

# Formalizing the Integrated Bulk System Planning Process Engagement Plan

Updated: February 2020

## I. Introduction

The IESO plans for the resources needed to meet Ontario's future electricity needs. This includes forecasting electricity demand, conservation, supply and transmission to transparently identify needs for electricity services well in advance of when they occur. Given recent changes with the potential to influence energy planning in Ontario, including the movement toward a more competitive electricity market through the Market Renewal Program, and the rapid development and availability of new technologies and tools, bulk system planning processes must evolve to coordinate with these changes.

As part of this process, the IESO will be seeking feedback from communities and stakeholders on the design of the evolution of the bulk system planning process, including coordination with other planning processes and what role communities and stakeholders will have in the planning process.

This engagement plan outlines the objectives, approach, timeline and considerations for engaging stakeholders in the formalization of an updated, more transparent bulk planning process. This engagement plan may be subject to review and update as the process evolves. All comments and enquiries on this engagement can be directed to [engagement@ieso.ca](mailto:engagement@ieso.ca).

## II. Engagement Objectives

The objectives of this engagement are to ensure that stakeholders and communities understand this initiative and can inform and provide comments on the existing bulk planning process, and on how the process should evolve to enable improvements to the inputs, processes and products and to support emerging trends and new priorities. To receive feedback on how and where engagement should occur in the bulk planning process. To outline proposed changes to the bulk planning process and on how recommended changes may affect stakeholders and communities and how they will be involved in the new bulk planning process.

## III. Stakeholders and Communities

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

## IV. Approach

The implementation of this engagement plan will be 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 for this initiative. In addition, any information/input supplied by interested parties will also be posted (with consent).

The approach for this engagement initiative includes opportunities to provide input through various channels such as meetings, webinars, information sessions, 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 will be divided into two phases.

### Phase 1: Introduction to Bulk Planning Process Engagement and Preliminary Feedback on Design

The IESO will carry out the first phase of bulk planning engagement with three main goals:

1. Present an overview of what bulk planning is, including why it is carried out, and the objectives it attempts to achieve.
2. Seek feedback from communities and stakeholders on their experiences with the existing bulk planning process, including how they interact with the process today, and what they feel is or isn't working.
3. Discuss how the bulk planning process could be improved. For example, how should the process be designed to ensure communities and stakeholders are involved at the stages of planning that impact them the most?

Phase 1 of this engagement will be driven through information shared at stakeholder and community forums including the First Nations Energy Symposium, IESO Regional Forums as well as through a webinar and a dedicated engagement webpage. The most detailed information will likely be reserved for the long-format presentation provided during the webinar. Presentations at various forums will primarily introduce the initiative, and promote the webinar for participants interested in learning or participating further. While all engagements will provide opportunity for input, formal feedback will be sought through written submissions following the webinar.

### Phase 2: Development of Updated Bulk Planning Process

The approach to the second phase of engagement is subject to change, depending on how the initiative evolves and what challenges are encountered during the initial process design phase. It is expected that this second phase may include:

- A review of what was heard during the first phase, in addition to how this feedback had or had not been incorporated.
- Proposed changes to the existing bulk planning process, including how recommended changes may affect communities and stakeholders.
- How the bulk planning process is expected to evolve to respond to changes in electricity planning, particularly with respect to Market Renewal.

Communities and stakeholders will be informed through draft material postings and a webinar, and potentially additional in-person sessions. Feedback will be sought through engagement meetings and written submissions.

## V. Proposed Engagement Schedule

Note that timing and activities associated with Phase 2 are subject to change. Effort will be made to coordinate engagement with other initiatives active at a similar time, or with similar targeted communities and stakeholders. This is particularly the case for the Regional Planning initiative, due to the potential for overlap in scope and issues within these two planning functions.

Timing	Engagement Activity
September 2018	Beginning of Phase 1 engagement
September 13, 2018	IESO Planning Conference <ul style="list-style-type: none"> <li>• Include introduction to bulk planning initiative</li> </ul>
October 22-24, 2018	First Nations Energy Symposium <ul style="list-style-type: none"> <li>• Describe regional and bulk planning initiatives</li> </ul>
November 2018	Regional Electricity Forums <ul style="list-style-type: none"> <li>• Describe regional and bulk planning initiatives</li> </ul>
November 23, 2018	Phase 1 Bulk Planning Webinar <ul style="list-style-type: none"> <li>• Overview of bulk planning, the initiative and objectives</li> <li>• How the process is expected to evolve to respond to changes in electricity planning, particularly with respect to Market Renewal</li> <li>• Although focus is on bulk planning, may require participation or coordination with regional planning, as appropriate</li> </ul>
November 23 – December 14, 2018	Window for survey responses/written submissions
January 2019	Acknowledge and summarize feedback received and end of Phase 1 engagement
February 2019	Beginning of Phase 2 engagement: <ul style="list-style-type: none"> <li>• Engagement on proposed changes to bulk planning process, including how Phase 1 engagement was taken into account</li> <li>• How the bulk planning process is coordinating with other planning initiatives</li> </ul>

February 2019	Second Bulk Planning Webinar <ul style="list-style-type: none"> <li>• Provide an update on the evolution of the Bulk Planning process</li> </ul>
February 2019	Window for written submissions on second Bulk Planning webinar
February 19, 2020	Update on Bulk Planning Process presented at Technical Planning Conference
April 2020	Post outline of proposed changes to bulk planning process for comment
April 2020	Third Bulk Planning Engagement <ul style="list-style-type: none"> <li>• Overview of high level design of proposed changes to Bulk Planning process</li> <li>• Seek feedback on evolved process</li> </ul>
April 2020	Window for written submissions on Bulk Planning high level design
May 2020	Response to feedback posted
Q3/Q4 2020	Fourth Bulk Planning Engagement <ul style="list-style-type: none"> <li>• Overview of Detailed Design</li> <li>• Seek feedback on select design elements from detailed design</li> </ul>
Q4 2020	Window for written submissions on detailed design
Q4 2020	Response to feedback posted
Q4 2020	Finalization of the Bulk System Planning Process. To be followed by implementation of updated Bulk Planning Process.