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

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