

Energy East Pipeline

In Service,
On Time.

Grassroots Advocacy Vision Document

May 15, 2014

Edelman

Suite 220, 903 – 8th Avenue SW

Calgary, AB T2P 0P7

T 403-817-0620

www.edelman.ca

A Daniel J Edelman Company



TransCanada

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Document Purpose

This is one of two documents that address the Advocacy Mobilization section of the Agency Scope of Work (updated May 7, 2014).

- Overall direction and oversight of the advocacy program, measurement and compliance, internal change management (i.e., assisting EE team to communicate the scope, approach and value of the digital public advocacy initiative internally)
- Scope, design, and development of an online action center (stand alone or integrated with TC or EE web properties), including enterprise grade CRM and advocacy database. Inclusive of applicable software licensing fees and ongoing maintenance
- Execution of ongoing recruitment activities including audience segmentation and targeting, message and materials development and data capture; Expenses include targeted paid placement as well as list rentals or potential third-party sponsorships; 2014 goal is 35,000 advocates
- Working with EE team to identify advocates for Energy East project
- Execution of ongoing education and engagement programs, optimization and list management, coordinated mobilization activities to create targeted outbound activism; Expenses to include both online and offline activation opportunities
- Initiate the effort to leverage advocates provided by team in campaign strategy and execution (landowners, employees, union leaders/members, business leaders/employees, Aboriginal groups, government and municipal leaders) in all communications channels
- Travel associated with scope of work

The related document is titled Grassroots Advocacy Implementation Plan and includes more detail about specific work and action plans to build and launch this campaign.

The approach and specifically detailed tactics align to the agreed upon objectives and strategy to “drive an active public discussion about Energy East that gives Canadians reasons to affirmatively support the project in the face of organized opposition.”

Grassroots Mobilization

A New Approach for a New Project

Edelman and TransCanada have agreed on a strategic communications plan designed to navigate the Energy East pipeline project through the new realities of designing, building and operating a major pipeline project in North America. These new realities include:

- Permanent, persuasive, nimble and well-funded opposition groups
- Pipeline projects being used as proxies for the broader “off-oil” public debate
- Record low levels of public trust in government, meaning regulatory approval is no longer sufficient to successful project implementation.

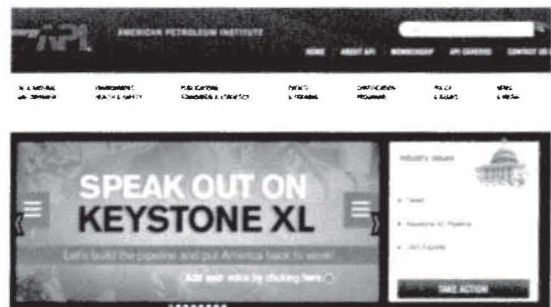
TransCanada has recognized that under these conditions, success can no longer be achieved without proactive, sincere, and expansive public engagement that clearly demonstrates not only the merits of the project but also TransCanada’s role as a leader in the energy industry.

From a Grassroots Mobilization perspective, moving forward we need to adapt to these new realities by redefining not just our approach but also success, by adopting some of the strategies and tactics of our opposition, and by committing to broad public engagement to build long-term advocacy for TransCanada. Ultimately, this new strategic approach and framework will serve as established best practices for TransCanada’s present and future business objectives.

Energy Policy Meets Data-Driven Politics

Industry Efforts

The energy industry the U.S. has invested considerable resources in digital advocacy as a core component of their efforts to retain their license to operate. Companies and organizations are demonstrating that not only is it possible to counter or mitigate the effect of sophisticated opposition efforts, a commitment to digital and grassroots advocacy can also drive proactive campaigns to expand access and operations.



For example, API has been using digital grassroots tools to organize and mobilize industry employees and other concerned Americans since 2007. They have deployed these activists in support of Keystone XL, for regulatory and permitting processes, to oppose higher taxes and on many other matters. It's been a key part of the API's advocacy efforts in Washington and around the country. They have built a direct connection with more than one million activists, and generated more than 500,000 supportive comments during the

KXL

**we are
energynation**



**Energy
Citizens**

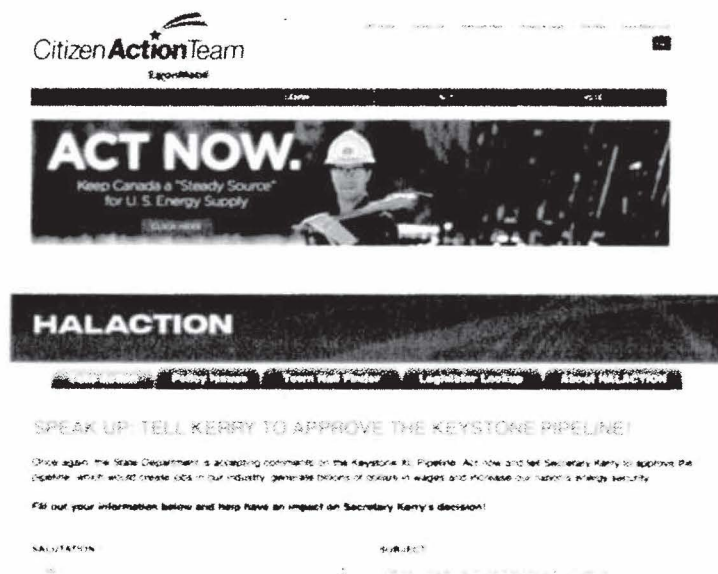


process.

AFPM (American Fuel & Petrochemical Manufacturers) has assembled a diverse coalition to drive a proactive campaign to reform the Renewable Fuel Standard and in support of hydraulic fracturing. A pillar of those campaigns is a digital advocacy program to bring consumers' voices to bear in Washington, D.C. They have recruited more than 150,000 activists and recently mobilized that group to submit more than 15,000 comments to an EPA hearing on the topic.



At the same time it's not just associations or advocacy groups building these programs in support of the industry. **Companies** like ExxonMobil, Chevron, Shell, and Halliburton (and many more) have all made key investments in building permanent advocacy assets and programs to support their lobbying, outreach, and policy efforts. In launching a program like this, TransCanada will be in good company with a strong roadmap to follow.



Opposition Efforts

Unfortunately, even with these investments and commitments from the industry, the opposition is far ahead and well suited to press its advantage not just in the U.S. but in Canada as well. Almost every ENGO in the U.S. has or supports a digital advocacy program. They use it to leverage some of their natural advantages:

- Large and passionate audiences that show a propensity to vote and take other political action;
- Organizational incentives (\$) that reward highly visible external efforts, not viable public policy;
- Alignment with official political organizations and parties

The standard practice for almost all of these ENGOs is a reliance on sophisticated technology, using centralized databases¹, email marketing and list management, geotargeted outreach, and paid recruitment. They all facilitate electronic advocacy communications to policymakers, influencers, and the media, and the most successful combine that digital effort with traditional “offline” political advocacy.



¹ Convio (<http://www.convio.org>) is one of the most popular technology products used by ENGOs to facilitate digital advocacy. Edelman developed the Multiplier Platform to ...

The Technology and Political Gap

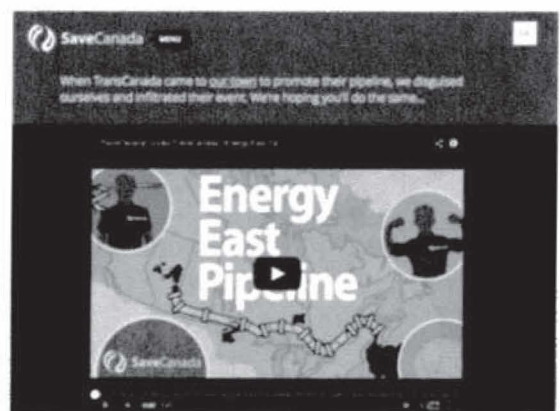
The ENGOS long ago adopted grassroots as part of their organizational DNA. More recently in the U.S., however, they have doubled down on both their technology investments as well as their coordination with official political organizations. No longer do these organization keep an arm's length of distance from electoral campaigns or party organizations; they have found ways to partner to the benefit of all those involved. This gives them an extraordinary institutional advantage over industry or even opposing political groups.



Data sharing among ENGOS and partisan organizations in the U.S.

The Opposition is Headed North

Unfortunately, the impact that ENGOS have had on energy policy in the U.S. has clearly encouraged these groups to begin to migrate those efforts and expertise into the Canadian policy arena. Groups include affiliates of global organizations like the Sierra Club of Canada, national groups like Save Canada, and local groups like those active in North Bay, Ontario. They are using the same digital tools as their U.S. counterparts as well as some more social-centric advocacy platforms like Care2 and Change.org.



A Coalition-Based Approach

No political or advocacy movement is monolithic in tone or message, nor would it be successful if it were. In order to win, we must assemble a coalition of different groups of people that coalesce for different individual reasons in support of a common goal. In this regard, Energy East has a significant advantage in that a diverse range of stakeholders stands to benefit from the project.

Measureable Goals and Effective Outputs

To achieve the program objectives of increasing positive perception, increasing public advocacy, increasing the support of local and affected communities and mitigating or reducing the effects of the opposition, the grassroots program will:

- **Recruit and engage** the largest possible number of Canadians in support of the Energy East project
- **Mobilize** those supporters to take action on behalf of the project to influence policymakers, regulators, and opinion elites. This mobilization effort will produce:
 - More supportive comments and participation during the OEB, BAPE, and NEB processes
 - Letters, calls, and other public displays of support for the project
 - Pressure on political, policy, and regulatory leaders to approve the project
- **Change the conversation** online by encouraging supporters to publicly join the policy discussion.

These efforts are tied directly to the master strategy of elevating Energy East to an issue that gives citizens reasons to affirmatively support the project in the face of organized opposition. Through recruiting, engaging and mobilizing advocates to speak out in support of the project, and to stand up against the opposition who would hold Canada back, the grassroots program will demonstrate meaningful public support to the decision makers whose approval will make project construction and operation possible.

Supporter Matrix

As previously mentioned, identifying logical supporters of the project is the first step to build a robust digital grassroots coalition². In this process, “logical” is deliberately not a synonym for “obvious.” Instead, we will work to identify supporters and partners whom politicians, media and other elites may be surprised to hear are taking action in support of the project. We do this to increase public advocacy for the project.

Through this process we will determine what types of individuals or groups would be most likely to support and/or benefit from development of Energy East, and which messages and approaches they would likely respond to positively, leading them to join our coalition. For

² Should offline and in-person activities be approved, the coalition would naturally extend to those areas as well.

instance, your shippers have a distinct self-interest in the success of the project, and we should build a digital toolkit for companies like Cenovus Energy to use in activating their thousands of employees.

The grid below details an initial consideration of what supporters could be brought to bear, based on their connection to the project. It also includes the key value proposition message to recruit them and the channel we would use to deliver the recruitment message.

This list will be enhanced, refined and improved as activities commence. Recruitment messages and channels will also be tested and refined continuously, based on performance.

Logical Supporters

Supporter Type	Connection (Benefits/Fears)	Key Message(s) to Deliver	How to Engage
TransCanada Employees	Jobs	Energy East means jobs and continued growth	Internal email; intranet; internal meetings
"Indirect" employees (vendors/suppliers, shippers, etc.)	Jobs	Energy East means jobs and security	In-person meetings; via partners; internal email
Canadian security and sovereignty advocates	Energy security; dependence on unfriendly states	Canadian resources for Canadians	Targeted online advertising; email lists
Quebec groups	TBD	TBD	TBD
Landowners/farmers	Income	Financial security	Email database; local events
Affected communities	Tax revenue and infrastructure	Pipeline development means community development	Local events; targeted online advertising
Unions (domestic)	Jobs	Canadian built	Direct outreach
End-user consumers in Eastern Canada	Access to supply	Lower prices	Targeted online advertising
Pro-energy production citizens	Ideological	Harness our resources to benefit everyone	Targeted online advertising; email lists; allied organizations
Economic development advocates	Jobs and revenue	More than building a pipeline – building a stronger Canada	Targeted online advertising; email lists; allied organizations
TransCanada Shareholders	Revenue	Energy East is a smart investment for the future	Events and calls; outbound materials; existing databases

Supporter Progression Model

We approach digital advocate engagement through two continual and concurrent processes.

First, we take a methodical and deliberate approach designed to convert average citizen into issue activists. This happens through three distinct phases:

- First, we **recruit** an individual to affirmatively join our cause;
- Second, we provide enough informational and emotional appeals to **engage** him or her and solidify that individual's commitment to our cause;
- And third, we **mobilize** that individual to take an action when requested.

Simultaneously, we must also understand how to deepen and broaden each individual's commitment to our cause, using targeted messaging and behaviour tracking to directly appeal to the individual's trigger points and develop them from a supporter to an activist to a champion. We refer to this as our Stakeholder Progression Model:



We achieve this by continually offering supporters additional opportunities to provide more information about their interests and offering them actions that require deepening levels of commitment. We pair this with providing additional benefits to the supporter for partnering with us – whether those are exclusive access to information, incentives or personal attention.

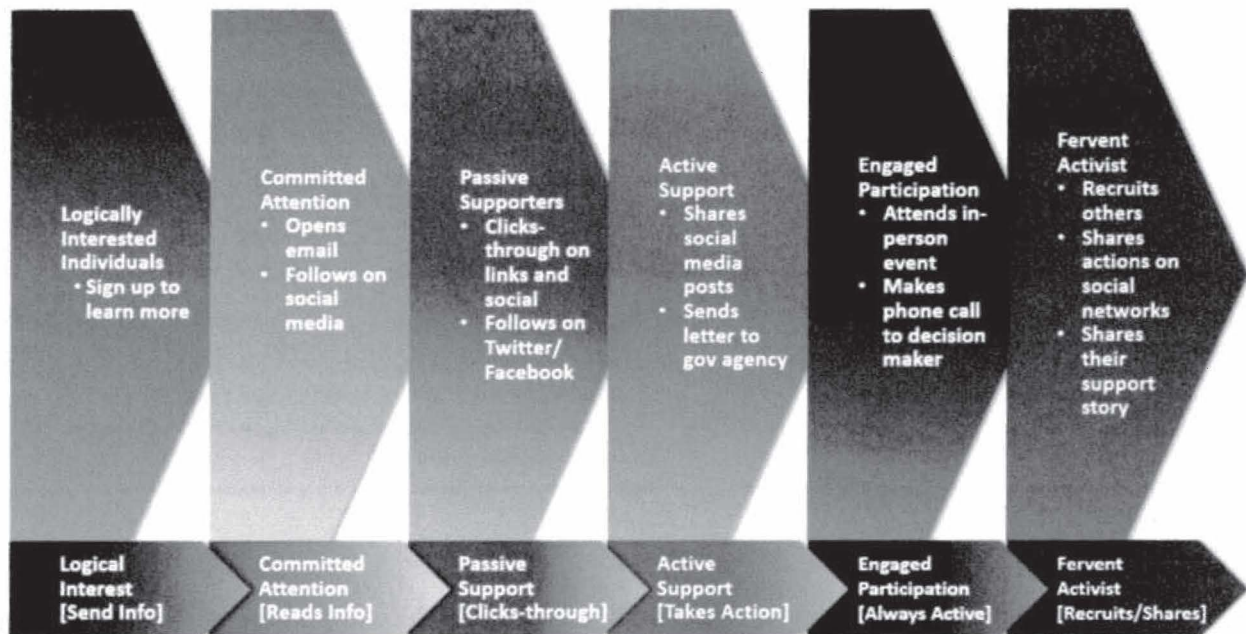
Jointly, these processes create the outputs we need to achieve the outcomes we desire; in short, they provide us a rich base of advocates who passionately understand and support our cause and are willing - more often than not - to do what's asked of them.

Of equal value, it creates a lasting asset. Rather than seeking a simply transactional relationship between TransCanada and the advocate, this process is designed to build a relationship that is lasting and can be used again, significantly increasing the ROI of the endeavour.

To be clear, not every advocate will do everything we ask of him or her, and not every advocate will have the willingness or ability to become a true champion. Accordingly, we must track and monitor how individuals behave and perform so that we can provide them with the materials calls to action that best align with where they are and what they are able to offer – while always pushing them to do just a bit more.

In practice, it functions as below:

Stakeholder Progression Defined: Continually Advancing Commitment Level

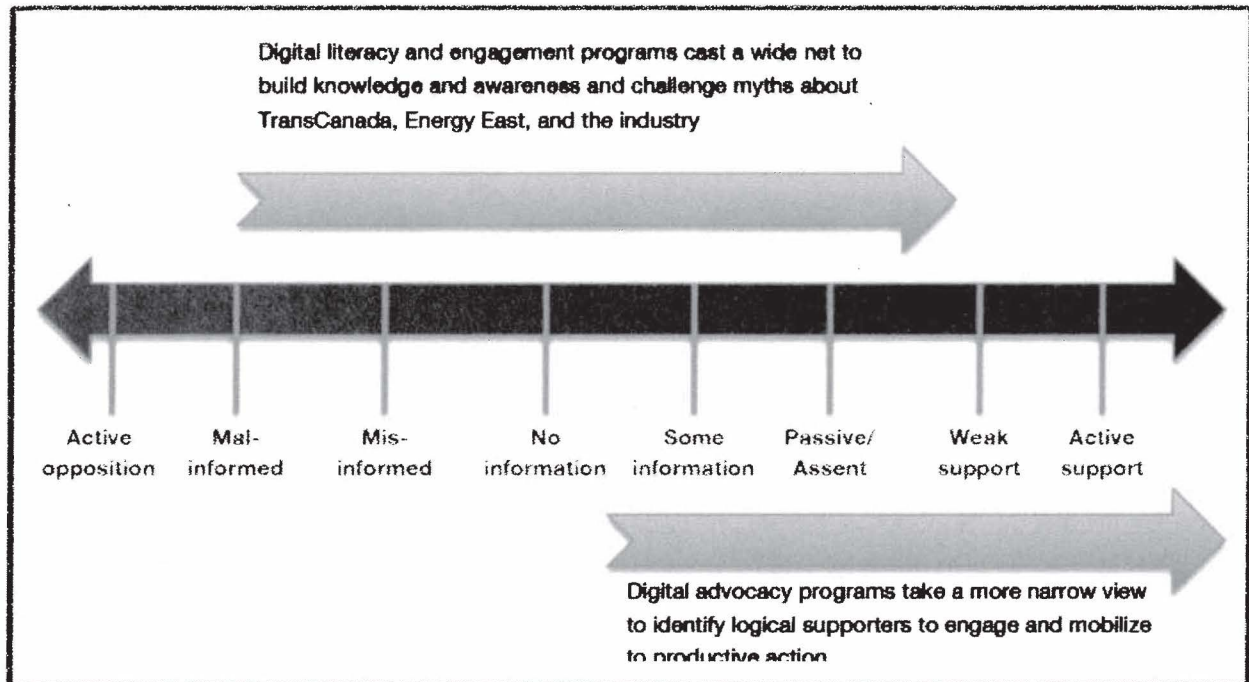


Combining Education and Advocacy

This advocacy plan focuses on identifying logical supporters, building a relationship with them, and over time motivating them to take a series of actions on our behalf. The nature of this effort is such that it must be narrowly focused on the group of people most likely to take action.

Meanwhile, TransCanada already conducts a much broader effort to drive awareness and education on behalf of the Company, the pipeline project, and the energy economy as a whole. While targeted at a much larger audience, this effort is crucial to the success of an advocacy program; the more awareness and information the public receives about the pipeline, the more supportive they are in general of the project.

Working in tandem, these two programs allow TransCanada to speak effectively to all of your important constituent audiences along the spectrum in the manner that is most effective relative to inspiring the desired action. The rich and deep amount of data that can be collected on user perception and behaviour through the digital tactics detailed in this document create significant efficiencies and benefit the overall execution of the campaign. Accordingly, undertaking the processes as a joint venture creates both time and cost efficiencies as well.



Action Toolkit

To support development of Energy East, and to increase the support of local and affected communities, there will most likely be a large number of potential actions we will want and need supporters to take over a relatively long period of time. This requires building sustainable relationships with supporters that are authentic, deep and perceived as personally valuable to the advocate. Doing this successfully requires communicating in ways that speak to what average Canadians stand to gain as a result of the new pipeline being in operation, what they stand to lose should opponents get their way and how – as an individual and collectively as a group – they can have an important and meaningful impact on the deliberations.

Aligned with the event and political calendar, we will sequence and segment the asks made to show supporters continual reasons to be involved and tailored reasons that inspire them to act. During periods when there aren't immediate, outward-facing calls to action, we will keep supporters engaged by sharing compelling news, information or multimedia pieces with them. At other times, we will ask them to take more inward actions, such as sharing their story or recruiting their friends.

Potential Action Types

Naturally, the regulatory and political processes surrounding approval of Energy East will be important points for advocates to voice their support. But there will be many other moments where supportive voices will be important, and there are many other audiences with whom we will want to communicate regularly.

Accordingly, we will build out a suite of actions for our supporters to take and deploy them strategically to enable citizens to affirmatively support the project.

These actions may include:

- Signing a petition indicating their support (or opposition to misguided actions)
- Sending a letter, email or placing a phone call to their political officials, including their mayor, local or provincial government officials, regulators, MPs, ministers or other logical parties
- Sending a letter to the editor of their local paper(s)
- Commenting on a blog or social media post
- Sharing content on their social media properties
- Sharing their personal story about why the support development of Energy East
- Submitting a supportive comment to the NEB, OEB, BAPE or other regulatory bodies
- Attending events, rallies or discussions about the project
- Recruiting and informing their friends, family and neighbours about the project
- Voicing their support of the project to candidates for political office
- Testifying or meeting in person with officials reviewing the project to voice their support
- Appearing or lending their name and/or story to advertisements, materials, or other promotional items.

We will partner with you to build an advocacy action centre on the Energy East website, or other appropriate web properties, to allow advocates to take these actions. As explained in the stakeholder progression model above, the structured and integrated digital communications program will continually “advance” advocates through this suite of actions, inspiring them to take the next logical action on the list, keeping them apprised of important developments along the way, and always demonstrating their individual value to the effort.

Our Multiplier CRM technology (detailed in the final section of this document) enabled this individual behaviour tracking, allowing us to be more precise and targeted with the requests put in front of a given individual.

Recruitment Plan

Based on the logical supporters matrix illustrated earlier, we will recruit supporters with distinct appeals through the most logical channel(s).

Our guiding principle will be to recruit the highest quality advocates in the highest quantity possible at the lowest cost possible. For internal or connected audiences (e.g. TC or partner employees), that will involve taking advantage of existing channels.

For external audiences, we rely on targeted paid recruitment through a variety of channels. We track recruitment campaigns on a cost per advocate/acquisition (CPA) basis. Historically, advocacy campaigns that yield high-quality advocates who will stay engaged with the program and take multiple actions have run in the \$4.50-7.75 CAD range.

Our recommended practice includes multiple pilot tests across different recruitment channels to determine which methods and tactics prove to be most effective, optimizing continually on a cost and quality basis. We will also conduct real-time message testing across each channel/platform by supporter profile to determine which messages are most resonant and likely to lead to conversion.

Historically, online acquisition techniques – including microtargeted online advertising, email list rental, newsletter inserts, social media advertising and direct partnerships (blogs, communities, aligned organizations) – have proven to be the most effective.

This can be paired with offline methods that embrace and utilize every event TransCanada staff attend to maximize reach without adding significant additional costs.

All supporters will be added to our Multiplier CRM solution, where data detailing how they were recruited will be captured.

Sample Paid Recruitment Executions

Energy East.



Canadian resources should help Canadians. You can make a difference.

[Sign the petition.](#)

Like - Susan Smith likes Trans Canada Energy East Pipeline

Figure 1: Canadian national security supporters



Figure 2 Canadian labor supporters



Figure 3: Farmers, landowners, directly affected communities

Channel Approach and Recommendations

The most effective advocacy communications programs utilize every channel at our disposal to drive forward engagement messages and calls to action. Our plan embraces producing content that can span channels to place our calls to action in front of supporters in as many different ways and places as possible.

Our content must use a voice that matches the nature of the effort: conversational, engaging, interesting, inspiring, urgent and important. We will monitor analytics across all channels to continually optimize how we face and voice the campaign messaging.

Internal website(s)

Employees should consistently and persistently see opportunities to take action across all internal company portals.

External websites(s)

All public-facing web properties where individuals may go to learn more about Energy East should include either a direct sign-up mechanism or a link to one on the main Energy East website.

Email

As it continually proves to be the most effective channel to drive action, email will be the primary driver of our ongoing engagement and mobilization communications with advocates.

Social

A project as significant as Energy East should have its own dedicated social presence to foster and host a social community of supporters³. At a minimum, Facebook and Twitter are crucial pieces to deploy on behalf of the project. Content generated by TransCanada corporate should be shared or cross-posted as appropriate. Also, in parallel to this document, Edelman is developing a further discussion of social strategy for Energy East.

Retargeting online ads

When urgent calls to action are required, we will use retargeting online ad units to place the calls to action in front of users who have previously taken action.

Telephone town halls

Telephone town halls are an effective way to engage advocates and deepen their base of knowledge and commitment to the project. We will recommend conducting calls with advocates ahead of the kickoff to important new phases of the campaign or when important new developments arise.

Dependencies

In our experience, including our work with several major and global natural resource companies, there are several key areas that present critical and foundational dependencies for success. Our approach is to try to identify serious potential obstacles or needs as early as possible in the planning process.

Tone and Audience Consideration for the Canadian Context

This campaign approach has a strong heritage in the more aggressive politics and policy fights in the US, and those lessons and best practices will be critical to our success. However, it is just as important that the face and tone of our messengers and messages must be distinctly Canadian. In addition, our strategies and tactics must recognize the geographic and cultural distinctions within Canada.

³ This approach will allow advocacy efforts to scale beyond Energy East; not all supporters of this project will support TransCanada generally, or other projects specifically. Keeping these dedicated channels will help retain those activists.

Technology & Data Security

Our first tangible dependency is a robust technology platform that enables us to run a sophisticated digital advocacy campaign.

The entire outreach campaign described above must be managed with an appropriate CRM-solution built specifically for recruiting, engaging and mobilizing stakeholder audiences online. The tools we use include a robust database back-end for collecting and storing information about advocates, e-mail communications tools to push out messages to audiences within the database, and web hosting application to manage content online.

Edelman has experience using a number of different systems in this marketplace and can provide detailed benchmark research we have developed in this space. However, given the timeframe and imperative to act quickly, we recommend deploying this campaign using Edelman's Multiplier platform that includes:

- CRM application specifically designed for stakeholder relationship management
- Built on the Salesforce.com platform – industry-leading CRM provider
 - **Web-hosted:** enables access by multiple users; remote access by mobile devices
 - **Highly robust:** designed to handle large volumes of data
 - **Versatile:** enables nearly limitless customization of fields, additional data objects, workflows, 3rd party applications
 - **Secure:** world-class provider ensures sensitive data is protected from unauthorized access
 - Stores contact data, but also serves as an outreach tool for email communications with contacts

Multiplier allows us to synthesize data from every element of our campaigns into intelligence that helps us surface insights for more effective outreach. Its reporting and analytics tools enable us to quickly gauge the success of our efforts and drill down into the data to compare results across outreach tactics, audience segments, and the lifetime value of every individual supporter.

In addition to the commitments we make to our advocates regarding our use of their data, we have an obligation to take all commercially acceptable steps to protect and safeguard that data.

Edelman's Multiplier platform includes the following security features:

- All data hosted in the Salesforce.com environment – a secure web-hosted application
- Data stored in secured facilities with industry-standard physical security measures, environmental controls, power redundancy, data backup systems, network security measures and disaster recovery protocols
- Access to the platform via SSL connection and unique user session tokens – ensuring security of data in transit
- Firewalls, intrusion detectors to prevent unauthorized access
- Highly configurable security settings within the system to restrict access
- 3rd party monitoring, auditing & assessment of security measures (TRUSTe, EU Safe Harbor, ISO 27001, SAS 70 Type II, SysTrust)
- Edelman has experience coordinating clients' security policies and protocols with

Salesforce.com system configuration

- Additional details on Salesforce.com's data security and privacy practices available at trust.salesforce.com

Compliance, TC Terms of Service and Privacy Policy

Collecting, maintaining, and using personal information during an engagement or advocacy program obligates us to take the proper care of that information in accordance with not only legal and regulatory guidance, but industry best practices as well.

Our recommended approach to this program sits on the foundation of permission based marketing. We must be transparent in our intentions and we must behave consistently with our commitments to users from the email confirming their participation to the one acknowledging their unsubscribe request.

We reviewed the TransCanada and Energy East website Terms of Service and Privacy policies⁴. Both appear to be standard comprehensive boilerplate and both seem to allow us the latitude to conduct a program as we've outlined, as long as we follow our own best practices of clear opt-in language as well as stay well in compliance with CASL⁵, which takes effect in July of this year.

We should work with your internal or external counsel, but in our experience in both the U.S. and Canada, a simple opt-in disclaimer that is broad enough to allow flexibility while also being sufficiently transparent to build trust is the best approach. For example:

Sign up via the form below to receive email updates from TransCanada about the Energy East project and other energy issues that impact Canada.

If we extend this program to off-line activities across the project, we should transfer these same best practices, disclosures, and disclaimers in an appropriate format.

For purposes of facilitating action by or on behalf of our advocates, we should investigate along with legal counsel to address any potential obligations in that area.

Resources

In order to operate with the speed and discipline of a campaign, this grassroots advocacy program will require some key resources within TransCanada as well as the agency.

TransCanada

- **Executive or senior sponsor:** with a new program that by definition will push the Company into new areas of activity, it will be absolutely crucial that the core effort have an internal advocate who can assist with internal communications and secure approvals in a timely manner.

⁴ <http://www.transcanada.com/your-privacy.html> and http://www.transcanada.com/docs/Media_Centre/protection_of_personal_information_policy.pdf

⁵ Canadian Anti-Spam Law <http://fightspam.gc.ca/eic/site/030.nsf/eng/home>

- **Day to day program lead (approx. 0.25 FTE):** counterpart for the Edelman program team, responsible for TC operations and support of advocacy efforts.

Edelman

- **Senior counsel (.25FTE):** responsible for overall strategic direction and directly accountable for the success of this campaign - Mike Krempasky from Edelman Washington. He will also serve as strategy counsel for the overall project campaign.
- **Program lead (.25-.5FTE):** day-to-day lead - Nate Bailey from Edelman Washington.
- **Canadian program lead (.15-.25FTE):** Beginning June 1st, Erin Jacobson from Edelman Toronto (formerly digital lead for the Official Opposition in Ottawa) will join the Energy East team to provide Canadian-specific advocacy counsel.
- **Quebec program support (.25-.5FTE):** a team member responsible for Quebec-specific activism, cultural nuance, and language
- **Copywriter (.5-.75FTE):** a focused and retained team member with a strong direct marketing background.
- **Data analyst (.5-.75FTE):** list building and selects, split and variant testing, optimization and measurement
- **Content and creative (TBD):** alignment with the Digital and Social team to leverage creative resources from the larger campaign

Next Steps

TBD based on early feedback

Dependencies Appendix

This is a placeholder section for any dependency discussion that may be more appropriate for narrow distribution.

Internal Integration and Change Management

The existing Energy East effort is a complex program that already involves not just a diverse set of external stakeholders but also a number of different internal departments, workstreams, and activities.

This complexity creates an opportunity for finding efficiencies across the project. For instance, other teams are investing considerable resources to identify local supporters in affected communities; we should have a process to quickly enlist those supporters in this grassroots effort. If we do it correctly, we will make TransCanada resources go much further and our supporters will have a much bigger stage on which to advocate on our behalf.

At the same time, so many moving pieces create a real risk of coordination failures or redundancy of effort. Worse, if integration isn't given the proper attention, we could potentially create reputational missteps.