

IESO'S IMPLEMENTATION PLAN WORK PLAN

Presentation to the Ministry of Energy

September 19, 2017

Purpose

- To review the IESO's draft work plan for the development of its Implementation Plan

Context

- Work has begun on the development of a work plan to deliver the IESO's Implementation Plan to the Minister of Energy; the draft work plan includes engagement considerations and target dates, updates to the Ministry, and communications milestones
- The IESO has also begun identifying opportunities for coordination with the OEB on shared directive items
- The LTEP and the IESO Implementation Directive are expected to be issued the week of October 10; this will formally kick-off the development of the IESO's Implementation Plan
- The draft IESO Implementation Plan directive states the plan is due to the Minister of Energy for approval by December 31, 2017

Draft Implementation Plan Milestones

	Target Completion
Implementation Plan development work plan	September 20
ENERGY Update	September 19
Finalize Engagement Plan	Week of September 25
LTEP and IESO Implementation Directive issued	Week of October 10
Implementation Plan development engagement	October 19 – November 10
ENERGY Update	Week of November 13
Draft of Implementation Plan	December 8
ENERGY Update	Week of December 4
Finalize Implementation Plan	Week of December 11
Deliver Implementation Plan	By December 31

Engagement Objectives

- Work with Stakeholder Advisory Committee, targeted stakeholders, customers and communities to:
 - Ensure understanding of context of Directive Items, and Implementation Plan scope and objectives
 - Gather input to understand priority of items, and to receive advice on approaches and expectations for Implementation Plan outcomes
- Engagement will adhere to IESO engagement principles
 - Analyze opportunities for engagement
 - Ensure inclusive and adequate representation
 - Provide effective communication and information
 - Promote openness and transparency
 - Provide effective facilitation
 - Communicate outcomes
 - Measure satisfaction

Engagement Forums and Channels

- Stakeholder Advisory Committee and other existing IESO forums depending on Directive Item
- The IESO's Aboriginal Energy Working Group (AEWG), Chiefs of Ontario and Metis Nation of Ontario
- Create an engagement page on the public website to post material, stakeholder feedback and IESO response(s) to feedback
- Broadcast emails (e.g. Weekly Bulletin), targeted emails and social media
- Public Q&A document
- Meetings with stakeholders, key customers, targeted by Directive item and on request (e.g. similar to meetings held for OPO)
- Regional Forums and First Nation sessions

Target Engagement Dates

- **Week of October 10 (LTEP launch):** post IESO Implementation Directive to web-page and launch engagement web-page
- **October 19:** communicate initiative via Weekly Bulletin and targeted emails
- **October 20-November 10:** Implementation Plan development engagement (SAC, AEWG, and other targeted groups)
- **November 29:** public SAC meeting to discuss engagement results and key Implementation Plan elements
- Updates on the IESO's Implementation Plan process will also be provided at the Regional Forums, taking place in October through to December

Implementation Plan – Draft Content

- An **Introduction** that describes the purpose of the Implementation Plan within the broader LTEP legislative process
- An **Executive Summary** that puts the Implementation Plan actions in broader context
- For **each Directive Item**:
 - Context
 - Scope, Objectives
 - Engagement results – what we heard
 - Next steps – Expected outcome and deliverable, implementation process and estimated timelines, all informed by engagement
- **Appendices** as required

APPENDIX

Expected Implementation Directive Items

1. Review and propose options to improve energy support programs to First Nations and Metis, with the objective of better aligning programs with community needs and interests
2. Prepare a report on options to improve conservation programs, and access to programs, for First Nations and Metis. The report timing shall be aligned with the Mid-Term Review of the Conservation First Framework
3. Work with the Ministry of Energy to develop a program to support the deployment of innovative distributed energy resource projects, including near-term virtual net-metering demonstration projects
4. In coordination with the OEB, review market rules, industry codes, and regulations, in order to identify potential obstacles to fair competition for energy storage with other technologies in the delivery of services, and where appropriate, propose mitigation strategies
5. Develop a formal integrated bulk system planning process that ensures solutions are identified transparently as needs materialize. The process shall also include a coordinated, cost-effective, long-term approach to replacing transmission assets at end-of-life
6. Develop a competitive transmitter selection or transmission procurement process that is transparent, efficient and able to respond to changing policy, market and system needs.
7. Review and report on technical criteria used to assess customer reliability in order to identify and evaluate options for local area enhancements
8. Review and report on the regional planning process, taking into account lessons learned, and provide options and recommendations.