

## Professional Experience

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### EPCOR

- *Director, Ontario Operations, 2019 to Present, Collingwood, Ontario*
  - Accountable for the safe operation of an electric distribution utility in Collingwood, a natural gas distribution utility in Aylmer, and a greenfield natural gas distribution utility in the Southern Bruce
  - Support to business development initiatives in Ontario including natural gas expansion and industrial water treatment facilities (Darlington Nuclear Power Plant)
  - Integration of commercial development projects and acquisitions into Ontario Operations
- *Director, System Operations, Distribution and Transmission, 2016-2019, Edmonton, Alberta*
  - Accountable for the real time operation of the power system for customers in City of Edmonton
  - Leadership of the system control center, power trouble field response, operations engineering, geographical information systems (GIS), operations network security and customer service
  - Responsible for the development of the smart grid strategy for EPCOR
  - Accountable for the implementation of the Alberta Reliability Standard (ARS) Critical Infrastructure Protection (CIP) Cyber Security Program
  - Support the implementation of the Advanced Distribution Management System (ADMS)

### TransAlta

- *Director, Common Services, Alberta Thermal Operations, 2013 to 2016, Spruce Grove, Alberta*
  - Accountable for multiple support service functions at two power plants with capacity of 3300 MWs
  - Support functions included Supply Chain Management, Turn Around Maintenance, Project Management, Reliability Engineering, Training, Security, Administration, Aboriginal Relations and General Maintenance Services
- *Director, Wind Operations, 2011-2012, Calgary, Alberta*
  - Accountable for the safe operation and maintenance of over 1000 MWs in four provinces
  - Accountable for TransAlta's wind power business profit and loss
  - Accountable to develop the long term operational strategy for the wind power business
- *Manager, Wind Plant Engineering, 2010-2011, Calgary, Alberta*
  - Accountable for the engineering team's support to operations and maintenance
  - Developed and implemented operational, market, safety and productivity projects
  - Developed power system operational procedures used in the Wind Control Center

### Alberta Electric System Operator

- *Program Manager, National and Provincial Transmission Interties, 2010, Calgary, Alberta*
  - Led industry wide stakeholder consultation on electricity market design pertaining to interties
  - Developed a market rule framework within legislation and regulations for new interties to Alberta
- *Systems Engineer, Generation and Control Systems, 2003-2008, Calgary, Alberta*
  - Project Managed an industry wide initiative developing wind power forecasting capabilities in Alberta
  - Conducted engineering studies of the impacts of wind power variability on Alberta's power system
  - Developed wind power connection and operational requirements to Alberta's power system
  - Developed Ancillary Service standards and requirements to support power system operation reliability
  - Managed the Ancillary Service compliance program

### Nortel

- *Power Systems Engineer, Wireless Technology, 2000-2003, Calgary, Alberta*
  - Wrote equipment specifications and designed equipment test plans
  - Lab tested equipment to Nortel technical and industry safety requirements (UL/CSA)
  - Performed root cause analysis on equipment field failures

## **TigrSoft**

- *Applications Engineer, 1998-1999, Edmonton, Alberta*
  - Designed and implemented test plans on new software releases (manufacturing scheduling software)
  - Supported internal staff and clients with software implementation and applications

## **Sunpine Forest Products**

- *Production Supervisor, 1997-1998, Rocky Mountain House, Alberta*
  - Supervised the commissioning of a continuous Laminated Veneer Lumber line
  - Trained and supervised equipment operators on the production line
  - Supported millwright and electrician crews in troubleshooting equipment failures

## **Canadian Armed Forces Reserve**

- *Army Engineer Officer, 1993-2011, notable experiences include:*
  - Feb-Nov 2009, NATO International Security Assistance Force, Task Force Kandahar, Afghanistan
  - 2006-2008, Commanding Officer of 33 Field Engineer Squadron, 41 Combat Brigade Group, Calgary
  - Feb-Sep 2000, NATO Stabilization Force, Bosnia and Herzegovina, 3 PPCLI Battle Group

## **Community Experience**

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- Coach of Minor Hockey, Soccer and Baseball teams in Spruce Grove & Collingwood - 2014 to Present
- Treasurer for the Collingwood Girls Hockey Association - 2022 to Present
- Head Trainer for the Collingwood Girls Hockey Association - 2021 to 2022
- Tournament Director for the Spruce Grove Ringette Association - 2018 to 2019
- Coach of Junior High School basketball team - 2003 to 2006

## **Education**

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- **Bachelor of Engineering in Electrical Engineering**  
1993-1997, Royal Military College of Canada, Kingston, Ontario
- **Master of Business Administration**  
2015-2017, University of Alberta, Edmonton, Alberta

# Ted Burrell

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## Profile

A reliable employee with over 30 years of experience in the electricity sector with 20 years as a tradesperson (Power Line Technician) and the last 10 years in supervisory and management positions. Working in a team environment with my co-workers, I currently manage the electricity operations department at EPCOR Electricity Distribution Ontario (EEDO). As I have always strived to become competent and efficient in the roles that I have held both previously and currently throughout my career, I hope to continue having the opportunity to learn new tasks and take on additional responsibilities with the same success that I've had with my current and previous roles.

## Professional Experience

[Manager-Collus Power Stream 2015-2018](#)

[EPCOR \(EPCOR Electricity Distribution Ontario\) 2018-2021](#)

[Manager and General Manager](#)

- Responsible for the operation, maintenance and construction of the hydro system within the EPCOR Electricity Distribution Ontario (EEDO) service area.
- Provide monthly reports regarding the progress of Capital Projects, SAIDI, new services, locates
- Working with Engineering Dept. to develop the internal Capital Project Program
- Manage the Capital Projects, order material and distribute to the Supervisor of Operations Dept. for completion.
- Ensure that the Metering Dept., Inspector/locating Dept. and Stores/Facilities team have support and communication on upcoming projects.
- Work with developers and engineering consultants on customer contributed projects such as condo complexes, new subdivisions, commercial and industrial builds.
- Assist Operations Supervisor as required when working with electrical contractors for upgrades.
- Work with our GIS specialist to maintain real time updates with mapping in our SmartMap system.
- Complete OTO's (Switching Orders) for the Operations Dept. to complete.
- Work with procurement to build contracts and MSA's for tenders to complete pole line replacements, substation maintenance, vegetation management, u/g installations, vehicles and equipment
- Assist in the development of an asset management program, as well as development of future 5 year cost of service filing (DSP)
- Assist in developing a working relationship with EDTI's control room to assist EEDO staff with hold offs, switching and after hours call outs
- Co-ordinate the scheduling of substation oil samples and substation maintenance
- Complete site inspections

## Collus Power Stream 2011-2015

### Supervisor

- Co-ordinate and schedule work flow for line staff to complete Capitol projects and maintenance of infrastructure in EEDO'S service area
- Complete OTO's for line staff
- Co-ordinate fleet maintenance and schedule yearly safety inspections
- Co-ordinate quarterly preventative maintenance and yearly annual inspections for heavy equipment including bucket and digger trucks
- Work with electrical contractors on service upgrades to residences
- Complete site inspections
- Create WO's through Geographical Information System (GIS)

## Canadian Niagara Power 2001-2011

### Fortis Ontario Inc.

- Lead Hand for crews on overhead and underground construction.
- Worked closely with the planning department to resolve issues that arise during construction and maintenance projects.
- As an experienced Lead Hand with over 3000 hours, I have overseen crews working bare hand and live line tool techniques up to 38KV and rubber glove techniques on 4KV to 27.6KV.
- Lead Hand responsibilities also included the completion of time sheets, trouble outage sheets, and company & customer deficiency reports.
- Competent working knowledge of Microsoft Excel, Word and Outlook.

## Current Certificates

Journeyman Lineman Certificate – 1994

Provincial Powerline Technician Certificate – 1997

Bare Hand Techniques – 2008 (Up to 69KV)

Propane Heaters/Torches under 400,000BTUH)

Lift Truck Operator Training

Transportation of Dangerous Goods (Classes 1-9)

Basics of Fall Protection

DZ Drivers Designation

Standard First Aid

Level C CPR/AED

Utility Work Protection Code

Master Electricians License Relative to 434A Certificate-May 2015

## Additional Training

Annual Certification of Pole Top & Bucket Rescue Techniques

WHMIS Training

Electrical Safety Authority Regulation 22-04

Chainsaw Awareness Training

Commercial Vehicle Operators Registration Training

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- SKILLS & ABILITIES**
- CPA accounting designation
  - Two years of international project management
  - Analytical, deadline driven & focused on change mgmt
  - OPEX Blue Belt trained (Allianz operational process excellence)
  - Excellent communication & leadership skills
  - Demonstrated ability to learn and immerse rapidly in multiple industries

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**RECENT EXPERIENCE** **SENIOR MANAGER, REGULATORY AFFAIRS, EPCOR ONTARIO UTILITIES INC.**

July 2020 – Present

- Expansion of regulatory responsibilities in previous role to include Natural Gas business filings, major applications along with distribution system expansion and growth
- Primary regulatory contact with various regulating bodies, including the OEB, the Ministry of Energy, Statcan

**MANAGER, REGULATORY AFFAIRS AND BILLING, EPCOR ELECTRICITY DISTRIBUTION ONTARIO**

May 2017 – July 2020

- Successful in obtaining Ontario Energy Board (OEB) approval of full requested dispositions in three annual IRM (Incentive Rate Mechanism) filings resulting in a recovery of \$2.8M.
- Coordination and preparation of filings with various regulating bodies, including the OEB, the Ministry of Energy, Northern Development and Mines, CRA
- Provided support of annual forecasting and budgeting process through the creation of Statistical Energy Data, Energy Related Costs, and Rate data models
- Emergence as a subject matter experience on IESO settlement including rollout of a created model on the provincial level to other colleague LDC's.

**DIRECTOR, CORPORATE OPERATIONS, THE ONTARIO FEDERATION OF SNOWMOBILE CLUBS**

March 2016 – May 2017

- Lead the development and ongoing management of the federation's provincial programs and operations (financial responsibility operational controls, administrative and reporting procedures, human resources, business systems, facilities.)
- Planned, developed and implemented processes for operational management

**DIRECTOR, ORGANIZATIONAL MANAGEMENT, ALLIANZ GLOBAL ASSISTANCE**

January 2015 – March 2016

- Responsible for development of a new department during the year of a corporate merger which successfully completed over 20 major projects including financial institutions, e-commerce and technical integration activities (rebranding/telephony migration).

- Designed and implemented a change management strategy integrating a team of six people from our merged partner during a global IT transformation with 0 FTE loss
- Instrumental in building a corporate strategic roadmap alongside our executive group.

**ACCOUNTING MANAGER, ALLIANZ GLOBAL ASSISTANCE**

June 2014 – December 2014

- Leading a team of 8 people, successfully completed monthly financial statements, following internal controls while improving payments processes and coordination between departments.

**SAP IMPLEMENTATION MANAGER, ALLIANZ GLOBAL ASSISTANCE**

January 2012 - May 2014

- Management of FI/CO SAP implementation in Americas cluster and Europe. In addition to project management tasks, completed business requirements and cost accounting module configuration.
- Lead a task force to escalate the technical interface specification between group IT, local IT and internal outsourced IT (Thailand) contributing to a successful implementation in 7 countries

**FINANCIAL ANALYST, ALLIANZ GLOBAL ASSISTANCE**

September 2007 – December 2011

- Extensive experience analyzing data, budgeting and preparing management reports

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**EDUCATION CGA ONTARIO – CGA DESIGNATION PROGRAM 2013**

- Completion of CGA (certified general accountant) program with specialization in internal auditing and information systems strategy

**TRENT UNIVERSITY – B.A. (HONS) SOCIOLOGY, ECONOMICS MINOR 2001**

- Focus of studies included global economic structures, organizations and institutions

# Jacyn Koski

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## Professional Summary

Experienced and well-qualified Financial executive demonstrating expertise and competency in a wide range of Financial accountabilities. Very strong commitment to, and interest in, continual learning

## Core Qualifications

- Strong Corporate Finance, Treasury Operations and Business Valuation experience
- Advanced financial reporting and financial analysis technical skills
- Advanced theoretical and practical understanding of regulatory accounting, regulated operations and regulatory filing requirements
- Strong verbal and written communication skills with demonstrated ability to deliver complex information concisely
- Advanced income and other tax knowledge and experience
- Excellent people leadership abilities with a keen and demonstrated interest in people management and development

## Experience

*July 2020 to present*

### **Treasurer and Commercial Services Controller EPCOR Utilities Inc., Edmonton, AB**

- Responsible for setting strategic operating and personnel goals and strategies for the department
- Oversight and completion of all Treasury related functions, including Corporate Finance, Treasury Operations and Business Valuations
- Oversight and completion of the Company's annual Long Term Plan
- Manage and mentor department personnel (22 direct and indirect reports)
- Lead Corporate Finance and general Finance accountabilities on several business development and business integration projects
- Oversight of all full cycle accounting for an operating division including all financial reporting, monthly variance reporting, budgeting, forecasting; and regulatory reporting, compliance and filings

*March 2017 to June 2020*

### **Corporate Controller EPCOR Utilities Inc., Edmonton, AB**

- Responsible for setting strategic operating and personnel goals and strategies for the department
- Oversight of all consolidated internal and external reporting requirements
- Oversight of all consolidated budgeting and forecasting requirements
- Oversight of all fully cycle accounting for the Company's Shared Services business unit, including oversight and support of regulatory filing requirements
- Manage and mentor department personnel (29 direct and indirect reports)
- Participated, as Finance subject matter expert, on several business development and business integration projects

*July 2014 to September 2014, October 2015 to January 2016 and April 2016 to March 2017*

### **Controller, Water Canada EPCOR Utilities Inc., Edmonton, AB**

- Responsible for setting strategic operating and personnel goals and strategies for the department
- Oversight of all full cycle accounting for the operating division including all financial reporting, monthly variance reporting, budgeting and forecasting



- Oversight and completion of all financial elements for the performance based rates regulatory filing for the business
- Manage and mentor department personnel (21 direct and indirect reports)
- Participated, as Finance subject matter expert, on several business development and business integration projects

*March 2014 to July 2014, October 2014 to October 2015 and February 2016 to March 2016*

**Senior Manager, Forecasts and Commercial Water Account  
EPCOR Utilities Inc., Edmonton, AB**

- Oversight and review of monthly full cycle accounting for EPCOR's Commercial Water business
- Oversight and review of accounting and reporting positions
- Manage and mentor Commercial Water department personnel (6 direct and indirect reports)
- Oversight and review of preparation of consolidated budgets and forecasts for the Canadian Water division of EPCOR
- Participated, as Finance subject matter expert, on several business development and business integration projects

*November 2012 to February 2014*

**Jacyn Koski, Chartered Accountant  
Self-Employed**

- Managed the tax department for a large utility company
- Oversaw tax planning and tax due diligence for all significant business development for a large utility company
- Oversaw tax compliance, tax research and financial statement tax reporting for a large utility company
- Participated as a core team member for a material business development project, focusing on tax due diligence and financial model review and preparation

*May 2011 to October 2012*

**Senior Manager, Tax  
KPMG LLP, Edmonton, AB**

- Lead and manage the tax department's involvement with quarterly and annual tax provision audits and reviews and GAAP technical expert for accounting for income taxes
- Review of tax compliance and tax research prepared by junior staff for large public and private groups of companies
- Mentor and manage pool of junior tax specialists and managers, including performance management
- Management of tax planning projects for various differing corporate tax clients

*April 2010 to May 2011*

**Senior Manager, Consolidated Financial Reporting and Analysis  
EPCOR Utilities Inc., Edmonton, AB**

- Oversight and review of quarterly and annual external audited financial statements, MD&A and monthly consolidated management-reporting financial statements
- Review and preparation of technical accounting and reporting positions
- Manage internal control procedures and documentation for CSOX controls for the department, including redesign of controls for change to IFRS from former Canadian GAAP
- Manage and mentor the financial reporting and analysis department personnel (6 direct and indirect reports)
- Oversight and review of consolidated budget reporting for the corporation
- Participate as part of the due diligence team for several business development projects (accounting and tax functions)

*August 2007 to December 2009*

**Manager, Taxation/Senior Manager, Canadian and Cross Border Income Tax**

**EPCOR Utilities Inc./Capital Power Corporation, Edmonton, AB**

- Manage income tax compliance and accounting for income taxes for the

corporation, including oversight of all accounting for income taxes and review of all tax compliance for the group of companies

- Preparation and review of technical positions relating to Canadian corporate income and cross border tax issues and accounting for income taxes issues
- Mentoring and coaching junior staff pool related to all Canadian income tax reporting and accounting functions (department of approximately 6)
- Member of IFRS Oversight Committee for company and responsible for IFRS changes related to accounting for income taxes
- Manage tax group's involvement in the corporation's business development projects, including planning for tax resource participation

*October 2006 to August 2007*

**Senior Manager, Tax**

**KPMG LLP, Edmonton, AB**

- Review and supervision of tax provision audits as part of public company and large private company year-end and quarterly financial statement filings
- Review of tax compliance for large public and private groups of companies
- Preparation of tax planning projects for various levels of corporate tax clients
- Review of tax compliance and planning projects prepared by junior staff members
- Mentor and manage pool of junior tax specialists and managers
- Review and preparation of FIN 48 documentation for US securities filers

**Education and Professional Accomplishments**

- CICA In-Depth Tax Course Part I, Part II and Part III
- Chartered Accountant Designation, April 2003
- Completion of CA School of Business and Uniform Final Examination, December 2002 - 1st Decile Standing
- University of Alberta Edmonton, Alberta  
Bachelor of Commerce (Accounting, with Distinction), December 2000
- University of Alberta Edmonton, Alberta  
Bachelor of Science (Specialization in Zoology), April 1998

**References**

References are available upon request

## SENIOR CONSULTANT

Andrew Blair has six years of experience as a research analyst and consultant in electricity and gas utility price regulation. He regularly prepares load forecasts for electricity and natural gas utility cost of service applications in Ontario and provides cost allocation and rate design support to utilities across Canada.

Andrew regularly prepares models, reports, and other written evidence for utility public application filings. He appears before the New Brunswick Energy & Utilities Board as New Brunswick Power's cost allocation subject matter expert in annual general rate applications and has appeared before the Ontario Energy Board on an expert panel on transmission cost allocation. Andrew has created and developed cost allocation and rate design models, including for Monserrat Utilities and Ontario's Independent Electricity System Operator. He is an instructor in MEARIE's Regulatory Specialist Certificate program in the area of load forecasting, cost allocation, and rate design. He previously worked for the Ontario provincial government over a seven-year period as a trust analyst and a trust accountant. Andrew has a Master's Degree in Economics from Carleton University and a Bachelor's Degree in Economics and Financial Management from Wilfrid Laurier University.

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## PROFESSIONAL OVERVIEW

### **Elenchus Research Associates** **Research Analyst & Senior Consultant**

**January 2016 - Present**

- Prepare load forecasts for electricity and natural gas utilities
- Design and prepare cost allocation and rate design models and evidence
- Research regulatory filings and common practices across jurisdictions and regulators
- Provide research and modeling support for economic feasibility studies
- Prepare evidence, interrogatories, cross-examination, and submissions for regulatory hearings

### **Office of the Public Guardian and Trustee** **Trust Analyst**

**May 2012 – June 2013**  
**Summers 2010 & 2011**

- Designed estate allocation and payment disbursement system
- Summarized and analyzed aggregate account information
- Allocated interest and fees to close out accounts
- Researched Public Guardian clients' files and family histories to determine estate beneficiaries
- Located beneficiaries and distributed estates

**Accountant of the Superior Court of Justice  
Trust Accounting Officer**

- Reconciled client account balances
- Located clients with an outstanding balance with the court
- Updated client account balances as well as pension and disability allowances

## EDUCATION

June 2014	Master of Arts, Economics, Carleton University
June 2012	Bachelor of Arts, Economics and Financial Management, Wilfrid Laurier University

## Selected Specific Project Experience:

### Cost of Service and Tariff Design

- **New Brunswick Power** – prepared cost allocation evidence for annual general rate applications. Contributed to export reports on cost allocation issues and proposed methodology changes for NB Power. Appeared before New Brunswick Energy & Utilities Board as NB Power subject matter expert in area of cost allocation.
- **Montserrat Utilities Ltd.** – for an integrated resource plan, cost of service and tariff study led by HATCH, created a cost allocation model to attribute costs to electricity, water, and wastewater services and to rate classes within each service. Proposed changes to tariff structures.
- **Burlington Hydro** - prepared cost allocation and rate design models and evidence for cost of service application to OEB.
- **Grimsby Power Inc.** - prepared cost allocation and rate design models and evidence for cost of service application to OEB.
- **SaskPower** - prepared rate design analysis for proposed standby rates in report submitted to the Saskatchewan Rate Review Panel.
- **EfficiencyOne Nova Scotia** – prepared and revised long-term rate and bill impact analysis model for Nova Scotia demand-side management programs.
- **Greater Sudbury Hydro** - prepared cost allocation and rate design models and evidence for cost of service application to OEB.
- **Lakefront Utilities** - prepared 40-year cost of service and bill analysis for prospective natural gas utility along the north shore of Lake Superior. Also prepared bill-smoothing and rate mitigation analysis.
- **Hydro Ottawa** - prepared cost allocation and rate design models and evidence for cost of service application to OEB.

- **E.L.K. Energy** - prepared cost allocation and rate design models and evidence for cost of service application to OEB.
- **Utilities Kingston** - prepared cost allocation and rate design models and evidence for Kingsotn Hydro's cost of service application to OEB.
- **Milton Hydro** - prepared cost allocation and rate design models and evidence for cost of service application to OEB.
- **Hydro One Transmission** - prepared report on export transmission service rates based on cost allocation between domestic and export services.
- **Independent Electricity System Operator** - prepared annual cost allocation and usage fee design models for revenue requirement submissions.
- **Power Worker's Union** – act as intervenor on behalf of the Ontario Power Worker's Union in OEB consultations and rate cases of large utilities with PWU-represented employees. Reviewed evidence, prepared interrogatories and submissions on behalf of the PWU in rate cases for Hydro One, Ontario Power Generation, Toronto Hydro, and Alectra Utilities.
- **MEARIE Regulatory Specialist Training** – conducted training in areas of cost allocation and rate design for cost of service applications to employees of Ontario distribution utilities.

### Load Research

- **Burlington Hydro** – prepared a load forecast for Burlington's cost of service application to the Ontario Energy Board ("OEB"), including various scenarios related to the COVID-19 pandemic. Prepared peak demand analysis of various rate classes to be used in cost allocation.
- **Grimsby Power Inc.** – prepared a load forecast for Grimsby Power's cost of service application to the OEB.
- **E.L.K. Energy** – prepared a load forecast for E.L.K. Energy's cost of service application to the OEB.
- **EPCOR Natural Gas LP** – prepared 5-year natural gas throughput forecasts for its natural gas service territory in Aylmer, Ontario. The throughput forecasts include scenario analyses and are prepared regularly for gas supply plans submitted to the OEB.
- **EnWin Utilities** - prepared a load forecast for EnWin's cost of service application to the OEB.
- **Erie Thames Powerlines** - prepared a load forecast for Erie Thames's cost of service application to the OEB and peak demand analysis of various rate classes for cost allocation.
- **Essex Powerlines** - prepared a load forecast for Essex's cost of service application to the OEB.
- **Halton Hills Hydro** – Supported Halton Hills's cost of service in load forecasting and conservation and demand management reporting.

- **Greater Sudbury Hydro** - prepared a load forecast for Greater Sudbury's cost of service application to the OEB.
- **Kingston Hydro** - prepared a load forecast and load profile forecast for Kingston Hydro's cost of service application to the OEB.
- **Lakefront Utilities** - contributed to 40-year natural gas throughput and peak design day forecasts for prospective natural gas distribution utility.
- **MEARIE Regulatory Specialist Training** – conducted training in area of load forecasting for cost of service applications to employees of Ontario distribution utilities.
- **Milton Hydro** - prepared a load forecast for Milton Hydro's cost of service application to the OEB.