

November 24, 2021

Christine Long
Board Registrar
Ontario Energy Board
2300 Young Street
27th Floor
Toronto, ON M4P 1E4

By electronic filing

**RE: EB-2020-0230 – IESO Application for Approval of 2020 and 2021 Expenditures, Revenue Requirements and Fees
Cost Claim of Power Advisory LLC**

Dear Ms. Long,

Attached is the cost claim of Power Advisory for EB-2020-0230, pursuant to consulting services provided to the Canadian Renewable Energy Association (CanREA), Energy Storage Canada (ESC), and the Ontario Waterpower Association (OWA) (collectively referred to as “REASCWA” throughout the proceeding).

Sincerely,



Sarah Simmons
Manager, Generation and Emerging Sectors
Power Advisory

Ontario Energy Board
COST CLAIM FOR HEARINGS



Affidavit and Summary of Fees and Disbursements

This form should be used by a party to a hearing before the Board to identify the fees and disbursements that form the party's cost claim. Paper and electronic copies of this form and itemized receipts must be filed with the Board and served on one or more other parties as directed by the Board in the applicable Board order. Please ensure all required (yellow-shaded) fields are filled in and the Affidavit portion is signed and sworn or affirmed.

Instructions

- Required data input is indicated by yellow-shaded fields. Formulas are embedded in the form to assist with calculations.
- All claims must be in Canadian dollars. If applicable, state exchange rate and country of initial currency.
Rate: n/a Country: n/a
- A separate "Detail of Fees and Disbursements Being Claimed" (comprising a "Statement of Fees Being Claimed" and a "Statement of Disbursements Being Claimed") is required for each lawyer, analyst/consultant and articling student/paralegal. However, only one "Summary of Fees and Disbursements" covering the whole of the party's cost claim should be provided.
- The cost claim must be supported by a completed Affidavit signed by a representative of the party.
- A CV for each consultant/analyst must be attached unless provided to the Board as prescribed on the Cost Award Tariff.

Except as provided in section 7.03 of the Practice Direction on Cost Awards, itemized receipts must be provided.

File # EB- <u>2020-0230</u>	Process: <u>IESO Application for Approval of 2020 and 2021 Expe</u>
Party: <u>Joint: CanREA, ESC, OWA</u>	Affiant's Name: <u>Sarah Simmons</u>
HST Number: <u>813388691RT0001</u>	HST Rate Ontario: <u>0.00%</u> <u>13%</u> <u>ef.</u>
Full Registrant <input checked="" type="checkbox"/>	Qualifying Non-Profit <input type="checkbox"/>
Unregistered <input type="checkbox"/>	Tax Exempt <input type="checkbox"/>
Other <input type="checkbox"/>	

Affidavit

I, Sarah Simmons, of the City/Town of Toronto
in the Province/State of Ontario, swear or affirm that:

1. I am a representative of the above-noted party (the "Party") and as such have knowledge of the matters attested to herein.
2. I have examined all of the documentation in support of this cost claim, including the attached "Summary of Fees and Disbursements Being Claimed", "Statement(s) of Fees Being Claimed" and "Statement(s) of Disbursements Being Claimed".
3. The attached "Summary of Fees and Disbursements Being Claimed", "Statement(s) of Fees Being Claimed" and "Statement(s) of Disbursements Being Claimed" include only costs incurred and time spent directly for the purposes of the Party's participation in the Ontario Energy Board process referred to above.
4. This cost claim does not include any costs for work done, or time spent, by a person that is an employee or officer of the Party as described in sections 6.05 and 6.09 of the Board's Practice Direction on Cost Awards.


Signature of Affiant

Sworn or affirmed before me at the City/Town of Toronto,
in the Province/State of Ontario, on November 24, 2021.
(date)

**Ontario Energy Board
COST CLAIM FOR HEARINGS**



Affidavit and Summary of Fees and Disbursements

Commissioner for taking Affidavits

File # EB- 2020-0230

Process: IESO Application for Approval of 2020 and 2021 Expe

Party: Joint: CanREA, ESC, OWA

Summary of Fees and Disbursements Being Claimed

Legal/consultant/other fees	\$	13,775.00
Disbursements	\$	-
HST	\$	1,790.75
Total Cost Claim	\$	15,565.75

Payment Information

Make cheque payable to: Power Advisory LLC

Send payment to this address: 55 University Avenue
Suite 700, PO Box 32
Toronto ON
M5J 2H7

Ontario Energy Board

COST CLAIM FOR HEARINGS



Detail of Fees and Disbursements Being Claimed

File # EB- <u>2020-0230</u>	Process: <u>IESO Application for Approval of 2020 and 2021 Exp</u>
Party: <u>Joint: CanREA, ESC, OWA</u>	Service Provider Name: <u>Jason Chee-Aloy</u>

SERVICE PROVIDER TYPE (check one)	Year Called to Bar	Completed Years Practising/Years of Relevant Experience
Legal Counsel <input type="checkbox"/>		20
Articling Student/Paralegal <input type="checkbox"/>		
Consultant <input checked="" type="checkbox"/>		Hourly Rate: \$330
Analyst <input type="checkbox"/>		
For Consultant/Analyst: <input checked="" type="checkbox"/> CV attached		HST Rate Charged (enter %): 13.0%
<input type="checkbox"/> CV provided within previous 24 months		

Statement of Fees Being Claimed					
	Hours	Hourly Rate	Subtotal	HST	Total
Pre-hearing Conference					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Technical Conference					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Interrogatories					
Preparation	15.50	\$ 330.00	\$ 5,115.00	\$ 664.95	\$ 5,779.95
Responses		\$ 330.00	\$ -	\$ -	\$ -
Issues Conference					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
ADR - Settlement Conference					
Preparation	1.00	\$ 330.00	\$ 330.00	\$ 42.90	\$ 372.90
Attendance	11.00	\$ 330.00	\$ 3,630.00	\$ 471.90	\$ 4,101.90
Proposal Preparation	1.50	\$ 330.00	\$ 495.00	\$ 64.35	\$ 559.35
Argument					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Oral Hearing					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Other Conferences					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Case Management			\$ -	\$ -	\$ -
TOTAL SERVICE PROVIDER FEES			\$ 9,570.00	\$ 1,244.10	\$ 10,814.10

Ontario Energy Board

COST CLAIM FOR HEARINGS



Detail of Fees and Disbursements Being Claimed

File # EB- 2020-0230

Process: IESO Application for Approval of 2020 and 2021 Expe

Party: Joint: CanREA, ESC, OWA

Service Provider Name: Jason Chee-Aloy

Statement of Disbursements Being Claimed			
	Net Cost	HST	Total
Scanning/Photocopy		\$ -	\$ -
Printing		\$ -	\$ -
Courier		\$ -	\$ -
Telephone/Fax		\$ -	\$ -
Transcripts		\$ -	\$ -
Travel: Air		\$ -	\$ -
Travel: Car		\$ -	\$ -
Travel: Rail		\$ -	\$ -
Travel (Other):		\$ -	\$ -
Parking		\$ -	\$ -
Taxi		\$ -	\$ -
Accommodation		\$ -	\$ -
Meals		\$ -	\$ -
Other:		\$ -	\$ -
Other:		\$ -	\$ -
Other:		\$ -	\$ -
TOTAL DISBURSEMENTS:	\$ -	\$ -	\$ -

Ontario Energy Board

COST CLAIM FOR HEARINGS



Detail of Fees and Disbursements Being Claimed

File # EB- <u>2020-0230</u>	Process: <u>IESO Application for Approval of 2020 and 2021 Exp</u>
Party: <u>Joint: CanREA, ESC, OWA</u>	Service Provider Name: <u>Sarah Simmons</u>

SERVICE PROVIDER TYPE (check one)	Year Called to Bar	Completed Years Practising/Years of Relevant Experience
Legal Counsel <input type="checkbox"/>	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text"/> 13
Articling Student/Paralegal <input type="checkbox"/>		
Consultant <input checked="" type="checkbox"/>		
Analyst <input type="checkbox"/>		
For Consultant/Analyst: <input checked="" type="checkbox"/> CV attached		Hourly Rate: <input style="width: 100px;" type="text"/> \$290
<input type="checkbox"/> CV provided within previous 24 months		HST Rate Charged (enter %): <input style="width: 100px;" type="text"/> 13.0%

Statement of Fees Being Claimed					
	Hours	Hourly Rate	Subtotal	HST	Total
Pre-hearing Conference					
Preparation		\$ 290.00	\$ -	\$ -	\$ -
Attendance		\$ 290.00	\$ -	\$ -	\$ -
Technical Conference					
Preparation		\$ 290.00	\$ -	\$ -	\$ -
Attendance		\$ 290.00	\$ -	\$ -	\$ -
Interrogatories					
Preparation	6.00	\$ 290.00	\$ 1,740.00	\$ 226.20	\$ 1,966.20
Responses		\$ 290.00	\$ -	\$ -	\$ -
Issues Conference					
Preparation		\$ 290.00	\$ -	\$ -	\$ -
Attendance		\$ 290.00	\$ -	\$ -	\$ -
ADR - Settlement Conference					
Preparation	5.50	\$ 290.00	\$ 1,595.00	\$ 207.35	\$ 1,802.35
Attendance		\$ 290.00	\$ -	\$ -	\$ -
Proposal Preparation	3.00	\$ 290.00	\$ 870.00	\$ 113.10	\$ 983.10
Argument					
Preparation		\$ 290.00	\$ -	\$ -	\$ -
Oral Hearing					
Preparation		\$ 290.00	\$ -	\$ -	\$ -
Attendance		\$ 290.00	\$ -	\$ -	\$ -
Other Conferences					
Preparation		\$ 290.00	\$ -	\$ -	\$ -
Attendance		\$ 290.00	\$ -	\$ -	\$ -
Case Management			\$ -	\$ -	\$ -
TOTAL SERVICE PROVIDER FEES			\$ 4,205.00	\$ 546.65	\$ 4,751.65

Ontario Energy Board

COST CLAIM FOR HEARINGS



Detail of Fees and Disbursements Being Claimed

File # EB- 2020-0230

Process: IESO Application for Approval of 2020 and 2021 Expe

Party: Joint: CanREA, ESC, OWA

Service Provider Name: Sarah Simmons

Statement of Disbursements Being Claimed			
	Net Cost	HST	Total
Scanning/Photocopy		\$ -	\$ -
Printing		\$ -	\$ -
Courier		\$ -	\$ -
Telephone/Fax		\$ -	\$ -
Transcripts		\$ -	\$ -
Travel: Air		\$ -	\$ -
Travel: Car		\$ -	\$ -
Travel: Rail		\$ -	\$ -
Travel (Other):		\$ -	\$ -
Parking		\$ -	\$ -
Taxi		\$ -	\$ -
Accommodation		\$ -	\$ -
Meals		\$ -	\$ -
Other:		\$ -	\$ -
Other:		\$ -	\$ -
Other:		\$ -	\$ -
TOTAL DISBURSEMENTS:	\$ -	\$ -	\$ -

Summary of Consulting Hours and Description

File EB-2020-0230
 Process IESO Application for Approval of 2020 and 2021 Expenditure, Revenue Requirement and Fees
 Party Joint: CanREA, ESC, OWA

Consultant	Date	Description	Activity	Rate	Hours	Subtotal
Jason Chee-Aloy	07/27/2021	Meeting with B. Giannetta (CanREA), J. Rangooni (ESC), P. Norris (OWA), and Simmons (Power Advisory)	Interrogatories (Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy	08/13/2021	Reviewed IESO fee application submission	Interrogatories (Preparation)	\$330.00	2	\$ 660.00
Jason Chee-Aloy	08/14/2021	Reviewed IESO fee application submission	Interrogatories (Preparation)	\$330.00	2	\$ 660.00
Jason Chee-Aloy	08/15/2021	Reviewed IESO fee application submission	Interrogatories (Preparation)	\$330.00	2	\$ 660.00
Jason Chee-Aloy	08/16/2021	Call with B. Giannetta (CanREA), J. Rangooni (ESC), and P. Norris (OWA), re: review of draft IRs and prep for meeting with APPRO and OSEA	Interrogatories (Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy	08/16/2021	Meeting with S. Simmons (Power Advisory), re: review of IRs and prep for meeting with APPRO and OSEA	Interrogatories (Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy	08/16/2021	Meeting with APPRO/McCarthy Tetrault and OSEA/Wilms & Shier, and B. Giannetta (CanREA), J. Rangooni (ESC), and P. Norris (OW), re: review and coordination of IRs	Interrogatories (Preparation)	\$330.00	1	\$ 330.00
Jason Chee-Aloy	08/17/2021	Drafted REASCWA IRs	Interrogatories (Preparation)	\$330.00	2	\$ 660.00
Jason Chee-Aloy	08/19/2021	Finalized REASCWA IRs	Interrogatories (Preparation)	\$330.00	1	\$ 330.00
Jason Chee-Aloy	09/14/2021	Reviewed IESO IRRs	Interrogatories (Preparation)	\$330.00	4	\$ 1,320.00
Jason Chee-Aloy	09/14/2021	Meeting with K. Elson and A. Montgomery (ED), re: forthcoming IESO fee application Settlement Conference	ADR - Settlement Conference (Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy	09/14/2021	Meeting with R. Jackiw (Wilms & Shier - counsel for OSEA), etc., re: forthcoming IESO fee application Settlement Conference	ADR - Settlement Conference (Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy	09/15/2021	Day 1 Settlement Conference	ADR - Settlement Conference (Attendance)	\$330.00	4	\$ 1,320.00
Jason Chee-Aloy	09/17/2021	Day 2 Settlement Conference	ADR - Settlement Conference (Attendance)	\$330.00	2.5	\$ 825.00
Jason Chee-Aloy	09/20/2021	Day 3 Settlement Conference	ADR - Settlement Conference (Attendance)	\$330.00	4.5	\$ 1,485.00
Jason Chee-Aloy	09/21/2021	Meeting with B. Giannetta (CanREA), J. Rangooni (ESC), P. Norris (OWA), and Simmons (Power Advisory), re: IESO fee application Settlement Conference	ADR - Settlement Conference (Proposal Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy	09/29/2021	Reviewed draft Settlement Agreement, re: IESO fee application	ADR - Settlement Conference (Proposal Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy	10/08/2021	Reviewed final IESO fee application settlement proposal	ADR - Settlement Conference (Proposal Preparation)	\$330.00	0.5	\$ 165.00
Jason Chee-Aloy Total					29	\$ 9,570.00

Consultant	Date	Description	Activity	Rate	Hours	Subtotal
Sarah Simmons	07/27/2021	Meeting with B. Giannetta (CanREA), J. Rangooni (ESC), P. Norris (OWA), and J. Chee-Aloy (Power Advisory)	Interrogatories (Preparation)	\$290.00	0.5	\$ 145.00
Sarah Simmons	08/16/2021	Meeting with J. Chee-Aloy (Power Advisory), re: review of IRs and prep for meeting with APPrO and OSEA	Interrogatories (Preparation)	\$290.00	1.5	\$ 435.00
Sarah Simmons	08/18/2021	Comment, edits and additions to draft interrogatories	Interrogatories (Preparation)	\$290.00	2.5	\$ 725.00
Sarah Simmons	08/19/2021	Final review and edits, and submission of IRs	Interrogatories (Preparation)	\$290.00	1.5	\$ 435.00
Sarah Simmons	08/20/2021	Review of IRs submitted by intervenors to IESO	ADR - Settlement Conference (Preparation)	\$290.00	1.25	\$ 362.50
Sarah Simmons	09/12/2021	Preliminary review of IESO's IR responses	ADR - Settlement Conference (Preparation)	\$290.00	1.25	\$ 362.50
Sarah Simmons	09/13/2021	Review of IR Responses	ADR - Settlement Conference (Preparation)	\$290.00	1.25	\$ 362.50
Sarah Simmons	09/14/2021	Meeting with R. Jackiw (Wilms & Shier - counsel for OSEA), etc., re: forthcoming IESO fee application Settlement Conference; Test Session for Virtual OEB settlement conference	ADR - Settlement Conference (Preparation)	\$290.00	1.75	\$ 507.50
Sarah Simmons	09/15/2021	Day 1 Settlement Conference	ADR - Settlement Conference (Attendance)	\$0	4	\$ -
Sarah Simmons	09/16/2021	Review and comments re Intervener settlement proposal	ADR - Settlement Conference (Proposal Preparation)	\$290.00	0.75	\$ 217.50
Sarah Simmons	09/17/2021	Day 2 Settlement Conference	ADR - Settlement Conference (Attendance)	\$0	3	\$ -
Sarah Simmons	09/20/2021	Day 3 Settlement Conference	ADR - Settlement Conference (Attendance)	\$0	3.5	\$ -
Sarah Simmons	09/21/2021	Meeting with B. Giannetta (CanREA), J. Rangooni (ESC), P. Norris (OWA), and J. Chee-Aloy (Power Advisory), re: IESO fee application Settlement Conference	ADR - Settlement Conference (Proposal Preparation)	\$290.00	0.5	\$ 145.00
Sarah Simmons	09/22/2021	Correspondence with CanREA, ESC and OWA re Settlement notification	ADR - Settlement Conference (Proposal Preparation)	\$290.00	0.5	\$ 145.00
Sarah Simmons	09/29/2021	Review of draft settlement agreement and intervener edits	ADR - Settlement Conference (Proposal Preparation)	\$290.00	0.75	\$ 217.50
Sarah Simmons	10/08/2021	Review of suggested edits to settlement proposal and internal coordination with J. Chee-Aloy	ADR - Settlement Conference (Proposal Preparation)	\$290.00	0.5	\$ 145.00
Sarah Simmons Total					25	\$ 4,205.00
Grand Total					54	\$ 13,775.00

Power Advisory LLC

55 University Avenue, Suite 700, PO Box 32
Toronto, ON M5J 2H7

**Canadian Renewable Energy Association**

Brandy Giannetta
240 Bank Street
Suite 400
Ottawa, Ontario K2P 1X4

Invoice 211145

Date	Nov 21, 2021
Terms	
Service Thru	Nov 21, 2021

In Reference To: EB-2020-0230 - IESO 2020-2021 Expenditure and Revenue Requirement Application (Labor)

Joint intervention in EB-2020-0230 - IESO 2020-2021 Expenditure and Revenue Requirement Application.

Date	Services	Amount
11/21/2021	Consulting fees for joint intervention	\$ 4,591.67
		<hr/>
Labor		\$ 4,591.67
Labor HST 81338 8691 RT001		\$ 596.92
Total Labor		\$ 5,188.59
Total Invoice Amount		\$ 5,188.59
Previous Balance		\$ 0.00
Balance (Amount Due)		\$ 5,188.59

Notes:

Power Advisory LLC remittance address indicated above. Electronic payment instructions available upon request.

For invoice and payment questions contact:
Julie Glover (jglover@poweradvisoryllc.com)

Power Advisory LLC

55 University Avenue, Suite 700, PO Box 32
Toronto, ON M5J 2H7

**Energy Storage Canada**

Justin Rangooni
777 Bay Street
Unit C208B
Toronto, Ontario M5G 2C8

Invoice 211146

Date	Nov 21, 2021
Terms	N/A
Service Thru	Nov 21, 2021

In Reference To: EB-2020-0230 - IESO 2020-2021 Expenditure and Revenue Requirement Application (Labor)

Joint intervention in EB-2020-0230 - IESO 2020-2021 Expenditure and Revenue Requirement Application.

Date	Services	Amount
11/21/2021	Consulting fees for joint intervention	\$ 4,591.67
		<hr/>
Labor		\$ 4,591.67
Labor HST 81338 8691 RT001		\$ 596.92
Total Labor		\$ 5,188.59
Total Invoice Amount		\$ 5,188.59
Previous Balance		\$ 0.00
Balance (Amount Due)		\$ 5,188.59

Notes:

Please make the check payable to Power Advisory LLC and send to the address above.

For invoice and payment questions contact:
Cooper Berry | cberry@poweradvisoryllc.com

For questions about the services provided contact:
Travis Lusney | tlusney@poweradvisoryllc.com | 647-680-1154

Power Advisory LLC

55 University Avenue, Suite 700, PO Box 32
Toronto, ON M5J 2H7

**Ontario Waterpower Association**

380 Armour Rd., Suite 264
Peterborough, Ontario K9H 7L7

Invoice 211147

Date	Nov 21, 2021
Terms	N/A
Service Thru	Nov 21, 2021

In Reference To: EB-2020-0230 - IESO 2020-2021 Expenditure and Revenue Requirement Application (Labor)

Joint intervention in EB-2020-0230 - IESO 2020-2021 Expenditure and Revenue Requirement Application.

Date	Services	Amount
11/21/2021	Consulting fees for joint intervention	\$ 4,591.67
<hr/>		
	Labor	\$ 4,591.67
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	Total Labor	\$ 5,188.59
	Total Invoice Amount	\$ 5,188.59
	Previous Balance	\$ 0.00
	Balance (Amount Due)	\$ 5,188.59

Notes:

Power Advisory LLC remittance address indicated above. Electronic payment instructions available upon request.

For invoice and payment questions contact:
Julie Glover (jglover@poweradvisoryllc.com)

Jason Chee-Aloy

Managing Director



Power Advisory LLC

55 University Avenue

Suite 605, P.O. Box 32

Toronto, ON M5J 2H7

Cell: 416-303-8667

jchee-aloy@poweradvisoryllc.com

SUMMARY

Mr. Chee-Aloy is a professional with over 20 years of expertise in electricity and natural gas market analysis, policy development and market design, project development, resource and infrastructure planning, and stakeholder consultation and engagement. He has worked as an energy economist with a strong analytical foundation and understanding of commodity pricing, market design, contract design, industry restructuring, policy development, business strategy, industry governance, and planning and development of electricity infrastructure.

Mr. Chee-Aloy joined Power Advisory after being the Director of Generation Procurement at the Ontario Power Authority (OPA), where he was responsible for procuring over 15,000 MW of generation. He led the development, consultation and implementation of North America's first comprehensive Renewable Energy Feed-in Tariff (FIT) Program. Prior to joining the OPA, he worked for the Independent Electricity System Operator (IESO) where he was actively involved with restructuring Ontario's electricity sector by leading key areas of market design.

Mr. Chee-Aloy is acting for multiple generator, transmitter, distributor, financial institution, and regulatory agency clients regarding numerous areas of, but not limited to: policy design; market design; contract design; contract negotiation; project development; market analysis; business strategy; regulatory affairs; power system planning and resource assessments; etc.

Professional History

Ontario Power Authority

Independent Electricity System Operator

Ontario Ministry of Energy, Science and Technology

Canadian Enerdata Limited

Education

York University, MA, Economics, 1996

University of Toronto, 1995

PROFESSIONAL EXPERIENCE

Ontario Energy Sector Policy Development and Market Development

- Acted for the IESO as the facilitator/consultant for the IESO's Electricity Market Forum. One of his main deliverables was the development of the Roadmap that identified and sequenced the major initiatives and recommendations required to evolve Ontario's electricity sector throughout the short-term (present to 2014), Medium-Term (2015-2019) and Long-Term (2020 and beyond). The initiatives and recommendations included: review of wholesale spot pricing, costs (including global adjustment), and cost allocation; future role of distributors; review of OPA contracts to ensure alignment with the wholesale market; review of regulated rate design regarding its effect and integration with the wholesale market; increasing demand-side participation in the wholesale spot market; review and assess the need for new ancillary services in light of Ontario's changing supply mix; review of the two-schedule dispatch system within the wholesale market; and review of the framework for scheduling intertie transactions in the wholesale market.
- Acted for the IESO as the facilitator/consultant for the IESO's Electricity Market Forum. One of his main deliverables was the development of the Roadmap that identified and sequenced the major initiatives and recommendations required to evolve Ontario's electricity sector throughout the short-term (present to 2014), Medium-Term (2015-2019) and Long-Term (2020 and beyond). The initiatives and recommendations included: review of wholesale spot pricing, costs (including global adjustment), and cost allocation; future role of distributors; review of OPA contracts to ensure alignment with the wholesale market; review of regulated rate design regarding its effect and integration with the wholesale market; increasing demand-side participation in the wholesale spot market; review and assess the need for new ancillary services in light of Ontario's changing supply mix; review of the two-schedule dispatch system within the wholesale market; and review of the framework for scheduling intertie transactions in the wholesale market.
- Chaired the Renewable Energy Supply Integration Team (RESIT) of Executives and Senior Managers from the IESO, Ontario Energy Board (OEB), Hydro One, and the Ontario Ministry of Energy, that delivered recommendations to the Minister of Energy for development of the Green Energy Act and the FIT Program. Delivered a consensus document assessed and recommended changes to OEB Transmission and Distribution System Codes, regulations and legislation, in addition to the roles and responsibilities of the OPA, IESO, transmitters, OEB and Local Distribution Companies (LDCs) towards ensuring timely development of renewable generation. Senior staff from the IESO, OPA, Hydro One, OEB and the Ministry of Energy comprised the RESIT while Executives from IESO, OPA, OEB and Hydro One frequently attended these meetings.
- Presented multiple times and advised the Ontario Government's Electricity Conservation and Supply Task Force regarding the structure of Ontario's electricity sector, wholesale market design, electricity pricing, and resource adequacy needs regarding how to ensure investment and development of generation, transmission, distribution, and demand-side resources.

Generation Project Development and Project Acquisition

- Working with multiple generation clients regarding their participation in the IESO-Administered Markets and resolution of contract issues. Work with these generators includes strategy and solutions regarding analysis of impacts to changes to IESO's market rules and analysis of impacts to changes in the market design of the IESO-Administered Markets.

- Working with multiple generation developers towards commercial operation of their projects under multi-year contracts with the OPA. Work with these developers includes strategy and solutions regarding analysis of permitting and approvals, provincial content requirements, connection requirements, financing and future operations in the wholesale power market to optimize operations and maximize revenues in the wholesale market and under long-term contracts.
- For multiple renewable generation clients, advising and representing their interests towards developing their generation projects, including work in areas dealing with OPA contracts, Renewable Energy Approvals, Domestic Content Requirements, Connection Impact Assessments, System Impact Assessments, and Financial Plans.
- Working with manufacturers of solar PV and wind generation components regarding strategic advice on how to increase their market share.
- Working with lenders and financiers providing market intelligence and strategic advice regarding investment in renewable generation projects.
- Working with owners of existing generation facilities, prospective equity providers, and prospective developers to value projects for purposes of acquisitions. This work involves assessment of Ontario's electricity market and valuation of specific generation assets.

Ontario Market Design and Wholesale Market Development

- For gas-fired generator clients, advised how these facilities can meet power system needs in the Ontario electricity market and operate more efficiently given changes to the IESO-Administered Markets regarding options to secure gas supply, utilization of IESO programs such as cost guarantee programs relating to securing costs to recover starting up generating units for dispatch, and requirements for day-ahead commitment programs.
- For transmission clients, advising how new regulated or merchant transmission lines may be developed in the Ontario electricity market and the specific requirements of OEB policies.
- For multiple renewable generation clients, advising and representing their interests in the IESO's SE-91 stakeholder consultation and the Visibility Technical Working Group, Dispatch Technical Working Group (DTWG) and the Floor Price Focus Group (FPFG) on the integration of variable generation in the IESO-Administered Markets. The work within the DTGWG and FPFG requires intimate and technical knowledge of the operations on the IESO-Administered Markets and the technical capabilities of generation facilities regarding how generation units are scheduled and dispatched, how prices are set, and the mechanisms for compensation for production of energy output.
- For multiple generation clients and associations, advising on IESO's SE-105 (HOEP Review) and SE-106 (GA Review) including analysis of recommendations regarding changes to HOEP and associated changes to the design of the IESO-Administered Markets and IESO Market Rules, and analysis of recommendations regarding changes to the GA.
- For multiple clients, advised on IESO's Financial Transmission Rights Market rules and protocols relating to intertie transactions regarding scheduling transactions and associated risks dealing with congestion rents, failed transactions, etc.
- For multiple financiers, advising on investment opportunities in the Ontario electricity market, OPA contracts and IESO-Administered Markets.

- Worked with IESO staff on OPA contract provisions to incentivize efficient offers and dispatch in the IESO-Administered Markets and to manage help Surplus Baseload Generation.
- Developed, managed and delivered OPA Procurement Processes and innovative strategies to procure generation, including assessment of potential new market mechanisms to be developed within the IESO-Administered Markets (e.g., capacity markets).
- Worked with IESO staff to assess how Non-Utility Generator (NUG) facilities could be commercially incentivized to more efficiently participate in the IESO-Administered markets which concluded with a short-term OPA contract with a specific NUG that was validated by the IESO and OPA to have increased market efficiency.
- While at the IESO, was Project Manager of Long-Term Resource Adequacy and developed and delivered high-level design, detailed design, and draft market rules for a centralized forward capacity market (i.e., Resource Adequacy Market (RAM)), and chaired the Long-Term Resource Adequacy Working Group comprising over 20 electricity sector stakeholders.
- For the IESO, implemented short-term resource adequacy mechanisms through the Hour-Ahead Dispatchable Load program and Replacement Generation to Support Planned Outages in 2003 and 2004.
- Developed and drafted over 50 IESO Market Rule amendments, including applicable quantitative assessments, mainly regarding market surveillance, compliance, reliability, scheduling, dispatch and pricing rules, and settlements (i.e., Chapters 3, 5, 7 and 9), therefore having a very strong understanding and knowledge on how the IESO-Administered Markets operate and in particular how the dispatch and pricing algorithms work.
- Developed business processes, developed data requirements, and reviewed applicable Market Rules (e.g., local market power rules) for the Market Assessment Unit.

Power System Planning and Infrastructure Assessment

- For multiple generation and trade association clients, used power system planning techniques to develop alternate Ontario electricity supply and electricity demand scenarios to Ontario's Long-Term Energy Plan (LTEP) and IESO Planning Updates in order to project changes to the generation supply mix and conservation and demand management (CDM) targets.
- For multiple generation and trade association clients, assessed and optimized generation resource options and likely solutions to be developed to meet future Ontario power system needs, and developed business strategies and strategic plans for these clients to execute towards increasing their market share by increasing their development pipeline of projects.
- Member of the OPA's Integrated Power System Plan (IPSP) Steering Committee that was responsible for the development and review the 20-year IPSP, developed strategy for the regulatory filing and OEB proceeding, was an expert witness for the interfaces between the generation and CDM resource requirements specified within the IPSP and the applicable procurement processes that would be used to contract for these generation and CDM resources.

Generation and Transmission Procurement and Contracting

- Acting for multiple wind and solar generators by leading market analysis, contract analysis, and financial analysis, and leading contract negotiations with the OPA to amend their contracts to address potential IESO economic curtailment of energy production from these generators resulting from the integration of these generators into the real-time scheduling and dispatch process within the IESO-Administered Markets.
- Acting for multiple NUG facilities and other generator clients by leading market analysis, contract analysis, and financial analysis, and leading contract negotiations for existing and new generation facilities resulting from the expiration of existing Power Purchase Agreements.
- Responsible for the delivery of the design, management and execution of all generation procurement processes and contracts for development of electricity supply resources while at the Ontario Power Authority (2005 to 2010). This included contracting for over 15,000 MW of generation capacity (including some demand-response) with an approximate value of over \$25 billion, including combined cycle gas turbine facilities, simple cycle gas turbine facilities, combined heat and power facilities, waterpower facilities, bio-energy facilities, wind power (on- and off-shore) facilities, solar PV facilities and energy-from-waste facilities ranging in size from under 10 kW to over 900 MW through competitive and standard offer procurements and sole source negotiations. The development of procurement processes and long-term contracts needed to necessarily take into account the integration of these generation projects into the wholesale market.
- Managed over 80 staff, developed and successfully implemented North America's first large FIT procurement program for renewable electricity supply resources. To date, over 20,000 applications totaling over 18,000 MW from prospective generation projects have been submitted to the OPA, with over 2,500 MW successfully contracted. In addition, chaired the Renewable Energy Supply Integration Team (RESIT) comprising of Ontario agencies and Government. This Team also held responsibility to implementing the FIT Program.
- Advising multiple clients regarding transmission development opportunities and power system needs relating to the Ontario Government's identified transmission projects contained in the LTEP.
- Advised the Alberta Electricity System Operator (AESO) regarding development of their present transmission procurement process by researching and reviewing transmission procurement processes from Ontario and Texas.
- Led discussions and early negotiations with Hydro Quebec, Nalcor (i.e., formerly Newfoundland and Labrador Hydro) and Manitoba Hydro exploring scope of potential contracts for capacity and/or energy supply, including potential solutions to qualify Ontario capacity for trade with other jurisdictions.
- Received the Canadian Solar Industries Association's 2009 Solar Industry Leader of the Year award.

Wholesale Electricity Market Surveillance and Compliance

- While at the IESO, developed and delivered the IESO market rules and market manuals relating to the market surveillance and compliance activities, which included extensive research of other ISOs/RTOs regarding their market surveillance and compliance rules, protocols, and business practices.

- While at the IESO, worked with system vendors to determine, develop, and implement the data requirements and market monitoring indices to be used by the IESO's Market Assessment and Compliance Division (MACD) within their day-to-day operations and investigations.
- While at the IESO, worked with the Ontario Energy Board (OEB) and federal Competition Bureau to develop and deliver the first Memorandum of Understanding between these three organizations regarding their jurisdictional roles and responsibilities regarding the assessment, determinations, and investigations relating to gaming, market power, and anti-competitive behavior.
- For the Independent Power Producers Society of Alberta (IPPSA), assisted with research, analysis, and recommendations regarding potential changes to the Alberta Market Surveillance Administrator's assessment of market harm.
- For multiple generator clients, providing on-going research, analysis, and recommendations relating to their compliance with the IESO market rules and applicable IESO market manuals regarding offer strategies with respect to dispatch within the IESO-Administered Markets and regarding import and export transactions.

Policy Development

- For the Association of Power Producers of Ontario (APPrO) and the Canadian Solar Industries Association (CanSIA), member of the OEB's Standby Rates Working Group that commented on potential policy direction for standby rates, including analysis and commentary on revenue decoupling
- For multiple generation and association clients, using the supply mix and CDM scenarios and targets conveyed in the above point to assess and analyze the Ontario Government's present review of the LTP, and developing policy positions for these clients regarding forthcoming changes to the LTP.
- For multiple generation and association clients, assessing and analyzing applicable changes to CDM policies and targets as proposed in the July 2013 Ontario Government's conservation white paper, and developing policy positions for these clients.
- For multiple generation and association clients, assessing and analyzing a potential framework for regional planning and siting of large energy infrastructure projects, as the IESO and OPA have been directed by the Minister of Energy to provide recommendations by August 1, 2013, and developing policy positions for these clients.
- For multiple generation and association clients, assessing and analyzing potential changes to the procurement and contracting of renewable generation projects outside of the FIT Program through an OPA-to-be-developed competitive procurement process, and developing recommendations on the design of a competitive procurement process for these clients.
- Advised the Association of Power Producers of Ontario (APPrO) on the structure and design of the Ontario electricity market from policy, market structure and market design points of view (including SWOT analysis of APPrO vis-à-vis its position in Ontario's electricity market and with other energy associations) and facilitated meeting of the APPrO Board of Directors.
- Advised the Ontario Energy Association on various policy developments relating to the Green Energy and Green Economy Act, 2009, OEB's Renewed Regulatory Framework, etc.

Stakeholder Consultation and Engagement

- From November 2013 to April 2014, Jason Chee-Aloy was the Power Advisory lead acting for the OEB in reviewing the OEB's governance and processes regarding their policy stakeholder consultation framework. The OEB's policy stakeholder consultation framework was assessed relative to policy stakeholder consultation frameworks of other energy and non-energy North American regulators, interviews were confidentially conducted with stakeholders that typically participate in the OEB's policy stakeholder consultation framework, and recommendations to changes of the OEB's policy stakeholder consultation framework were made directly to the Chair of the OEB.
- In 2011, Power Advisory was appointed as the Government of Nova Scotia's Renewable Electricity Administrator (REA) to design and implement a competitive procurement process to contract for new renewable energy supply. As part of the REA's scope of work, Power Advisory designed and successfully implemented a robust stakeholder consultation and engagement for the procurement process which included setting clear goals and objectives for the competitive procurement process, scheduled and led meetings with stakeholders (including Aboriginal peoples), consulted and engaged stakeholders in the design of the Request for Proposal and Contract documents, regular reports back to the Government of Nova Scotia, and successful conclusion of the procurement process by execution of contracts for new renewable energy supply in 2012. Jason Chee-Aloy was a key part of Power Advisory's team that designed the stakeholder consultation and engagement process.
- In 2012, Jason Chee-Aloy acted for the IESO as the consultant and facilitator for the Electricity Market Forum. In addition to be the technical consultant and subject matter expert, this engagement comprised of facilitating bi-weekly meetings for nearly a year with senior stakeholders representing all segments of Ontario's electricity market.
- Prior to joining Power Advisory in 2010, Jason Chee-Aloy led the design and facilitation of stakeholder consultation and engagement initiatives as Director of Generation Procurement at the OPA (2005 to 2010), and as a Project Manager in the IESO's Market Evolution Program initiative (2003 to 2005). While at the OPA, Jason Chee-Aloy designed and chaired the Renewable Energy Supply Integration Team which was a form of stakeholder consultation with the goals and objectives of the OPA, OEB, IESO and Hydro One providing technical advice directly to the Minister of Energy and Infrastructure on the development of the Green Energy and Green Economy Act (2009) and the Feed-in Tariff (FIT) Program. Various Executives and senior staff from the OPA, OEB, IESO and Hydro One comprised the members of Renewable Energy Supply Integration Team. In part resulting from input from the Renewable Energy Supply Integration Team, Jason Chee-Aloy led the development of the stakeholder consultation and engagement of the design and implementation of the FIT Program. He led all stakeholder consultation and engagement meetings over several months where at times more than 400 stakeholders attended in person, by phone, or by web conferencing.

Selected Speaking Engagements

- UBS, Canadian Power Markets, New York, July 2015
- UBS, Canadian Power Markets, Toronto, June 2015
- Aird & Berlis LLP, The Impact of Capacity Market on LDCs, Toronto, May 2015
- Mindfirst Lunch Seminar: Ontario Capacity Auction - Analysis of Feasibility and Criteria for Design Elements, Toronto, May 2015

- U.S./Canada Cross-Border Power Summit, Boston, April 2015
- Ontario FIT and Renewable Energy Forum, Toronto, March 2015
- Canadian Wind Energy Association Operations & Maintenance Summit, Toronto, February 2015
- Canadian Power Finance Conference, Toronto, January 2015
- Canadian Solar Industry Association Annual Conference, Toronto, December 2014, December 2013, December 2012, December 2011, December 2010 and December 2009
- EUCL, Canada Energy Storage Summit, Toronto, November 2014
- UBS, Ontario Power Markets, New York, November 2014
- Association of Power Producers of Ontario Annual Conference, Toronto, November 2014, November 2013, November 2012, November 2011, November 2010, November 2009, November 2008, November 2007, November 2006 and November 2003
- Ontario Energy Association, Annual Energy Conference, Toronto, September 2014, 2013, Niagara Falls, September 2012
- Solar Ontario, Ottawa, May 2014
- Ontario Power, Examining the Future Structure of Ontario's Electricity Market: Should Ontario Incorporate a Capacity Market or Alternative Structure Framework?
- Toronto, April 2014
- Ontario Waterpower Association, Niagara Falls, October 2013, October 2013, December 2012, December 2011
- EUCL, Securing Ontario's Distribution Grid of the Future, Toronto, September 2013
- TD Securities, Canadian Clean Power Forum, Toronto, September 2013
- Ontario Energy Association, Energy Conference 13, Toronto, September 2013
- TREC Education, Toronto, June 2013
- Canadian Solar Industry Association, Solar Ontario 2013, Niagara Falls, May 2013
- FIT Forum, Toronto, April 2013, April 2012
- Nuclear Symposium, Toronto, May 2012
- TD Securities, The Future of Ontario's Power Sector, Toronto, April 2012
- Ontario Power Perspectives, Toronto, April 2012
- Ontario Energy Association Speaker Series - FIT and the Provincial Budget: What do they mean for Ontario's Electricity Sector, Toronto, April 2012
- Energy Contracts, Calgary, March 2012
- Canadian Power and Finance Conference, Toronto, January 2012, January 2011
- Environmental Law Forum, Cambridge, January 2012
- Capstone Infrastructure Corporation, Investor Day, Toronto, December 2011
- Canadian Projects and Money, Toronto, June 2011
- Ontario's Feed-in Tariff, Toronto, June 2011

- Photon's Solar Electric Utility Conference, San Francisco, February 2011
- Ontario Solar Network, Solar Summit, Toronto, February 2011
- Electricity Invitational Forum, Cambridge, January 2011
- Credit Suisse Alternative Energy Conference, Washington, June 2010
- Transmission and Integrating New Power into the Grid, Calgary, April 2010
- Feed-in Tariff: Another Tool for Meeting RPS, San Francisco, February 2010
- BC Power, Vancouver, January 2010
- Infrastructure Renewal, Toronto, October 2009
- Green Energy Week, Toronto, September 2009
- Ontario Waterpower Association Executive Dialogue, May 2009, May and October 2008
- GasFair and PowerFair, Toronto, April 2008, May 2007 and April 2006
- Eastern Canadian Power and Renewables Finance Forum, Toronto, February 2008
- Quebec Forum on Electricity, Montreal, April 2007
- Energy Contracts, Toronto, March 2007 and November 2003
- Power On, Toronto, October 2006
- Generation Adequacy in Ontario, Toronto, April 2006, March 2005 and April 2004
- Installed Capacity Markets - Designing and Implementing Installed Capacity Markets, Boston, May 2004
- Ontario Electricity Conservation and Supply Task Force, September and July 2003

Sarah Simmons

Manager, Generation and Emerging Sectors



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SUMMARY

Sarah is an electricity sector professional with over 12 years of experience in the electricity sector based in Toronto. She has worked with utility scale and distributed generators, electricity distributors and transmitters, system operators, industrial load customers, and emerging technology providers.

Sarah has supported clients in electricity regulatory and policy matters with a particular focus on sector evolution and distributed energy resources. Recently, she contributed to the development of several innovative studies and reports, including the Ontario Independent Electricity System Operator's Innovation Roadmap and Workplan, the Electricity Distributor Association's Power to Connect Roadmap to a Brighter Future, and the Ontario Energy Association's Discussion Paper on Load-Serving Entities.

Prior to joining Power Advisory, Sarah was a core member of the team that developed and launched of the Feed-in Tariff Program in 2009 at the Ontario Power Authority. Throughout her career, she has supported clients as they navigate changes in electricity policy and regulation, procurement of generation, and innovation impacting the power system.

Sarah has an MSc of Environmental Studies focusing on electricity pricing policy from the University of Waterloo, and has an BSc in Environmental Science from the University of Guelph with a major in environmental monitoring and analysis.

Professional History

Power Advisory LLC, Manager, Generation and Emerging Sectors, 2017 - Present

Sussex Strategy Group, Senior Associate, 2012-2017

SunEdison Canada, Manager of Government Affairs, 2010-2012

Ontario Power Authority, Analyst, 2008-2010

Education

University of Guelph, B.Sc. Environmental Sciences, 2006

University of Waterloo, Masters Environmental Studies, 2009

PROFESSIONAL EXPERIENCE

Energy Policy

- For Master's thesis, review and analysis of time-of-use rate structures and the impacts on lower-income and senior-headed households. Completed a jurisdictional scan of electricity pricing structures, rate setting policies, and energy poverty literature. Working with a local distributor evaluated the pricing impact and behavioural change of customers with the implementation of time-of-use rates.
- While at the Ontario Power Authority, coordinated with the Ontario Energy Board, Ministry of Energy, Electrical Safety Authority and Local Distribution Companies in respect of policy matters related to the development of the development of the FIT and microFIT programs, including matters related to FIT pricing, siting and environmental requirements, regulatory integration, interconnection requirements, amongst other program design criteria.
- For the Electricity Distributors Association, led the research and drafting of the report entitled Power to Connect: A Roadmap to a Brighter Ontario, which identified the challenges and barriers within the statutory framework, and proposed solutions, with respect to the transition of LDCs to "Fully Integrated Network Orchestrators".
- For the Electricity Distributors Association, coordinated the review of the IESO's Market Renewal Program and implications for the distribution sector. Represented the EDA during IESO engagement meetings and led the development of analysis and submission related to the High-Level Designs and Detailed Designs of the Market Renewal Program. Facilitated outreach and engagement to the Ontario Energy Board on behalf of distributors related to the regulatory implication of MRP for the distribution sector.
- For the Ontario Energy Association, engaged with members of a Steering Committee to develop a comprehensive discussion paper and public report outlining the policy case and proposed implementation plan for the establishment of Load Serving Entities in Ontario.
- For the Independent Electricity System Operator, engaged with internal and external stakeholders to develop an Innovation Roadmap and Workplan, including the completion of a jurisdictional scan, facilitation and stakeholder engagement, and preparing final recommendations for the roadmap and workplan activities.
- For the Community Generation Working Group, consisting of Canadian Solar Industries Association, the First Nation Power Authority and the Alberta Community and Cooperative Association, led the development of written submissions, interrogatories and technical conference presentations for the Alberta Utilities Commission's Distribution System Inquiry (Module One) related to the impact of new technologies and innovation on the distribution sector.
- Working with ENMAX Corporation, led the project management, research and drafting of written submissions and interrogatories for the Alberta Utilities Commission's Distribution System Inquiry (Combined Module) related to evolution of the distribution sector, including adoption of distributed energy resources and electric vehicles, non-wires solutions, utility remuneration and rate design, and future operations of distributors as Distribution System Operators.

- For ENMAX Power Corporation, led the project management and development of a “Future Utility Plan” that identified key investments the utility will need to make to realize its 2030 Vision. The plan assessed the potential benefits and financial potential for a series of initiatives related to electrification, non-wires solutions, grid modernization and customer services. The final deliverable included a 7-year roadmap, justification for proposed initiatives, and assessed the utilities overall regulatory and policy strategy for achieving the plan.
- For the Canadian Solar Industries Association, lead consultant for the Nexus project, which included the development of two discussion papers, 1) Non-Wires Alternatives: Energizing Distributed Energy Resources to Bring Value to Canadian Grids, Utilities and Ratepayers, and 2) Hybrid Energy Systems: Reviewing the Case for the Co-location of Renewables and Energy Storage. Prepared submissions and represented the solar and storage sector with respect to the IESO's regional planning review process, and energy storage design project. Prepared submission and represented the solar and storage sector with respect to the OEB's Responding to DERs and Utility Remuneration policy consultations. Further supported CanSIA with respect to electricity pricing policy in Ontario and submissions to the Ontario Government's review of industrial electricity pricing.
- For Energy Storage Canada, led the project management, research and drafting of their Energy Storage Valuation Study focusing on the benefits that would be realized in Ontario through greater integration on energy storage within the wholesale market and electricity infrastructure.
- Co-chairing the industry-led Distributed Energy Resources Advisory Committee (DER AC), which consists of energy service providers with interest developing resources that distribution-level to meet the needs of electricity customers, including solar PV, energy storage, demand response, energy efficiency, electric vehicles, and other demand-side resources, for the contribute to the IESO's Market Renewal Program and the implementation of the Ministry of Energy's 2017 Long-Term Energy Plan.
- Working with the Canadian Solar Industries Association, coordinated the submission to the Ontario Ministry of Energy regarding the development of the revised Long-Term Energy plan, including matters related to technology costs digression, cost reduction strategies, resource and system benefits, and environmental attributes.
- Working with a local distribution company, provided advice and facilitated the development of feedback submissions on several regulatory and policy matters, including recommended changes to the FIT program and other generation procurement programs, changes to the net-metering regulation, regional planning coordination, conservation programs and climate change policies.
- On behalf of large industrial electricity consumers, provided analysis and strategic advice with respect to the implementation of the Cap and Trade program and the impacts on electricity pricing. Coordinated policy and regulatory submissions to the Ministry of Energy, the Ministry of Environment and Climate Change, and the Ontario Energy Board.
- Working with a transmitter, reviewed and provided strategic advice with respect to the policy and environmental requirements related to the development of a new transmission line in Northern Ontario.
- For an energy storage provider, prepared a detailed report and assessment of energy storage opportunities in Ontario. The report focused on Ontario market fundamentals (e.g., wholesale electricity pricing), behind the meter opportunities (e.g., the Industrial Conservation Program), and other potential revenue streams that may be available through current and future IESO programs, including the Market Renewal Program.

Program and Procurement Design

- While at the Ontario Power Authority, led the development of the microFIT program, including the program rules, eligibility requirements and contract provisions. Led stakeholder consultation activities and communications outreach as the program was implemented, including the development of training materials. Program management of software development required for back-end application intake and processing.
- For multiple renewable generation clients, provided support with respect to the development and submission of industry-led feedback to the Ontario Power Authority (and later IESO), and Ministry of Energy, in respect to the changes to the FIT and microFIT program, and the design and implementation of the Large Renewable Procurement program.
- For a distributed renewable energy provider and its partner, an unregulated LDC-affiliate, provided strategic counsel and business strategy development related to the transition to the net-metering program, including the potential for virtual net metering.
- On behalf of a renewable energy industry association, coordinated consultation activities with association members and led the development of detailed program design recommendations for a solar rebate program.

Project development and contract negotiation

- On behalf of a solar developer, coordinated contract management and regulatory affairs in respect of the development and construction of utility scale and rooftop solar systems under the FIT program. This included all matters related to the Ontario Power Authority and the Ontario Energy Board (e.g., meeting contract requirements/milestones, licensing requirements, etc.)
- Working for a Non-Utility Generator and its industrial host, provided strategic advice and facilitated negotiations with respect to the re-contracting efforts with the IESO. Facilitated efforts with respect to determining the resource value and related programs for funding support.
- Provided strategic counsel and negotiation support to a Non-Utility Generator with a fleet of northern Ontario generating units related to the re-contracting of the assets, negotiating contract amendments leading to more efficient operations, and provided strategic advice with respect to the implementation of the Cap & Trade program.
- Working with a group of unregulated LDC-affiliates, provided tactical support with respect the potential development of a large-scale renewable energy project as part of a competitive procurement process.
- On behalf of an energy services company, provided a detailed review of the IESO's demand response auction program and strategic advice with respect to business development strategy.

Government and Regulatory Affairs

- Working with a group of contracted renewable energy suppliers, provided strategic and led advocacy efforts with respect to changes to IESO market rules (SE-91) and the implementation of IESO curtailment. Led outreach to the Ontario Power Authority and Ministry of Energy.
- On behalf of a large electricity customer, provided strategic advice and led advocacy efforts on matters related to the renewal of the Northern Industrial Electricity Rate program.

- Working with an energy conservation service provider, provided strategic advice and led advocacy efforts with respect to the development and delivery of Green Ontario Fund programs.
- Working with a clean technology solutions provider and its property development partner, coordinated regulatory and advocacy efforts with respect to the development of a net-zero energy community in Ontario. Provided strategic advice and coordinated submissions in respect of applicable programs and regulatory barriers, including net-metering and virtual net-metering.
- Provided regulatory and policy support to a smart-grid solutions and software provider related to the development of pilot programs and other business development opportunities with Ontario distributors.
- Working with a software service provider, coordinated regulatory and program information with respect to energy conservation and demand response programs, specifically behavioural-based programs. Led advocacy efforts with respect to the implementation of a pilot program with Ontario distributors. Assisted with business development strategy related to climate change policies.