



ENVIRONICS
R E S E A R C H G R O U P

2004 INDUSTRY SURVEY

FINAL REPORT

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National Energy Board

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INTRODUCTION

The National Energy Board (NEB, or the Board) was established in 1959 as an independent federal agency to regulate key aspects of Canada's energy industry, including the construction and operation of pipelines and power lines. Under a mandate defined by the National Energy Board Act and other federal legislation, the Board's purpose is to promote safety, environmental protection and economic efficiency in the Canadian public interest. Fulfilling this role requires engaging all relevant stakeholders through a number of processes, including workshops, pre-application meetings and public hearings.

With respect to energy pipelines, a key stakeholder group consists of companies and associations that interact with the NEB in such areas as the application process and cost recovery. The NEB commissioned Environics Research Group to conduct a survey to gather feedback on NEB services provided to this group.

More specifically, the objectives of this survey are to:

- Measure company and association experiences and satisfaction with their interactions with the NEB, including the application process, the Cost Recovery Liaison Committee (CRLC), the website and direct contact;
- Obtain industry perspectives on the key issues facing the NEB, and the extent to which it is realizing its vision; and
- Provide the NEB with recommendations for future research and communications with companies and associations.

Interviews were conducted with four sub-groups of organizations (as defined by the NEB), which included members of the NEB CRLC, large companies subject to cost recovery, small and medium companies subject to cost recovery, and other organizations from the NEB's general mailing list.

This survey incorporates relevant metrics developed under the Service Improvement Initiative (SII) by the Treasury Board as a federal government-wide framework for measuring service quality performance and improvement over time and across departments and agencies. A key component of the SII is the Common Measurements Tool (CMT), consisting of a standardized set of survey questions that will provide a basis for comparing NEB results with broader government benchmarks for customer service performance.

The survey consisted of telephone interviews conducted by Environics with selected representatives from companies and associations, between March 30 and April 23, 2004. The NEB provided Environics with a list of 54 company and association representatives, from which 24 interviews were completed. This represents a 44 percent response rate, which is very good for this type of project involving busy senior professionals over a limited time frame.

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the survey data. Because of the small size of the survey sample, the results are presented in more general terms than is normally the case for sample surveys (e.g. statistical significance and margin of sampling error are not applicable).

For the sake of editorial clarity, the term "company" will be used to describe all respondents, including industry associations. A copy of the questionnaire is included in the Appendix. In graphs and tables, the sub-sample size is noted whenever it is less than the full sample of 24. All results presented in this report are expressed as numbers (rather than percentages) unless otherwise noted, because of the small sample size.

EXECUTIVE SUMMARY

The results of this survey indicate that among the companies and associations canvassed, there is a high degree of satisfaction with the procedures and services provided by the NEB, and a general endorsement of its current mandate. This does not mean that everyone is fully satisfied with all aspects of their dealings with the NEB and see no room for improvement. But it is clear from the research that desired changes tend to be company-specific rather than indicative of broader industry needs.

Understanding the NEB Application Process

Most of the companies surveyed have participated in the Board's application process, and they give the NEB strong marks for the direction that is provided for doing so. All but one (an association) believe they have an adequate understanding of the application process, and most agree they have the necessary tools required to complete the process (e.g., Filing Manual). About half of the companies surveyed have used the Board's e-filing option (in most cases on a number of occasions), and they are generally satisfied with this service. Important to this level of satisfaction is the fact that most companies (14 out of 18) say they have had an adequate opportunity to communicate with Board staff prior to filing their applications (the few that did not indicated this was because of their role as an intervener).

The results indicate that the NEB-supplied information about the application process is largely fulfilling companies' needs and expectations. A clear majority of the companies having filed an application are satisfied with the information supplied by the Board, with none expressing clear dissatisfaction. Companies give

the strongest marks for the information being up-to-date and understandable, with marginally lower ratings given in terms of consistency. Given this strong endorsement of the NEB's information, it is not surprising that most companies (CRLC members in particular) agree that in cases of incomplete applications, the Board should require applicants to provide the missing information, although non-CRLC members would also like to see the NEB provide guidance and dialogue as needed.

Cost Recovery Liaison Committee

Companies' perspectives on the Board's Cost Recovery Liaison Committee are somewhat mixed. Fewer than half of the companies and associations surveyed (10 out of 24) report membership in the CRLC. Of the remainder, most (10) indicate some awareness of this committee, while the other four do not.

Member companies are divided in their assessment of the value of this committee, with six of the ten agreeing that it provides them with meaningful input on cost recovery issues. The four that disagree with this view are split between those that feel they have too little influence on costs charged by the Board, and those that acknowledge they have not taken full advantage of their participation to date.

Non-member companies give various reasons for why they have not participated on this committee to date, including a lack of perceived benefits or inconvenient location (large companies), limited application volume or their failure to get cost recovery in the past (small and medium-sized companies). A couple of companies from the general mailing list indicate they have not been invited to participate.

NEB Website

Companies and associations are making active use of the NEB website. All but one have visited the site in the past 12 months, with companies averaging 20 visits over this time period. Companies access the website for a number of reasons, but most commonly to get general information on the NEB and for more specific information on Board decisions and filing applications.

Most give a positive assessment of the NEB website, with 18 expressing overall satisfaction, compared with two that are dissatisfied (based on difficulty in finding the information they sought). More specifically, companies are most likely to be satisfied with the website in terms of being easy to find and protecting privacy of users, and somewhat less so in terms of its navigability (being easy to find what you are looking for, visual appeal) and containing the information they need. In all cases, however, no more than two companies out of all users express clear dissatisfaction with any aspect of the NEB's website.

Contact with the NEB

All of the companies and associations surveyed report having direct contact with the Board and/or its staff. This contact covered a range of different departments and areas of the organization, and was most commonly in connection with information requests and application filings.

Companies' experience with this direct contact with the NEB is mostly positive, with almost all companies indicating they are very (11) or somewhat (8) satisfied with their most recent contact experience, compared with only one that expresses dissatisfaction (based largely on an unfavourable Board decision). Satisfaction levels are strongest among CRLC members and companies on the general mailing list.

Companies place considerable importance on a number of aspects in terms of what they expect from the NEB when they contact the Board directly, but at the top of the list is fair treatment. The NEB receives a very strong rating on this dimension, with almost everyone strongly (12) or somewhat (11) agreeing that the Board

is delivering in this area. The NEB receives strong marks on all aspects of contact rated on the survey, and in each case the ratings are strongest among those companies that consider it to be of greatest importance.

NEB Vision and Mandate

As a whole, the group of companies and associations surveyed generally endorse the NEB's current mandate as "a respected leader in safety, environment and economic efficiency in areas under its jurisdiction." Ten of the 24 companies surveyed agree this mandate accurately represents what they believe the Board's mandate should be. The remainder do not necessarily disagree with this, but are more apt to emphasize the importance of ensuring fair treatment to all stakeholders, ensuring efficiency in its decisions and operations, and a number of other priorities (each identified by only one company). Moreover, the balance of opinion is that the NEB is, in fact, fulfilling its stated mandate, although few (2) agree it is doing so "fully."

Companies identified a number of priority issues they believe are facing the NEB today, but none of them emerge as predominant. Of the 63 issues identified (each company could list up to three), the most common theme revolves around improving the effectiveness and efficiency of regulations, policies and directives (mentioned 10 times), followed by rates and cost issues (8) and energy supply issues (8). Many of the issues were identified by no more than one or two companies.

How well is the NEB addressing these priority issues? Given that companies were asked to identify issues that almost by definition remain unresolved, it is predictable that the Board receives a mixed assessment. Of the 63 issues mentioned, the NEB is seen as currently doing an excellent or good job in 25 cases, a fair job in 27 cases, and a poor job in six cases. The Board is most apt to be seen as doing well in addressing issues involving pipeline safety and the environment, while the largest gaps appear in terms of effective regulations and policies, aboriginal issues, speed and efficiency in dealing with issues and approvals, and accommodating the competitive reality of the industry.

Recommendations for Further Research

This survey provides a valuable initial assessment of the NEB from the perspective of key company and association stakeholders. The results of this research should be made available to participating stakeholders (as well as to the broader community of stakeholders across the country), accompanied by an NEB statement that deals with how it intends to use this research (e.g., any issues stemming from it that will be further addressed).

Pending feedback from these stakeholders and others on the value of this research, it is recommended that the NEB establish a plan to repeat this type of survey on an annual basis as a regular mechanism for obtaining feedback that will complement other forms of feedback. This process may play a uniquely important

role in providing the only mechanism through which stakeholders can provide feedback to the NEB in an anonymous way, thereby encouraging input that might not otherwise be communicated.

The efficiency and participation of the research can be improved by establishing a “panel” of representatives from the appropriate companies and associations. This would involve identifying in advance the most appropriate number and mix of organizations and their representatives, and then securing their commitment to participate in this process for the next several years. This approach would also make it possible to track changes in NEB performance at the individual stakeholder level (although these would not be identified by name) as well as collectively, to more specifically measure the impact of NEB activities and changes.

NEB APPLICATION PROCESS

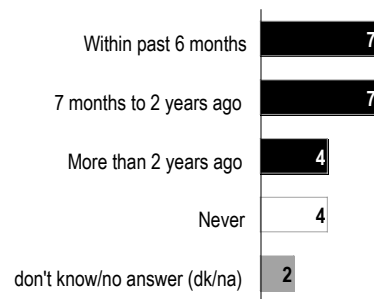
Information Support for Filing an Application

Most companies that have experience with the NEB application process report a good understanding of the application filing requirements and have received adequate direction from the Board.

EXPERIENCE WITH THE APPLICATION PROCESS. Of the organizations surveyed, a strong majority (18 out of 24) report to have participated in the NEB application process, most of which have done so in the past six months (7) or between 7 and 24 months ago (7). The mean time frame for the most recent application experience is 30 months (this high average reflects three companies that say their most recent application experience was in 1980, 1996 and 1999, respectively). Three out of the four associations surveyed indicate they have never participated in this process.

Those companies reporting participation in the application process were then asked a series of questions about this experience in terms of the adequacy of the information and direction supplied by the Board.

Last time company participated in application process to NEB



Q.1

When was the last time your company participated in the application process to the National Energy Board?

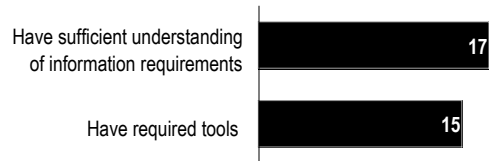
UNDERSTANDING OF THE APPLICATION PROCESS. Almost all of the companies surveyed report a good level of understanding of the NEB application process. All but one (17 out of 18) indicate that they or others in their company have a sufficient understanding of the information requirements for submitting a complete application, the lone exception being an association.

Almost as many (15) say they have the tools required to complete an application, such as the Filing Manual and Streamlining Order, with the other three indicating they are unsure. (It is possible that these individuals may be hesitant to give a definitive answer because they believe someone else in their company has a better understanding of what tools they have available). Among those companies that currently report having NEB tools, most (12 out of 15) also say the Board has provided them with clear direction on how to use them in preparing an application.

PRE-FILING OPPORTUNITIES TO COMMUNICATE WITH THE NEB. Of those that have participated in the application process, a majority (14 out of 18) say their company has had adequate opportunity to communicate with Board staff prior to filing an application. Of the remainder, three say they have not had such opportunities (all companies), and the fourth (an association) cannot say clearly either way.

Of the few that say they do not have adequate opportunities in this area, three indicate there is no mandate or provision for such communication because of their status as an intervener. The fourth company in this group finds the opportunities are less than adequate because of what they see as the NEB's unwillingness to provide meaningful feedback.

Understanding of NEB application process



N=18

Q.2

Would you say you or others in your company have a sufficient understanding of the information requirements for submitting a complete application?

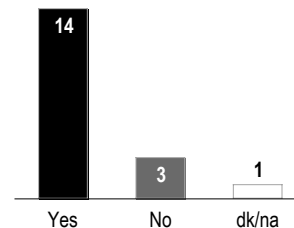
Subsample: Companies that have participated in the application process

Q.3

Do you have the tools required to complete an application, such as the Filing Manual and Streamlining Order?

Subsample: Companies that have participated in the application process

Company had opportunity to communicate with board staff prior to filing application



N=18

Q.5

Has your company had adequate opportunity to communicate with Board staff prior to filing applications?

Subsample: Companies that have participated in the application process

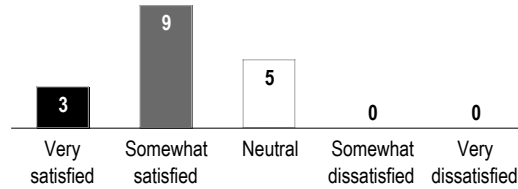
Satisfaction with Information about NEB Application Requirements

Most companies are generally satisfied with the NEB-supplied information about application requirements, particularly in terms of being up-to-date.

OVERALL SATISFACTION. Companies and associations that participated in the application process, (either as applicants or interveners) were asked to rate their overall satisfaction with the information on application requirements provided by the NEB, using a scale from “1” (very dissatisfied) to “5” (very satisfied). Overall, companies provide a positive assessment of this information, with two-thirds giving satisfied ratings of “4” (somewhat satisfied) or “5” (very satisfied), while none express dissatisfaction (“1” or “2”). Companies on the general list are most likely to say they are very satisfied with this information, while CRLC members are more apt to be neutral in their assessment (giving the midpoint rating of “3”).

SATISFACTION WITH SPECIFIC ASPECTS OF APPLICATION INFORMATION. Companies were also asked to evaluate five specific aspects of the application information provided by the NEB. In all cases, a strong majority give positive marks to NEB-supplied information, with more than three-quarters either strongly agreeing or agreeing that this information is easy to understand (16), up to date (15), accurate (14) and what they needed (14). Two-thirds (12) agree that the information is consistent, while a much smaller group (3) disagrees. Companies are most likely to strongly agree that the information provided is up-to-date (10 out of 18).

Overall satisfaction with information on application requirements provided by NEB



N=18

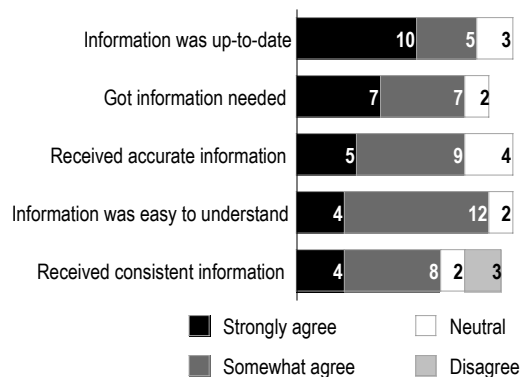
Excludes don't know/no answer (dk/na) responses

Q.6

Overall, how satisfied were you with the information on application requirements provided by the NEB? Please rate your experience, with “1” being “Very dissatisfied” and “5” being “Very satisfied.”

Subsample: Companies that have participated in the application process

Satisfaction with specific aspects of NEB application information



N=18

Excludes don't know/no answer (dk/na) responses

Q.8.

I would like to know how satisfied you were with the application information provided by the NEB in a number of specific ways. Please tell me the extent to which you agree with each statement, where “1” means “Strongly disagree” and “5” means “Strongly agree,” ... The information was easy to understand ... The information you received was up-to-date ... You received consistent information ... You received accurate information ... You got the information you needed.

Subsample: Companies that have participated in the application process

BOARD RESPONSE TO INCOMPLETE APPLICATIONS.

When asked an open-ended question about how the NEB should respond to incomplete applications, there is general consensus that the Board should ask the applicant to provide the missing pieces of information with guidance, and should expand communication with applicants to clarify the requirements.

CRLC members (that file applications more regularly) propose a somewhat firmer approach. They say the Board should only ask for the missing pieces, and some even believe the Board should suspend the hearings until it receives a complete application. Non-CRLC members are more likely to propose increased informal communications, such as phone calls, to help the applicants properly complete their applications. A handful of respondents say that if an application is severely deficient, it should simply be returned to the applicant with a request to re-file it.

Board responses to incomplete applications

	TOTAL	CRLC MEMBERS	NON- MEMBERS
Identify missing pieces of information	6	2	4
Offer help/provide guidance	5	1	4
Contact/communicate/discuss informally	5	0	5
If very problematic, just return to applicant	4	2	2
Delay hearing until application complete	2	2	0
Don't know	6	2	4

N=18
Total number of mentions exceeds number of companies surveyed because more than one response can be provided

Q.9

How do you think the Board should respond in situations in which an incomplete application is filed?

Subsample: Companies that have participated in the application process

EXPERIENCE AND SATISFACTION WITH NEB'S E-FILING SERVICE

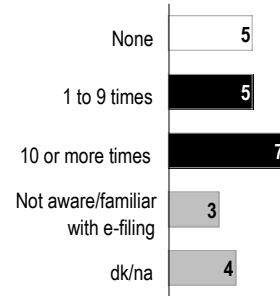
Half of the companies surveyed have made use of the Board's e-filing service, and most are satisfied with the service. Those that have not used it see no need or were not aware of it.

EXPERIENCE WITH E-FILING SERVICE. All of the organizations surveyed were asked about their use of NEB's e-filing service. Half (12) report having used this service, and this group is split fairly evenly between those that have used it less than ten times (5), and those that have used it ten times or more (7). The remainder have either not used the e-filing service (5), have never heard of it (3), or are unsure whether their organization used this service (4). None of the associations (compared to companies) report ever having used this service.

Of the few that say they have never made use of NEB's e-filing service, most say it is because they have no need for this service (4). One company indicates that the benefits do not justify the effort required to set up the process.

OVERALL SATISFACTION WITH E-FILING SERVICE. Companies that have used the e-filing service were asked about their overall satisfaction with the service, using a scale where "1" is very dissatisfied and "5" is very satisfied. Companies are generally positive about their e-filing experiences, with three-quarters giving a satisfaction rating of "4" or "5". The remaining companies (3) give a neutral assessment (a rating of "3"), while none express dissatisfaction (a rating of "1" or "2").

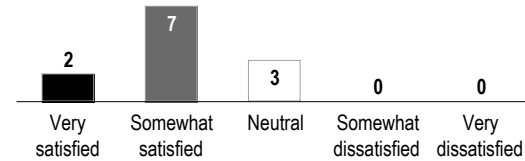
Number of times used NEB E-filing service



Q23

How many times has your company used the Board's e-filing service?

Overall satisfaction with most recent use of NEB E-filing service



N=12

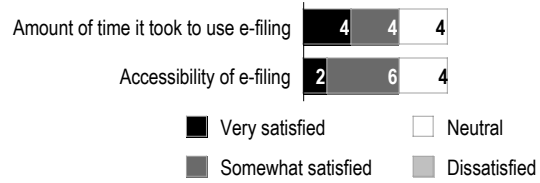
Q.25c

How satisfied were you with your overall experience in using e-filing?

Subsample: Companies that have used e-file service

SATISFACTION WITH SPECIFIC ASPECTS OF E-FILING SERVICE. Companies that used the e-filing service were also asked about their satisfaction with the accessibility of this service, and how long it took them to use it. The companies are generally favourable about these aspects of the service, with two-thirds either very satisfied or satisfied (rated “4” or “5”) with the amount of time needed to use the service (8) and with its accessibility (8). Once again, no company expresses dissatisfaction with either service element.

Satisfaction with specific aspects of NEB e-filing service



N=12

Q25ab

Overall, how satisfied were you with your most recent use of the Board's e-filing service in terms of the following, with “1” meaning “Very dissatisfied” and “5” meaning “Very satisfied.” How satisfied were you with ... the amount of time it took to use e-filing ... the accessibility of e-filing?

Subsample: Companies that have used e-file service

APPROPRIATE DISPUTE RESOLUTION PROGRAM

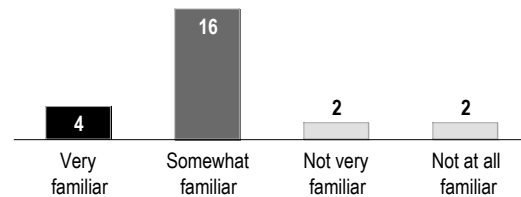
Most companies are generally familiar with the Appropriate Dispute Resolution Program, and express limited interest in receiving more information about it.

FAMILIARITY WITH APPROPRIATE DISPUTE RESOLUTION (ADR) PROGRAM. Most companies and associations surveyed (20) are at least somewhat familiar with the ADR Program, of which four say they are very familiar. The remainder indicate that they are not very (2) or not at all (2) familiar with the program. CRLC members are most likely to say they are very familiar, while no large or small/medium companies indicate they are as familiar with this program.

INTEREST IN RECEIVING INFORMATION ABOUT THE ADR PROGRAM. Interest in receiving information about the ADR program is limited. Just over one-third of the organizations surveyed (9) say they are interested in receiving such information. There is slightly greater interest among companies and associations that are only somewhat familiar (7 out of 16) or are unfamiliar (2 out of 4) with the program, while none of those that are very familiar say they need further information.

Information about the ADR Program could be made available through a variety of different methods, since there is no clear preference among companies that are interested in receiving such information. Stated preferences include receiving further information by mail (4), by e-mail (3) or from an in-person presentation (3), while one company favours an informal conversation with Board staff.

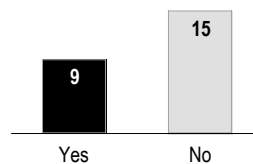
Familiarity with NEB's Appropriate Dispute Resolution (ADR) program



Q10

I would now like to ask you about the NEB's Appropriate Dispute Resolution, or ADR Program. Would you say you are very, somewhat, not very or not at all familiar with this program?

Would like to receive information about ADR program



Q11

Would you like to receive information about this program?

COST RECOVERY LIAISON COMMITTEE

Experience with CRLC

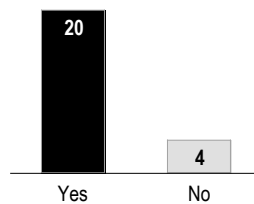
Most companies are familiar with the Cost Recovery Liaison Committee, and half of them report to be members.

FAMILIARITY WITH CRLC. The large majority of companies and associations surveyed (20 out of 24) are familiar with the Board's Cost Recovery Liaison Committee (CRLC). Interestingly, two of the organizations identified by the NEB as CRLC members say they are not familiar with the committee.

MEMBERSHIP IN CRLC. Of those that are familiar with the CRLC, half (10 out of 20) say their company is currently a member of this committee. This includes six companies previously identified as CRLC members, two large companies and two companies from NEB's general mailing list.

When non-members were probed as to why their company does not participate on this committee, the reasons given differ according to type of company. Large companies (3) indicate that they made the choice not to participate, either because it was not of benefit to them or because of the location of meetings. In comparison, the two small or medium companies say that participation is less relevant for them, either because they do not have many applications or because it is not relevant to them since they do not receive cost recovery. Non-members from NEB's general mailing list (4) say they have not participated in CRLC because they have not been invited or because it would be of limited relevance to their organization.

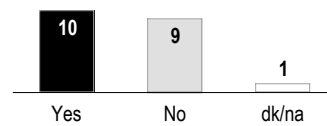
Familiar with Cost Recovery Liaison Committee (CRLC)



Q.13

Are you familiar with the Cost Recovery Liaison Committee?

Company is a member of CRLC



N=20

Q.14

Is your company a member of this Committee?

Subsample: Companies familiar with CRLC

Input on Cost Recovery

A slim majority of members say the CRLC offers them opportunities for meaningful input on cost recovery issues.

CRLC members were asked if the committee provides their company with meaningful input on cost recovery issues. Members are divided in their opinion, with just over half (6 out of 10) agreeing that the committee offers an opportunity for significant input, while the remainder (4) disagree.

Of those that do not believe the committee allows for meaningful input on cost recovery issues, two say it is because there is no scope to influence the costs charged by the Board, while the other two suggest it is because they have not taken full advantage of their participation in the CRLC.

CRLC provides company with meaningful input on cost recovery issues



N=10

Q.16

Does this committee provide your company with meaningful input on cost recovery issues?

Subsample: Companies that identify themselves as CRLC members

NEB WEBSITE

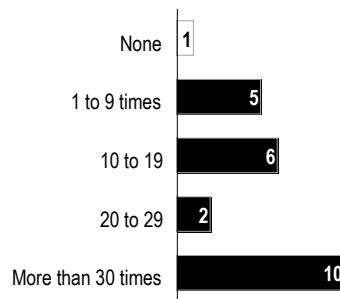
Experience with NEB Website

The organizations surveyed are frequent visitors to the NEB website, primarily for information on NEB generally and on the Board's decisions.

The NEB website is frequently consulted by the companies and associations surveyed. All but one (23 out of 24) indicate that they have visited the NEB website in the past 12 months. During that period of time, visitors report having made an average of 20 visits to the website.

Companies are visiting the NEB website for a number of reasons, but most commonly to obtain general information on the NEB (12 out of 23) and for information on the Board's decisions (9). There is also a group that uses the website for guidance on filing applications (6) or for the e-filing service (4). Other reasons for using the website include looking for information about other companies and looking for updates on NEB activities. Not surprisingly, more frequent visitors to the website cite a wider range of reasons for their visits.

Number of times visited NEB website in past 12 months



Q.18

How many times have you visited the NEB website in the past 12 months?

Reason for visiting NEB's website

General information on the NEB	12
Information on Board decisions	9
Information on filing applications	6
Information about other companies	5
E-filing service	4
NEB activities (hearings, speeches, conferences)	4
Statistical info/studies	3
Regulations/regulatory initiatives and materials	3
Guidance documents and notes/procedures	3
Others	4

N=23

Total number of mentions exceeds number of companies surveyed because more than one response can be provided

Q.19

For what reasons did you visit this website?

Subsample: Visited NEB website in past 12 months

Satisfaction with NEB Website

Most organizations are generally satisfied with their most recent visit to the NEB website, but the lowest ratings are given to the ease of locating the information they need or want.

OVERALL SATISFACTION. Visitors to the NEB website were asked to rate their overall satisfaction with their most recent visit, using a scale from “1” (very dissatisfied) to “5” (very satisfied). Most visitors are positive about their visit, with three-quarters saying they are satisfied (ratings of “4” or “5”) and only two expressing dissatisfaction (“1” or “2”). Companies are more likely than associations to give a positive assessment of the website. By company type, CRLC members are least positive about their most recent website visit.

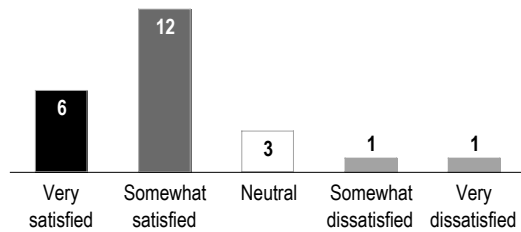
The two companies that are dissatisfied with their visit say it is because it was difficult to find the information they needed.

OPINIONS ABOUT SPECIFIC ASPECTS OF THE NEB WEBSITE. Website visitors were also asked to evaluate six specific aspects of their most recent experience with the NEB website, using a scale from “1” (strongly disagree) to “5” (strongly agree). The highest approval is given for the site being easy to find, with all but one (22 out of 23) indicating that they agree strongly with this statement. Majorities also agree (either strongly or somewhat) that they are confident in their privacy protection on the site (19), and that they get the information they needed in the end (17).

However, companies are less convinced about the navigability of the NEB website. They give lower ratings to the website for having easy-to-find information, containing the information they need, and being visually appealing. A related finding is that companies that have used the website for general information on the NEB are more likely to be satisfied overall with their visit than are those that visited the website for more specific information (e.g., searching for information on filing applications or on Board decisions).

Across all six aspects, CRLC members and large companies are less positive about the website than are small and medium companies and those from NEB’s general mailing list.

Overall satisfaction with most recent visit to NEB website



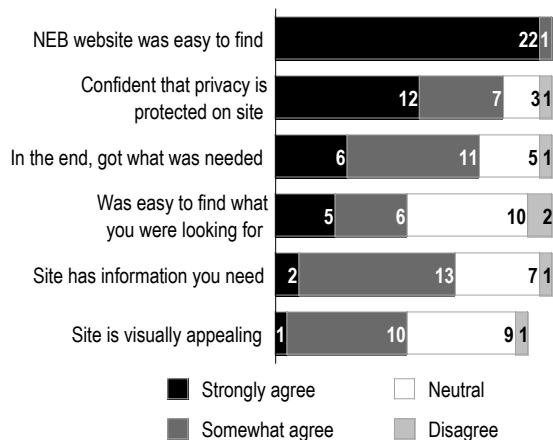
N=23

Q.20

Overall, how satisfied were you with your most recent visit(s) to the NEB website, with “1” meaning “Very dissatisfied” and “5” meaning “Very satisfied.”

Subsample: Visited NEB website in past 12 months

Opinion of specific aspects of NEB website experience



N=23

Q.22

Please tell me whether you agree or disagree with each of the following statements about your recent experience with the NEB website, where “1” means “Strongly disagree” and “5” means “Strongly agree,” ... It was easy to find the NEB’s website ... When you got to the site, it was easy to find what you were looking for ... The site is visually appealing ... The site has the information you need ... You feel confident that your privacy is fully protected on this site ... In the end, you got what you needed

Subsample: Visited NEB website in past 12 months

CONTACT WITH NEB

Company Contact with NEB

The companies surveyed have all had direct contact with the NEB or its staff, most commonly related to an information request or filing an application.

All companies and associations surveyed (24 out of 24) indicate that they have personally had direct contact with the Board or its staff. These organizations were asked about the nature of their most recent contact, and with which department of the NEB they had been in contact.

NATURE OF CONTACT. Companies are most commonly in contact with the NEB regarding an information request (8 out of 24) or filing an application (6). Other reasons include a meeting or presentation (3) or a general discussion (2), while a number of individual reasons are provided (e.g., due to role as intervener, an audit, a rates case).

DEPARTMENTS CONTACTED. The organizations have been in contact with a number of different departments or areas of the NEB. The most commonly contacted areas are those that deal with applications (6 out of 24) and legal issues (5), followed by the commodities or electricity department (3) and operations (2). There were also a wide variety of single mentions, including the secretary's office, the library, Board members, the financial regulatory brands, safety and regulatory affairs, rate filing, technicians and the pipeline hearing process.

Reason for contact with NEB

Information request	8
Filing an application (E-file or other)	6
Meeting/presentation	3
General discussion	2
Other	6

Total number of mentions exceeds number of companies surveyed because more than one response can be provided

Q.28

What was your most recent contact in connection with?

Satisfaction with NEB Contact

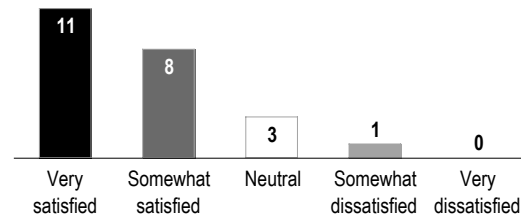
Most companies are satisfied with their most recent contact with the NEB, both generally and in terms of the company's accessibility.

OVERALL SATISFACTION. Companies and associations express a high degree of satisfaction with their most recent contact with the NEB. Almost half (11 out of 24) say they are very satisfied (rated "5"), while a further third (8) are somewhat satisfied. Only one company expresses dissatisfaction, while the remainder are neutral (3). CRLC members and companies on NEB's general mailing list are most likely to say they are very satisfied with their recent contact.

The one company expressing dissatisfaction with their NEB contact indicates this is due to an unfavourable decision rather than from their interaction with the NEB.

SATISFACTION WITH ASPECTS OF NEB CONTACT. As with their overall impression most companies are also favourable towards two specific aspects of their contact with the NEB. More than three-quarters are satisfied with their most recent NEB contact in terms of the time it took to make a successful contact (20 out of 24), and with the accessibility of the NEB (21). In both cases, companies express less satisfaction than do associations.

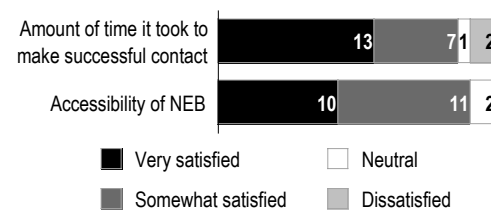
Overall satisfaction with most recent contact with Board or its staff



Q.30c

How satisfied were you with your overall experience with your contact with the NEB on this occasion?

Satisfaction with specific aspects of most recent contact with NEB



Q.30ab

Overall, how satisfied were you with your most recent contact with the NEB in terms of the following, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied." How satisfied were you with ... the amount of time it took to make successful contact with the NEB on this occasion ... the accessibility of the NEB?

Importance of Aspects of NEB Service

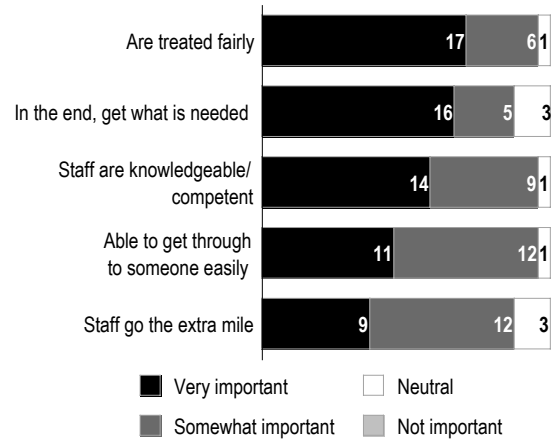
Companies consider fair treatment and getting what they need to be the most important aspects of NEB's service.

These organizations were asked to rate the importance of five different aspects of NEB's service, on a scale from "1" (not at all important) to "5" (very important). In general, all five aspects are held to be important, with each receiving a rating of "4" or "5" from more than eight in ten companies.

However, some differences appear when only the "very important" ratings are considered. Companies are most likely to place the highest degree of importance on receiving fair treatment (17 out of 24) and getting what they need in the end (16 out of 24). A majority of companies also ascribe considerable importance to the knowledge and competence of staff (14). By comparison, less than half believe it is very important to get through to someone without difficulty (11) or that staff go the extra mile to make sure they get what they need (9).

Across all five service aspects, associations appear to have slightly higher expectations than do companies. By type of company, large companies generally have the lowest expectations, particularly in terms of fair treatment and getting what they need.

Importance of aspects of service when contacting NEB



Q.33

I'd now like to ask you about what aspects of service are important to you when contacting the NEB for any reason. Please tell me how important each of the following are to you, where "1" means "not at all important" and "5" means "very important," ... You are able to get through to someone without difficulty ... The staff you deal with were knowledgeable and competent ... You are treated fairly ... Staff go the extra mile to make sure you get what you need ... In the end, you get what you need

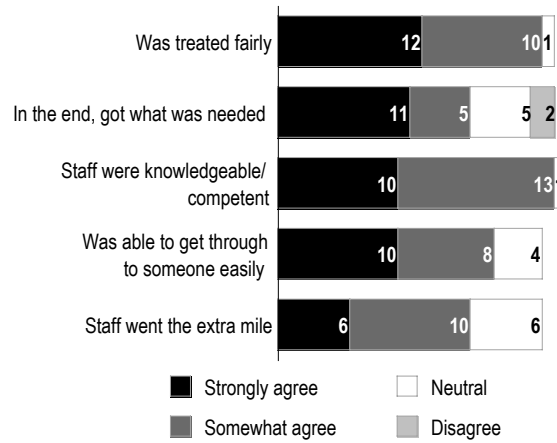
Opinion of Aspects of NEB Service

Companies are generally positive about the service they receive from the NEB.

Companies were asked to rate their most recent contact with the NEB on the same five dimensions, on a scale from “1” (strongly disagree) to “5” (strongly agree). In all five cases, the majority of organizations agree (either “4” or “5”) they received the desired level of service during this most recent contact with the NEB.

Companies are most likely to agree that they were treated fairly (22 out of 24), and that NEB staff were knowledgeable and competent (23). Fewer companies agree that they got through to the Board without difficulty (18), got what they needed in the end (16) or that staff went the extra mile to help them out (16). The two small or medium companies that participated in the survey express the most satisfaction about all five aspects of the service they received from the NEB.

Opinion of specific aspects of NEB service



Q.32

I would like to ask you more specifically about your most recent contact with the NEB. Thinking about when you contacted them, please tell me the extent to which you agree with each of the following statements, where “1” means “Strongly disagree” and “5” means “Strongly agree,” ... You were able to get through to someone without difficulty ... The staff you dealt with were knowledgeable and competent ... You were treated fairly ... Staff went the extra mile to make sure you got what you needed ... In the end, you got what you needed from this particular interaction.

Gap Analysis

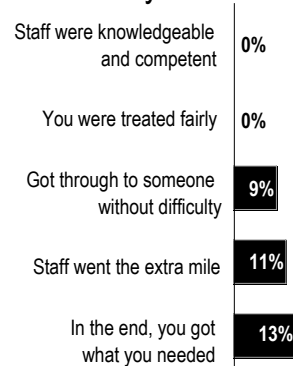
The NEB is effectively meeting the expectations of companies in all aspects of service.

An analysis was performed to integrate the importance and satisfaction measures to identify service gaps, those areas that are considered to be important but are not fully meeting these companies' expectations. This was performed using a "gap analysis" methodology drawn from research techniques used to evaluate customer service quality among leading private sector service providers. It entails a two-step procedure for each service feature for which both importance and satisfaction data were collected.

The analysis was conducted as follows. First, the subset of companies that rated the service dimension as "very important" was identified – this is the segment of the user group for which this type of service really matters. Second, within this subgroup, the proportion that is less than satisfied with the service is identified (in this case, those that disagree "somewhat" or "strongly"). This percentage represents the "service gap", which is the proportion of the user base for which this service is important but that do not believe it is being effectively provided by the NEB. The larger this percentage, the more important it is to address this area of service.

Overall, no significant service gaps were identified for any of the five dimensions evaluated. Companies that rate these services as very important to them also agree that they received the desired level of service during their most recent contact with the NEB. Instead, it is those that consider these services to be less important that express more concern about the actual service they received. Thus, the NEB is delivering the service that companies with the highest expectations want to receive.

Satisfaction with NEB contact – GAP analysis



N=9-17

GAP analysis is calculated as the percentage of companies who consider this aspect of service to be very important who do not think that the NEB has delivered on it during their most recent contact (i.e., ratings of neutral or disagree)

NEB VISION AND MANDATE

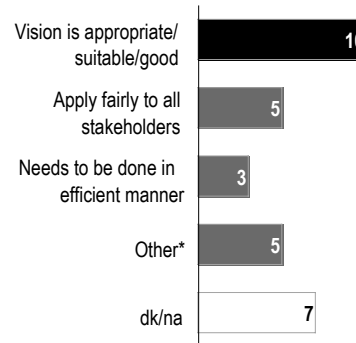
Perceptions of NEB's Vision

Companies are favourable towards the NEB's vision, but some emphasize the importance of balancing the interests of all stakeholders. Over half believe the NEB is fully or mostly realizing this vision.

DEFINITION OF NEB'S VISION. All companies surveyed were read a sentence outlining the NEB's vision, and asked their opinion of it.¹ Many organizations (10 out of 24) reacted positively to the vision, indicating they consider it to be most appropriate for the Board. For some (5 out of 24), a key part of the vision is the fairness with which it is applied: This group would like to see the NEB fairly balance the interests of all stakeholders involved. A few other companies relate this vision to the importance of efficiency or speed with which the NEB fulfills its role. Almost one-third of all companies (7 out of 24) were unsure how to answer the question.

EXTENT TO WHICH VISION IS BEING REALIZED. Having given their opinion of the NEB's vision, organizations were then asked to what extent they feel the NEB is realizing this vision. A slight majority believe that the NEB is fully (2) or mostly (9) realizing this vision. The remainder (8) feel it is being realized to some degree, while no company says the NEB is realizing this vision "only a little" or "not at all".

Definiton of NEB's vision



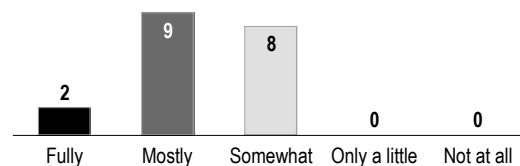
* Each mentioned by one company

Total number of mentions exceeds number of companies surveyed because one than one response can be provided

Q.34

The "Vision" of the National Energy Board is to be "a respected leader in safety, environment and economic efficiency in areas under its jurisdiction." How would you define this vision, from your perspective as a regulated company?

Extent to which NEB is realizing its vision



Q.35

To what extent do you feel the NEB is realizing this vision, as you would define it?

Subsample: Provided their opinion of NEB's vision (n=19)

¹ Companies were told: "The vision of the National Energy Board is to be 'a respected leader in safety, environment and economic efficiency in areas under its jurisdiction'."

MOST IMPORTANT ISSUE FACING THE NEB

Companies identify a number of issues facing the NEB, none of which are predominant. They are divided in their impressions of how well the Board is addressing those issues.

MOST IMPORTANT ISSUE FACING THE NEB. Companies and associations were asked to identify what they consider to be the three most important issues facing the NEB today. Of the 63 responses provided by these organizations, no one or two key issues stand out.² Instead, a multitude of issues were raised, which can be divided into several themes (a few comments fall into more than one theme).

Most important issues facing NEB

Number of mentions by theme

Effective and streamlined regulations/policies/clear directives (e.g. Timely regulatory decisions, efficiency of regulatory practices)	10
Rates cases/cost escalations/ structures/control (eg. Cost control, low cost of delivery from supply to market)	8
Energy supply/natural gas/future supply (eg. Energy supply, future supply, the available supply of natural gas)	8
Safety/pipeline safety (eg. Safety, reputation regarding safety and pipeline integrity)	6
Aboriginal issues/land use issues (eg. Aboriginal consultations, dealing appropriately with aboriginal issues/concerns)	5
Speed/efficiency (eg. NEB's ability to deal expeditiously with issues, approval times, approval times)	5
Competition/increased competition (eg. Balancing interested parties/interveners with realities of competition, competitiveness)	5
Environment (eg. Dealing with environment and cost of removing terminal life, environment)	3
Knowledge/competence (eg. More expertise in professional areas, staff competency)	3
Deregulation (eg. Moving to deregulated electrical market in Canada, deregulation)	2
Other	12

Q.36

What would you consider to be the three most important issues facing the NEB today?

² Findings for this question are evaluated on a “per mention” basis, rather than per respondent basis used throughout the rest of the report because companies were invited to provide up to three responses to this question. Thus, the maximum number of mentions for this question is 72 (24 respondents multiplied by 3 mentions each), although not all companies provided three issues, resulting in a total of 63 mentions for this question.

None of the themes are mentioned more than 10 times (out of 63). The issues most likely to be identified by these organizations include developing effective and streamlined regulations or policies and giving clear directives (10), cost and rate control (8), ensuring future energy supply (6), and ensuring pipeline safety (6), among others. The “other” category comprises twelve mentions, each made by only one company.

The adjacent table presents the individual mentions that comprise the “other” category in the previous table:

PERCEIVED PERFORMANCE OF NEB IN ADDRESSING THESE ISSUES. Companies were then asked how good a job they believe the Board is doing in addressing each of the issues they identified. In general, these organizations are divided as to the performance of the NEB. Of the 63 total mentions made by these companies, the NEB is perceived to be doing an excellent or good job in 25 cases, compared to only a fair job in 27 cases.³ The NEB is felt to be doing a poor job on the following six issues:

- Balancing interested parties/intervenors with the realities of competition
- Approval for additional pipelines to the detriment of existing pipeline infrastructure
- How to deal with the environment and the cost of removing terminal life
- Exercising strong leadership
- Aboriginal consultations
- More expertise in professed areas of knowledge

In 5 cases, companies said it was too early to tell or could not answer the question.

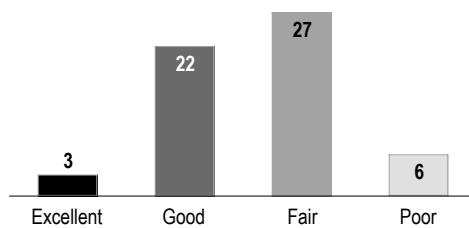
Most important issues facing NEB Individual mentions comprising “other” theme

Expansion policy	1
Fairness of long-term incentive calling agreements	1
Potential for unutilized natural gas pipelines from declining production	1
Dealing with an aging pipeline infrastructure under it’s regulation	1
Level of communication between members companies and the NEB	1
Federal and provincial accountabilities	1
Achieving the Board’s 4 or 5 goals	1
Interprovincial connectivity of electricity	1
Approval for additional pipelines to the detriment of existing pipeline infrastructures	1
NEB must exercise strong leadership	1
Maintaining the objectivity for both applicants and intervenors	1
Balancing economic interests and social interests	1

Q.36

What would you consider to be the three most important issues facing the NEB today?

NEB performance addressing issues Number of mentions



Q.37

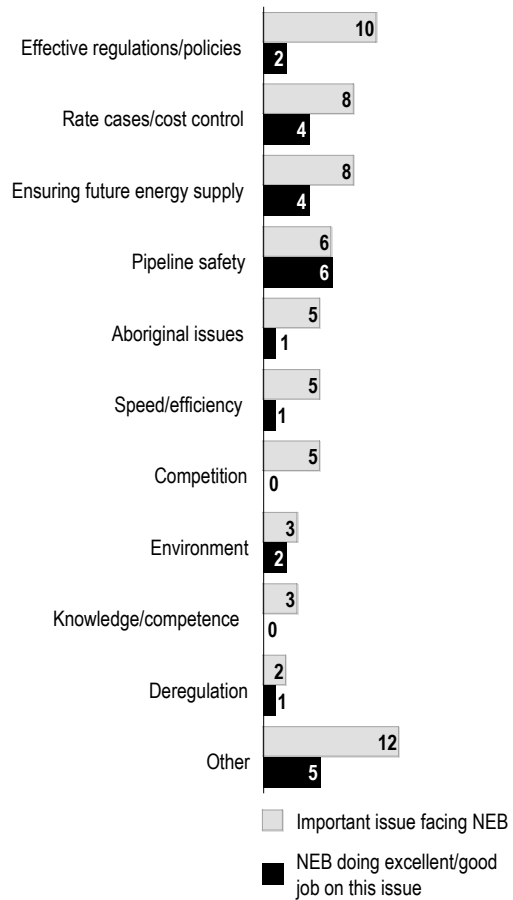
How good a job do you believe the Board is doing in addressing each of these issues at this point in time? Is it doing an excellent, good, only fair or poor job in addressing ...?

³ Findings for this question are evaluated on a “per mention” basis, rather than per respondent basis used throughout the rest of the report. That is, assessments of how good a job the Board is doing were given for all 63 issues raised.

These opinions can also be examined on an issue-by-issue basis. For example, while ten companies indicated that improved regulations or policies are a key issue, in only two cases is the Board considered to be doing an excellent or good job of addressing this. The strongest approval is for the role the Board is playing in pipeline safety, with all companies that identified this as a key issue indicating that the NEB is doing an excellent or good job in this area.

NEB performance by key issues

Number of mentions



Q.36

What would you consider to be the three most important issues facing the NEB today?

Q.37

How good a job do you believe the Board is doing in addressing each of these issues at this point in time? Is it doing an excellent, good, only fair or poor job in addressing ...?

Greatest Opportunity for Improvement

Companies identify a range of areas in which they see opportunities for the NEB to improve the level of service it provides to the industry.

When asked which aspect of the NEB's service offers the greatest opportunity for improvement, companies offer a wide range of suggestions. None of these areas emerge as predominant, however, and most of them are mentioned by only one company or association. The only area to be given more noticeable attention is the application process, in which seven companies offer suggested improvements, primarily in terms of improving approval times and efficiency in general (4 mentions). Five of the companies surveyed did not offer any suggested areas for improvement.

Final Comments

At the end of the survey, each company was offered the opportunity to make any final comments or suggestions regarding the NEB, beyond the topics already covered. Over half (15 out of 24) declined to do so. A few companies (3) say they believe the NEB is generally doing a good job in the face of challenges such as changing stakeholder expectations or time and resource limitations. Another small group (3) re-iterated the need for more frequent and thorough consultations with stakeholders.

NEB's service offering greatest opportunity for improvement

Application process (NET)	7
Approval times and efficiency	4
Information requests	2
General	1
Pipeline toll review work	1
Clearer reasons for decisions	1
Board needs to lead and not just arbitrate	1
Publications and reports	1
Balancing special groups and industry reality	1
Website search engine	1
Speed up decision making times	1
Defining scope of joint panel review applications	1
Conducting adequate aboriginal consultations	1
Improve perception of formality with people it deals with	1
Staying on top of merging issues in regulatory form	1
Post approval monitoring of its requirements and orders/rules	1
Accessibility of web based hearing and board decision info	1
Expertise of staff	1
De-regulations	1
Don't know	5

Total number of mentions exceeds number of companies surveyed because more than one response can be provided

Q.38

Based on your experience, which aspect of the NEB's service offer the greatest opportunity for improvement?

SURVEY METHODOLOGY

Questionnaire Design

The questionnaire was designed by senior Environics researchers, in conjunction with representatives from the National Energy Board (NEB), and consisted of a mix of open-ended questions as well as structured questions incorporating the Common Measurements Tool (CMT). This format allowed for the collection of a greater amount of information than what can be collected using a fully structured format.

Once the questionnaire was finalized and approved by the NEB, it was then translated into French using Environics' professional translators. A copy of the questionnaire (in English) is attached as an Appendix.

PRE-TEST. Prior to finalizing the survey for the field, Environics conducted a full pre-test with "live" respondents. This consisted of telephone interviews in the same manner as for the full survey with three organizations drawn from the sample list. However due to the small size of the population, these "pre-test" interviews were incorporated in the final sample since no changes to the survey were required.

Sample Design

The sampling method was designed to complete in-depth telephone interviews with 20 to 30 companies and associations that deal with the NEB. A target sample of 54 organizations was drawn from four lists of NEB contacts: the CRLC member list, the cost recovery invoice list of large companies, the cost recovery invoice list of small and medium companies, and organizations from the general NEB mailing list.

The initial contact was made through an introductory letter sent by mail from the NEB to the appropriate person at each company, informing them of the purpose of the study and requesting their participation. Environics then followed up by telephone to confirm participation and to conduct the interview.

Fieldwork

The interviewing was conducted between March 30 and April 23, 2004 by senior Environics researchers. Interviews averaged 27 minutes in length. Twenty-three interviews were conducted in English, and one in French.

All surveys were conducted in respondents' official language of choice. Respondents were advised of their rights under the Privacy and Access to Information Act (e.g., identifying purpose of research, identifying sponsoring agency and research supplier, the voluntary nature of the survey, and the protection of their responses under the Act), and offered a copy of the final results once they are published by the NEB. This survey was registered under the Canadian Survey Research Council (CSRC). This registration system permits a respondent to verify a survey call, inform themselves about the industry and/or register a complaint.

Completion Results

A total of 24 interviews were completed with companies and associations from the original sample of 54 contacts, within the timeframe available. This represents an overall participation rate of 44 percent. The number of interviews completed from each list is presented in the following table.

Completion Results

	SAMPLE AVAILABLE	NUMBER OF COMPLETES	% COMPLETES
CRLC members	14	8	57
Cost recovery invoices – large companies	10	5	50
Cost recovery invoices – small/ medium companies	6	2	33
NEB general mailing list	24	9	38
Total interviews completed	54	24	44
Associations	7	4	57
Companies	47	20	43

The table below presents a list of the organizations that participated.

Participating organizations

Companies (20 Participants)

Alliance Pipeline Limited
 BP Canada Energy Company
 Champion Pipe Line Corporation Limited
 Cochin Pipe Lines Ltd.
 Coral Energy Canada Inc.
 Duke Energy
 Enbridge Pipelines Inc.
 Encana Border Pipeline Limited
 ESSO
 Hydro One Networks Inc.
 Maritimes & Northeast Pipelines
 Ontario Power Generation Inc.
 Pouce Coupé Pipe Line Company Limited
 Sun Canadian Pipe Line Company Limited
 Talisman Energy Inc.
 Terasen Pipelines (TransMountain) Inc.
 TransCanada Pipelines
 TransGas Limited
 Union Gas
 Williams Energy (Canada) Pipeline Inc.

Associations (4 participants)

Canadian Association of Petroleum Producers
 Canadian Energy Pipeline Association
 Canadian Gas Association
 Industrial Gas Users Association

APPENDIX: QUESTIONNAIRE

**National Energy Board
2004 Company Survey**

Final Questionnaire

Introduction

Good morning/afternoon/evening. May I speak with [NAME]

WHEN MAKE CONTACT WITH [NAME]

My name is _____ and I am calling from the Environics Research Group, a public opinion research company. Today we are conducting a survey on behalf of the National Energy Board, or NEB, with senior individuals responsible for regulatory affairs in regulated companies.

Do you recall receiving a letter in the mail recently from the National Energy Board informing you about this survey?

- 01 - Yes
- 02 - No

The purpose of the survey is to obtain feedback on your company's experience with the NEB, in terms of applications and other services provided by the Board. The survey will take about 15 minutes, and your answers will remain strictly confidential.

IF ASKED: I can give you a contact name at the NEB at the end of the survey [PROVIDE UPFRONT IF RESPONDENT INSISTS

IF RESPONDENT SAYS HE/SHE IS NOT THE BEST PERSON TO COMMENT ON THIS TOPIC, ASK FOR ALTERNATIVE

IF PERSON SELECTED IS NOT AVAILABLE, ARRANGE FOR CALL-BACK

A. Application Process

Before I begin, I'd like to ask that you provide all your responses on behalf of your company.

I'd like to begin by asking you a few questions about the application process

1. When was the last time your company participated in the application process to the National Energy Board?

___ Month
and

___ Year

VOLUNTEERED

98 - Never

99 - DK/NA

SKIP TO Q.10

SKIP TO Q.10

2. Would you say you or others in your company have a sufficient understanding of the information requirements for submitting a complete application?

01 - Yes
02 - No
99 - DK/NA

3. Do you have the tools required to complete an application, such as the Filing Manual and Streamlining Order? (READ IF NECESSARY: This was formerly called the "Guidelines for Filing Requirements")

01 - Yes
02 - No SKIP TO Q.5
99 - DK/NA SKIP TO Q.5

4. (IF YES TO Q.3) Has the Board provided clear direction in how to use these tools?

01 - Yes
02 - No
99 - DK/NA

5. Has your company had adequate opportunity to communicate with Board staff prior to filing applications?

01 - Yes SKIP TO Q.6
02 - No
99 - DK/NA

- 5a. (IF NO TO Q.5) What would you say has prevented you from having better opportunities for communicating with the Board prior to filing an application?
SPECIFY

99 - DK/NA

6. Overall, how satisfied were you with the information on application requirements provided by the NEB? Please rate your experience, with "1" being 'Very dissatisfied' and "5" being "Very satisfied."

01 - Very dissatisfied
02 -
03 - SKIP TO Q.8
04 SKIP TO Q.8
05 - Very satisfied SKIP TO Q.8
VOLUNTEERED
99 - DK/NA SKIP TO Q.8

7. (IF 01/02 IN Q.6) What would you say is the main reason you were dissatisfied with this information?
SPECIFY

99 - DK/NA

8. I would like to know how satisfied you were with the application information provided by the NEB in a number of specific ways. Please tell me the extent to which you agree with each statement, where "1" means "Strongly disagree" and "5" means "Strongly agree"
READ IN SEQUENCE

- a) The information was easy to understand (CMT - not core)
- b) The information you received was up-to-date (CMT - not core)
- c) You received consistent information (CMT - not core)
- d) You received accurate information (CMT - not core)
- e) You got the information you needed (CMT - not core)

01 - Strongly disagree
02 -
03 -
04 -
05 - Strongly agree
VOLUNTEERED
99 - DK/NA

9. How do you think the Board should respond in situations in which an incomplete application is filed?
SPECIFY

99 - DK/NA

B. Appropriate Dispute Resolution Program

10. I would now like to ask you about the NEB's Appropriate Dispute Resolution, or ADR Program. Would you say you are very, somewhat, not very or not at all familiar with this program?

01 - Very familiar
02 - Somewhat familiar
03 - Not very familiar
04 - Not at all familiar
VOLUNTEERED
99 - DK/NA

11. Would you like to receive information about this program?

01 - Yes
02 - No
99 - DK/NA

12. (IF YES IN Q.11) In which of the following ways would you like to receive this information?
READ - CODE ALL THAT APPLY

01 - Through the mail
02 - Through an in-person presentation
03 - Through an informal conversation with Board staff
VOLUNTEERED
98 - Other (SPECIFY _____)
99 - DK/NA

C. Cost Recovery

13. Are you familiar with the Cost Recovery Liaison Committee?

- 01 - Yes
- 02 - No SKIP TO Q.18
- 99 - DK/NA SKIP TO Q.18

14. Is your company a member of this Committee?

- 01 - Yes SKIP TO Q.16
- 02 - No
- 99 - DK/NA

15. (IF NO/DK TO Q.14) Can you tell me why your company does not participate on this committee?
SPECIFY

99 - DK/NA

SKIP TO Q.18

16. (IF YES TO Q.14) Does this committee provide your company with meaningful input on cost recovery issues?

- 01 - Yes SKIP TO Q.18
- 02 - No
- 99 - DK/NA

17. (IF NO TO Q.16) Why not?
SPECIFY

99 - DK/NA

D. NEB Website

And now a few questions about the NEB website . . .

18. How many times have you visited the NEB website in the past 12 months?

- 01 – 0 SKIP TO Q.23
- 02 – 1-9
- 03 – 10 – 19
- 04 – 20 - 29
- 05 – more than 30 times

19. For what reasons did you visit this website?
DO NOT READ - CODE ALL THAT APPLY

- 01 - General information on the NEB
- 02 - Information on filing applications
- 03 - e-filing service
- 04 - Information on Board decisions
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

20. Overall, how satisfied were you with your most recent visit(s) to the NEB website, with “1” meaning “Very dissatisfied” and “5” meaning “Very satisfied.”

- 01 - Very dissatisfied
- 02 -
- 03 - SKIP TO Q.22
- 04 - SKIP TO Q.22
- 05 - Very satisfied SKIP TO Q.22
- VOLUNTEERED
- 99 - DK/NA SKIP TO Q.22

21. (IF 01/02 IN Q.20) In what way were you dissatisfied with the NEB website?
DO NOT READ - CODE ALL THAT APPLY

- 01 - Too hard to find what I need
- 02 - Not up to date
- 03 - Difficult to navigate
- 04 - Too slow
- 05 - Poorly designed
- 06 - Information not current
- 07 - Does not have information I want/need
- 08 - Search engines do not work well
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

22. Please tell me whether you agree or disagree with each of the following statements about your recent experience with the NEB website, where "1" means "Strongly disagree" and "5" means "Strongly agree."

READ IN SEQUENCE

- a. It was easy to find the NEB's website (CMT - not core)
- b. When you got to the site, it was easy to find what you were looking for (CMT Core)
- c. The site is visually appealing (CMT – Core)
- d. The site has the information you need (CMT – Core)
- e. You feel confident that your privacy is fully protected on this site (CMT Core)
- f. In the end, you got what you needed (CMT core)

01 - Strongly disagree

02 -

03

04

05 - Strongly agree

VOLUNTEERED

98 - Not applicable

99 - DK/NA

E. E-Filing

I'd now like to ask you about the Board's e-filing service . . .

23. How many times has your company used the Board's e-filing service?]

___ Number of times SKIP TO Q.25

00 - None/Have never used

98 - Not aware/familiar with e-filing SKIP TO Q.27

99 - DK/NA SKIP TO Q.27

24. (IF NONE IN Q.23) Why has your company not made use of this service?
DO NOT READ - CODE ALL THAT APPLY

01 - Not aware of it

02 - Too difficult to use

03 - Not mandatory

04 - Not broad enough (??)

98 - Other (SPECIFY _____)

99 - DK/NA

SKIP TO Q.27

25. Overall, how satisfied were you with your most recent use of the Board's e-filing service in terms of the following, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."

READ IN SEQUENCE

- a. How satisfied were you with the amount of time it took to use e-filing?
- b. How satisfied were you with the accessibility of e-filing?
- c. How satisfied were you with your overall experience in using e-filing?

01 - Very dissatisfied

02 -

03 -

04 -

05 - Very satisfied

VOLUNTEERED

99 - DK/NA

26. (IF 01/02 in Q.25c) In what way were you dissatisfied with your recent e-filing experience?

DO NOT READ - CODE ALL THAT APPLY

01 - Too hard to find what I need

02 - Not up to date

03 - Difficult to navigate

04 - Too slow

05 - Poorly designed

06 - Information not current

07 - Does not have information I want/need

08 - Search engines do not work well

98 - Other (SPECIFY _____)

99 - DK/NA

F. Direct Contact with the NEB

Moving now to another topic . . .

27. Have you personally ever had direct contact with the Board or its staff?

01 - Yes

02 - No SKIP TO Q.33

99 - DK/NA SKIP TO Q.33

28. (IF YES TO Q. 27) What was your most recent contact in connection with?

DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED

01 - Filing an application (e-file or other)

02 - Request for information

98 - Other (SPECIFY _____)

99 - DK/NA

29. Which area or department of the Board did you contact on this most recent occasion?
DO NOT READ - CODE ALL THAT APPLY

- 01 - Secretary's office
- 02 - Communications
- 03 - Applications
- 04 - Operations
- 05 - Legal
- 06 - Library
- 07 - Records
- 08 - Corporate services/Accounting
- 09 - Chief Operating Officer (COO)
- 10 - Board members
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

30. Overall, how satisfied were you with your most recent contact with the NEB in terms of the following, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."
READ IN SEQUENCE

- a. How satisfied were you with the amount of time it took to make successful contact with the NEB on this occasion? [CMT Core]
- b. How satisfied were you with the accessibility of the NEB? [CMT Core]
- c. How satisfied were you with your overall experience with your contact with the NEB on this occasion? [CMT Core]

- 01 - Very dissatisfied
- 02 -
- 03 -
- 04 -
- 05 - Very satisfied
- VOLUNTEERED
- 99 - DK/NA

31. (IF 01/02 IN Q.30c) What would you say is the main reason you were dissatisfied with the way you were treated by the NEB?
DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED

- 01 - Took too long to get what I needed
- 02 - Staff not responsive
- 03 - Could not get answers to questions
- 04 - Too much bureaucracy
- 05 - Hard to reach
- 06 - Did not take issue/problem seriously
- 07 - Still waiting for a response/resolution
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

32. I would like to ask you more specifically about your most recent contact with the NEB. Thinking about when you contacted them, please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree"

READ IN SEQUENCE

- a. You were able to get through to someone without difficulty [CMT Core]
- b. The staff you dealt with were knowledgeable and competent [CMT Core]
- c. You were treated fairly [CMT Core]
- d. Staff went the extra mile to make sure you got what you needed (CMT core)
- e. In the end, you got what you needed from this particular interaction (CMT core)

01 - Strongly disagree

02 -

03

04

05 - Strongly agree

VOLUNTEERED

99 - DK/NA

33. I'd now like to ask you about what aspects of service are important to you when contacting the NEB for any reason. Please tell me how important each of the following are to you, where "1" means "not at all important" and "5" means "very important."

READ IN SEQUENCE

- a. You are able to get through to someone without difficulty [CMT Core]
- b. The staff you deal with were knowledgeable and competent [CMT Core]
- d. You are treated fairly [CMT Core]
- e. Staff go the extra mile to make sure you get what you need (CMT core)
- g. In the end, you get what you need (CMT core)

01 - Not at all important

02 -

03

04

05 - Very important

VOLUNTEERED

99 - DK/NA

G. NEB Vision and Mandate

Now I'd like to ask you some general questions about the NEB . . .

34. The "Vision" of the National Energy Board is to be "a respected leader in safety, environment and economic efficiency in areas under its jurisdiction." How would you define this vision, from your perspective as a regulated company?

SPECIFY

99 - DK/NA

SKIP TO Q.36

35. To what extent do you feel the NEB is realizing this vision, as you would define it? Would you say the Board is realizing this vision:

01 - Fully
02 - Mostly
03 - Somewhat
04 - Only a little, or
05 - Not at all
VOLUNTEERED
06 - DK/NA

36. What would you consider to be the three most important issues facing the NEB today?

SPECIFY - ACCEPT UP TO THREE

1. _____

2. _____

3. _____

99 - DK/NA

SKIP TO Q.38

37. How good a job do you believe the Board is doing in addressing each of these issues at this point in time? Is it doing an excellent, good, only fair or poor job in addressing [ISSUE]?

READ FOR EACH ISSUE IDENTIFIED IN Q.33

1. _____

2. _____

3. _____

01 - Excellent job
02 - Good job
03 - Only fair job
04 - Poor job
VOLUNTEERED
05 - Too early to tell
99 - DK/NA

38. Based on your experience, which aspect of the NEB's service offer the greatest opportunity for improvement?
SPECIFY

99 - DK/NA

39. Before we finish, do you have any final comments or suggestions that you would like to add about any of the topics we've just covered?
SPECIFY

99 - None/DK/NA

This completes the survey.

On behalf of the NEB, thank you very much for your time and cooperation. The NEB will be happy to provide you with a summary of the results of this survey in the next couple of months or you can find this on their website at www.neb-one.gc.ca. Would you like to receive a copy in the mail?

- 01 - Yes RECORD NAME/ADDRESS IF NOT ALREADY RECORDED ABOVE
02 - No

IF ASKS FOR NEB CONTACT: You can contact Charlene Gaudet at the NEB at 1-800-899-1265.

In case my supervisor would like to verify that I conducted this interview, may I have your first name?

First Name: _____

RECORD BY OBSERVATION

40. Language of interview

- 01 English
02 French

SYSTEM RECORDED

41. Type of company (from sample list)

- 01 CRLC Members
02 Large Companies
03 Intermediate/ Small Companies
04 General NEB Mailing List