

# Engagement Plan

## Bulk System Planning Process

### Introduction

The Independent Electricity System Operator (IESO) is seeking to formalize the activities and processes by which it plans for the resources needed to reliably meet Ontario's future electricity needs. These activities include accounting for Ontario's forecasted electricity requirements, and carrying out integrated resource planning for energy efficiency, generation and transmission infrastructure to meet those requirements. In order to align with market outcomes, and ensure that solutions are in place when they are needed, the IESO's planning processes need to transparently identify investment plans long before the needs arise. Given the evolution of the sector, including competitive markets and emerging technologies, the IESO is proposing an evolution to how bulk power system planning is done to achieve a more standardized and transparent process.

The IESO is undertaking this Bulk System Planning Process to support the following outcomes: ensuring that electricity system issues, needs, and the rationale for recommendations are transparently assessed and identified, with a process that supports information sharing with stakeholders in a timely manner; ensuring that bulk system planning delivers regular reporting and follows consistent timelines; and is done in a manner that fully integrates all bulk system planning activities.

This engagement plan outlines the objectives, approach, timeline and considerations for engaging with stakeholders during the development of the Bulk System Planning Process. This plan may be subject to review and updates as the process evolves. All comments and enquiries on this engagement can be directed to [engagement@ieso.ca](mailto:engagement@ieso.ca).

### Stakeholders and Communities

The IESO encourages all interested parties to participate in this engagement through the public engagement activities described in the Approach section below. The IESO anticipates that this initiative will be of particular interest to transmitters, generators, industry associations, local distribution companies, consumer groups, municipalities, First Nations and Métis, transmission-connected customers and the Ontario Energy Board (OEB).

## Engagement Objectives

The objectives of this engagement are:

- To ensure that stakeholders and communities understand the purpose of this initiative;
- To purposefully engage on the existing bulk planning process, and how we propose to evolve the process to enable improvements to the inputs, processes and products;
- Discuss how stakeholders and communities can be involved in bulk system planning, and to gather feedback and suggestions; and
- To incorporate suggested changes, where possible, into the Bulk System Planning Process.

## Approach

This engagement plan will be implemented in accordance with the IESO's approved engagement principles.

This is a public engagement process. All materials will be posted on the dedicated IESO engagement webpage, and, any information/input supplied by interested parties will also be posted (with consent).

The approach for this engagement includes opportunities to provide input through various channels such as webinars, information sessions, meetings, and written feedback. The project team will consider all relevant input and illustrate how feedback was considered to shape the stated objectives.

Stakeholder engagement on the bulk planning process has been divided into three phases which mirror the equivalent stages of process development:

### **Phase One: Introduction to the Bulk System Planning Process (Completed)**

- This focused on introducing stakeholders to the guiding principles and objectives of the Bulk System Planning Process initiative. This phase was completed in 2020.

### **Phase Two: High-level Design and Development of the Bulk System Planning Process (2021)**

- This phase will introduce and define, at a more granular level, the process steps involved in planning the bulk power system, and work with stakeholders to identify the potential opportunities for engagement in carrying out the IESO's system planning mandate.

### **Phase Three: Transition to the Bulk System Planning Process (2022)**

- This phase will present the new bulk planning process and will prepare stakeholders to participate in the process.

Further details are provided below.

## Phase 1: Introduction to Bulk System Planning Process

The IESO carried out the first phase of bulk planning engagement with three goals:

1. Present an overview of bulk system planning and how it fits in within the overall IESO planning framework;
2. Seek feedback from stakeholders on how they interact with bulk system plans and planning today, and what they feel is or isn't working; and
3. Discuss how the bulk planning process could be improved.

This first phase of engagement was carried out through a series of activities in 2018 through to late 2020, including public webinars, discussions at related forums including the First Nations Energy Symposium, IESO Regional Forums, Technical Planning Conferences in September 2018 and February 2020, and a stakeholder engagement held on November 2020. Presentations were given at various forums to introduce the initiative, and promote the engagement opportunities for participants interested in learning or participating further. These engagements provided opportunities for input, and formal feedback was sought through written submissions following the Technical Planning Conferences and webinars.

The IESO incorporated feedback to inform the development of a draft high-level design for the Bulk System Planning Process.

## Phase 2: High-level Design and Development of the Bulk System Planning Process

The second phase of the Bulk System Planning Process engagement is focused on finalizing the process high-level design, and defining the process steps at a more granular level to develop the process elements related to ensuring transparency and opportunities for stakeholder engagement.

It is expected that this second phase of engagement may include:

- Webinars to provide an overview of the high-level design, with deeper investigation and discussion on specific topics.
- Discussion on proposed enhancements to the existing bulk planning process, including how recommended changes may affect communities and stakeholders, and opportunities to be informed and to provide input to bulk system planning.
- Discussion on how the bulk planning process is expected to evolve to respond to changes in electricity planning, particularly with respect to downstream acquisitions activities.

Communities and stakeholders will be informed through draft material postings and a webinar, with no in-person engagements planned for the foreseeable future. Feedback will be sought through engagement meetings and written submissions. The approach to the second phase of the engagement is subject to change as the COVID-19 pandemic continues to evolve through 2021.

## Phase 3: Transition to the Bulk System Planning Process

Engagement activities during Phase 3 will focus on information updates and capacity building among groups that participate in bulk system planning. This will likely take the form of webinars, and/or presentations at related forums or stakeholder engagement days.

Additional updates on the planned engagement strategy for Phase 3 will be available once the high-level design is complete.

## Proposed Engagement Schedule

The anticipated timing for this engagement is presented below. Note that timing and content associated with upcoming activities are subject to change. Effort will be made to coordinate engagements with other initiatives active at a similar time, or with similar targeted communities and stakeholders. Updates will be posted to the Bulk System Planning engagement page, when available.

Timing	Engagement Activity
2018-2020	Phase 1: Introduction to the Bulk System Planning Process <ul style="list-style-type: none"> <li>• Overview of bulk system planning, the initiative and objectives</li> <li>• Draft outline of the proposed Bulk System Planning Process</li> </ul>
February 2021	Phase 2: High-level Design and Development of the Bulk System Planning Process <ul style="list-style-type: none"> <li>• Present the draft high-level design with descriptions of the proposed changes to bulk system planning process</li> <li>• Discussion on how stakeholders want to be involved in the bulk system planning process</li> <li>• Seek feedback on opportunities for stakeholder and community engagement in bulk system planning</li> </ul>
Q2 2021	Acknowledge and summarize feedback received
Q3-Q4 2021	Second engagement on the final high-level design and the process detail for stakeholder engagement <ul style="list-style-type: none"> <li>• Additional engagement may be done to seek further input</li> </ul>
2022	Phase 3: Transition to the Bulk System Planning Process <ul style="list-style-type: none"> <li>• Discussion on proposed enhancements and how recommended changes may affect communities and stakeholders</li> </ul>