

Project Charter for: ERP Distributed Energy Resources (DER) Integration Project

Document ID:	██████	██████████	Jennifer Tsai
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1. Executive Summary

Distributed Energy Resources (DERs) are expected to become an increasingly important resource to meet Ontario's electricity needs given their relatively quick time to deployment, high level of community support, and scalability. The Enabling Resources Program (ERP) DER Integration Project aims to unlock the value that DERs can provide to the bulk electricity system by implementing:

1. A new participation model for dispatchable DERs and DER aggregations (together referred to as "DER/As") to participate in the IESO-Administered Markets (IAM) and support Ontario's bulk system reliability needs.
2. Approaches for data sharing and operational coordination between the IESO, Local Distribution Companies (LDCs) and DER/A operators.

ERP is engaging key external stakeholders, the OEB, and internal business units to inform the design. The DER Integration Project will not prescribe a specific Distribution System Operator (DSO) model. Rather, it will implement solutions that enable the IESO to integrate DERs into the IAMs as the regulatory framework and LDC efforts to modernize distribution utilities evolve. A key project design principle is to utilize existing IESO systems and processes to minimize costs and accelerate the solution delivery. The project will also seek to implement a phased solution delivery to provide early wins for the sector compared to a single solution approach which delays any solution delivery.

Within the context of ERP, the DER Integration Project advances the IESO's core strategies in the following manner:

Advance Reliability and Cost-Effectiveness in an Evolving System: Currently, DERs greater than 1MW are enabled to participate in the IAMs, and only behind the meter DER aggregations are enabled to participate in the IESO's Capacity Auction as Hourly Demand Response Resources. The DER Integration Project will provide a pathway for DER/As, including individual contributors smaller than

1MW, to participate in the IAMs, which will increase supply options participating in the IAM, procurements, and capacity auctions. Enabling increased competition helps to maintain competitive market pressures that ultimately benefit ratepayers.

A second aspect of the DER project is to expand data sharing between LDCs, all DER/As and the IESO. This expanded data sharing presents an opportunity to improve reliability for operations and planning activities through increased situational awareness and improved coordination.

Drive and Guide the Sector's Future: Currently, there are 20,000+ DER contracts with the IESO, totalling approximately 4 GW of distribution-connected generation. DERs are especially valuable in congested areas and, depending on size, can be deployed quickly to address regional and system-wide supply needs. The DER Integration Project is a key step towards (1) opening opportunities for DERs to access the wholesale market and (2) building the crucial communication and coordination pathways between the IESO, LDCs and DER operators, to enable DERs to support both transmission and distribution systems. ERP is implementing a foundational DER participation model that will continue to evolve (post-ERP) as the regulatory landscape changes and LDCs modernize their distribution networks.

The ERP DER Integration Project was included in the three-year (2023-2025) approved project portfolio under the Enabling Resources Program and is included in the proposed 2026-2028 Business Plan.

Project Charter Approval

To ensure that appropriate cost and schedule controls are in place for the current stage of the project while allowing the project to finalize cost and schedule as more details become available, the project's budget and schedule will be released through a staged approval process. This first version of the Project Charter will request approval of the funds and schedule required to complete the Planning and Design stage only. During the Planning and Design stage, the project team will refine the business objectives and measures, develop detailed requirements and solution design documents, and engage in initial procurement activities as necessary in order to improve cost and schedule estimate accuracy.

When appropriate, subsequent releases of the Project Charter will request approval for the budget and schedule required to successfully achieve the business objectives and complete each stage of the project; i.e. the project expects that there will be one Project Charter version 2 (Execution stage), with separate releases so that the project does not have to wait for the entire design of the project to be completed before proceeding to Execution stage for some of the project deliverables. Each release of future Project Charter revisions will be approved by the appropriate signing authority based on IESO's Delegation of Authority Policy.

IESO has secured up to \$16.7M in federal funding from NRCAN through the Smart Renewables and Electrification Pathways Program for costs to partially support implementation of the Enabling Resources Program, which will help defray a portion of the DER Integration Project costs.

We are seeking approval for cost and time to complete the Planning and Design stage: an initial investment of \$10.1M which includes \$2.9M contingency, and completion by December 31, 2028, which includes 12 months of contingency to reflect scheduling uncertainty. The significant contingency is required to address the uncertainty associated with material changes in settlement activities for DERs. Subsequent releases of the Project Charter will reflect updated cost and time estimates to complete the Execution stage of the project.

2. Business Objectives and Measures

The objectives of the DER Integration Project are to:

1. enable dispatchable DER/As to participate in the IAMs and enable more options for participation in future IESO capacity auctions, or IESO/LDC procurements.
2. build the foundational communication and coordination pathways between the IESO, LDCs and DER operators that will support the safe and reliable operation of the electricity system and prepare the IESO for the future.

A significant challenge for decarbonizing Ontario's electricity system will be to replace the capacity and flexibility currently provided by gas-fired generators. Enabling dispatchable aggregations of DERs will provide increased flexibility to the system through dispatchability and associated market services and will increase the pool of resources available to participate in future resource acquisition processes. DERs create additional means to locate supply resources on the distribution system, or to facilitate a value stacking of DERs that also benefit the distribution system.

ERP will implement a foundational DER participation model for DER/A market participation which is a critical step in enabling DER/A participation in IESO procurements. This model can then evolve in lockstep with the sector and regulatory structure. By taking a proactive approach, the IESO and sector have the best opportunity to support effective integration – resulting in maintaining system reliability and market efficiency.

Lastly, one of the most critical components of the DER/A stream is to establish a form of data sharing and operational coordination between LDCs and the IESO that will support transmission-distribution coordination, market integration, and improve system reliability.

Business objectives will be validated, and draft measures will be quantitatively defined as part of the Planning and Design stage and will be updated as appropriate in subsequent releases of the Project Charter.

Ref #	Business Objective	Procedure for Measures (identify how the performance will be measured)	Measured when and by whom?
1	Unlock opportunities for dispatchable DER/As to participate in the IAMs and in future IESO procurements	Implement DER foundational participation model	Measured at project delivery by Project Sponsor
2	Build the foundational communication and coordination protocols between the IESO, LDCs and DER operators that will enhance internal IESO modeling and operation of DERs	Implement planning and operational DER data sharing between IESO, LDCs and DER operators	Measured at project delivery by Project Sponsor

2.1 Benefits Expected

Within the context of ERP, the expected benefits of the DER Integration Project are the following:

1. **Acquire services to maintain reliability and support the evolution of the sector:**
Participation by DER/As in the IESO-administered markets provides additional cost-effective resources that may offset more expensive existing resources that would provide increased value for ratepayers as the lowest cost resources would be utilized. Enabling DER/As to more fully participate in the IESO's resource adequacy procurements and auctions also creates more competition in meeting system needs.
2. **Continue to evolve the markets to improve market efficiency:**
The DER Integration Project will place the IESO as a sector leader in Canada providing customers with new opportunities to leverage their assets to support the electricity system and earn revenue. It will maintain the IESO's role as a leader in advancing communication and coordination with distribution utilities.

3. Project Overview

3.1 Project Scope

The DER Integration Project will implement: (1) a foundational DER participation model into IESO tools, systems, and processes, which can be leveraged in future procurements and capacity auctions and (2) communication and coordination pathways between the IESO, LDCs and DER operators that will support the safe and reliable operation of the electricity system and prepare the IESO for the future.

The DER Integration Project is focused on designing and implementing a foundational DER participation model and coordination pathways, that: (1) builds upon existing sector work; (2) leverages existing tools and systems, to the extent possible, and (3) develops incrementally to allow for regulatory and sector evolution.

Stakeholders are a critical component of the DER Integration Project; extensive engagement including targeted outreach and public engagements will be conducted, targeting LDCs of all sizes (large and medium/small), associations, and aggregators. The ERP team will continue to work closely with the OEB on initiatives that may impact ERP design, including (1) data sharing and (2) distribution system operator (DSO) roadmap and consultations.

The project will take a pragmatic, cost-effective, and outcomes-based approach, starting with a foundational DER participation model as a near-term solution. It will not prescribe a specific DSO model, but will leverage the work previously conducted in the Transmission-Distribution Working Group (TDWG). The project will implement solutions that enable the IESO to integrate DERs into the IAMs as the regulatory framework and LDC efforts to modernize distribution utilities evolve.

3.2 High Level Assessment of Impacted Business Processes, Systems and Governing Documents

The project expects to make changes to the following business processes, systems and governing documents:

3.2.1 Processes

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

3.2.3 Governing Documents

There will be impacts to internal procedures, Internal Manuals, Market Manuals, and Market Rules.

Further assessment of the impact to internal procedures, Internal Manuals, Market Manuals, and Market Rules will be carried out during the Planning and Design stage and included in the subsequent version of the Project Charter.

3.3 Out of Scope

- Downstream impacts on procurements

3.4 Planning and Design Stage

The Planning and Design stage milestone schedule is provided in the table below.

The Planning and Design stage will result in the development of the market design for the foundational DER participation model, data sharing initiatives, business requirements, and solutioning artifacts. The Planning and Design stage will also include the Data Sharing Plan outlined in the Report Back per the IEP Directive.

Activity	Date
Planning and Design stage begins	Q3 2025
Stakeholder engagement #1	Q4 2025
Data Sharing Plan (Report Back per IEP Directive)	Q1 2026
Stakeholder engagement #2	Q2 2026
Data Sharing market design #1 developed: LDC visibility of controllable DERs	Q2 2026
Stakeholder engagement #3	Q4 2026
Data Sharing market design #2 developed: Transmission/Distribution network coordination	Q4 2027
Data Sharing market design #3 developed: Bidirectional static data sharing	Q4 2027

Foundational DER Participation Model market design developed	Q4 2027
Conclude Planning and Design stage	Q4 2027
Continued internal engagement	Ongoing

The Planning and Design stage time estimates are as follows. The significant duration contingency is required to account for the uncertainty associated with material changes in settlement activities for DERs.

Planning Time Estimates		
Start Date (kickoff)	End Date (without contingency)	End Date (with contingency)
July 2, 2025	December 31, 2027	December 31, 2028

The table below shows the anticipated expenditure for the Planning and Design stage:

	Oct to Dec 2025	2026	2027	Contingency (40%)	Total
Capital	\$0	\$1.8M	\$2.4M	\$1.7M	\$5.9M
Operating	\$0.4M	\$1.0M	\$1.6M	\$1.2M	\$4.2M
Total	\$0.4M	\$2.8M	\$4.0M	\$2.9M	\$10.1M

The level of contingency required for the Execution stage of the DER Integration Project will be re-assessed during the Planning and Design stage and included in the subsequent version of the Project Charter when moving towards the Execution stage of the project.

3.4.1 Key activities to be undertaken in the Planning and Design Stage

The Planning and Design stage will focus on the drafting of a data sharing plan, development of a foundational DER participation model, and a technical assessment of DER/As. Additionally, activities will be undertaken that will support the implementation of the foundational DER participation model, including developing the market design and the various associated business requirement documents (BRDs), and engaging with vendors.

3.4.2 Resources

Business Units	Planning and Design Stage			Execution Stage	
	Oct - Dec 2025	2026	2027	2028	2029
ERP Core Team	7	7.5	7.5	2.5	2.5
Enterprise Project Delivery	3.5	4	4	4	4
Risk Management	0.1	0.1	0.1	0.1	0.1
Information & Technology Services	4.5	4.5	6	14	14
Business Unit SMEs	7	10	13	14	14
Total FTE	22.1	26.1	30.6	34.6	34.6

4. Key Stakeholders

The DER Integration Project will need support from various teams within the following business units: Markets and Reliability, Power System Development, Market Assessment and Compliance, Legal Resources and Corporate Governance, Information and Technology Services, Corporate Relations, Engagement, & Strategy (CRES), and Corporate Services.

In addition, ERP plans on regular engagement with external stakeholders including targeted outreach and public engagement. Key stakeholders include LDCs, associations (Ontario Energy Association, Electricity Distributors Association, Energy Storage Canada) and aggregators (Rodan and Voltus).

Stakeholder	Stakeholder Role	How They Are Affected or How They Are Participating
Customers external to IESO (LDCs, aggregators)	Direct Customer	Directly impacted stakeholder; receives benefit of the change initiative
Market and Sector Evolution	Builder	Provides input to the market design for the change initiative
Corporate Relations, Engagement, and Strategy	Builder	Provides resources to support coordination and alignment of the initiative with government and regulatory affairs
Stakeholder Engagement	Indirect Customer, Builder	Supports external inquiries about the change initiative; provides resource to do the work to conduct external stakeholdering of the initiative
Enterprise Project Delivery	Builder	Provides program and project management support for the change initiative

Stakeholder	Stakeholder Role	How They Are Affected or How They Are Participating
Risk Management	Builder	Provides risk management support for the change initiative
IT – Solution Architecture	Builder	Provides resource to do the work to implement the changes
IT – Business Solutions	Manager, Indirect Customer, Builder	Solution owner and solution stewards; supports the solutions impacted by this initiative; provides resources to do the work to implement the changes
IT – Infrastructure & Operations	Indirect Customer, Builder	Supports the systems and infrastructure impacted by this initiative; provides resources to do the work to implement the changes
IT – Quality Assurance	Builder	Provides resources to do the work to implement the changes
IT – Information Security	Builder	Provides resource to do the work to assess the impact of the changes on the overall information security of the IESO
Market Rules and Manuals	Indirect Customer, Builder	Supports impacted market rules and manuals post go-live; provides resources to implement the updates to market rules and manuals
Legal	Indirect Customer, Builder	Supports legal challenges to the impacted market rules; provides resources to implement the updates to market rules and manuals
Contract Management	Indirect Customer, Builder	Provides resources to provide input to the market design and update existing DER contracts; processes or procedures may be impacted
Prudential	Indirect Customer, Builder	Provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Settlements	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Meter Data Management	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design and

Stakeholder	Stakeholder Role	How They Are Affected or How They Are Participating
		test the updated solutions; processes or procedures may be impacted
Market Registration	Indirect Customer, Builder	Provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Operational Effectiveness	Indirect Customer, Builder	Provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Operations Readiness	Manager, Indirect Customer, Builder	Process owner and steward; provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Operational Transformation	Builder	Provides input to the market design for the change initiative
Performance Validation & Modelling	Indirect Customer, Builder	Provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Real-Time Applications	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
MACD – Compliance	Indirect Customer	Processes or procedures may be impacted
MACD – Market Power Mitigation	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Market Forecasts & Integration	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
System Operations	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted

Stakeholder	Stakeholder Role	How They Are Affected or How They Are Participating
Resource and System Adequacy	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design; processes or procedures may be impacted
Demand Forecast	Indirect Customer, Builder	Provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Regulatory Affairs	Indirect Customer, Builder	Provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Resource Planning	Indirect Customer, Builder	Provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted
Connection Assessments	Manager, Indirect Customer, Builder	Process steward; provides resources to provide input to the market design and test the updated solutions; processes or procedures may be impacted

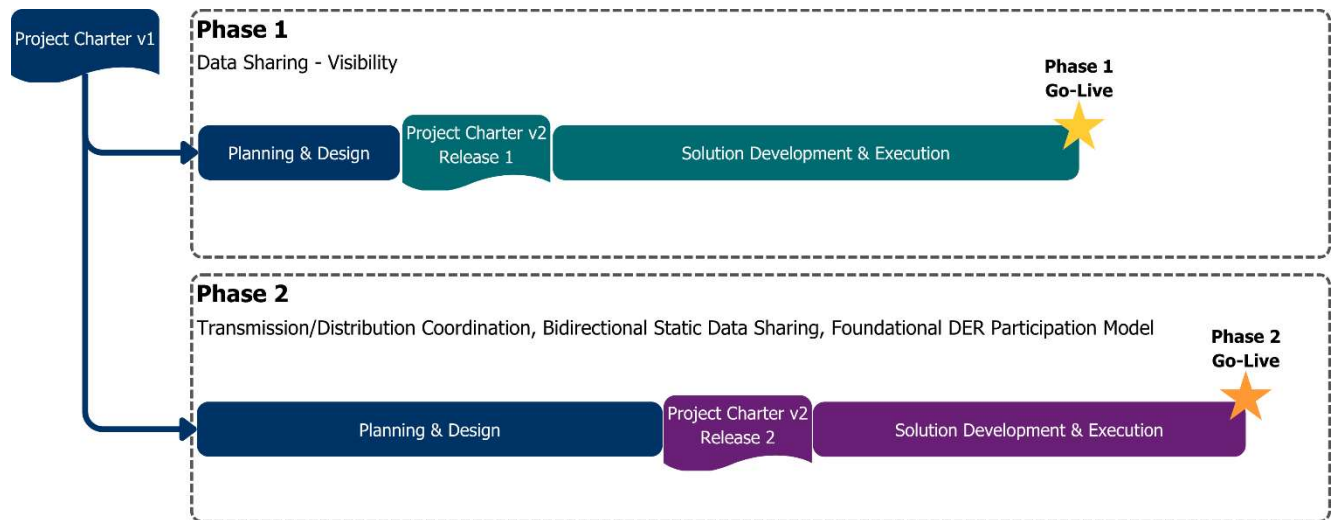
The list of stakeholders will be further refined as part of the Planning and Design stage and will be updated in subsequent releases of the Project Charter version 2.

5. Project Governance Structure

The project team structure will be further refined as part of the Planning and Design stage and updated in subsequent releases of the Project Charter.

6. Delivery Approach

This project will take an incremental solution (i.e. phased) approach, with one incremental release delivering the LDC visibility aspect of DER data sharing, and another incremental release delivering transmission/distribution coordination protocols, DER bidirectional static data sharing, and the foundational DER participation model. Subsequent releases will deliver potential enhancements to the foundational DER participation model.



The delivery approach will be further refined as part of the Planning and Design stage and updated in the subsequent versions of the Project Charter, with an updated Project Charter for each subsequent release for the Execution stage of the project.

7. Assumptions, Constraints and Potential Risks

7.1 Project Assumptions

A primary assumption is that the IESO's current vendors will be available during the Planning and Design stage to support the development of estimates for costs and schedule, including the Dispatch Scheduling and Optimization System (DSOS) solution, along with a general feasibility analysis for the DER market participation model.

Vendor support will also be needed to re-work the Dispatch Data Management System (DDMS) and IESO Settlement systems. There is an assumption that vendors continue to support existing products; however, it is possible that new tools and processes will be needed for DER integration. It is expected that numerous tools and processes will be impacted during the DER Integration Project.

7.2 Project Constraints

The IESO's vendors are busy with work from other parts of the sector and other IESO projects. There are numerous competing projects external to Ontario that could impact vendor availability as they may have higher priority projects to complete. Vendor outreach will take place during the Planning and Design stage to understand their capacity to support the project.

7.3 Potential Project Risks and Mitigation Actions

The following risk has the potential of preventing the project from meeting its business objectives within the planned timeframe:

Risk ID	Risk Description	Residual Risk	Mitigation/Controls	Target Risk
TRAC-29939	Inability to secure IESO resources results in delays in meeting key milestones	Residual Risk: High Likelihood: Possible Impact: Significant	Securing dedicated project resources: 1. Incremental headcount 2. Contract resources Securing resources from other business units: 3. PPMT prioritization process 4. Early engagement with resource managers to enable proactive resource management 5. Interdependency review of project and line initiatives to determine ERP impacts 6. Quarterly long term critical resource requirement forecast and gaps analysis for senior leadership review 7. Monthly resource requirement reviews Reducing resource requirements by: 8. Implementing a minimum viable product leveraging existing tools	Target Risk: Medium Likelihood: Possible Impact: Moderate

A more detailed risk assessment will be performed as part of the Planning and Design stage and residual risks with a high or critical risk level will be included in subsequent releases of Project Charter version 2 along with mitigation actions planned or taken in order to reduce the risk level to an acceptable level.

8. Change Controls

Changes in the project that will impact/exceed tolerance levels for objectives, time and cost will be managed through the formal Project Change Management Process resulting in a Project Exception Report. The Project Exception Report (if approved) will result in the re-baselining of the project.

9. Appendix A: Alternative Analysis

Identified Alternatives Summary

Alternative 1 – Do Nothing (Not Viable)

Doing nothing to advance the integration of DERs into the IAM would not fulfill the business objectives. The IESO would not have the ability to enact the actions outlined in the Directive issued by the Minister of Energy and Mines that accompanied the Integrated Energy Plan (June 2025). The ability to monitor and anticipate DER activity to maintain grid reliability and support efficient market outcomes, and the capability for DERs to participate in the IESO-Administered Markets does not currently exist.

Alternative 2 – Single-Phase Delivery (Viable, Not Recommended)

The IESO took a single-phased delivery approach for the Market Renewal Program, simultaneously implementing many significant changes to the IESO tools, systems and processes in one major release to users. While the single-phased delivery approach is potentially less costly due to lower project overhead costs, the disadvantage of this approach is that the value of the project is not realized until the delivery of this major release. A single-phase delivery would achieve the business objectives of the DER Integration Project but is not recommended.

Alternative 3 – Multi-Phase Delivery (Recommended)

IESO market evolution initiatives are expected to shift away from a combined approach to an incremental (i.e. phased) solution approach, implementing smaller changes over time. This allows for early implementation of key components which gains improvements for the sector and also allows for early learnings so the IESO can continue to evolve with future deliveries and enhancements. A multi-phase delivery would achieve the business objectives of the DER Integration Project and enable earlier realization of value than a single-phase delivery.

Appraisal of Alternatives

Ref#	Alternative	NPV	Achievement of Business Objectives	Risk	Consideration
1	Do Nothing	\$0	Not achieved	Critical	
2	Single-Phase Delivery	TBD ¹	Achieved	High	Value of the project would not be realized until implementation of both data sharing and foundational DER participation model in a single release
3	Multi-Phase Delivery	TBD ²	Achieved	Medium	Execution of project releases (data sharing) can be started prior to completion of the overall Planning and Design stage of the project

Further alternatives will be examined in the Planning and Design stage and refined in subsequent releases of the Project Charter version 2.

¹ Dependent on the number of DERs participating in the IAMs under a foundational participation model

² Dependent on the number of DERs participating in the IAMs under a foundational participation model

10. Appendix B: Project Cost Worksheet

Project Information	
Project: 757-2 (DER Integration)	
Project Capital Expenses	Project Charter v1
Status	Budget
Summary	
Total Capital Budget without Contingency	\$19,800,000
Total Operations Budget without Contingency	\$6,800,000
Subtotal Capital and Operating Budget without Contingency	\$ 26,600,000
Capital Contingency	\$7,900,000
Operating Contingency	\$2,600,000
Total Capital and Operating Budget with Contingency	\$ 37,100,000
Capital Expense	
IESO Labour	
IESO Labour	\$11,510,000
Total IESO Labour	\$ 11,510,000
Professional & Consulting	
Non IESO Labour	\$-
Consultants	\$125,000
Contract Service	\$275,000
Legal Service	\$-
Total Professional & Consulting	\$ 400,000
Operating & Administration	
Computer Services & Software	\$7,890,000
Computer Equipment	\$-
Operations & Admin - Other	\$-
Financing Charges	\$-
Total Operating & Administration	\$ 7,890,000

Subtotal Capital Budget without Contingency	\$	19,800,000
Capital Contingency		\$7,900,000
Total Capital Budget with Contingency	\$	27,700,000

Operations Expense

IESO Labour		
IESO Labour		\$6,284,483
Total IESO Labour	\$	6,284,483
Professional & Consulting		
Consultants		\$-
Contract Service		\$164,991
Legal Service		\$350,000
Non IESO Labour		\$-
Total Professional & Consulting	\$	514,991
Operating & Administration		
Computer Equipment		\$-
Computer Services & Software		\$-
Financing Charges		\$-
Other		\$525
Total Operating & Administration	\$	525
Subtotal Operating Budget without Contingency	\$	6,800,000
Operating Contingency		\$2,600,000
Total Operating Budget with Contingency	\$	9,400,000

11. Document Control

Note: * indicates which roles will be required to approve in Citadel workflow, however, document will be reviewed by all other roles identified.

Authors:

Prepared By	Role
Jennifer Tsai	Project Manager*
Peter Nolan	Project Manager
Sunil Maniyappan	Business Analyst

Project Management Adherence Review:

Reviewed By	Role
Aadhya Bhatt	PMO Project Support

Financial Review:

Reviewed By	Role
Sarah Bolduc	Director, Corporate Finance and Enabling Resources Program Steering Committee Member

Content Reviewers:

Reviewed By	Role
Ian Leung	ERP Supervisor Market Development, DER Integration Project Business Lead
Karlyn Mibus	ERP Change Management Lead
Maral Kassabian	ERP Senior Manager, Implementation
Wang Chiu	ERP Senior Manager, Business Services
Ian Mullin	Senior Manager, Program Management
Phil Bosco	Senior Manager, Change Delivery
Robert Doyle	Senior Manager, Business Architecture and Analysis
Nicholas Ingman	Acting Director, Enterprise Project Delivery
Barbara Ellard	Enabling Resources Program Steering Committee Member
Bob Yeoman	Enabling Resources Program Steering Committee Member
Darren Matsugu	Enabling Resources Program Steering Committee Member
Marko Cirovic	Enabling Resources Program Steering Committee Member
Elinor D'Cunha	Enabling Resources Program Steering Committee Member
Joleyne Groat	Enabling Resources Program Steering Committee Member
Lia Kotic	Enabling Resources Program Steering Committee Member
Roy Marra	Enabling Resources Program Steering Committee Member
Jessica Savage	Vice-President Markets, Settlements, and Sector Development

Approvals:

Approved By	Role
David Short	Project Sponsor*
Lesley Gallinger	President & Chief Executive Officer*

Distribution List

Name	Organization
Citadel	IESO
PMO	IESO
Finance	IESO

Document Change History

Issue	Reason for Issue	Date
1.0	First issue	October 20, 2025

References

Document Title	Document ID
Enabling Resources Program Charter 1.0	██████████
DER Integration Project Roles and Responsibilities (RACI)	██████████

Related Documents

Document Title	Document ID
Integrated Project Plan	██████████
Enabling Resources Program Business Case	██████████

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