the template in last year's survey
- We announced we would further improve the comments template by creating an online version this year
- The new tool has been promoted at stakeholder meetings since February to build awareness
- Stakeholder focus group participated in the testing of the tool
- Outreach to stakeholders soliciting their feedback on the use of the tool

Stakeholder feedback

Suggestion	ISO Response
Tool needs additional text formatting	Improved capability for text formatting provided; enhancements being evaluated
If a document is uploaded, will it be lost when grouped with the other comments?	No, the document is visible when filtered by organization. The document is not visible when filtered by question. We are working towards a resolution.
Having the ability to submit comments in a structure that may not fit the template	Every template will have a summary field at the beginning and two fields at the end for additional comments.
The font size for these entry boxes is small and will contribute to text errors in comments	We will increase the font size
Would like more time to vet the tool	We will roll out in a phased approach for ease of adoption
Ability to download specific comments	This is possible but implemented at a later date

Next steps & implementation timeline

- Launch date to be determined based on evaluation of feedback
- Market notice will announce launch and training webinar
- Phased roll out approach:
 - Complete functionality of new tool will be available
 - We will accept a completed template as an attachment in the tool for a period of time
- Continued feedback is welcomed
- Continued support of the tool available
- Contact us at ISOStakeholderAffairs@caiso.com

Demo of comments tool

Questions?