



California ISO  
Your Link to Power

# Briefing on 2008 Corporate Survey Overview

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# Targeted Surveys ask “*the right questions of the right people.*”

- 9 Focused Surveys: Combination of phone interviews and electronic

The Executive Perspective	Grid Ops	Stakeholder Engagement & Policy Resolution
Settlements & Billing	Market Ops	Trans. Planning, Maintenance & Gen Interconnect
GMC & Budget	Credit	Regulatory (FERC, CPUC, CEC)

- Cross Functional team – all divisions represented
- Scoring scale 1 to 6; 1-3 = “disagree”, 4-6 = “agree”
- 3 benchmark questions: general health of stakeholder satisfaction
- Strong participation rate: 52% overall (78% interviews, 31% electronic)
- Rich anecdotal responses

## 2008 results point to key areas for improvement.

- 168 questions among nine surveys
  - 47 increased by 3+%, 52 decreased by 3-%
  - Specific rankings shared with each officer and team
- 3 benchmark questions:

Statement	% agree	
	2008	2007
The service provided by the ISO is valuable to my firm	92% ▲	82%
The service quality delivered by the ISO has improved over the past year	79% ▼	83%
Generally, the service level delivered by the California ISO is better than other ISOs / RTOs	41% ▼	46%

## Headlines: MRTU dominated the surveys.

- ↓ Focus on MRTU caused service to drop in other areas.
- ↓ Some issues over ISO's representations of readiness.
  - *Early concerns: "The ISO has not accurately reflected our readiness to the Board."*
- ↑ MRTU training garnered praise.
  - *"MRTU training has been the most effective campaign the ISO has ever put together."*

## Headlines: Stakeholder process showed gains. More work to be done.

### ↑ Quality controls and centralized planning were acknowledged

- *“The stakeholder process has become more consistent. The ISO has done a better job in managing the process.”*
- *“Having an objective facilitator keeps the meetings on track.”*

### ↓ Need to improve comments management

- *“Our comments seem to fall into a black hole. The ISO never tells you if they got your comments or how they were used.”*
- *“The ISO needs to more accurately reflect our positions in Board documents.”*

# Headlines: Respondents caution against shifting priorities and recognized diverse customer views.

## ↓ Project prioritization and grid planning need attention

- *“The pressures of MRTU have short-circuited stakeholder processes on important issues.”*
- *“The ISO is unpredictable when it comes to transmission planning.”*

## ↑ ↓ Regulators noted challenges of diverse views

- *“The ISO sometimes bends over backwards to accommodate unworthy market participants.”*
- *“Due to fragmented jurisdictions, it is difficult for the ISO to implement state policy. I’ve seen an improvement in recent years.”*
- *“The ISO needs to be more cooperative with the munis.”*

# Headlines: Staff commitment saluted; ideas shared on Board operations.

- ↑ ↓ ISO staff acknowledged for dedication; also challenged to expand knowledge levels
- ↑ Confirmed: Executive outreach is core to strong relationships
  - *“The ISO has held high-level meetings with our senior management. This is greatly appreciated.”*
- ↓ ↑ Mixed views on Board deliberations
  - *“I appreciate being able to represent our position to the Board.”*
  - *“The Board does not have the technical knowledge for a full discussion.”*
  - *“The Board rubber-stamps ISO proposals.”*
  - *“By the time the issue has gotten to the Board, it’s a done deal. Cooked, wrapped and sealed.”*

Most important step: cross functional team converting survey data into action plans.

### 2009 improvement concepts

- Consult more effectively with stakeholders on policy initiatives.
- Expand the use of meeting quality guidelines.
- Collaborate better in regional transmission planning.
- Enable more stakeholder participation in credit policy development.
- Redouble customer service commitment.
- Provide more stakeholder-to-Board interaction.
  - Idea: One day forum