

Message

From: Crystal Pritchard [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=8FDBBAF38FAE4FDCBF1272FEB20C58D5-CRYSTAL PRI]
Sent: 2018-10-10 3:24:39 PM
To: Jeannette Briggs [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=148095610f7242f48a5a9da24b1a8a87-Jeannette B]
Subject: RE: NEW: Freedom of Information request 2018-033
Attachments: Request 2018-033.pdf; Request 2018-034.pdf

Thanks Jeannette.

I also wanted to quickly summarize our call to ensure that we both understand the next steps and what we are each working on.

For request 2018-033 (attached), you are going to confirm whether you have any additional records for part 1 of the request. Parts 2-9 are confidential to market participants and the data is therefore exempt. We can provide a link to the IESO home page where aggregate information is available under Settlements in the Sector Participant part of the webpage.

For request 2018-034 (also attached), I will be clarifying parts 8 and 10-12 with the requester since we are uncertain exactly what information is being sought. You are going to look through the remaining parts to confirm whether any of the information is publicly available already and to confirm whether we have any other responsive records, regardless of whether they can be disclosed. Once we have all the responsive records, we can look into what can be disclosed and what should be withheld.

For both requests, please provide any documents that are responsive, regardless of whether they can be disclosed. This does not include the 5 minute raw data collected, but includes things like memos, reports, etc. that contain the requested information. We will then work with your group to determine whether the information can be disclosed; nothing will be given to the requester unless you or your group has approved it. I also forgot to mention email correspondence, should we be doing an email collection for any of the information requested?

Lastly, your email below references Fair Hydro and I forgot to discuss this on the phone call today. Do you think information related to Fair Hydro is responsive? Or is this something I should clarify with the requester?

You also mentioned the National Steel v. IESO case; I need more information about this case before I can determine whether it is responsive to one of the requests. I also assume a lot of the information would be privileged, but I can't confirm this until I have seen the documents and have additional information about the context of the information, for example whether it prepared for use in or in contemplation of litigation, etc.

If you have any questions, please let me know.

Thanks,

Crystal Pritchard | Freedom of Information Coordinator
Independent Electricity System Operator (IESO) | T: (416) 969-6036
120 Adelaide Street West, Suite 1600 Toronto, Ontario M5H 1T1
Web: www.ieso.ca | Twitter: [IESO Tweets](#) | LinkedIn: [IESO](#)

From: Jeannette Briggs
Sent: October 10, 2018 2:05 PM
To: Crystal Pritchard
Cc: Michael Boll
Subject: RE: NEW: Freedom of Information request 2018-033

<http://www.ieso.ca/-/media/Files/IESO/Document-Library/Market-Rules-and-Manuals-Library/market-manuals/settlements/se-rtestatements.pdf?la=en>

As suspected our market manual 5.5 explains global adjustment settlement. It is publically available at this link and I have attached a copy for your reference as well.

Regards,

Jeannette Briggs Director, Settlements - Corporate Services
Independent Electricity System Operator (IESO) | T: 905-855-6364 | C: 416-997-6364
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From: Jeannette Briggs
Sent: October 03, 2018 10:25 AM
To: Crystal Pritchard
Cc: Michael Boll
Subject: RE: NEW: Freedom of Information request 2018-033

Crystal,

First, could you define "document" for me in this context please. As well in the first request, it appears to be narrow to "data collected" on documents. Can you confirm this request excludes IAM variable data used in the formula for example 5 minute price for prescribe assets settlement or preliminary and final settlement statements, or invoices for example? None of the last list is "collected" data on documents.

Even if the definition for data collected is narrow, this request would result in documents many that would be privileged as they are participant specific submissions. We have form submissions which are market participant specific, spreadsheets and database documents on the settlement for differences of contracts. These are subsequently aggregated on a form but still contain information that is participant specific, like the nuclear contract which is wholly assigned to the Bruce Power refurbishment payment.

In the second request, many of the requested documents are publically available on either the OEB or the IESO website. Some are participant specific and therefore not necessarily publically available. I am not sure of the protocol for release of the information to non-governmental entities even with approval of the participant. We of need to find out what is meant by "classification" of GA in order to respond to those requests. Under this request, I believe all preliminary and final settlement statements, along with invoices would be capture but again this is participant specific documents.

Based on the second request we would likely need to include Fair Hydro which has resulted in many documents about data used in the deferral of GA. While participants submit data (data collected), it is not part of the formula per se but rather an aggregate setoff due to pricing recovery which impact GA funds allocation which is requested. The monthly aggregate is publically available on our website.

I am going to assume the court case document for National Steel v. IESO would be exclude even though it was all about the formula. Anyway, this would be treated as privileged, correct?

In terms of people that would have documents referring to the formula the list is large:

Jeannette Briggs

Richard Zaworski

Idalin McKenzie

All of Corporate Services – Market Settlements CorporateServicesMarketSettlements@ieso.ca

Daryl Yahoda

Catherine Forester and her team for starters and if other contract leads need to be included she can let you know who those would be.

Anthony Martinello

Natalie Schaus and her team

There would be additional people for Fair Hydro if included.

My calendar is getting crazy so I put some time into our respective calendars. We can go through each request and discuss what is publically available and just how big the request is in terms of documents and review.

Regards,

Jeannette Briggs Director, Settlements - Corporate Services

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From: Crystal Pritchard

Sent: October 02, 2018 5:55 PM

To: Jeannette Briggs

Subject: NEW: Freedom of Information request 2018-033

Response required by end of day Thursday October 18, 2018.

Jeannette,

Michael Boll mentioned that I should contact you because this request deals with global adjustment. A separate email with a second request about global adjustment will also follow.

The requester is interested in information about the global adjustment formula and the request (attached) is separated into nine parts. We may also need your help understanding the request and the responsive documents.

Please provide a of list of custodians who worked on the requested information, file paths to where the relevant records are stored and relevant keywords that I should use when searching if there are emails or records discussing this matter.

If this email is supposed to go to someone else in the program area, please let me know and I will follow up directly.

Thanks,

Crystal Pritchard | Freedom of Information Coordinator

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