

Dan Gapic

From: Dan Gapic
Sent: May 16, 2017 4:59 PM
To: 'Hanna Smith'
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hanna, thanks for coming to our office and sharing with us in the meeting.

regards

Dan

Dan Gapic, 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.gapic@oeb.ca

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]
Sent: May-16-17 4:46 PM
To: Dan Gapic
Subject: RE: IESO/OEB Meeting re GA/ICI?

Thank you very much, Dan, and again for meeting with us today. I'll forward this to Jeannette, Idalin and Tam, noting the strict confidentiality.

Hanna
 (416) 969-6213

From: Dan Gapic [<mailto:Dan.Gapic@oeb.ca>]
Sent: May 16, 2017 4:14 PM
To: Hanna Smith
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Hanna, attached is the Accounting Guidance document we are planning on sending out over the next day or two, if any questions don't hesitate to contact me,

Best regards

Dan

Dan Gapic, CPA, CMA

Manager, Incentive Rate Setting & Accounting

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]
Sent: May-16-17 12:46 PM
To: Dan Gapic
Subject: RE: IESO/OEB Meeting re GA/ICI?

That sounds good – thanks, Dan, and see you soon.

Hanna
 (416) 969-6213

From: Dan Gapic [<mailto:Dan.Gapic@oeb.ca>]
Sent: May 16, 2017 12:43 PM
To: Hanna Smith
Subject: RE: IESO/OEB Meeting re GA/ICI?

That should be enough. Also, I wanted to run something by the folks at the IESO regarding a letter that the OEB plans on sending out to distributors. Given the late notice I can hand out copies at the meeting,

Regards

Dan

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]
Sent: May-16-17 12:39 PM
To: Dan Gapic
Subject: RE: IESO/OEB Meeting re GA/ICI?

Hi Dan,

I'll bring hard copies for everyone. Do you think 10 will be enough?

Hanna
 (416) 969-6213

From: Dan Gapic [<mailto:Dan.Gapic@oeb.ca>]
Sent: May 16, 2017 12:36 PM
To: Hanna Smith

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

Hi Hanna, will you be needing the overhead, or will everyone be bringing a hard copy?

Dan

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

Sent: May-16-17 10:42 AM

To: Dan Gapic

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 Gapic'

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 send 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 Gapic [<mailto:Dan.Gapic@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

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]
Sent: May-15-17 1:25 PM
To: Dan Gapic
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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 Applications Division
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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 Gopic [<mailto:Dan.Gopic@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 Gopic, 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.gopic@oeb.ca

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From: Hanna Smith [<mailto:Hanna.Smith@ieso.ca>]
Sent: April-18-17 2:40 PM
To: Dan Gopic
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 Gopic; 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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Conservation: www.saveONenergy.ca | Twitter: [saveONenergyOnt](#) | LinkedIn: [saveONenergy](#)

From: Theodore Antonopoulos [<mailto:Theodore.Antonopoulos@oeb.ca>]

Sent: April 18, 2017 10:29 AM

To: Tam Wagner

Cc: Dan Gopic

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 Gopic, 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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