

Chris Cincar

From: Chris Cincar
Sent: May 17, 2017 11:28 AM
To: 'Hanna Smith'
Cc: Rajvinder Sabharwal; Donna Kwan; Dan Gopic
Subject: RE: IESO/OEB Meeting re GA/ICI?

Proposed FHA appears to be the same
Specified consumer

(2) For the purposes of clause (a) of the definition of “specified consumer” in subsection (1), the person must meet any one of the following criteria:

1. The person has a demand for electricity of **not more than 50 kilowatts**, or such other amount as may be prescribed.
2. The person **annually uses not more than 250,000 kilowatt hours** of electricity, or such other amount as may be prescribed.
3. The person carries on a business that is a **farming business for the purposes of the Farm Registration and Farm Organizations Funding Act, 1993** and either holds a valid registration number assigned under that Act or has had the obligation to file a farming business registration form waived pursuant to an order made under subsection 22 (6) of that Act.
4. The person’s account with the electricity vendor relates to,
 - i. a dwelling,
 - ii. a property within the meaning of the **Condominium Act, 1998**,
 - iii. a residential complex within the meaning of subsection 2 (1) of the **Residential Tenancies Act, 2006**, without regard to section 5 of that Act, or
 - iv. a property that includes one or more housing units and that is owned or leased by a co-operative within the meaning of the **Co-operative Corporations Act**.
5. The person satisfies such criteria as may be prescribed.

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From: Hanna Smith [mailto:Hanna.Smith@ieso.ca]
Sent: May 16, 2017 4:56 PM
To: Chris Cincar
Cc: Rajvinder Sabharwal; Donna Kwan; Dan Gopic

Subject: RE: IESO/OEB Meeting re GA/ICI?

Excellent, thank you Chris! I'll forward this to my colleagues.

Hanna
(416) 969-6213

From: Chris Cincar [<mailto:Chris.Cincar@oeb.ca>]
Sent: May 16, 2017 4:47 PM
To: Hanna Smith
Cc: Rajvinder Sabharwal; Donna Kwan; Dan Gopic
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hanna

RPP reg is attached.

Class of consumers, s. 79.16

4. (1) Revoked: O. Reg. 494/10, s. 2 (1).

(2) On and after November 1, 2009, the following are prescribed as the class of consumers for the purposes of subsection 79.16 (1) of the Act:

1. Low-volume consumers.
2. A consumer who has a demand of **50 kilowatts or less**.
3. A consumer who has an account with a distributor, if the account relates to,
 - i. a dwelling,
 - ii. a property as defined in the *Condominium Act, 1998*,
 - iii. a residential complex as defined in the *Residential Tenancies Act, 2006*, or
 - iv. a property that includes one or more dwellings and that is owned or leased by a co-operative as defined in the *Co-operative Corporations Act*.
4. A consumer who annually uses **at least 150,000 but not more than 250,000 kilowatt hours** of electricity.
5. A consumer who has an account with a distributor if the consumer,
 - i. carries on a business that is a **farming business for the purposes of the *Farm Registration and Farm Organizations Funding Act, 1993***, and
 - ii. holds a valid registration number assigned under that Act or the consumer's obligation to file a farming business registration form was waived pursuant to an order made under subsection 22 (6) of that Act. O. Reg. 58/08, s. 1; O. Reg. 115/09, s. 1 (2); O. Reg. 494/10, s. 2 (2, 3).

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]
Sent: May 16, 2017 10:42 AM
To: Dan Gopic
Cc: Rajvinder Sabharwal; Donna Kwan; Chris Cincar
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hello Dan,

Attached is an updated version of the presentation for today, which includes updates to the Class A eligibility rules (errors that I missed yesterday were kindly caught by Chris).

Jeannette, Idalin, Tam and Anthony now have a meeting today that means they won't be able to attend in

person. They will, however, be calling in. Thank you again for providing a teleconference number. The following people will be attending in person:

- Bryan Young, Business Manager (filling in for Carrie Aloussis, Manager of Alliances in Conservation)
- Abdi Mohamed, Business Manager for LDCs
- Emily Somerville, Business Manager for LDCs
- Rouselle Gratela, Business Manager for LDCs (tentative)
- Myself

Looking forward to meeting with you later,
Hanna
(416) 969-6213

From: Hanna Smith
Sent: May 15, 2017 4:28 PM
To: 'Dan Gagic'
Cc: Rajvinder Sabharwal; Donna Kwan; Chris Cincar
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Dan,

Certainly, I'll add it to the agenda. It'll fit well after an overview of the Class B GA estimates. Here is an updated agenda:

- Overview of how the IESO calculates the global adjustment (including Class B estimates) and how it's allocated amongst market participants
- GA RSVA accounts
- Overview of the data we collect from LDCs and how we use it to settle various programs and initiatives (e.g. RPP, OESP, FIT)
- Summary of the Industrial Conservation Initiative
- Shared issues and inquiries from LDCs related to the GA/ICI

Attached is a draft presentation for tomorrow, which is currently pending review from Settlements. I'll sent an updated version before the meeting if there are any changes. I'll also bring along printed copies.

Given the limited time that we have and depending on the discussions, we may not spend much time (or any) on some of the slides. They're there for context as needed.

Looking forward to meeting with you and your colleagues tomorrow,
Hanna

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From: Dan Gagic [<mailto:Dan.Gagic@oeb.ca>]
Sent: May 15, 2017 4:15 PM
To: Hanna Smith
Cc: Rajvinder Sabharwal; Donna Kwan; Chris Cincar
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Hanna, thanks for the update, an item OEB staff would like to discuss with IESO, relates to GA

pricing and the impacts that distributors are having with their commodity and GA RSVA accounts. Can you add this to the Agenda as well, thanks

Dan

Dan Gagic, CPA, CMA

Manager, Incentive Rate Setting & Accounting

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]

Sent: May-15-17 1:25 PM

To: Dan Gagic

Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Dan,

Thanks for checking in. I'll have a presentation to share with you later today, which will walk through the following agenda items from us:

- Overview of how the IESO calculates the global adjustment (including Class B estimates) and how we allocated it amongst market participants
- Overview of the data we collect from LDCs and how we use it to settle various programs and initiatives (e.g. RPP, OESP, FIT)
- Summary of the Industrial Conservation Initiative

These items are intended to provide some brief context on the next and most important agenda item, which is:

- Inquiries and issues from LDCs that have come to our attention that we believe overlap with the OEB.

Attending from the IESO will be:

- Jeannette Briggs, Director of Market Settlements (tentative)
- Anthony Martinello, Senior Manager of Finance (via teleconference if possible)
- Tam Wagner, Senior Manager of Regulatory Affairs (tentative)
- Idalin McKenzie, Supervisor of Market Settlements
- Bryan Young, Business Manager (filling in for Carrie Aloussis, Manager of Alliances in Conservation)
- Abdi Mohamed, Business Manager for LDCs
- Emily Somerville, Business Manager for LDCs
- Rouselle Gratela, Business Manager for LDCs (tentative)
- Myself

Please let me know what you think. We are happy to adapt the agenda to your group's interests if they differ from above.

Thanks,
Hanna

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From: Dan Gapic [<mailto:Dan.Gapic@oeb.ca>]
Sent: May 15, 2017 12:03 PM
To: Hanna Smith
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Hanna, do you have an agenda for the meeting tomorrow. Also, what materials should all participants have in advance to prepare for the meeting?

Dan

Dan Gapic, CPA, CMA

Manager, Incentive Rate Setting & Accounting
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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]
Sent: April-20-17 8:45 AM
To: Dan Gapic
Subject: RE: IESO/OEB Meeting re GA/ICI?

Excellent, thanks Dan! Would you prefer that we venture up to the OEB on the 16th?

Hanna
(416) 969-6213

From: Dan Gapic [<mailto:Dan.Gapic@oeb.ca>]
Sent: April 19, 2017 4:23 PM
To: Hanna Smith
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Hanna, you're right this is an interesting industry, never a dull moment!

Yes the 16th works for me. I plan on including someone from our Regulations Department as well. Once the date is confirmed I will let you know who else will be attending the meeting.

Regards

Dan

Dan Gapic, CPA, CMA

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]

Sent: April-19-17 2:13 PM

To: Dan Gapic

Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Dan,

That's good to hear! The OEB seems like a very interesting place to work and your in-depth LDC experience would no doubt come in handy.

The regulatory world has been interesting – much to learn. I do miss working more closely with LDCs though.

It would be nice to have you at the meeting. Would either of the following dates/times work?

- Monday, May 15 at 10:00 am
- Tuesday, May 16 at 2:00 pm

Thank you,

Hanna

(416) 969-6213

From: Dan Gapic [<mailto:Dan.Gapic@oeb.ca>]

Sent: April 18, 2017 7:03 PM

To: Hanna Smith

Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Hanna, all is going well for me in my new job, and you haven't been in your role too long either if I recall correctly.

I will be away on vacation from April 27th to May 12th. I can have someone else attend in my absence if you cant reschedule,

Please advise.

Dan

Dan Gapic, CPA, CMA

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]

Sent: April-18-17 2:40 PM

To: Dan Gapic

Subject: RE: IESO/OEB Meeting re GA/ICI?

Hello Dan,

I hope all is going well with you.

Any time on Wednesday, May 3 and the morning of Thursday, May 4 would work well for us. Are there time slots on those days that would work well for you and your colleagues? We would be happy to venture up to the OEB.

Interested in attending from the IESO are Jeannette Briggs (Director of Settlements) and some of her staff, the business managers in Conservation who take care of the day-to-day questions from LDCs and myself.

Thank you,
Hanna

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From: Tam Wagner
Sent: April 18, 2017 12:37 PM
To: Theodore Antonopoulos
Cc: Dan Gagic; Hanna Smith
Subject: RE: IESO/OEB Meeting re GA/ICI?

Thanks Ted.

Dan: I've cc'ed Hanna Smith from my group who will coordinate with you on setting something up.

Thank you,
-Tam-

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From: Theodore Antonopoulos [<mailto:Theodore.Antonopoulos@oeb.ca>]
Sent: April 18, 2017 10:29 AM
To: Tam Wagner
Cc: Dan Gagic
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Tam,

This is a good idea as we at times have found it difficult to manage the true up issues in rate cases, especially for transitioning customers. It will be good to discuss what further issues the recent changes will pose.

Feel free to contact Dan Gagic, our Manager of Incentive Rate-setting and Regulatory Accounting to set something up.

Thanks

Ted

Theodore Antonopoulos

Director, Rates
Applications Division
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please don't print this e-mail unless you really need to.

Please note my email address has changed to theodore.antonopoulos@oeb.ca. Please update your address book accordingly.

From: Tam Wagner [<mailto:tam.wagner@ieso.ca>]

Sent: April-17-17 8:35 PM

To: Theodore Antonopoulos

Subject: IESO/OEB Meeting re GA/ICI?

Hi Ted:

Hope you had a nice long weekend.

We've been receiving a number of questions from LDCs about the recent and proposed changes to the Industrial Conservation Initiatives with some of these questions potentially spanning into the OEB's expertise. For example, the inclusion of lower volume consumers in the upcoming ICI adjustment period (starting July 1) has meant that some RPP customers could be eligible as Class A. However, these customers would need to leave the RPP if they wish to be Class A. Several LDCs have reached out to us to inquire about the deadline by which these customers would need to opt out of the RPP. We've also received questions on the application of Class B rates to defined customer classes and how/to whom to report GA and RPP data reporting errors.

There may be good opportunities for us to better factor OEB considerations into our answers and more effectively connect LDCs to the OEB where appropriate. With this in mind, would you and your staff be interested in an information sharing meeting on the GA and ICI? If time is especially limited, we would be pleased to visit your offices or conduct the meeting via teleconference.

Please advise.

Thank you,

Tam Wagner, P. Eng. | Senior Manager, Regulatory Affairs

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