



Sarah Walsh
Director, Regulatory Affairs

Gas Regulatory Affairs Correspondence
Email: gas.regulatory.affairs@fortisbc.com

Electric Regulatory Affairs Correspondence
Email: electricity.regulatory.affairs@fortisbc.com

FortisBC
16705 Fraser Highway
Surrey, B.C. V4N 0E8
Tel: (778) 578-3861
Cell: (604) 230-7874
Fax: (604) 576-7074
www.fortisbc.com

May 16, 2023

British Columbia Utilities Commission
Suite 410, 900 Howe Street
Vancouver, BC
V6Z 2N3

Attention: Patrick Wruck, Commission Secretary

Dear Patrick Wruck:

Re: FortisBC Energy Inc. (FEI)

**Application for a Certificate of Public Convenience and Necessity for the
Okanagan Capacity Upgrade (OCU) Project (Application) ~ Project No. 1599152
Supplementary Filing**

On November 16, 2020, FEI submitted the above referenced Application, and on February 23, 2022, the British Columbia Utilities Commission (BCUC) issued Order G-48-22 adjourning the proceeding. On March 31, 2023, FEI filed its submission advising that it was preparing to file supplementary information in the proceeding. On May 5, 2023, the BCUC issued Order G-106-23 establishing a further regulatory timetable.

Please find attached FEI's Supplementary Filing to the Application, pursuant to the regulatory timetable established in Order G-106-23.

Request for Confidential Treatment of Certain Appendices

FEI requests that the BCUC hold the following Appendices confidential in perpetuity, pursuant to Section 18 of the BCUC's Rules of Practice and Procedure regarding confidential documents as set out in Order G-72-23 for the reasons identified below.

- Appendices A-1 and A-2 – Risk Analysis Reports; and
- Appendix B – Financial Schedules.

These Appendices should be kept confidential on the basis that they contain operationally sensitive information pertaining to FEI's assets. In particular, they identify vulnerable points on FEI's gas transmission system and areas of risk to the project including detailed information that if disclosed, could impede FEI's ability to work safely and reliably operate its gas system assets and could risk the safety of both its workers and the public. These documents also include cost estimates and identify project risks. They should be kept confidential on the basis that FEI may be going to the market to seek competitive bids for the materials and construction

work for the project. If the estimated costs for the material and construction work are disclosed, FEI reasonably expects that its negotiating position may be prejudiced. For instance, the bidding parties with knowledge about the estimated costs may use the estimate costs as a reference for their bidding.

If further information is required, please contact the undersigned.

Sincerely,

FORTISBC ENERGY INC.

Original signed:

Sarah Walsh

Attachments

cc (email only): Registered Interveners



FORTISBC ENERGY INC.

**Application for a Certificate of Public
Convenience and Necessity for the
Okanagan Capacity Upgrade Project**

Supplementary Filing

May 16, 2023

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1. PROJECT BACKGROUND

On November 16, 2020, FEI submitted an application (Original Application) to the British Columbia Utilities Commission (BCUC) for, among other things, a Certificate of Public Convenience and Necessity (CPCN) pursuant to sections 45 and 46 of the *Utilities Commission Act* (UCA) for the Okanagan Capacity Upgrade Project (OCU Project), which was updated by a filing on January 13, 2021 (Updated Application).

In addition to the Updated Application, during 2021 a substantial amount of evidence was gathered in the proceeding, including three rounds of information requests (IRs) containing responses to approximately 965 IRs. By Order G-48-22 dated February 23, 2022, the BCUC adjourned the proceeding to allow FEI and the Penticton Indian Band (PIB) to continue their engagement and discussions.

On March 31, 2023, in response to a request from the BCUC, FEI filed its submission, advising that following the adjournment of the regulatory process on February 23, 2022, the PIB and FEI continued discussions regarding the OCU Project which were progressing well. FEI also advised that it was preparing supplementary information to provide updates to key evidence in this proceeding.

In recognition of the time that has passed since the adjournment of the proceeding, FEI provides updates and supplementary information to certain areas of the evidence (Supplementary Filing). This Supplementary Filing confirms the continued need for the OCU Project to address customer load growth that will exceed existing system capacity.

This Supplementary Filing updates evidence to the proceeding and generally follows the format of the Updated Application as outlined below:

- **Section 3: Project Need and Justification** – As discussed in the Updated Application, FEI forecasts an increase in its peak demand in the central and north Okanagan regions, which, if not addressed, will lead to an imminent Interior Transmission System (ITS) capacity shortfall, resulting in the likely and widespread curtailment of customers. Therefore, FEI must undertake the OCU Project to increase the delivery capacity of the ITS and to ensure that FEI maintains long-term safe and reliable gas service to meet customers' expectations.

FEI has updated the demand forecast for the Okanagan region (Section 2 of the Supplementary Filing). The updated demand forecast demonstrates the continued need for the OCU Project as the system will approach its maximum capacity prior to the winter of 2023/2024 and a capacity upgrade to the ITS is required to maintain secure and reliable supply to the central and north Okanagan regions.

- **Section 4: Description and Evaluation of Alternatives** – FEI notes that there are no updates to the evaluation of alternatives considered and selection of the preferred solution discussed in Section 4 of the Updated Application.

- 1 • **Section 5: Project Description** – The identified Project components to address the
2 OCU Project need remain the same as filed in Section 5 of the Updated Application.
3 However, based on more recently available information, FEI provides an update to the
4 OCU Project's basis of cost estimate and OCU Project schedule (Section 3 of the
5 Supplementary Filing).
- 6 • **Section 6: Project Cost Estimate** – Based on its revised cost estimate, FEI has
7 updated the OCU Project's financial summary and rate impacts (Section 4 of the
8 Supplementary Filing).
- 9 • **Section 7: Environment and Archaeology** – There are no updates to the environment
10 and archaeology section contained in Section 7 of the Updated Application.
- 11 • **Section 8: Consultation and Engagement** – FEI continued consultation and
12 engagement activities with local governments, stakeholders, and Indigenous
13 communities since filing the Application in December 2020 (Section 5 of the
14 Supplementary Filing). This Supplementary Filing takes into account FEI's most up-to-
15 date understanding of the implications of the requirements of an agreement with
16 Indigenous communities on the OCU Project, including with respect to cost and
17 schedule.
- 18 • **Section 9: Provincial Government Energy Objectives** – Since filing the Original
19 Application (and Updated Application), FEI has filed its 2022 Long Term Gas Resource
20 Plan (LTGRP). The OCU Project remains consistent with FEI's most recently filed
21 LTGRP and remains aligned with provincial energy objectives, including those
22 concerning greenhouse gas emissions.¹ FEI has provided additional information (Section
23 6 of the Supplementary Filing) to show how the OCU Project addresses the recent
24 developments in the regulatory and policy environment, such as the *CleanBC Roadmap*
25 *to 2030*, as requested by BC Sustainable Energy Association in its submission to the
26 BCUC on the next steps in this proceeding.

¹ Exhibit B-16, BCOAPO IR2 14.1.

2. FEI'S MOST RECENT DEMAND FORECAST DEMONSTRATES THE OCU PROJECT IS NECESSARY AND JUSTIFIED

FEI updated the peak demand forecast for the ITS in 2023 (referred to as the “Supplementary Filing Forecast” in this document). Though the Supplementary Filing Forecast shows comparatively lower peak demand relative to the Updated Application Forecast, demand has exceeded current system capacity, as shown in Figures 2-1 and 2-2 below. Therefore, as identified in Section 3.4 of the Updated Application, the OCU Project is still imminently needed as a long-term practical solution to increase the ITS capacity. This will ensure that FEI can meet the current and forecast peak demand and continue to provide natural gas service to customers safely and reliably.

2.1 *FEI UPDATED THE PEAK DEMAND FORECAST FOR THE ITS*

FEI updates the peak demand forecast on an annual basis. Accordingly, FEI's current peak demand forecast differs from the one provided in the Updated Application. When comparing the Supplementary Filing Forecast to the forecast used in the Updated Application, FEI observes that gas demand is still expected to increase, but at a lower rate. The Supplementary Filing Forecast confirms an imminent capacity shortfall.

The Supplementary Filing Forecast represents FEI's current available forecast information. The Supplementary Filing Forecast consists of the 2022 Forecast but incorporates the 2022 peak demand from core customers, which is calculated based on actual 2022 year-end core customer attachment and consumption data. The figures below show the change in peak demand forecast between FEI's Updated Application Forecast (titled “ITS Peak Demand – Updated Application Forecast” in the figure), and FEI's Supplementary Filing Forecast (titled “ITS Peak Demand – Supplementary Filing Forecast” in the figure). The horizontal lines show different representations of the ITS capacity. For clarity, FEI has provided the Supplementary Filing Forecast at two levels of scale. Figure 2-1 presents the forecast at a higher scale, providing context on how demand on the ITS has progressed over time. Figure 2-2 is an extract of the Figure 2-1 graph area within the red box and highlights the imminent need for a capacity upgrade.

Figure 2-1: Supplementary Filing Peak Demand Forecast

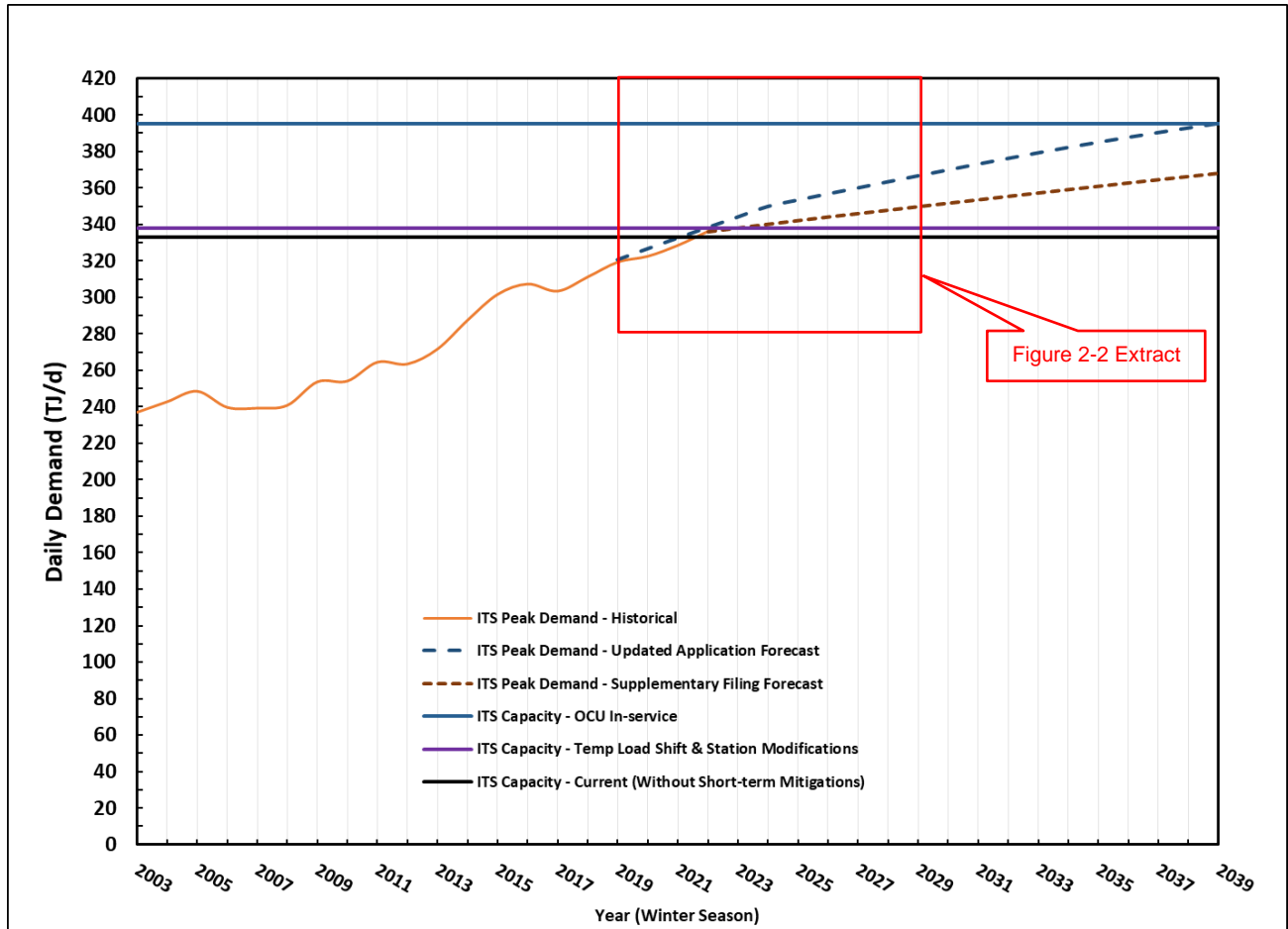
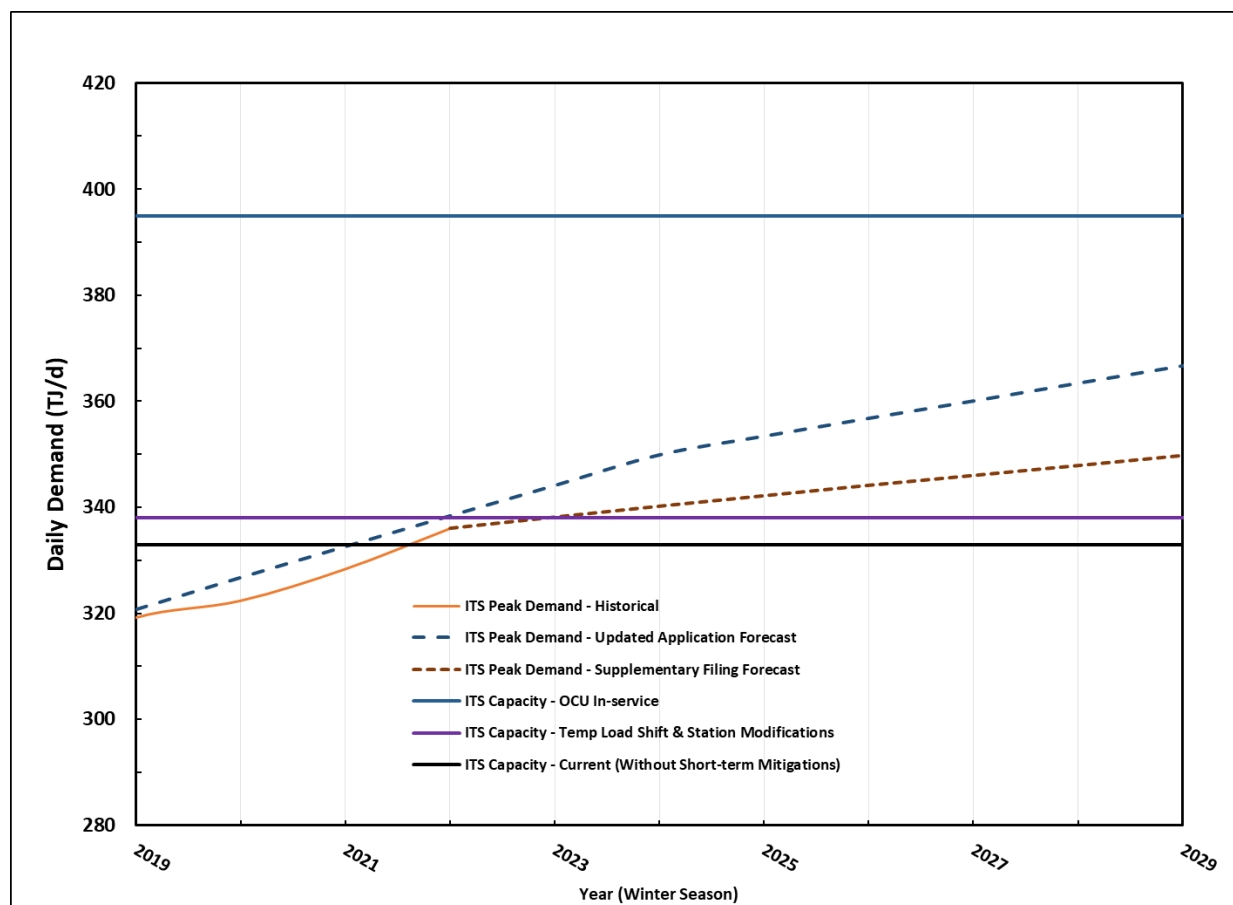


Figure 2-2: Extract from Supplementary Filing Peak Demand Forecast



2.2 FEI MUST UNDERTAKE THE OCU PROJECT NOW TO MEET THE SUPPLEMENTARY FILING FORECAST AND AVOID ANY CAPACITY SHORTFALL

The historical peak demand for the ITS, titled “ITS Peak Demand – Historical”, can be seen in Figures 2-1 and 2-2 above. The curve represents the calculated peak demand based on actual customer attachment and load data. FEI updated the curve in 2023 based on the actual 2022 core customer data. The curve shows the imminent need for the OCU Project, noting that the 2022 historical peak demand exceeds the current ITS capacity.

Figures 2-1 and 2-2 above also show that demand is forecast to exceed the ITS capacity with short-term mitigation measures² in place, resulting in an expected capacity shortfall. With the temporary load shifting and station modification measures in place, a capacity shortfall is expected this winter (i.e., Winter 2023-24), as shown by the intersection of the Supplementary Filing Forecast line and the line titled “ITS Capacity – Temp Load Shift & Station Modifications”.

² Refer to Section 4.2 of the Updated Application for information on the short-term mitigation measures.

1 FEI has also worked with Westcoast Energy Inc. (WEI) on an additional short-term capacity
2 mitigation wherein WEI will attempt to provide FEI with a minimum Savona tap pressure of 650
3 psig. Incorporating this additional measure (i.e., with the Temporary Load Shifting, Station
4 Modifications, and Savona Tap Pressure Increase all being in place), results in the
5 Supplementary Filing Forecast deferring the predicted capacity shortfall to no later than Winter
6 2026-27. FEI notes that no firm contractual obligation exists to provide this tap pressure
7 between FEI and WEI, and as such, there is no guarantee of the availability of this temporary
8 measure.

9 As the 2022 historical peak demand exceeds the existing ITS capacity, and as the
10 Supplementary Filing Forecast shows that demand will soon exceed the ITS capacity with short-
11 term mitigations in place, the need identified in Section 3.4 of the Updated Application remains,
12 and FEI must still proceed with the OCU Project to provide service to customers.

3. PROJECT COST ESTIMATE AND SCHEDULE

FEI retained an Engineering Consultant³ to complete an AACE Class 3 cost estimate for the construction component of the OCU Project described in the Estimate Basis Memorandum (EBM).⁴ This Class 3 construction estimate was added to FEI's Owner's Class 3 estimate for project support services and project management to form the Base Estimate for the OCU Project.

In March 2023, FEI updated the construction component of the Base Estimate for the OCU Project. The scope of the update was limited to rate increases for labour and materials, and increases to material cost, effectively updating the estimate to 2023\$.

3.1 ASSUMPTIONS

The following assumptions were used in preparing the updated estimate:

- The alignment of the pipeline route described in the Updated Application remained the same;
- The production rates assumed for contractors in 2020 remained the same; and
- The duration for the works and the construction season constraints remained the same except that the OCU Project start date shifted to May 2023, with completion in May 2026.

3.2 METHODOLOGY

3.2.1 Data Sources

FEI has two comparable pipeline projects:

- The Inland Gas Upgrade (IGU) project which started in 2020 and is scheduled for completion in 2024; and
- The Eagle Mountain Gas Pipeline (EGP) project which is scheduled to begin construction in 2023.

One of the contractors engaged for both of the above projects provided bids in 2023\$ for equipment and labour resources which can be used as a basis to estimate costs for other pipeline construction projects. As such, FEI has used the updated rates for both labour and equipment for the OCU Project as they reflect current market conditions and union labour rates.

³ Solaris Management Consultants Inc.

⁴ Exhibit B-1-2 (Updated Application), Appendix A-3.

3.2.2 Labour and Equipment Rates

The construction estimate in the EBM consists of two tables of rates: *Attachment B.4 Labour Rates* and *Attachment B.5 Equipment Rental Rates*. FEI determined that five different crew rates and seven different equipment rates totalled over 80 percent of the total labour and equipment costs respectively. For each of these labour and equipment rates, the 2023 unit rates used in the IGU and EGP projects were reviewed and the average of the two rates was computed. The average change in labour rates was an approximately 8.9 percent increase and the average change in equipment rates was an approximately 8.8 percent increase. These percent increases were applied to each of the labour and equipment resource rates in the estimate. This maintains the validity of the original estimate basis as it is consistent with how the inflation metric is computed by analyzing the net impact on prices rather than focusing on individual items.

3.2.3 Subcontractors

The rates for subcontractors were adjusted in a similar fashion as the Labour and Equipment Rates discussed in Section 3.2.2. First, an analysis was performed to determine the most impacted subcontracts to the estimate. FEI determined that four subcontractors met the criteria: blasting, clearing and grubbing, non-destructive testing and the Penticton Horizontal Directional Drill. Subsequently, FEI obtained updated quotations from contractors' 2020 quotations. The rates provided by the four subcontractors were used to update the rates used described in *Attachment B.6 Subcontract Budget Pricing* of the EBM.

For all other subcontractors the annual BC CPI index of an approximately 9.9 percent⁵ increase from 2020 to 2022 was applied.

3.2.4 Materials

FEI obtained updated quotes from vendors for the line pipe and facilities materials. These new values were used in the estimate as direct inputs without any normalizing.

3.2.5 Project Services and Engineering

The construction estimate for project services and engineering was adjusted by approximately 7.7 percent based on known increases to these services from other recent projects.

3.2.6 Owner's Costs

Similar to the Labour and Equipment Costs, the Owner's Costs estimate was analyzed to establish the top contributors to the overall estimate total. The rates for these job titles were compared between the initial FEI 2020 rates and the current 2023 rates, with the average increase applied to all Owner's Costs. The updated Owner's Costs estimate in this

⁵ Reference: https://www2.gov.bc.ca/assets/gov/data/statistics/economy/cpi/cpi_annual_averages.pdf.

Supplementary Filing also includes FEI's most up-to-date understanding of implications of the requirements of an agreement with Indigenous communities on the Project, as further discussed in Section 5 below.

3.3 SUMMARY OF PROJECT COSTS ESTIMATE

Table 3-1 below summarizes the total updated OCU Project cost estimate, including contractor's construction costs, FEI owner's costs, Inspection Services, additional construction costs including de-activation costs, project development costs, contingency and management reserve, escalation, and financing costs, in as-spent dollars. FEI also provided the original project cost estimate that was included in the Updated Application in January 2021 for comparison.

Table 3-1: Summary of Forecast Capital and Deferred Costs (\$ millions)

Line	Particular	Updated Application (\$Millions)	Supplementary Filing (\$Millions)	Change
1	Construction Cost Estimate (Contractor)	153.486	176.969	23.483
2	Owner's Costs (FEI)	25.137	35.855	10.718
3	Inspection Services (FEI)	8.637	8.689	0.052
4	AC Mitigation, Cathodic Protection, Deactivation (FEI)	0.700	0.755	0.055
5	Subtotal Construction Capital Cost Estimate	187.960	222.268	34.308
6	Contingency	25.100	28.400	3.300
7	Cost Escalation Estimate	11.611	10.185	(1.426)
8	Subtotal w/ Contingency & Escalation	224.671	260.853	36.237
9	CPCN Application Costs	0.400	0.555	0.155
10	Project Development Costs	7.864	17.706	9.841
11	Subtotal w/ Application and Development Costs	232.935	279.114	44.807
12	Management Reserve	23.600	27.800	4.200
13	AFUDC	16.834	22.969	6.136
14	Income Tax Recovery	(2.034)	(2.473)	(0.439)
15	Total Project Cost Estimate (As-Spent)	271.335	327.410	54.704

The OCU Project updated cost estimate, reflected in the table above, is based on the following:

- An updated construction capital cost estimate of \$222.268 million in 2023 dollars developed based on the methodology discussed in Section 3.2 above;
- An updated contingency estimate of \$28.400 million in 2023 dollars (approximately 12.8 percent of the updated construction capital cost estimate), which provides a total capital budget at a P50 confidence level as determined by Validation Estimating and provided in Confidential Appendix A-1;
- A recommended P70 management reserve of \$27.800 million (approximately 12.5 percent of the updated construction capital cost estimate) as determined by Validation Estimating and provided in Confidential Appendix A-1;

- 1 • A P50 escalation value of \$10.185 million during the project from 2023 to 2026⁶, as
2 determined by Validation Estimating and provided in Confidential Appendix A-2, applied
3 to a base cost estimate of \$222.268 million plus a contingency of \$28.400 million. The
4 escalation is used to convert the project capital cost estimate from 2023 dollars to as-
5 spent dollars;
- 6 • An updated estimate of \$0.555 million for the regulatory review of the proceeding from
7 2018 to 2023, including actual spending of approximately \$0.235 million up to March
8 2023, recorded in the proposed OCU Application and Preliminary Stage Development
9 Costs Deferral Account, as further discussed in Section 4.2;
- 10 • An actual amount of \$17.706 million for the project development costs from 2018 to
11 March 2023, with \$0.902 million recorded in the proposed OCU Application and
12 Preliminary Stage Development Costs Deferral Account, as further discussed in Section
13 4.2 below, and the remaining \$16.804 million capitalized as pre-construction
14 development costs. Project development costs include all of the costs associated with
15 developing an AACE Class 3 cost estimate in accordance with AACE International
16 Recommended Practices Nos. 18R-97 and 97R-18 as required by the BCUC's CPCN
17 Guidelines as well as additional work required to advance the project to date; and
- 18 • AFUDC, assumed at FEI's approved 2023 AFUDC rate of 5.46 percent, which is equal
19 to FEI's after-tax weighted average cost of capital.⁷

20 **3.4 SUMMARY OF PROJECT SCHEDULE**

21 The preliminary OCU Project execution schedule was updated to reflect the delay in the OCU
22 Project observed to date. By utilizing the same construction methodology to reduce the risks
23 associated with working during forest fire season, bird nesting windows and other seasonal
24 constraints, the revised schedule is generally deferred three years from what was outlined in the
25 Updated Application.

26 The preliminary OCU Project execution schedule is based on receiving CPCN approval by
27 December 2023 and an assumed construction start of Q1 2025. The OCU Project schedule
28 after obtaining CPCN approval is divided into seven main phases as shown in Table 3-2 below.

⁶ No escalation applied on actual costs incurred by FEI prior to April 2023.

⁷ As proposed in the 2023 Annual Review. The actual AFUDC will be calculated based on approved AFUDC rate at the time of construction.

1

Table 3-2: Project Schedule and Milestones

Activity	Date
Pre-Approval Activities	
Continued engagement with PIB to secure consent for the project	May 2023 – Aug 2023
Implement pre-construction Indigenous engagement and activities	Aug 2023 – Jan 2025
Contractor/Consultant Selection and Award	
Procure Engineering Services	Complete
Contractor Tendering and Contract Negotiation – HDD Contractor	Jun 2024 – Dec 2024
Contractor Selection and Contract Negotiation – Mainline Contractor	Jun 2024 – Jan 2025
Detailed Engineering Design and Land Acquisition	
Engineering Detailed Design	Jan 2024 – Sept 2024
Preliminary Land Negotiation - Option to Purchase	Complete
Land Acquisition	Oct 2023 – Dec 2023
Procurement	
Procure Long Lead Items	April 2024 – Oct 2024
Permitting	
BC Energy Regulator Permits	Jan 2024 – Jan 2025
BC Energy Regulator Post Permit Notices	Feb 2025 – Oct 2026
BC Energy Regulator Deactivation Notice of Intent	August 2026
Indigenous Engagement	Jun 2019 – Dec 2026
Federal Permits (Department of Fisheries and Oceans, <i>Species at Risk Act</i>)	Jan 2024 – Jan 2025
Ministry of Transportation and Infrastructure Permits	Jan 2024 – Jan 2025
Municipal Permits	Jan 2024 – Jan 2025
Utility Permits	Jan 2024 – Jan 2025
Environmental and Archaeological Permits	Jan 2024 – Jan 2025
Early Works Construction	
Early Works Mainline Contractor Mobilize to Site (Clearing and ROW Prep)	Jan 2025
HDD Contractor Mobilize to Site	Mar 2025
HDD Construction Complete	Apr 2025
Early Works Complete	May 2025
Demobilization for Early Works	Jun 2025
Mainline Construction	
Mainline Construction Mobilization	Sep 2025
Mainline Construction Complete	Jul 2026
Restoration and Demobilization	Sep 2026 – Oct 2026
Project Close Out	Mar 2027

2

4. FINANCIAL ANALYSIS AND RATE IMPACT

The updated Total Project Cost estimate for the OCU Project is \$327.410 million in as-spent dollars as shown in Table 3-1 above. This section summarizes the updated financial analysis, and the resulting updated delivery rate impact of the OCU Project.

4.1 FINANCIAL ANALYSIS

FEI has performed an updated financial evaluation of the OCU Project in terms of the present value (PV) of the incremental revenue requirement and the levelized delivery rate impact to FEI's non-bypass customers over the 70-year analysis period (including the construction period).

Table 4-1 below summarizes the financial analysis based on the updated project cost estimate as shown in Section 3.3 above plus additional assumptions over the 70-year analysis period (including the construction period), as discussed further below in this section. Details of the financial evaluation of the project can be found in the Financial Schedules included in Confidential Appendix B.

The OCU Project will result in a cumulative delivery rate impact of 2.37 percent by 2027 when all assets as well as closing costs have entered rate base. Please refer to Section 4.3 for further discussion on the delivery rate impact and equivalent bill impact to an average residential customer. Over the 70-year analysis period, the PV of the incremental revenue requirement is approximately \$331.711 million, and the levelized delivery rate impact is 1.78 percent or \$0.093 per GJ. Table 4-2 below summarizes the change in levelized delivery rate impact over the 70-year analysis period between the Updated Application and this Supplementary Filing, demonstrating that the change is small, from 1.62 percent to 1.78 percent.

Table 4-1: Financial Analysis of the Project (\$ millions)

Line	Particular	TOTAL	Reference (Confidential Appendix B, Financial Schedule)
1	Total Capital Costs to Gas Plant in Service (\$ millions)	328.660	Schedule 6, Sum of Line 43 (2023-2026)
2	Incremental Sustainment Capital	43.085	Schedule 6, Sum of Line 43 (2027-2092)
3	Total Incremental Capital Costs over 70 years (\$ millions)	371.744	Line 1 + Line 2
4			
5	Incremental Rate Base in 2027 (\$ millions)	326.165	Schedule 5, Line 19 (2027)
6	Incremental Revenue Requirement in 2027 (\$ millions)	24.788	Schedule 1, Line 11 (2027)
7	PV of Incremental Revenue Requirement 70 years (\$ millions)	331.711	Schedule 10, Line 25
8			
9	Delivery Rate Impact in 2027, compared to 2023 Approved (%)	2.37%	Schedule 10, Line 28 (2027)
10	Levelized Delivery Rate Impact 70 years (%)	1.78%	Schedule 10, Line 32
11	Levelized Delivery Rate Impact 70 years (\$/GJ)	0.093	Schedule 10, Line 45

Table 4-2: Comparison of Delivery Rate Impacts between the Updated Application and Supplementary Filing

	Updated Application	Supplementary Filing	Change
Delivery Rate Impact when all assets entered Rate Base (%)	2.21%	2.37%	0.16%
Levelized Delivery Rate Impact 70 years (%)	1.62%	1.78%	0.16%
Levelized Delivery Rate Impact 70 years (\$/GJ)	\$ 0.073	\$ 0.093	\$ 0.020

The financial evaluation of the OCU Project includes the following assumptions over the 70-year analysis period. FEI applied the same assumptions as in the Updated Application and no new assumptions are introduced in this Supplementary Filing; however, FEI updated these assumptions from the original estimate in 2019 dollars to 2023 dollars.

- **Incremental Sustainment Capital for In-Line Inspection and O&M for Integrity Digs:**

The financial analysis over the 70-year period includes the ongoing capitalized costs for integrity in-line inspection runs, based on an estimate of \$950 thousand in 2023 dollars associated with the 406 mm pig barrel, which are estimated to begin in 2027 and expected to be incurred after every seven years. FEI also assumed incremental O&M of approximately \$48 thousand in 2023 dollars per integrity dig⁸ and an estimated five integrity digs occurring every third and/or fourth year of the 7-year cycle of integrity runs;

- **Future Replacement Capital:** Incremental capital for future replacement of assets associated with measuring & regulating equipment (once in 47 years), measuring & regulating structures (once in 46 years) as well as telemetry (once every 11 years). The future replacement costs are estimated based on today's costs of the assets (i.e., as part of the OCU Project costs) plus an annual escalation of 2 percent. The year of the future replacement for each of these assets is determined based on the currently approved depreciation rates (i.e., when the assets are fully depreciated financially);

- **Incremental O&M:** For the new station estimated at approximately \$5 thousand per year in 2023 dollars and for the additional transmission pipeline estimated at approximately \$25.3 thousand per year. The incremental O&M also includes FEI's most up-to-date understanding of the implications of the requirements of an agreement with Indigenous communities on the Project, as discussed further in Section 5 below;

- **Property Tax:** Incremental property tax due to the construction of a new Chute Lake Pressure Control Station, an approximately 30-kilometre pipeline, and associated Right of Way, partially offset by the deactivation of 1,200 metres of pipeline, based on the 2023 assessment and 2022⁹ tax rates; and

- **Inflation:** Two percent annually for incremental property tax and the aforementioned incremental sustainment capital costs estimated to occur in 2027 and beyond during the

⁸ 2023 Forecast based on FEI's 2023 Annual Review, Section 6.3.3.1, approved by Order G-352-22.

⁹ The 2023 tax rates were not available at the time of filing this Supplementary Filing.

1 post-project analysis period. FEI used the midpoint of inflation-control target range of 1
2 to 3 percent by the Bank of Canada for long-term inflation forecasts for 2027 and
3 beyond.

4 For clarity, FEI is not seeking approval of the incremental sustainment capital, incremental O&M
5 or the future replacement capital as part of this proceeding. These costs are included as a
6 proxy to ensure a fulsome analysis of the financial impact of the OCU Project over the expected
7 life of the new assets. If these requirements materialize in the future, FEI would seek approval
8 from the BCUC, as required, for these incremental costs in future applications such as FEI's
9 revenue requirement applications.

10 **4.2 OCU APPLICATION AND PRELIMINARY STAGE DEVELOPMENT COSTS** 11 **DEFERRAL ACCOUNT**

12 As discussed in the Updated Application, pursuant to sections 59 to 61 of the UCA, FEI is
13 seeking approval of a new non-rate base deferral account, titled the "OCU Application and
14 Preliminary Stage Development Costs Deferral Account", for deferral treatment of the costs of
15 preparing this Application and Preliminary Stage Development Costs, attracting FEI's after tax
16 weighted average cost of capital. These costs include:

- 17 • CPCN Application Costs related to expenses incurred for the regulatory process to
18 review the OCU Project CPCN Application. The cost estimate is based on a written
19 process with an expected total of four rounds of IRs with expenses for external legal
20 counsel, consultant costs, BCUC costs, and BCUC approved intervenor costs; and
- 21 • Project Development Costs, which can be further broken down into the following:
 - 22 ○ Preliminary Stage Development costs related to expenses incurred for engaging
23 third-party consultants for feasibility evaluation, preliminary development, and
24 assessment of the potential design and alternatives as required to complete the
25 Application; and
 - 26 ○ Pre-Construction Development Costs include the costs related to the front-end
27 engineering and design, CPCN development costs including environmental
28 assessments, and Indigenous and stakeholder consultations.

29 Table 4-3 below provides the updated estimate of Application costs as well as actual preliminary
30 stage development costs and pre-construction development costs up to March 2023 associated
31 with the OCU Project. Consistent with the approved treatment in past FEI projects, FEI
32 proposes the following:

- 33 • The pre-construction development costs associated with the OCU Project will be
34 capitalized by transferring to construction work-in-progress (CWIP) on January 1, 2024;
35 and

- The remaining costs in the proposed deferral account, i.e., the Application costs, including financing and any income tax recovery, estimated to be a credit of \$1.249 million (at December 31, 2023; Line 7 of Table 4-3 below), will be transferred to rate base on January 1, 2024, following a BCUC decision on the Application, and amortized over a three-year period.

Table 4-3: Deferred Application Costs and Preliminary Stage Development Costs (\$ millions)

Line	Particular	March 2018 - March 2023 Actual			Total
		CPCN Application Costs	Preliminary Stage Development	Pre- Construction Development	
1	Pre-Tax Costs	0.555	0.902	16.804	18.261
2	Financing, WACC Return	0.024	0.192	1.254	1.470
3	Subtotal Before Tax Offset	0.579	1.094	18.058	19.731
4	Income Tax Recovery	(0.150)	(0.243)	(2.080)	(2.473)
5	Subtotal w/ Income Tax Recovery	0.429	0.851	15.978	17.258
6	Cost Capitalized (incl. AFUDC)	-	-	(18.507)	(18.507)
7	Total Deferral Costs	0.429	0.851	(2.529)	(1.249)

4.3 RATE IMPACT

The OCU Project will have incremental delivery rate impacts from 2024 to 2027. The drivers of the delivery rate impact in each year are explained below:

- **From 2024 to 2026:** As discussed in Section 3.2 above, FEI is proposing to transfer the balance of the OCU Application and Preliminary Stage Development Costs Deferral Account, estimated to be a credit of \$1.249 million, to rate base on January 1, 2024 following the expected approval of the OCU Project before the end of 2023. The credit balance will return to customers through delivery rates with a three-year amortization from 2024 to 2026; and
- **2027:** All new assets related to the OCU Project are expected to be in-service in 2026 and will be transferred to rate base on January 1, 2027, resulting in an incremental delivery rate impact of approximately 2.37 percent in 2027, when compared to the approved 2023 delivery rates.

Table 4-3 below provides an estimate of the annual incremental revenue requirement in \$ millions and the annual delivery rate impact in percentage terms to FEI's customers due to the OCU Project from 2024 to 2027, when compared to FEI's current 2023 approved delivery rates.

Table 4-3: Summary of Project Annual Delivery Rate Impact

	2024	2025	2026	2027
Incremental Delivery Margin, compared to 2023 Approved, Non-Bypass (\$ millions)	(0.554)	(0.474)	(0.319)	24.788
<i>Annual Delivery Rate Impact, compared to 2023 Approved, Non-bypass</i>	<i>(0.05%)</i>	<i>(0.05%)</i>	<i>(0.03%)</i>	<i>2.37%</i>

The delivery rate impact of 2.37 percent in 2027 is equivalent to approximately \$0.125 per GJ when compared to FEI's 2023 approved delivery rates. For an average FEI residential customer consuming 90 GJ per year, this would equate to a total bill impact of approximately \$11.22 in 2027.

5. CONSULTATION AND ENGAGEMENT

Consultation, engagement, and communication are integral components of FEI's project development process. FEI's consultation and engagement on the OCU Project began in late 2019, with early consultation and engagement on the project. FEI engaged early with Indigenous groups and consulted with local governments including City of Penticton (Penticton), Regional District Okanagan Similkameen (RDOS), City of Kelowna, and City of West Kelowna. In 2020, as project planning continued, the preferred alternative was refined, and FEI presented this revised route to Indigenous groups and local government officials. The OCU Project was also introduced to the public, potentially impacted landowners, and other stakeholders, including customers, residents, businesses, stakeholder groups and organizations. Throughout this consultation and engagement, FEI tracked the issues and concerns raised.

FEI continued consultation and engagement activities with local governments, stakeholders, and Indigenous communities since filing the Original Application in December 2020. FEI has continued to work with Indigenous groups and stakeholders to address any outstanding items on the OCU Project.

5.1 LOCAL GOVERNMENT AND STAKEHOLDERS

FEI's consultation with the public has been a crucial component in the development of the OCU Project. FEI recognizes the importance of meaningful consultation and of developing, maintaining, and enhancing strong stakeholder relationships. To support the successful approval and completion of the OCU Project, FEI's approach has been open, transparent, and consistent in interactions with stakeholders and local government.

FEI continued to engage with stakeholders and local government after the CPCN application filing, but at a limited capacity as FEI staff focussed on engaging directly with Indigenous communities to address their concerns. FEI's log of stakeholder and local government consultation activities to date is included as Appendix C.

On December 17, 2020, FEI sent letters via email to notify stakeholders and local government of the filing with the BCUC. On January 29, 2021, FEI presented virtually to the BC Energy Regulator (BCER and formerly the BC Oil and Gas Commission) on the OCU Project. The project was well received by the BCER and no further follow up was required after the meeting. Additional project updates were provided to stakeholders and local government from February 1, 2021 to April 17, 2023. FEI also made a virtual presentation to an interested community member group, First Things First Okanagan, on the OCU Project and the benefits of the Diversified Pathway.

Bi-weekly meetings were held with Penticton to provide project updates, seek feedback on the project, and create a Terms of Reference Agreement (TOR). The TOR outlines: the three parcels of Penticton-owned land for which the OCU Project requires Surface-Rights-of-Way, and timelines for project-related permit reviews and approvals from Penticton. Feedback was

received from Penticton on the TOR, and FEI plans to send a final draft to send back to Penticton before the end of May for signing.

Bi-weekly meetings were also held with the RDOS to provide Project updates, seek feedback on the Project, and create a Campbell Mountain Landfill Agreement (Landfill Agreement). The Landfill Agreement contemplates FEI access to, and use of, the Campbell Mountain Landfill for temporary workspace. FEI plans to send a final draft of the Landfill Agreement to the RDOS for signing before the end.

On June 2, 2022, FEI appeared as a delegation and presented updates to the RDOS Board of Directors regarding the OCU Project, including information on the route, community and Indigenous relations, environmental impacts and mitigations, and other general OCU Project updates.

The bi-weekly meetings with both Penticton and the RDOS were paused in December 2022. On April 17, 2023, FEI had a meeting with Penticton to provide an update on the progress of the OCU Project and notified them of the status of the agreements. FEI will be commencing the meetings in May 2023, to finalize negotiations on the agreements and have both parties sign the agreements. FEI's public consultation and communication activities since the filing of the Original Application have been sufficient, appropriate, and reasonable. As discussed above, FEI will continue to engage with stakeholders and the public throughout the lifecycle of the OCU Project, in order to keep them informed and to mitigate any impacts associated with the project.

5.2 INDIGENOUS COMMUNITIES

FEI is committed to building strong working relationships with Indigenous groups and recognizes that the potential impacts of the OCU Project on the title, rights, and interests of affected Indigenous groups must be identified and avoided or mitigated as appropriate. To achieve this, FEI has committed to an engagement approach that has been thorough, timely, and meaningful. FEI is also committed to working with local Indigenous groups to create project benefits, through capacity building and economic opportunities.

In 2019, FEI began early engagement with Indigenous groups with asserted interests in the OCU Project area. FEI continued engagement with Indigenous groups following the filing of the CPCN application in December 2020. In January 2021 FEI sent a notification and information letter by email to Westbank First Nation (WFN), Lower Similkameen Indian Band (LSIB), Upper Nicola Indian Band, Okanagan Nation Alliance, Nooaitch Indian Band, and PIB. The letter explained that FEI submitted an application to the BCUC for a CPCN; provided information on how the group could register as an interested party, including contact information, website address, and timeline; notified the Indigenous groups of a *Heritage and Conservation* permit application; and provided contact information for FEI where any comments, questions or concerns could be directed. FEI's log of Indigenous engagement to date is included as Appendix D.

5.2.1 Lower Similkameen Indian Band

In May 2021 the BCER notified FEI that LSIB had provided its position on the OCU Project to the BCER. LSIB reviewed the shape files and noted that the work is primarily within PIB area of responsibility, and that the LSIB supports any comments and request brought forth from PIB.

5.2.2 Westbank First Nation

Engagement with WFN continued since the Original Application was filed, including WFN sending a letter of conditional consent for the OCU Project. The condition is that archaeology work is conducted and WFN receives a minimum of three weeks' notification to schedule WFN field works. Other engagement activities included finalizing and signing the Capacity Funding Agreement in February 2021, which outlines the work plan and engagement process WFN and FEI will undertake on the OCU Project; and engagements such as archaeology, geotechnical and environmental field work, report reviews and general administrative engagements.

5.2.3 Penticton Indian Band

Engagement with PIB continued since the Original Application and focussed on engagement processes and activities outlined in the Capacity Funding Agreement. Examples of activities include archaeology, geotechnical and environmental field work, report reviews and engagements; regulatory application information, such as the BCER; and community-led studies such as the Use and Occupancy studies and report, and the Traditional Ecological Knowledge Keepers studies and reports.

The BCUC regulatory process was adjourned on February 23, 2022. Following the adjournment, PIB and FEI continued discussions regarding the OCU Project. On March 31, 2023, FEI advised the BCUC that discussions between PIB and FEI were progressing well. FEI remains optimistic and anticipates advising the BCUC whether FEI and the PIB can reach an agreement with respect to the OCU Project in the coming months. FEI is seeking PIB's consent for the OCU Project in that agreement. While the discussions between FEI and PIB remain confidential, FEI plans to file any final agreement reached with the BCUC on a confidential basis once completed. This Supplementary Filing takes into account FEI's most up-to-date understanding of the implications of the requirements of an agreement on the OCU Project, including with respect to cost and schedule.

FEI remains committed to engaging in an ongoing, transparent, and meaningful manner. FEI will continue engaging with Indigenous communities throughout the regulatory process, preconstruction and close out phases of the OCU Project.

6. PROVINCIAL GOVERNMENT ENERGY OBJECTIVES AND POLICY CONSIDERATIONS

In Fall of 2021, the Province released the *CleanBC Roadmap to 2030* (CleanBC), which is the government's plan to accelerate climate action in order to meet its 2030 greenhouse gas (GHG) reduction goals. The OCU Project is aligned with CleanBC as it supports FEI's transition to low-carbon gases and investment in energy efficiency to reduce consumption.

In response to increasing provincial policy ambition to reduce BC's GHG emissions, FEI developed the Clean Growth Pathway – an overarching framework to guide FEI's decarbonization activities to align with the Province's 2030, 2040 and 2050 GHG reduction goals.¹⁰ FEI then worked with Guidehouse to develop the Pathways Report, which was filed in the OCU Proceeding.¹¹ The Pathways Report concludes that a diversified pathway, such as the Clean Growth Pathway, which preserves a prominent role for FEI's infrastructure in the decarbonization of BC's energy system, is the most affordable, resilient and practical pathway to achieve the provincial government's GHG reduction objectives.

Two key pillars in the Clean Growth Pathway are transitioning to renewable and low-carbon gases and investing in energy efficiency and conservation measures to reduce energy use among FEI's customers. These two pillars work together to ensure that GHG reduction targets can be achieved. Energy efficiency and conservation measures lower energy use per customer, while the transition to low-carbon gases will gradually decarbonize customer energy use over time by scaling up the overall share of renewable and low-carbon gas supply.

FEI's gas infrastructure has a critical role in providing low carbon and renewable energy, as renewable gas has enormous potential to reduce BC's GHG emissions. The provincial government has signaled the importance of the gas system to meet their decarbonization goals by setting a renewable gas content target in 2018 of 15 percent.¹² In May 2021, the Province supported this policy by enabling gas utilities to acquire up to 15 percent of their gas from renewable and low-carbon sources, including hydrogen, through amendments to the *Greenhouse Gas Reduction Regulation*.¹³ In October 2021, the CleanBC spoke further about the important role that gas infrastructure and renewable gases play in reducing emission in BC:

B.C.'s existing pipeline infrastructure can play an important role in reducing greenhouse gases by transitioning away from delivering fossil natural gas to delivering renewable gas. B.C.'s gas utilities have been leaders in enabling this transition.

¹⁰ <https://www.cdn.fortisbc.com/libraries/docs/default-source/about-us-documents/clean-growth-pathway-brochure.pdf>.

¹¹ Exhibit B-16, BCOAPO IR2 14.1.

¹² CleanBC Plan. [CleanBC: our nature. Our power. Our future. \(gov.bc.ca\)](https://www.bcclearinghouse.ca/cleanbc-plan)

¹³ Greenhouse Gas Reduction Regulation. [Greenhouse Gas Reduction \(Clean Energy\) Regulation \(gov.bc.ca\)](https://www.bcclearinghouse.ca/greenhouse-gas-reduction-regulation)

1 To help drive this transition, we will introduce a GHG emissions cap that will
2 require gas utilities to undertake activities and invest in technologies to further
3 lower GHG emissions from the fossil natural gas used to heat homes and
4 buildings and power some of our industries.

5 Following further modelling and analysis, the cap will be set at approximately 6
6 Mt of CO₂e per year for 2030, which is approximately 47% lower than 2007
7 levels. Since emissions from gas consumption are linked to industry (excluding
8 oil and gas) and the built environment, the cap is consistent with emissions
9 targets for those sectors.

10 Utilities will determine how best to meet the target, which could include acquiring
11 more renewable gases as well as supporting greater energy efficiency. Measures
12 in CleanBC allow gas utilities to use renewables such as synthetic gas,
13 biomethane, green and waste hydrogen and lignin to achieve this.¹⁴

14 CleanBC anticipates significant investment in renewable and low carbon gases which require
15 gas infrastructure, like the OCU Project, to be delivered to customers. As a result, maintaining a
16 robust gas system is essential to meeting provincial climate targets and aligning with provincial
17 energy objectives.

18 Another important consideration is that the OCU Project is needed to support peak energy
19 demand in the Okanagan Region, a critical service which is difficult to electrify. In FEI's 2022
20 LTGRP, FEI filed evidence examining the impacts to the electric system associated with
21 electrifying gas heating load in the City of Kelowna.¹⁵ The study demonstrates that the transfer
22 of peak demand from the gas system to the electric system creates a significant requirement for
23 additional electric infrastructure and associated land to address the incremental winter electric
24 peak demand and therefore, may not be an optimal approach to decarbonization.

25 Guidehouse's Pathways Report¹⁶ made a similar finding that a diversified pathway, requiring the
26 majority of the energy delivered in the gas system to be renewable by 2050, would be a more
27 affordable and resilient pathway to achieve emissions reductions targets as compared to a
28 pathway that focuses solely on electrification.

29 The diversified pathway proposes that significant investments in energy efficiency will be made,
30 and approximately three-quarters of customer gas demand will be served by renewable or low-
31 carbon gases. For example, the proposed energy efficiency measures would reduce carbon
32 emissions by more three million tonnes of reductions by 2050. Despite the impact of efficiency
33 measures to reduce energy use per customer over time, potential capacity expansions are
34 nonetheless required to meet to meet growing peak loads with increasing proportions of
35 renewable and low carbon gas supply.

¹⁴ CleanBC Roadmap to 2030. [cleanbc_roadmap_2030.pdf \(gov.bc.ca\)](https://www2.gov.bc.ca/gov/content/sustainability/2030/cleanbc-roadmap-2030.pdf)

¹⁵ FEI 2022 Long-term Gas Resource Plan Proceeding, Exhibit B-20, Kelowna Electrification Case Study.

¹⁶ Exhibit B-16, FEI Response to BCOAPO IR2 14.1.

1 One of the main advantages of the diversified pathway is that it leverages existing gas delivery
2 infrastructure, avoiding the need for significant and costly expansion of long-lead energy
3 infrastructure such as electric generation, transmission, and distribution systems. Furthermore,
4 the diversified pathway takes advantage of the gas system which is specifically designed to
5 address seasonal energy peaks with its ability to cost-effectively store large volumes of energy
6 for long periods of time. Transitioning to delivering renewable and low-carbon gases ensures
7 these socio-economic and operational benefits are realized while also reducing GHG emissions.

8 Finally, as discussed in FEI's LTGRP Application filed in 2022, FEI has demonstrated the merits
9 of a diversified pathway to meet the Province's climate goals while still investing in new capacity
10 infrastructure such as the OCU Project to improve FEI's ability to continue to provide gas
11 service to customers safely, cost effectively and reliably. Therefore, the OCU Project and FEI's
12 Clean Growth Pathway approach remains aligned with BC's energy objectives, including those
13 related to reducing greenhouse gas emissions in BC (i.e., objectives (g), (h) and (i)).¹⁷

¹⁷ FEI 2022 Long-term Gas Resource Plan Application, Exhibit B-1, Table 1-5, Page 1-12.

7. CONCLUSION

The OCU Project as proposed in the Updated Application is necessary for FEI to continue to maintain safe and reliable gas service to its existing and future customers in the central and north Okanagan regions. Based on the information included in this Supplementary Filing, FEI continues to predict that forecast peak demand will exceed its existing capacity on the ITS. Therefore, a system upgrade is imminently required to increase ITS capacity. FEI needs an acceptable, practical and long-term solution to serve the growing load in the central and north Okanagan regions that will address the expected capacity shortfall as discussed in the Updated Application and this Supplementary Filing.

Appendix A-1

**VALIDATION ESTIMATING CONTINGENCY REPORT –
REVISED FINAL**

FILED CONFIDENTIALLY

Appendix A-2

**VALIDATION ESTIMATING ESCALATION REPORT –
REVISED FINAL**

FILED CONFIDENTIALLY

Appendix B
FINANCIAL SCHEDULES

FILED CONFIDENTIALLY

Appendix C

**STAKEHOLDER AND LOCAL GOVERNMENT
CONSULTATION LOG**

OCU - Stakeholder Consultation Log

Date	Consultation Type	External Representatives	FEI Representatives	Municipality/Stakeholder	Summary
17-Dec-20	Letter	City of Penticton	Hayley Newmarch - Community Relations Manager	City of Penticton	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Regional District Okanagan Similkameen	Hayley Newmarch - Community Relations Manager	Regional District of Okanagan-Similkameen	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Legislative Assembly of British Columbia	Hayley Newmarch - Community Relations Manager	Legislative Assembly of British Columbia	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Member of Parliament for South Okanagan—West Kootenay	Hayley Newmarch - Community Relations Manager	South Okanagan—West Kootenay	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Ministry of Energy, Mines & Low Carbon Innovation	Hayley Newmarch - Community Relations Manager	Ministry of Energy, Mines & Low Carbon Innovation	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Penticton and Area Cycling Association (PACA)	Hayley Newmarch - Community Relations Manager	Penticton and Area Cycling Association	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Naramata Bench Winery Association	Hayley Newmarch - Community Relations Manager	Naramata Bench Winery Association	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Naramata Citizens Association	Hayley Newmarch - Community Relations Manager	Naramata Citizens Association	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Chute Lake Lodge	Hayley Newmarch - Community Relations Manager	Chute Lake Lodge	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Okanagan Similkameen Stewardship Society	Hayley Newmarch - Community Relations Manager	Okanagan Similkameen Stewardship Society	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
17-Dec-20	Letter	Penticton Disc Golf Club	Hayley Newmarch - Community Relations Manager	Penticton Disc Golf Club	Emailed an update letter informing them that FEI has submitted the CPCN application to the BCUC.
29-Jan-21	Virtual Meeting	Oil and Gas Commission	Hayley Newmarch - Community Relations Manager	Oil and Gas Commission	Presentation to the OGC on the OCU project. Presented on the community and Indigenous engagement efforts completed to date.
1-Feb-21	Virtual Meeting	Karla Kozakevich - RDOS Board Chair & Director Ron Obirek - RDOS Board Chair & Director	Shelley Martens - Community & Indigenous Relations Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	Regional District of Okanagan-Similkameen	Met to discuss the OCU project updates, the potential reroute around the Spier's vineyard via the Campbell Mountain Landfill and future community investment projects in the parks. Positive feedback from Ron and Karla about our communication and outreach with the community.
4-Feb-21	Virtual Meeting	Michael Hodges, Kristen Dixon, Blake Laven - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met to discuss the proposed OCU project, project concerns, and the preferred solutions. Discussed the MOU, the Operating Agreement, and the parking lot option at the top of Riddle Road.
17-Feb-21	Virtual Meeting	Michael Hodges & Blake Laven - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met to discuss the proposed OCU project, project concerns, and the preferred solutions. Discussed the MOU, the Operating Agreement, and the parking lot option at the top of Riddle Road.
1-Mar-21	E-Mail	PACA President	Hayley Newmarch	Penticton and Area Cycling Association	Email sent to the PACA to set up a time to meet on site at the Three Blind Mice location and go over the proposed route. The week of March 4 did not work for PACA but will set up a future onsite meeting.

OCU - Stakeholder Consultation Log

Date	Consultation Type	External Representatives	FEI Representatives	Municipality/Stakeholder	Summary
2-Mar-21	Virtual Meeting	Karla Kozakevich - RDOS Board Chair & Director Doug Reeves - RDOS Capital Project Manager	Shelley Martens - Community & Indigenous Relations Manager Hayley Newmarch - Community Relations Manager Jayms Morrison - Indigenous Relations Manager	Regional District of Okanagan-Similkameen	Met to discuss a potential community investment project at Manitou Park in Naramata. Duel language signage in the park and five new signs.
3-Mar-21	Virtual Meeting	Michael Hodges & Kristen Dixon - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met to discuss the proposed OCU project, the HDD and Open Cut alignment options, as well as reviewed the draft Terms of Reference. FortisBC to send the updated Terms of Reference before the next meeting on March 17.
4-Mar-21	In-Person Meeting	Shawn Black, President of the Penticton Disc Golf Course 2 Board Members, Penticton Disc Golf Course	Hayley Newmarch - Community Relations Manager Sami Brar - Community Relations Liaison Nick Richardson - Engineer	Penticton Disc Golf Club	Met with Shawn Black and two other board members to review the project area to view the newly installed FEI sponsored baskets and discuss potential impacts to the course.
11-Mar-21	Virtual Meeting	Mark Woods - RDOS General Manager of Community Services	Hayley Newmarch - Community Relations Manager Ly-shu Ramos - Permitting Manager Nick Richardson - Engineer	Regional District of Okanagan-Similkameen	Met with Mark Woods to discuss the OCU project and the FLNRO application for trail use access along the Kettle Valley Rail Trail. He agreed to send FEI a letter of support for the project to submit to FLNRO.
6-Mar-21	E-Mail	PACA President	Hayley Newmarch - Community Relations Manager	Penticton and Area Cycling Association	Emailed with Travis K from PACA to discuss the upcoming application to FLNRO for trail use access through the Three Blind Mice Trail Network. We discussed PACA supporting our application and helping submit a letter of support for the project.
12-Mar-21	E-Mail	PACA President	Hayley Newmarch - Community Relations Manager	Penticton and Area Cycling Association	Received a letter of support for the FLNRO trail access permit for the Three Blind Mice Trail Network from PACA.
12-Mar-21	E-Mail	Mark Woods - RDOS General Manager of Community Services	Hayley Newmarch - Community Relations Manager	Regional District of Okanagan-Similkameen	FEI received a letter of support for the OCU project and for the application to FLNRO for access through the Kettle Valley Rail Trails. The letter was signed by Karla Kozakevich, Chair of the RDOS.
31-Mar-21	Virtual Meeting	Michael Hodges, Kristen Dixon, Blake Laven - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference document. The City will be presenting the TOR to Mayor and Council in camera on April 20 or May 6. FEI will received a revised copy after their meeting. The City asked for FEI to share a copy of the potential parking lot assessment report with them. FEI sent a copy of the report to the City on March 31.
21-Apr-21	Virtual Meeting	Karla Kozakevich - RDOS Board Chair & Director Doug Reeves - RDOS Capital Project Manager	Hayley Newmarch - Community Relations Manager Sami Brar - Community Relations Liaison	Regional District of Okanagan-Similkameen	FEI met with the RDOS on April 21 to discuss the Manitou Park Community Investment project in Naramata. The project consists of duel language signage (English/Syilx) in collaboration with PIB and local Indigenous art work. The RDOS is looking for a donation of \$40k for the signage and sculpture.
22-Apr-21	E-Mail	Shawn Black, President of the Penticton Disc Golf Course	Hayley Newmarch	Penticton Disc Golf Club	Email sent to the Penticton Disc Golf Club to mark trees of importance on the course, as the survey team will be in the area the following week to review the route. FEI approved the draft sponsor thank you sign for the entrance to Three Blind Mice.
26-Apr-21	E-Mail	PACA President	Hayley Newmarch	Penticton and Area Cycling Association	Notification email sent on April 26 regarding the upcoming survey work for the OCU project. Information was sent on the location of the survey work, the work taking place, and a link to our Talking Energy website for more information.

OCU - Stakeholder Consultation Log

Date	Consultation Type	External Representatives	FEI Representatives	Municipality/Stakeholder	Summary
26-Apr-21	E-Mail	Shawn Black, President of the Penticton Disc Golf Course	Hayley Newmarch	Penticton Disc Golf Club	Notification email sent on April 26 regarding the upcoming survey work for the OCU project. Information was sent on the location of the survey work, the work taking place, and a link to our Talking Energy website for more information.
26-Apr-21	E-Mail	Chute Lake Lodge	Hayley Newmarch	Chute Lake Lodge	Notification email sent on April 26 regarding the upcoming survey work for the OCU project. Information was sent on the location of the survey work, the work taking place, and a link to our Talking Energy website for more information.
26-Apr-21	E-Mail	Karla Kozakevich - RDOS Board Chair & Director Ron Obirek - RDOS Board Chair & Director	Hayley Newmarch	Regional District of Okanagan-Similkameen	Notification email sent on April 26 regarding the upcoming survey work for the OCU project. Information was sent on the location of the survey work, the work taking place, and a link to our Talking Energy website for more information.
26-Apr-21	E-Mail	Michael Hodges, Kristen Dixon, Blake Laven - City of Penticton	Hayley Newmarch	City of Penticton	Notification email sent on April 26 regarding the upcoming survey work for the OCU project. Information was sent on the location of the survey work, the work taking place, and a link to our Talking Energy website for more information.
27-Apr-21	E-Mail	PACA President	Hayley Newmarch	Penticton Disc Golf Club	Follow up email sent on April 27, to confirm the second sponsorship installment has been received for the trail upgrades in Three Blind Mice Park.
28-Apr-21	Virtual Meeting	Michael Hodges, Kristen Dixon, Blake Laven - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document on April 28. FEI will receive the red-lined document before the next meeting on May 12. The RDOS is expecting to present the Campbell Mountain Landfill ROW to the Board of Directors on either May 6 or May 20 in camera.
15-May-21	Virtual Meeting	Lisa Scott, Executive Director - Okanagan and Similkameen Invasive Species Society (OASSIS)	Hayley Newmarch - Community Relations Manager Sami Brar - Community Relations Liaison Catherine Hayes - Environmental Program Lead	OASSIS	Met with OASSIS to discuss the OCU Project and learn about the work OASSIS is doing with invasive species in the area. OASSIS informed FEI that they are planning to do herbicide treatment in the area and depending on the route location, they could reconsider areas they plan to treat. Next steps include continuing conversation with our environmental department and adding OASSIS to our project stakeholder list so they receive future notifications about updates on the project.
16-Jun-21	E-Mail	Penticton Disc Golf Club	Hayley Newmarch - Community Relations Manager	Penticton Disc Golf Club	FEI sent an email to PDGC informing them that our team would be in the park starting next week for two weeks to conduct early work on motorized vehicles. There will be signage up in the park to inform park users of the motorized vehicles in the area. No next steps.
16-Jun-21	E-Mail	Penticton and Area Cycling Association	Hayley Newmarch - Community Relations Manager	Penticton and Area Cycling Association	FEI sent an email to PACA informing them that our team would be in the park starting next week for two weeks to conduct early work on motorized vehicles. There will be signage up in the park to inform park users of the motorized vehicles in the area. No next steps.
28-Apr-21	Virtual Meeting	Michael Hodges, Kristen Dixon, Blake Laven - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document on April 28. FEI will receive the red-lined document before the next meeting on May 12. The RDOS is expecting to present the Campbell Mountain Landfill ROW to the Board of Directors on either May 6 or May 20 in camera.
12-May-21	Virtual Meeting	Michael Hodges, Blake Laven - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document.

OCU - Stakeholder Consultation Log

Date	Consultation Type	External Representatives	FEI Representatives	Municipality/Stakeholder	Summary
26-May-21	Virtual Meeting	Michael Hodges, Ian Chapman, Blake Laven - City of Penticton	Shelley Martens - Community & Indigenous Relations Manager Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document.
16-Jun-21	Virtual Meeting	Michael Hodges, Ian Chapman, Blake Laven - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Blake Mansbridge - Manager, Community Relations Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document.
9-Jul-21	E-Mail	Karla Kozakevich - RDOS Board Chair & Director Ron Obirek - RDOS Board Chair & Director	Hayley Newmarch	Regional District of Okanagan-Similkameen	Notification email sent on July update the RDOS on the project updates and Saliken Drive MOTI reroute approval.
21-Jul-21	Virtual Meeting	Michael Hodges, Kristen Dixon, Blake Laven - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document and the Ellis Creek water line tie in.
4-Aug-21	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document.
8-Sep-21	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document and Sendero Canyon route

OCU - Stakeholder Consultation Log

Date	Consultation Type	External Representatives	FEI Representatives	Municipality/Stakeholder	Summary
22-Sep-21	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document.
13-Oct-21	Virtual Meeting	Michael Hodges, Kristen Dixon, Blake Laven - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document.
24-Nov-21	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document.
8-Dec-21	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document and project update.
13-Jan-22	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document and project update for 2022.
27-Jan-22	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference (TOR) document and project update for 2022, regarding the delays on the project.
3-Feb-22	E-Mail	City of Penticton	Hayley Newmarch - Community Relations Manager	City of Penticton	Emailed an update letter on the project, regarding the project delays and updated BCUC decision date.
3-Feb-22	E-Mail	Regional District Okanagan Similkameen	Hayley Newmarch - Community Relations Manager	Regional District of Okanagan-Similkameen	Emailed an update letter on the project, regarding the project delays and updated BCUC decision date.

OCU - Stakeholder Consultation Log

Date	Consultation Type	External Representatives	FEI Representatives	Municipality/Stakeholder	Summary
3-Feb-22	E-Mail	Penticton and Area Cycling Association (PACA)	Hayley Newmarch - Community Relations Manager	Penticton and Area Cycling Association	Emailed an update letter on the project, regarding the project delays and updated BCUC decision date.
3-Feb-22	E-Mail	Chute Lake Lodge	Hayley Newmarch - Community Relations Manager	Chute Lake Lodge	Emailed an update letter on the project, regarding the project delays and updated BCUC decision date.
3-Feb-22	E-Mail	Okanagan Similkameen Stewardship Society	Hayley Newmarch - Community Relations Manager	Okanagan Similkameen Stewardship Society	Emailed an update letter on the project, regarding the project delays and updated BCUC decision date.
3-Feb-22	E-Mail	Penticton Disc Golf Club	Hayley Newmarch - Community Relations Manager	Penticton Disc Golf Club	Emailed an update letter on the project, regarding the project delays and updated BCUC decision date.
10-Feb-22	E-Mail	Doug Reeves, Project Coordinator II	Hayley Newmarch - Community Relations Manager	Regional District of Okanagan-Similkameen	Community investment update on the Manitou Park project in Naramata and the collaboration with the Penticton Indian Band on the sculpture and duel language signage.
16-Feb-22	E-Mail	Jeremey Dresner Senior Energy Specialist, Community Services	Hayley Newmarch - Community Relations Manager	Regional District of Okanagan-Similkameen	Provided Jeremy with maps on borehole locations for the OCU project, as well as tie in and block hole locations.
24-Feb-22	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference document.
10-Mar-22	Virtual Meeting	Michael Hodges, Ian Chapman - City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference document and the Penticton Creek Crossing. Shelley to reach out to Ian in regards the creek crossing upgrade. FEI to set up an RDOS Environmental sub committee meeting with RDOS, FEI and CoP to discuss the Sperling Hansen report and Campbell Mtn Landfill.
20-Apr-22	E-Mail	RDOS Board Members	Hayley Newmarch	Regional District of Okanagan-Similkameen	Sent a project update to the RDOS Board members and invited them to reach out with any questions about the project. Also notified them of the engagement with the First Things First Okanagan committee.
21-Apr-22	E-Mail	First Things First Okanagan	Hayley Newmarch	Public	Sent email to the FTFO group to invite them to an information session meeting with FEI. The meeting has been set up for April 29, 2022.
21-Apr-22	Virtual Meeting	Michael Hodges, Kristen Dixon - City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Met with the City of Penticton to discuss the draft Terms of Reference document, PIB updates and FTFO organization.
21-Apr-22	Virtual Meeting	RDOS Board Meeting	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	Regional District of Okanagan-Similkameen	Attended the RDOS Board meeting virtually to listen to the First Things First Okanagan environmental group speak in opposition to the OCU project.
27-Apr-22	Virtual Meeting	Kristen Dixon - City of Penticton and Andrew Reeder - RDOS	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager, Andrew Loge	Regional District of Okanagan-Similkameen	Bi-weekly meeting in regards to the Campbell Mountain Landfill and engineering/environmental impacts that will tie into the TOR with the City of Penticton.
28-Apr-22	E-Mail	Doug Reeves, Project Coordinator II	Hayley Newmarch - Community Relations Manager	Regional District of Okanagan-Similkameen	Community investment update on the Manitou Park project in Naramata and the collaboration with the Penticton Indian Band on the sculpture and duel language signage.
29-Apr-22	Virtual Meeting	First Things First Okanagan	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager Salman Hussain Tyler Bryant	Virtual	Met virtually with members of the FTFO group to introduce the OCU project team, provide information on the project, how FEI is a regulated utility and the Diversified Pathways report
5-May-22	Virtual Meeting	Michael Hodges, Kristen Dixon - City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Sent a revised version of the TOR to the City. Discussed revisions at the meeting.
11-May-22	Virtual Meeting	Kristen Dixon - City of Penticton and Andrew Reeder - RDOS	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager, Andrew Loge	Regional District of Okanagan-Similkameen	Bi-weekly meeting in regards to the Campbell Mountain Landfill and engineering/environmental impacts that will tie into the TOR with the City of Penticton.

OCU - Stakeholder Consultation Log

Date	Consultation Type	External Representatives	FEI Representatives	Municipality/Stakeholder	Summary
25-May-22	Virtual Meeting	Kristen Dixon - City of Penticton and Andrew Reeder - RDOS	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager, Andrew Loge	Regional District of Okanagan-Similkameen	Bi-weekly meeting in regards to the Campbell Mountain Landfill and engineering/environmental impacts that will tie into the TOR with the City of Penticton.
2-Jun-22	Virtual Meeting	RDOS Board Meeting	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager, Salman Hussain, Catherine Hayes	Regional District of Okanagan-Similkameen	Presented at the RDOS Board meeting about the OCU project and updates on the project. Provided information on the route, community and Indigenous Relations, Environmental and other updates. The Mayor of Penticton was also in attendance.
6-Jul-22	Virtual Meeting	Kristen Dixon - City of Penticton and Andrew Reeder - RDOS	Darren McElhinney - Senior Project Manager, Andrew Loge	Regional District of Okanagan-Similkameen	Bi-weekly meeting in regards to the Campbell Mountain Landfill and engineering/environmental impacts that will tie into the TOR with the City of Penticton.
27-Jul-22	E-Mail	PACA President	Hayley Newmarch	Penticton and Area Cycling Association	Stakeholder update email on the project status. \$3,000 donation to PACA for the Three Blind Mice trail improvements.
27-Jul-22	E-Mail	Shawn Black, Penticton Disc Golf	Hayley Newmarch	Penticton Disc Golf Club	Stakeholder update email on the project status.
27-Jul-22	E-Mail	Kelley Kenyon	Hayley Newmarch	Chute Lake Lodge	Stakeholder update email on the project status.
27-Jul-22	E-Mail	Alyson Skinner	Hayley Newmarch	OASSIS	Stakeholder update email on the project status.
11-Aug-22	Virtual Meeting	Michael Hodges, Kristen Dixon - City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Review the revised TOR with the City. City's legal team has reviewed the TOR with no major comments.
21-Sep-22	E-Mail	Michael Hodges - City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	TOR has been reviewed by City staff with two minor changes. The TOR is currently with City's legal team and will be sent to FEI before our next meeting on October 6.
1-Nov-22	E-Mail	Michael Hodges - City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Received the Oct 3, 2022 revised Terms of Reference from the City of Penticton. This document has been reviewed by the City's legal team.
3-Nov-22	Virtual Meeting	Michael Hodges - City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Reviewed the revised TOR with the City's legal team's comments. Discussed presenting in camera the final TOR to the City Mayor and Councilors in 2023.
17-Apr-23	Virtual Meeting	Kristen Dixon -City of Penticton	Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Provided the City of Penticton with an update on the OCU project and the objectives for 2023.
4-May-23	E-Mail	Kristen Dixon -City of Penticton	Chris Coady - Property Services Manager Hayley Newmarch - Community Relations Manager Darren McElhinney - Senior Project Manager	City of Penticton	Provided the City of Penticton with an update on the OCU project and providing them with the finalized TOR and Campbell Mountain Landfill agreements before the end of May.

Appendix D

INDIGENOUS ENGAGEMENT LOG

Indigenous Relations Engagement Log - Okanagan Capacity Upgrade					
Date	Engagement Type	Indigenous Community	External Representatives	FEI Representatives	Summary
20-Nov-19	Email	Esh-kn-am Cultural Resources Management Services		Shelley Martens - Community & Indigenous Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project
4-May-20	Email	Esh-kn-am Cultural Resources Management Services		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
4-Jun-20	Email	Esh-kn-am Cultural Resources Management Services		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
15-Oct-20	Email	Esh-kn-am Cultural Resources Management Services		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project: Permit Application
20-Nov-19	Email	Lower Similkameen Indian Band		Shelley Martens - Community & Indigenous Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project
4-May-20	Email	Lower Similkameen Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
4-Jun-20	Email	Lower Similkameen Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
15-Oct-20	Email	Lower Similkameen Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project: Permit Application
12-Jan-21	Email	Lower Similkameen Indian Band	Title and Rights Team Lead	IR Manager CIR Manager	FEI notified group of application to the British Columbia Utilities Commission for a Certificate of Public Convenience and Necessity on November 16, 2020. FEI provided information on how the group could register as an interested party, including contact information, website address, and timeline. FEI also notified group of the Heritage and Conservation Act Section 12.2 permit application made on December 15, 2020. The letter provided contact information for FEI where any comments, questions or concerns could be directed.
4-May-21	Email	Lower Similkameen Indian Band (LSIB); British Columbia Oil and Gas Commission	Title and Rights Team Lead; First Nations Liaison Assistant	IR Manager CIR Manager	The BCOGC notified FEI that LSIB had provided their position on the Project to the BCOGC. LSIB reviewed the shape files and note that the work is primarily within the PIB's area of responsibility, and that the LSIB supports any comments and request brought forth from PIB.
20-Nov-19	Email	Nooaitch Indian Band		Shelley Martens - Community & Indigenous Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project
4-May-20	Email	Nooaitch Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance

Indigenous Relations Engagement Log - Okanagan Capacity Upgrade

Date	Engagement Type	Indigenous Community	External Representatives	FEI Representatives	Summary
4-Jun-20	Email	Nooaitch Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
15-Oct-20	Email	Nooaitch Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project: Permit Application
12-Jan-21	Email	Nooaitch Indian Band		IR Manager CIR Manager	FEI notified group of application to the British Columbia Utilities Commission for a Certificate of Public Convenience and Necessity on November 16, 2020. FEI provided information on how the group could register as an interested party, including contact information, website address, and timeline. FEI also notified group of the Heritage and Conservation Act Section 12.2 permit application made on December 15, 2020. The letter provided contact information for FEI where any comments, questions or concerns could be directed.
20-Nov-19	Email	Okanagan Nation Alliance		Shelley Martens - Community & Indigenous Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project
4-May-20	Email	Okanagan Nation Alliance		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
4-Jun-20	Email	Okanagan Nation Alliance		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
15-Oct-20	Email	Okanagan Nation Alliance		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project: Permit Application
12-Jan-21	Email	Okanagan Nation Alliance		IR Manager CIR Manager	FEI notified group of application to the British Columbia Utilities Commission for a Certificate of Public Convenience and Necessity on November 16, 2020. FEI provided information on how the group could register as an interested party, including contact information, website address, and timeline. FEI also notified group of the Heritage and Conservation Act Section 12.2 permit application made on December 15, 2020. The letter provided contact information for FEI where any comments, questions or concerns could be directed.
28-Jun-19	In Person Meeting	Penticton Indian Band	Natural Resources Director TEKK members	Shelley Martens - Community & Indigenous Relations Manager	During a meeting regarding a different FBC project, FEI presented initial high-level overview of Okanagan Capacity Upgrade Project. Questions raised regarding age and location of existing line. Interested in learning more and understanding environmental & archaeological assessment process. Next step is to draft preliminary budget and work plan for early assessment and schedule a follow up meeting.

Indigenous Relations Engagement Log - Okanagan Capacity Upgrade

Date	Engagement Type	Indigenous Community	External Representatives	FEI Representatives	Summary
6-Sep-19	In Person Meeting	Penticton Indian Band	Natural Resources Project Manager	Shelley Martens -Community & Indigenous Relations Manager, Paul Chernikowsky - Director, Integrity Management & Damage Prevention, Mark Morrison - Sr. Project Engineer	Communicated project scope, proposed routing, and timelines. Natural Resources (NR) advised of TEKK involvement requirements, advised timelines and challenges. Natural Resources process: review by TEKK; complete desktop overview (use & occupancy mapping, non-recorded sites, etc.) and Preliminary Field Reconnaissance work. Early archaeological investigation activities required along the proposed route and within existing rights of way. Agreed Cultural Workshop at En’owkin Centre for OCU Project Team will be beneficial. FBC provided funding to support PIB's initial assessment of the route. Next step is to schedule a meeting with TEKK to present more detailed information on Project to determine level of assessment needed.
4-Oct-19	In Person Meeting	Penticton Indian Band and Traditional Ecological Knowledge Keepers	Natural Resources Project Manager TEKK members	Shelley Martens - Community & Indigenous Relations Manager, Paul Kropp - Transmission Pipeline Manager, Mark Morrison - Sr. Project Engineer, Catherine Hayes - Environmental Program Lead	Discussed Phase I Assessment findings. Four field visits and three meetings completed by TEKK to start to compile information pertaining to the land that the proposed work is to be done upon. Concerns raised regarding significance of cultural heritage and areas already impacted. Next steps are to provide archaeological/environmental contractors details to PIB and to schedule a Cultural workshop at En’owkin for OCU Project team.
15-Oct-19	In Person Meeting	Penticton Indian Band and Traditional Ecological Knowledge Keepers	Natural Resources Project Manager TEKK members	Shelley Martens - Community & Indigenous Relations Manager, Mark Morrison - Sr. Project Engineer	Discussed Environmental Overview and Archaeological Overview assessments. Request for presentation on construction methods and overview of CPCN process. Final work plan to be approved by Chief & Council. Next steps are for FEI to confirm workshop on Pipeline & FortisBC 101; send updated kmz files and for TEKK to provide questions in advance of next meeting; review kmz files; and develop draft work plan & budget/ estimate for next phases.
20-Nov-19	Email	Penticton Indian Band		Shelley Martens - Community & Indigenous Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project
28-Nov-19	In Person Meeting	Penticton Indian Band and Traditional Ecological Knowledge Keepers	Natural Resources Project Manager TEKK members	Shelley Martens - Community & Indigenous Relations Manager, Paul Kropp - Transmission Pipeline Manager, Mark Morrison - Sr. Project Engineer	Presentation to TEKK members to address questions from previous meetings regarding who FEI is, construction practices, OCU project update and our environmental process. Well received by the group with some questions clarifying the scope of the project. Concerns raised about impacts to plants and animals due to width of right of way. Began discussions on how to incorporate traditional plants and medicines during corridor restoration to rebuild cultural picking areas and ensure animals return to the area. Agreed to continue discussions on how this could be achieved.
17-Apr-20	Conference Call	Penticton Indian Band	Natural Resources Project Manager Natural Resources Director	Samantha Singbeil - Manager, Indigenous Relations, Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Provided a overview of the project scope and reviewed engagement activities and route change. Discussed creating liaison position between FBC and PIB within the capacity funding agreement. Discussed how COVID has impacted meetings and communication and options on how to engage in the future through the use of technology for meetings. Next steps include FEI to send PIB the timeline/milestone list before the next meeting; FEI to send the updated agreement to NR Director, along with the new FEI and PIB liaison position in it; FEI to send NR Director the telephone town hall information; and PIB NR Director to send a job description on a project manager position.

Indigenous Relations Engagement Log - Okanagan Capacity Upgrade

Date	Engagement Type	Indigenous Community	External Representatives	FEI Representatives	Summary
28-Apr-20	Conference Call	Penticton Indian Band	Natural Resources Project Manager Natural Resources Director	Samantha Singbeil - Manager, Indigenous Relations, Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Discussed NP Director presenting on the project at next meeting to Chief & Council. FEI provided update on geo tech work/routing/planning without PIB Engagement; raising concerns and creating anxiety that we're proceeding without PIB/ TEKK involvement. Next steps are for FEI to look at and review job description; want to get up and running; start at 2 year term with extension option; modify Work Plan and budget to accommodate the position; and schedule next meeting.
4-May-20	Email	Penticton Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
6-May-20	Conference Call	Penticton Indian Band	Natural Resources Director	Samantha Singbeil, Manager - Indigenous Relations, Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager, Darren McElhinney - Project Manager for OCU	Reviewed the Capacity Funding Agreement with the NR Director and he will update the document with edits and send back to FEI. FEI to work with legal on finalizing the agreement before our meeting on May 12th. Next steps are to review edits of the capacity funding agreement and finalize before Chief and Council meeting on May 13, 2020 and to schedule another meeting to review the agreement on May 12, 2020.
12-May-20	Conference Call	Penticton Indian Band	Natural Resources Director Natural Resources Project Manager	Samantha Singbeil - Manager, Indigenous Relations, Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Reviewed comments and edits from PIB on the Capacity Funding Agreement. Next step is to finalize agreement for PIB to present to Chief and Council on May 13, 2020.
3-Jun-20	Conference Call	Penticton Indian Band	Natural Resources Director	Samantha Singbeil - Manager, Indigenous Relations, Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Reviewed comments and edits from PIB on the Capacity Funding Agreement. Band council resolution was signed.
4-Jun-20	Email	Penticton Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance

Indigenous Relations Engagement Log - Okanagan Capacity Upgrade

Date	Engagement Type	Indigenous Community	External Representatives	FEI Representatives	Summary
9-Jun-20	Conference Call	Penticton Indian Band	Natural Resources Director	Samantha Singbeil - Manager, Indigenous Relations, Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Reviewed comments and edits from PIB on the Capacity Funding Agreement. Band council resolution was signed. Finalized agreement sent to PIB for the Chief’s signature.
17-Jun-20	In Person Meeting	Penticton Indian Band and Traditional Ecological Knowledge Keepers	Natural Resources Project Manager TEKK members	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Darren McElhinney - Project Manager	Provided information to the TEKK members on the new proposed route and gave them an update on construction timelines and next steps. Well received by the group with some questions clarifying the scope of the project. Concerns raised about impacts to plants and animals, scheduling next meetings, as well as the different naming conventions. Agree to continue discussions on the project and how we can continue to collaborate. Next steps are to send a copy of the fly over video map of the route and schedule follow up meeting on July 10, 2020.
10-Jul-20	In Person Meeting	Penticton Indian Band and Traditional Ecological Knowledge Keepers	Natural Resources Project Manager TEKK members	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Darren McElhinney - Project Manager	Discussion around the cumulative effects on the plants, animals, and water were of top priority in the meeting. Discussion about how to protect the sacred areas along the routes from construction and trespassers. Electric and gas ROW distances from the centerline. Next step is to schedule a follow up meeting for July 24.
23-Jul-20	Conference Call	Penticton Indian Band K’ul Group - Previously known as PIBDC (Penticton Indian Band Development Corporation)	CEO, K’uL Group CEO, ReGen Global, K’uL Platform Partner	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Darren McElhinney - Project Manager	Meeting between K’ul Group and OCU Project team to discuss opportunities to learn more about K’ul Group and the businesses currently available and what is being developed for future opportunities. This will help provide a better outline of procurement and construction potential specific to the OCU project as the plans continue to be developed.
24-Jul-20	In Person Meeting	Penticton Indian Band and Traditional Ecological Knowledge Keepers	Natural Resources Project Manager TEKK members	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager	Reviewed the fly over video of the proposed route. Discussed upcoming preliminary geotechnical work that will be taking place in August.
25-Aug-20	In Person Meeting	Penticton Indian Band and Traditional Ecological Knowledge Keepers	Natural Resources Project Manager TEKK members	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Darren McElhinney - Project Manager	Discussed the preliminary findings along the route and the next steps for TEKK. Next step is to schedule a follow up meeting via phone the week of September 14, 2020.

Indigenous Relations Engagement Log - Okanagan Capacity Upgrade

Date	Engagement Type	Indigenous Community	External Representatives	FEI Representatives	Summary
15-Sep-20	Conference Call	Penticton Indian Band	Natural Resources Project Manager Natural Resources Director	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Darren McElhinney - Project Manager	Bi-weekly progress update meeting. Discussed interim TEKK report which is due on November 1, 2020.
30-Sep-20	Conference Call	Penticton Indian Band	Natural Resources Project Manager Natural Resources Director	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Darren McElhinney - Project Manager, Jayms Morrison - Indigenous Relations Manager	Bi-weekly progress update meeting. Discussed interim TEKK report which is due on November 1, 2020.
15-Oct-20	Email	Penticton Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project: Permit Application
20-Oct-20	Conference Call	Penticton Indian Band	Natural Resources Director	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Darren McElhinney - Project Manager	Bi-weekly progress update meeting. Discussed interim TEKK report which is due on November 1, 2020, safety plans and training opportunities.
20-Oct-20	Email	Penticton Indian Band	Natural Resources Department (NR) Project Manager NR Director	Community Relations Manager (CR Manager)	Follow up documents sent to PIB from October 20, 2020 meeting including Pipeline Construction Specifications and Conducting Pipeline Patrols.
21-Oct-20	Email	Penticton Indian Band	Policy and Planning (PP) Director	Community and Indigenous Relations Manager (CIR Manager)	FEI offered to meet to discuss the potential for locating temporary project sites on PIB lands. Agreed to meet Tuesday, October 27, 2020.
23-Oct-20	Email	Penticton Indian Band	NR Director NR Manager	Indigenous Relations Manager (IR Manager) CR Manager	Draft Borehole AIA report sent for Review by communities.
23-Oct-20	Email	Penticton Indian Band	NR Director NR Manager	CR Manager CIR Manager IR Manager	PIB said that they reviewed the Geotechnical AIA report and it is compliant with the provincial AIA standards; that the contractor has done a good job in that respect.
23-Oct-20	Email	Penticton Indian Band	NR Director NR Manager	CR Manager CIR Manager IR Manager	PIB sent their interim Use and Occupancy Mapping (UOMS) report.
29-Oct-20	Conference Call	Penticton Indian Band	NR Director NR Manager	CR Manager CIR Manager IR Manager	Bi-Weekly progress update meeting. Discussed: high-level quantitative and qualitative aspects of PIB’s Cultural Heritage Resource Assessment report and potential to mitigate impacts; construction methods including proposed timelines; next steps including PIB TEKK studies and report writing.

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19-Nov-20	Conference Call	Penticton Indian Band	NR Director NR Manager	CR Manager CIR Manager IR Manager	Bi-Weekly progress update meeting. Discussed PIB's TEKK reports' progress, and meeting with Chief and Council. PIB said that they would present a briefing note to Chief and Council at the December 15, 2020 Chief and Council meeting and determine if FEI needs to come in to present the project. PIB offered to write a Letter of Support for the Heritage Conservation Act, Archeology Branch, 12.2 Permit Application. PIB Requested updated maps of the project. Provided update that the CPCN application had been filed.
27-Nov-20	Email	Penticton Indian Band	NR Director NR Manager	CR Manager CIR Manager IR Manager	FEI sent PIB follow up maps from the November 19 meeting.
1-Dec-20	Email	Penticton Indian Band	NR Director	CR Manager CIR Manager IR Manager	PIB requested a project schedule from FEI.
2-Dec-20	Email	Penticton Indian Band	NR Director	CR Manager CIR Manager IR Manager	FEI sent PIB a link to the BCUC Application and the page number the project schedule can be found on. FEI requested confirmation of the December 3, 2020 scheduled meeting.
3-Dec-20	Virtual Meeting	Penticton Indian Band	NR Director NR Manager Syilx Traditional Ecological Knowledge Keepers (TEKK)	CR Manager CIR Manager IR Manager	Bi-Weekly Meeting between FEI and PIB. Discussed Invoicing Process; previous meeting minutes; future planning for meetings to discuss project reroutes; mitigations; the PIB department's planned address to Chief and Council on December 15, 2020 on the Project; safety plan & training requirements; and capacity funding agreement work items. PIB requested Preliminary Field Reconnaissance documentation from Golder (FEI consultant), and any information on how they can register as an intervener in BCUC CPCN project application review process. PIB offered to write a letter of support for the Arch permit application, FEI said they would get back to PIB on takeaways.
4-Dec-20	Email	Penticton Indian Band	NR Director	CR Manager CIR Manager IR Manager	PIB said that they would no longer be able to present the briefing to Chief and Council at the December 15, 2020 Chief and Council meeting, and that the January 5, 2021 Chief and Council meeting is also postponed. PIB said that the next available spot to present to Chief and Council would be at the January 19, 2021 Chief and Council meeting and that they would work to get FEI on the agenda and let FEI know.
4-Dec-20	Email	Penticton Indian Band	NR Director	CR Manager CIR Manager IR Manager	FEI followed up on the November 19 conference call and confirmed that a Letter of Support from PIB for the Heritage Conservation Act, Archeology Branch, 12.2 permit application would be great.
7-Dec-20	Email	Penticton Indian Band	NR Director	CR Manager CIR Manager IR Manager	PIB responded to December 4, 2020 email, and requested Golder send the permit/application number. FEI responded that once Golder submits the application, they would receive the application number and share with PIB.
15-Dec-20	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI wrote an email advising that the HCA Permit Application was submitted and provided the Application number.

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15-Dec-20	Virtual Meeting	Penticton Indian Band	NR Manager NR Director TEKK	IR Manager CIR Manager	<p>PIB representative facilitated TEKK Members and FEI meeting. PIB thanked FEI for the Amazon Fire Tablets provided to TEKK members so they could participate in the meeting; discussed Project reroutes, PIB community led project and field study timelines for the UOMS and TEKK final reports (Due January 1 and February 1, 2021, respectively), PIB's interest in water and water bodies, and water crossings.</p> <p>FEI agreed to prepare a presentation on the watercourse crossing techniques used for pipelines and this project.</p> <p>FEI, PIB, TEKK agreed to another meeting in early January.</p> <p>FEI and PIB/TEKK agreed to form a subcommittee to discuss water issues, concerns and mitigations on a crossing by crossing basis.</p>
18-Dec-20	Email	Penticton Indian Band	NR Manager NR Director	IR Manager CIR Manager	<p>PIB said that the meeting with Syilx TEKK was a success, and that they would be going to do field assessments of the re-routes on Monday, December 21, 2020.</p> <p>FEI followed up on December 17, 2020 meeting with a recommended cecwixa (water) mitigations sub-committee group structure format to discuss impacts with Syilx TEKK and PIB. Follow up emails made agreement on the number of representatives from each organization who would form the committee.</p>
21-Dec-20	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI sent a PowerPoint overview presentation in followed up on a PIB request for presentation for PIB. The presentation was for use in developing a briefing note for Chief and Council, as well as the presentation that FEI could speak to at the FEI/PIB Chief and Council presentation meeting to be scheduled in January.
5-Jan-21	Email	Penticton Indian Band	NR Manager NR Director	IR Manager CIR Manager	FEI followed up on December 15, 2020 meeting with a cecwixa (water) crossings table, asking if the list was comprehensive according to PIB's knowledge.
8-Jan-21	Email	Penticton Indian Band	NR Manager	IR Manager CIR Manager	FEI sent a letter clarifying health and safety field crew requirements.
12-Jan-21	Phone	Penticton Indian Band	NR Manager NR Director	IR Manager CIR Manager	FEI requested to meet with Chief and Council to introduce the project (PIB said timing is still TBD), and discussed planning for technical PIB/TEKK report reviews, and planning for next meeting. PIB confirmed receipt of the PowerPoint presentation from FEI, PIB said that the Final UOMS Report needs to be signed off on by Chief and Council and the next meeting is January 19 prior to being provided to FEI.
12-Jan-21	Email	Penticton Indian Band	NR Manager NR Director	IR Manager CIR Manager	<p>FEI provided further notice to PIB of application to the British Columbia Utilities Commission for a Certificate of Public Convenience and Necessity filed on November 16, 2020. FEI provided information on how PIB could register as an interested party, including contact information, website address, and timeline.</p> <p>FEI also notified PIB of the Heritage and Conservation Act Section 12.2 permit application made on December 15, 2020.</p>
13-Jan-21	Email	Penticton Indian Band	NR Manager	IR Manager CIR Manager	FEI sent email requesting availability and updates for: 1) dates that would work for the Syilx TEKK recurring meeting, bi-weekly 2) dates that would work for Syilx TEKK Cecwixa (water) Impact Mitigations Sub-committee meeting and 3) update on the Syilx TEKK field studies and TEKK reports.
14-Jan-21	Phone	Penticton Indian Band	NR Manager	IR Manager CIR Manager	PIB identified Syilx TEKK members who would be part of the Cecwixa Impact Mitigations Sub-committee; TEKK/PIB community led field studies upcoming on January 18 and winter prints studies ongoing; the PIB Final UOMS Report requires final sign off from chief and council, which will happen January 19; PIB TEKK final report is well underway and reroute studies are upcoming; PIB and TEKK agreed to reconvene on Friday, January 22 for two meetings: 1) a broad TEKK meeting Friday morning with all TEKK members, and 2) separate TEKK Cecwixa Mitigations Sub-committee meeting in the afternoon.

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22-Jan-21	Email, Text	Penticton Indian Band	NR Manager	IR Manager CIR Manager	Text Messages and Email communication. PIB said that the email servers were all being transferred over to a new system, and all emails and calendars were lost. The January 22 scheduled meetings with the broad Syilx TEKK members and the TEKK Cecwixa Impact Mitigations Sub-committee meeting both need to be cancelled and rescheduled for next week. Agreed to schedule meetings on January 27 & 28, 2021 for broader TEKK meeting, and Cecwixa Impact Mitigations Sub-committee meeting, respectively.
26-Jan-21	Phone	Penticton Indian Band	NR Manager	IR Manager CIR Manager	PIB confirmed that the January 27, 2021 meeting with PIB and the Syilx TEKK ; discussed the agenda for the meeting - that FEI's presentation about watercourse crossing techniques would be useful and that the cecwixa (watercourse crossings) table would be a good way to organize each crossing and have a mitigation conversation about each one.
27-Jan-21	Phone	Penticton Indian Band	NR Manager	IR Manager CIR Manager	PIB cancelled the Syilx TEKK meeting and the Syilx cecwixa mitigations meeting.
27-Jan-21	Phone	Penticton Indian Band	NR Director	IR Manager CIR Manager	<p>PIB said that the new Chief and Council was briefed on the OCU project, and staff recommended to Chief and Council that FEI present the project directly to elected officials. Chief and Council advised they would make a decision on FEI presenting the project at the February 2 meeting and respond to FEI. FEI stated they are willing to present at anytime.</p> <p>PIB advised FEI that the new Council is getting up to speed on the project.</p> <p>PIB requested the needs assessment for the project and FEI sent a link to BCUC application, which includes the needs assessment.</p> <p>PIB advised that Chief and Council created a Committee to work with FEI on the project; Committee includes Chief, two council members and two staff members.</p> <p>PIB requested the link and letter regarding the intervener application process be re-sent; FEI provided.</p> <p>PIB agreed to continue ongoing bi-weekly meetings for OCU and that they would provide an update once Council approval and direction are confirmed - should be known by Feb 2.</p>
27-Jan-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI sent a follow up email to the phone conversation that same day including resending the January 11, 2021 letter with information on how to register as an intervener on the project, and the link to the BCUC CPCN application. The email also asked for confirmation that the Thursday, February 4 meeting would happen, and requested the timing to present the OCU project to Chief and Council.
3-Feb-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI provided updated shape files for the project to PIB and asked for confirmation that the bi-weekly February 4 meeting was to proceed.
8-Feb-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI sent email with link to the Pre-Construction Site Assessment Report (Habitat Assessment) for project area geotechnical work, for community review and comment.
8-Feb-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI sent an email confirming understanding of PIB intervener status on the BCUC CPCN application and confirmed FEI's desire to continue to engage with PIB; FEI requested a meeting with Chief and Council.
9-Feb-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI sent the Preliminary Field Reconnaissance Arch report for review and comment.

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12-Feb-21	Virtual Meeting	Penticton Indian Band	NR Director	IR Manager CIR Manager	<p>FEI requested clarity on the 'community engagement' section of the capacity funding agreement, when presentation to Chief and Council can be arranged, and how FEI and PIB will work together moving forward.</p> <p>PIB advised that the community engagement section of the CFA is to be led by PIB, and FEI brought in when requested. All meetings with Syilx TEKK constitute community engagement, both the engagements with and without FEI.</p> <p>PIB confirmed internal PIB meeting being held later in the day (February 12, 2021), and would have clarity on when FEI could present the project to Chief and Council, and have a discussion about the project.</p> <p>PIB advised that they would confirm how their committee would work with FEI moving forward on the OCU project.</p>
16-Feb-21	Text Message	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI requested an update from PIB on the preferred engagement approach, the potential for a Chief and Council meeting date, time and agenda, and offered to have a conversation. PIB said that the committee discussed the approach and they expect to have further clarification on February 17, 2021.
17-Feb-21	Text Message	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI followed up with PIB to confirm the regularly scheduled bi-weekly meeting on February 18, 2021 at 8am. PIB advised the meeting would need to be delayed until Council confirms direction on the PIB process. FEI requested an estimate on the timing of that process being finalized. No response was received.
23-Feb-21	Text Message	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI followed up with PIB for an update regarding the preferred engagement approach, a potential Chief and Council meeting date, time and agenda. No response was received.
25-Feb-21	Text Message	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI followed up with PIB to confirm availability on Feb 25 or 26, 2021 to discuss next steps. PIB confirmed meeting for February 26, 2021 and they would call FEI on that date.
26-Feb-21	Phone Call	Penticton Indian Band	NR Director	IR Manager CIR Manager	<p>PIB provided an update:</p> <ul style="list-style-type: none">-PIB Chief, Council, Legal have reviewed all PIB TEKK reports and data collection.- Chief and Council expressed interest in meeting to discuss the finalized reports and to update on future structure of engagement. The preferred meeting date for PIB is March 10, 2021.- PIB internal meeting to be held on March 4. PIB agreed to provide agenda items and list of attendees after the meeting.- OCU PIB Committee: Chief, 2 Councillors, Legal Counsel, Director Natural Resources, Director Policy and Planning.
1-Mar-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	<p>FEI followed up on February 21, 2021 phone conversation:</p> <ul style="list-style-type: none">- confirmed FEI available to attend March 10, 2021 meeting;- requested agenda items PIB would like to discuss; and- requested PIB provide the Final UOMS Report and Final TEKK) Report to FEI for review in advance of the meeting.
2-Mar-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	FEI provided Pre-Construction Site Assessment (PCSA) Environmental Report (site specific version of the PCSA sent at the beginning of February, focussing on the HDD of Penticton Creek Only) and Environmental Management Plan (EMP) for review and comment.
3-Mar-21	Email	Penticton Indian Band	NR Director	IR Manager CIR Manager	<p>FEI followed up with PIB to confirm:</p> <ul style="list-style-type: none">- that the March 10 meeting invite was received and- availability to attend regularly scheduled bi-weekly meeting on March 4, 2021 at 8am. <p>PIB responded:</p> <ul style="list-style-type: none">- PIB waiting for confirmation of March 10, 2021 meeting; and- PIB unable to attend regularly scheduled bi-weekly meeting.

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4-Mar-21	Phone Call	Penticton Indian Band	PP Director	IR Manager CIR Manager	PIB requested FEI's Attendance list for the March 10 meeting.
5-Mar-21	Email	Penticton Indian Band	NR Director PP Director	IR Manager CIR Manager	FEI followed up on the March 4 phone conversation with an email listing the FEI participants anticipated to attend the March 10 meeting. FEI requested PIB attendees, meeting agenda and final community led study reports (TEKK and UOMS reports). PIB responded with list of PIB participants confirmed for the March 10 meeting.
16-Mar-21	Letter	Penticton Indian Band	NR Manager NR Director	IR Manager CIR Manager	FEI provided a notification letter that an Investigative Use Permit Application was submitted to the BCOGC.
29-Mar-21	Letter	Penticton Indian Band	NR Manager NR Director	IR Manager CIR Manager	FEI provided a notification letter of the application to be submitted to the BCOGC for the upcoming Penticton Creek crossing.
30-Mar-21	Letter	Penticton Indian Band	Confidential	Confidential	Confidential
7-Apr-21	Letter	Penticton Indian Band	PP Director	IR Manager CIR Manager	PIB responded to FEI's March 16, 2021 notification letter. PIB advised they require free, prior and informed consent, including consultation and accommodation of concerns before FEI submits regulatory applications.
7-Apr-21	Letter	Penticton Indian Band	PP Director	IR Manager CIR Manager	PIB responded to FEI's March 29, 2021 notification letter. PIB advised they require free, prior and informed consent, including consultation and accommodation of concerns before FEI submits regulatory applications.
2021 - Present	Confidential	Penticton Indian Band	Confidential	Confidential	PIB discussions took place on a confidential basis and are not detailed for that reason.
20-Nov-19	Email	Upper Nicola Indian Band		Shelley Martens - Community & Indigenous Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project
4-May-20	Email	Upper Nicola Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
4-Jun-20	Email	Upper Nicola Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
15-Oct-20	Email	Upper Nicola Indian Band		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project: Permit Application
12-Jan-21	Email	Upper Nicola Indian Band		IR Manager CIR Manager	FEI notified group of application to the British Columbia Utilities Commission for a Certificate of Public Convenience and Necessity on November 16, 2020. FEI provided information on how the group could register as an interested party, including contact information, website address, and timeline. FEI also notified group of the Heritage and Conservation Act Section 12.2 permit application made on December 15, 2020. The letter provided contact information for FEI where any comments, questions or concerns could be directed.
20-Nov-19	Email	Westbank First Nation		Shelley Martens - Community & Indigenous Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project

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Date	Engagement Type	Indigenous Community	External Representatives	FEI Representatives	Summary
3-Mar-20	In Person Meeting	Westbank First Nation	WFN Archaeology Supervisor WFN Archaeology Project Coordinator	Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	WFN identified they would like to be involved with work and view the draft reports for their area near Chute Lake. WFN to join PIB TEKK in their assessments by sending one or two people to cover their area in the north end of the route. Discussed the restoration of the corridor and to plant traditional fruit and plants over the new line. Discussed how this was accomplished with past gas projects. Ancestral remains and environmental issues are of primary concern. No Chief and Council presentation required. WFN Arch would brief them on TEKK's findings. Next steps are to notify WFN Arch Department when arch work is starting and confirm what we are planning to accomplish before CPCN filing in terms of AOA and EOA work. Service agreement (Capacity funding agreement) needed between FBC and WFN for their TEKK work on the north end of the route – WFN Arch to send us a template.
20-Apr-20	Email	Westbank First Nation	WFN Archaeology Supervisor WFN Archaeology Project Coordinator WFN Lands Referral Officer	Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Discussed the Okanagan Capacity Upgrade Project and its potential route. Sent the AOA and EOD draft documents, along with the KMZ file of the route. Followed up on agreement for the northern section of the route, which WFN has expressed interest in.
4-May-20	Email	Westbank First Nation	WFN Archaeology Supervisor WFN Archaeology Project Coordinator WFN Lands Referral Officer	Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Discussed the Okanagan Capacity Upgrade Project and its potential route. Sent the AOA and EOD draft documents, along with the KMZ file of the route. Followed up on agreement for the northern section of the route, which WFN has expressed interest in
4-May-20	Email	Westbank First Nation		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
6-May-20	Email	Westbank First Nation	WFN Archaeology Supervisor WFN Archaeology Project Coordinator WFN Lands Referral Officer	Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Discussed the Okanagan Capacity Upgrade Project and its potential route. Sent the AOA and EOD draft documents, along with the KMZ file of the route. Followed up on agreement for the northern section of the route, which WFN has expressed interest in
4-Jun-20	Email	Westbank First Nation		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade (OCU) Project: Preliminary Field Reconnaissance
12-Jun-20	Conference Call	Westbank First Nation	WFN Archaeology Supervisor WFN Archaeology Project Coordinator	Hayley Newmarch - Community Relations Manager, Shelley Martens - Community & Indigenous Relations Manager	Discussed the Capacity Funding Agreement and reviewed any outstanding items. Sent the AOA and EOA Service agreement for their review. Review due July 13, 2020. Sent Capacity Funding agreement for their legal team to review. Next step is to book a follow up meeting to discuss any questions with the agreement.
24-Jun-20	In Person Meeting	Westbank First Nation Okanagan Training & Development Council (WFN)	Employment and Training Facilitator with WFN contracted with Okanagan Training and Development Council.	Shelley Martens, Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager, Erinn Mah - Indigenous Talent Specialist	Discussed employment opportunities for Okanagan Nation communities in the central Okanagan for the OCU project. Discussed addressing local and regional labour market, community needs and priorities through the delivery of employment, training, programs, and services. Okanagan Training & Development Council (OTDC) Service Areas consist of six First Nation Community memberships: Okanagan Indian Band, Westbank First Nation, Penticton Indian Band, Osoyoos Indian Band, Upper Similkameen Indian Band and Lower Similkameen Band. Next steps are to follow up with OTDC once we have a construction schedule.

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25-Aug-20	Conference Call	Westbank First Nation	WFN Archaeology Supervisor WFN Archaeology Project Coordinator	Shelley Martens - Community & Indigenous Relations Manager, Hayley Newmarch - Community Relations Manager	Discussed the Capacity Funding Agreement and reviewed any outstanding items. Next step is to book a follow up meeting to discuss any questions with the agreement.
6-Oct-20	Email	Westbank First Nation	WFN Archaeology Supervisor WFN Archaeology Project Coordinator	Hayley Newmarch - Community Relations Manager	Followed up with WFN on the Capacity Funding Agreement and their lawyers contact information. Faskens to follow up with WFN's legal team on final comments on the agreement
15-Oct-20	Email	Westbank First Nation		Hayley Newmarch - Community Relations Manager	Update on FortisBC Okanagan Capacity Upgrade Project: Permit Application
23-Oct-20	Email	Westbank First Nation	Archaeology Supervisor (AS) Archaeology Project Coordinator (APC)	IR Manager CIR Manager	Draft Borehole AIA report sent for Review; Follow up sent November 2, 2020 to confirm receipt.
26-Oct-20	Phone Call	Westbank First Nation	AS APC Director Intergovernmental Affairs	IR Manager CIR Manager	Reviewed Capacity Agreement and discussed AIA work on project.
20-Nov-20	Phone Call	Westbank First Nation	APC	IR Manager CIR Manager	WFN confirmed receipt of AIA report sent October 23, 2020 and November 2, 2020. Discussed the opportunity for WFN to review and comment on the report. WFN said they would review and get back to FEI.
26-Nov-20	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	FEI sent latest, marked up version of the Capacity Funding Agreement.
3-Dec-20	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	FEI sent a follow up email to confirm WFN had received the latest version of the Capacity Funding Agreement, originally sent November 26, 2020.
4-Dec-20	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	WFN said they are reviewing the Capacity Funding Agreement.
8-Jan-21	Phone Call	Westbank First Nation	AS	IR Manager CIR Manager	WFN said that the Capacity Funding Agreement is being reviewed and should be sent to FEI soon.
12-Jan-21	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	FEI notified group of application to the British Columbia Utilities Commission for a Certificate of Public Convenience and Necessity on November 16, 2020. FEI provided information on how the group could register as an interested party, including contact information, website address, and timeline. FEI also notified group of the Heritage and Conservation Act Section 12.2 permit application made on December 15, 2020. The letter provided contact information for FEI where any comments, questions or concerns could be directed.
15-Jan-21	Phone	Westbank First Nation	APC	IR Manager CIR Manager	WFN said that the Capacity Funding Agreement is being reviewed and should be sent to FEI soon.
20-Jan-21	Email	Westbank First Nation	APC	IR Manager CIR Manager	WFN sent markup of capacity funding agreement.
4-Feb-21	Email	Westbank First Nation	APC	IR Manager CIR Manager	WFN and FEI agreed to, signed and finalized the Capacity Funding Agreement. The Agreement outlines the relationship, work plan and engagement process WFN and FEI will undertake on the project.

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8-Feb-21	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	FEI sent email with link to the Pre Construction Site Assessment Report (Habitat Assessment) for project area geotechnical work, for community review and comment.
9-Feb-21	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	FEI sent the Preliminary Field Reconnaissance Arch report for review and comment. WFN confirmed receipt of the Pre Construction Site Assessment and the Preliminary Field Reconnaissance Arch report with FEI, and that they would respond in a week.
2-Mar-21	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	FEI sent the Pre Construction Site Assessment (PCSA) Environmental Report (site specific version of the PCSA sent at the beginning of February, focussing on the HDD of Penticton Creek Only) and the Environmental Management Plan (EMP) for review and comment.
15-Mar-21	Email	Westbank First Nation	AS APC	IR Manager CIR Manager	FEI advised that an Investigative use Permit application was submitted to the BCOGC.
29-Mar-21	Email	Westbank First Nation		IR Manager CIR Manager	FEI sent a notification letter of the upcoming Penticton Creek crossing OGC application. FEI asked for the contact name who received the referrals@wfn.ca email address and who regulatory letters should be addressed to moving forward.
30-Apr-21	E-Mail	Westbank First Nation	AS APC	IR Manager CIR Manager	WFN sent a letter of conditional consent for the OCU Project. The condition is that Archaeology work is conducted and WFN receives a minimum of three weeks notification to schedule WFN field works.
28-May-21	Email	Westbank First Nation	Referral Officer (RO)	IR Manager CIR Manager	FEI sent Geotech Boreholes AIA report for WFN review.
28-May-21	Email	Westbank First Nation	RO	IR Manager CIR Manager	FEI resent AOA and EOA for the Project, and the June 4, 2020 Geotechnical Notification Letter and KMZ map of borehole locations.
28-May-21	Email	Westbank First Nation	RO	IR Manager CIR Manager	FEI sent Penticton Creek HDD Crossing documents: 1. Pre-Construction Site Assessment (PCSA) - Environmental Report (Site Specific Version of PCSA sent at the beginning of February); and 2. Environmental Management Plan (EMP)
28-May-21	Email	Westbank First Nation	RO	IR Manager CIR Manager	FEI sent link to download the Pre Construction Site Assessment (PCSA) report from environmental consultant's website.
28-May-21	Email	Westbank First Nation	RO	IR Manager CIR Manager	FEI sent the Archaeological Preliminary Field Reconnaissance Report for the Project.
2-Jun-21	Email	Westbank First Nation	AS APC	Archaeology Contractor	Follow up on phone conversation earlier that day to confirm June 21st AIA study start date and request technician for the Project, for approximately 15 days of fieldwork (working Monday to Friday). Requested feedback on timing and if it would work - suggested there is some flexibility to accommodate different timing if needed.
4-Jun-21	Email	Westbank First Nation	RO	IR Manager	FEI responded to WFN that there is a Capacity Funding Agreement in place, and attached the agreement to the email.
15-Jun-21	Email	Westbank First Nation	AS APC	Archaeology Contractor IR Manager	WFN confirmed participant for fieldwork, starting June 22.
13-Aug-21	Email	Westbank First Nation	RO	IR Manager	FEI sent a summary of work completed by WFN to date, and which sections of the Capacity Funding Agreement they applied to.