

Dan Gagic

From: Dan Gagic
Sent: May 15, 2017 4:16 PM
To: 'Hanna Smith'
Subject: RE: IESO/OEB Meeting re GA/ICI?

I have a meeting room booked from 2 pm to 4 pm. When you come to the OEB tomorrow, please go to reception on the 27th and sign in and ask for me,

Regards

Dan

Dan Gagic, CPA, CMA

Manager, Incentive Rate Setting & Accounting
 Ontario Energy Board
 Applications Division
 2300 Yonge Street, 24th Floor, Toronto, ON M4P 1E4
 Phone: 416-440-7654
 Email: dan.gagic@oeb.ca

Please note my email address has changed from dan.gagic@ontarioenergyboard.ca . Please update your address book accordingly.

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

Hanna Smith | Senior Regulatory Analyst | Planning, Legal, Indigenous Relations and Regulatory Affairs
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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 Gapic; 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-

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

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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
Ontario Energy Board
Phone: 416-440-8137



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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