# EB-2022-0318: 1: Avi Lipsitz

**COST CLAIM NUMBER** SUBMISSION DEADLINE DATE

1633 September 05, 2023

**CLAIM STATUS** Approved by Finance

EB# OTHER EB#S PHASE #\*

EB-2022-0318: Rates: Distribution: Independent

**Electricity System Operator** 

alipsitz@poweradvisoryllc.com

**INTERVENOR** INTERVENOR COMPANY\* INTERVENOR TYPE Lipsitz, Avi; +1 (416) 294-3117 Power Advisory LLC, Toronto: Full Registrant

Corporation

HST RATE ONTARIO **EXCHANGE RATE COUNTRY** 

13.00

**HST NUMBER** LATE SUBMISSION ALLOWED EXTENSION DEADLINE DATE

813388691RT0001 No

PAR1	TICIPANTS					Participant
New	Non-Filing l	Participant First, Last Name	Filing Participant	Total (\$)	Total Hours	Claim Status
Yes	Sarah	, Simmons		491.55	1.50	Submitted
Yes	Jason	, Chee-Aloy		1,491.60	4.00	Submitted
No		,	Lipsitz, Avi; +1 (416) 294-3117 alipsitz@poweradvisoryllc.co	5,847.78	22.50	Submitted
			m			

### **ATTACHMENTS**

Attachment	Document Import Message Type	
Cost claim cover letter.pdf	Cover	
	Letter	
PAL EB-2022-0318 Cost Claim 090520231434.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES 6,930.00

TOTAL DISBURSEMENTS 0.00

TOTAL HST 900.93

TOTAL CLAIM 7,830.93

**TOTAL AMOUNT AWARDED** 

**TOTAL HOURS CLAIMED** 

28.00

TOTAL HOURS DISALLOWED

REASON FOR REASON FOR REASON FOR DISALLOWANCE - 2 DISALLOWANCE - 3

MAKE CHEQUE PAYABLE TO Power Advisory LLC

SEND PAYMENT TO ADDRESS ATTENTION

700-55 University Ave. P.O. Box 32 Toronto, ON

M5J 2H7

#### SUBMIT SECTION

I am a representative of the Party. I have examined all of the documentation in support of this cost claim. The costs incurred and time spent are directly related to the Party's participation in the OEB Process referred to above.

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 section 6.05 and 6.09 of the OEB's Practice Direction on Cost Awards.

The information (fees and disbursements) filed in this cost claim is complete and accurate and in accordance with the OEB's Practice Direction for Cost Awards and Appendix A, the Cost Awards Tariff.

SUBMITTED BY
Avi Lipsitz

DATE SUBMITTED
September 05, 2023

# **Sarah Simmons**

EB-2022-0318: Rates: Distribution: Independent Electricity System Operator EB-2022-0318 : 1 : Avi Lipsitz

**COST CLAIM** 

INTERVENOR NAME Lipsitz, Avi; +1 (416) 294-3117 PARTICIPANT
CLAIM STATUS
Submitted

alipsitz@poweradvisoryllc.co

m

Sarah

FILING PARTICIPANT

NEW PARTICIPANT NON-FILING
PARTICIPANT F. NAME

NON-FILING PARTICIPANT L. NAME

Simmons

**SERVICE PROVIDER TYPE\*** 

Consultant

**CASE** 

YEAR CALLED TO BAR\*

COMPLETED YEARS
PRACTICING/YEARS OF
RELEVANT EXPERIENCE\*

HOURLY RATE 290

\_\_\_

**HST RATE CHARGED\*** 

13.00

CV STATUS (FOR CONSULTANT/ANALYST)

CV Attached

LAST CV DATE

September 05, 2023

15

OVERRIDE HOURLY RATE

No

**HST NUMBER** 813388691RT0001

**HEARINGS** 

Yes

**CONSULTATIONS** 

No

**DISBURSEMENTS** 

No

### **HEARINGS**

Hearings Hours 1.50	Hearings Subtotal (\$) 435.00		<b>Hearings Total</b> 56.55	Tax (\$)		<b>gs Total (\$)</b> 491.55
<u>Name</u>	<u>Hours</u>	Hourly Rate	Sub Total	HST Rate	<u>HST</u>	<u>Total</u>
REVIEW APPLICATION AND EVIDENCE Review Application and Evidence	0.50	290	145.00	13.00	18.85	163.85
<b>DISCOVERY</b> Preparation of Interrogatories	0.50	290	145.00	13.00	18.85	163.85
Review Interrogatory Responses		290		13.00		
Technical Conference Preparation		290		13.00		
Technical Conference Attendance		290		13.00		
Technical Conference Follow Up		290		13.00		
ISSUES LIST Preparation		290		13.00		
Attendance at Issues Conference		290		13.00		
INTERVENOR EVIDENCE Preparation		290		13.00		
Interrogatory Responses		290		13.00		
Preparation of Witness(es) for Atter at Hearing SETTELEMENT CONFERENCE / ADR	ndance	290		13.00		
Preparation	0.50	290	145.00	13.00	18.85	163.85
Attendance		290		13.00		

	<u>Name</u>	<u>Hours</u>	Hourly Rate	Sub Total	HST Rate	<u>HST</u>	<u>Total</u>
	Preparation of Settlement Proposal		290		13.00		
	Attendance at Presentation to Panel		290		13.00		
ORA	L <b>HEARING</b> Preparation		290		13.00		
	Attendance at Oral Hearing		290		13.00		
SUBI	MISSIONS Written Submissions		290		13.00		
	Oral Submissions		290		13.00		
	Attendance at Oral Submissions		290		13.00		
ОТН	ER ATTENDANCE Other Attendance		290		13.00		
COM	MUNICATION With Client		290		13.00		
	With Other Parties		290		13.00		
MOT	IONS Preparation of Motion(s) Materials		290		13.00		
	Prepare Submissions on the Motion(s)		290		13.00		
	Attendance at Hearing on Motion(s)		290		13.00		
CON	FIDENTIALITY Preparation of Application for Confidentiality		290		13.00		
	Prepare Submissions on Confidentiality		290		13.00		
	Attendance at Hearing on Confidentiality		290		13.00		
DECI	SION Review		290		13.00		
RATE	E ORDER Review		290		13.00		
	Prepare Submission on Rate Order		290		13.00		
TOTA	AL SERVICE PROVIDER FEES  Total Service Provider Fees:	1.50		435.00		56.55	491.55

Attachments General Attachments

CV - Sarah Simmons.pdf CV

REASCWA invoices.pdf Invoice

REASCWA - PA time log.pdf Time Docket

# Power Advisory LLC - Time Entry

Date Start: 1/1/2023 | Date End: 9/5/2023 | Clients: Power Advisory | Projects: IESO Rev Req | Users: All | Client Type: All | Project Type: All | Location: All | Billin Project

Date	Client	Project Type	User	Activity	Description	Billable Time	Total Time	Bi ab Fla
IESO Rev Red	7							
04/24/2023	Power Advisory	T - Time & Materials	Sarah Simmons	Unassigned	internal kick off	0.50	0.50	Υ
05/08/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of IESO application	1.50	1.50	Υ
05/10/2023	Power Advisory	T - Time & Materials	Jason Chee-Aloy	Unassigned	Reviewed IESO 2023-2025 Revenue Requirement filing and proposed Issues List	4.00	4.00	Υ
05/11/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of IESO application	1.25	1.25	Υ
05/12/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Discussion with Jason, Sarah, Travis re: issues list, interrogatories	0.25	0.25	Υ
05/12/2023	Power Advisory	T - Time & Materials	Sarah Simmons	Unassigned	Internal call to discuss IRs; plus preparation	0.50	0.50	Υ
05/17/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Draft IR on forward capacity auction, including review of capacity auction stakeholder material	0.75	0.75	Y
05/23/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Preparation of second IRs - OM&A budget for procurements	1.00	1.00	Υ
05/25/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review and make Jason's edits to IRs, draft cover letter, prepare and submit to OEB and parties	0.75	0.75	Υ
06/22/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Check-in with Sarah re: IESO IRRs and next steps for settlement conference. Draft update email to Jason/clients re: next steps	0.50	0.50	Υ
06/23/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Draft memo to clients outlining IESO's responses to our IRs and setting	0.50	0.50	Y

					out proposed focus for settlement conference			
06/26/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Attendance at settlement conference - day 1	6.00	6.00	Y
06/26/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Post-meeting call with Jason re: client instruction/next steps	0.50	0.50	Y
06/27/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Attendance at settlement conference - day 2	4.00	4.00	Υ
06/28/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Attendance at settlement conference - day 3	3.25	3.25	Υ
06/28/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Settlement conference - day 3 - discussion with Sarah re: strategy	0.25	0.25	Υ
06/28/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Settlement conference - day 3 - correspondence with Jason re updates/instruction	0.25	0.25	Y
06/28/2023	Power Advisory	T - Time & Materials	Sarah Simmons	Unassigned	Debrief call with A. Lipsitz; plus preparation	0.50	0.50	Y
06/29/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Meeting with IESO to receive IESO's final counterproposal on 3 outstanding issues	0.25	0.25	Y
06/29/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Meeting with IESO to present 3 outstanding issues	0.25	0.25	Y
07/17/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of draft settlement agreement, other intervenors' edits thereto, and correspondence with Jason re: instruction/approval	0.50	0.50	Υ
07/20/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of revised settlement proposal (IESO's comments/changes and intervenors' further edits).	0.25	0.25	Υ
08/30/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review OEB's decision and order. Draft update note to clients summarizing order/settlement,	0.50	0.50	Υ

work done, and closing out file.		
Totals For IESO Rev Req	28.00	28.00
Grand Total	28.00	28.00

# Sarah Simmons

Director, Utilities and Innovation

### Power Advisory LLC

55 University Avenue Suite 700, P.O. Box 32 Toronto, ON M5J 2H7 Tel: (647) 525-9373

ssimmons@poweradvisoryllc.com



### **SUMMARY**

Sarah is an electricity sector professional with over 14 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.
- Provided strategic and analytical support to Toronto Hydro as it prepared its Climate Action Plan in compliance with the direction from the City of Toronto and supported initial program development related to solar, storage, and EV charging infrastructure.
- Supported the development of the IESO's DER potential study, which included contribution from EVs as DERs including overarching advisory support to the project throughout the development of the project's methodology, focusing on the unique aspects of Ontario's hybrid electricity market.
- Complete landscape review and strategy pertaining to the implications of the adoption of new technologies, particularly DERs and EVs for the Electrical Safety Authority, including advice with respect to implications on regulations, operations, finance and human resources, and completed strategic planning sessions to inform a final recommendation report to the board of directors.

• Completed a landscape review and considerations for strategic refresh for a large Ontario local distribution company, including advice with respect to role of utility and new business opportunities pertaining to renewables, DERs, EVs, corporate procurement and ESG.

### 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.

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



#### **Canadian Renewable Energy Association**

Vittoria Bellissimo 240 Bank Street Suite 400 Ottawa, Ontario K2P 1X4

# Invoice 2308053

Date	Aug 31, 2023
Terms	N/A
Service Thru	Aug 31, 2023

In Reference To: IESO 2023-2025 Revenue Requirement (Labor)

Representation of the Canadian Renewable Energy Association (CanREA), Energy Storage Canada (ESC) and Ontario Waterpower Association (OWA), collectively referred to as REASCWA, in the IESO's application before the Ontario Energy Board seeking approval for its proposed 2023-2025 expenditure and revenue requirement. (EB -2022-0318)

Date	Services		Amount
08/31/2023	Application complete		\$ 2,310.00
		Labor	\$ 2,310.00
		Labor HST 81338 8691 RT001	\$ 300.30
		Total Labor	\$ 2,610.30
		Total Invoice Amount	\$ 2,610.30
		Previous Balance	\$ 0.00
		Balance (Amount Due)	\$ 2,610.30

#### Notes:

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

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 2308054

Date	Aug 31, 2023
Terms	N/A
Service Thru	Aug 31, 2023

In Reference To: IESO 2023-2025 Revenue Requirement (Labor)

Representation of the Canadian Renewable Energy Association (CanREA), Energy Storage Canada (ESC) and Ontario Waterpower Association (OWA), collectively referred to as REASCWA, in the IESO's application before the Ontario Energy Board seeking approval for its proposed 2023-2025 expenditure and revenue requirement. (EB -2022-0318)

Date	Services		Amount
08/31/2023	Application complete		\$ 2,310.00
		Labor	\$ 2,310.00
		Labor HST 81338 8691 RT001	\$ 300.30
		Total Labor	\$ 2,610.30
		Total Invoice Amount	\$ 2,610.30
		Previous Balance	\$ 0.00
		Balance (Amount Due)	\$ 2,610.30

#### Notes:

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

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

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

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



#### **Ontario Waterpower Association**

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

# Invoice 2308055

Date	Aug 31, 2023
Terms	N/A
Service Thru	Aug 31, 2023

In Reference To: IESO 2023-2025 Revenue Requirement (Labor)

Representation of the Canadian Renewable Energy Association (CanREA), Energy Storage Canada (ESC) and Ontario Waterpower Association (OWA), collectively referred to as REASCWA, in the IESO's application before the Ontario Energy Board seeking approval for its proposed 2023-2025 expenditure and revenue requirement. (EB -2022-0318)

Date	Services		Amount
08/31/2023	Application complete		\$ 2,310.00
		Labor	\$ 2,310.00
		Labor HST 81338 8691 RT001	\$ 300.30
		Total Labor	\$ 2,610.30
		Total Invoice Amount	\$ 2,610.30
		Previous Balance	\$ 0.00
		Balance (Amount Due)	\$ 2,610.30

#### Notes:

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

# Jason Chee-Aloy

EB-2022-0318: Rates: Distribution: Independent **Electricity System Operator**  **COST CLAIM** EB-2022-0318:1: Avi Lipsitz

Lipsitz, Avi; +1 (416) 294-3117

**INTERVENOR NAME** 

alipsitz@poweradvisoryllc.co

**PARTICIPANT CLAIM STATUS** Submitted

**FILING PARTICIPANT** 

**NEW PARTICIPANT** Yes

**NON-FILING** 

PARTICIPANT F. NAME

Jason

**NON-FILING** 

PARTICIPANT L. NAME

Chee-Aloy

**SERVICE PROVIDER TYPE\*** 

Consultant

**CASE** 

YEAR CALLED TO BAR\*

**COMPLETED YEARS** PRACTICING/YEARS OF **RELEVANT EXPERIENCE\*** 

24

**HST RATE CHARGED\*** 

13.00

**CV STATUS (FOR CONSULTANT/ANALYST)** 

CV Attached

LAST CV DATE

September 05, 2023

**OVERRIDE HOURLY RATE** 

**HOURLY RATE** 

330

No

**HST NUMBER** 813388691RT0001 **HEARINGS** 

Yes

**CONSULTATIONS** 

No

330

330

330

330

**DISBURSEMENTS** 

No

13.00

13.00

13.00

13.00

#### **HEARINGS**

Hearings Subtotal (\$) **Hearings Hours Hearings Total Tax (\$)** Hearings Total (\$) 171.60 4.00 1,320.00 1,491.60 **HST** Name **Hourly** Sub Total <u>HST</u> Hours Rate Rate **REVIEW APPLICATION AND EVIDENCE** Review Application and Evidence 4.00 330 1.320.00 13.00 171.60 **DISCOVERY** Preparation of Interrogatories 330 13.00 **Review Interrogatory Responses** 330 13.00 13.00 **Technical Conference Preparation** 330 **Technical Conference Attendance** 330 13.00 Technical Conference Follow Up 330 13.00 **ISSUES LIST** 330 13.00 Preparation

at Hearing **SETTELEMENT CONFERENCE / ADR** 

Interrogatory Responses

INTERVENOR EVIDENCE Preparation

Attendance at Issues Conference

Preparation 330 13.00 330 13.00 Attendance

Preparation of Witness(es) for Attendance

Total

1.491.60

	<u>Name</u>	<u>Hours</u>	Hourly Rate	Sub Total	<u>HST</u> Rate	<u>HST</u>	<u>Total</u>
	Preparation of Settlement Proposal		330		13.00		
	Attendance at Presentation to Panel		330		13.00		
ORA	L <b>HEARING</b> Preparation		330		13.00		
	Attendance at Oral Hearing		330		13.00		
SUBI	MISSIONS Written Submissions		330		13.00		
	Oral Submissions		330		13.00		
	Attendance at Oral Submissions		330		13.00		
ОТН	ER ATTENDANCE Other Attendance		330		13.00		
COM	MUNICATION With Client		330		13.00		
	With Other Parties		330		13.00		
MOT	ONS Preparation of Motion(s) Materials		330		13.00		
	Prepare Submissions on the Motion(s)		330		13.00		
	Attendance at Hearing on Motion(s)		330		13.00		
CON	FIDENTIALITY Preparation of Application for Confidentiality Prepare Submissions on Confidentiality		330 330		13.00 13.00		
	Attendance at Hearing on Confidentiality		330		13.00		
DECI	•		330		13.00		
RATE	E ORDER Review		330		13.00		
	Prepare Submission on Rate Order		330		13.00		
TOTA	L SERVICE PROVIDER FEES  Total Service Provider Fees:	4.00		1,320.00		171.60	1,491.60

Attachments General Attachments

CV - Jason Chee-Aloy.pdf CV

REASCWA invoices.pdf Invoice

REASCWA - PA time log.pdf Time Docket

# Power Advisory LLC - Time Entry

Date Start: 1/1/2023 | Date End: 9/5/2023 | Clients: Power Advisory | Projects: IESO Rev Req | Users: All | Client Type: All | Project Type: All | Location: All | Billin Project

Date	Client	Project Type	User	Activity	Description	Billable Time	Total Time	Bi ab Fla
IESO Rev Red	7							
04/24/2023	Power Advisory	T - Time & Materials	Sarah Simmons	Unassigned	internal kick off	0.50	0.50	Υ
05/08/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of IESO application	1.50	1.50	Υ
05/10/2023	Power Advisory	T - Time & Materials	Jason Chee-Aloy	Unassigned	Reviewed IESO 2023-2025 Revenue Requirement filing and proposed Issues List	4.00	4.00	Υ
05/11/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of IESO application	1.25	1.25	Υ
05/12/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Discussion with Jason, Sarah, Travis re: issues list, interrogatories	0.25	0.25	Υ
05/12/2023	Power Advisory	T - Time & Materials	Sarah Simmons	Unassigned	Internal call to discuss IRs; plus preparation	0.50	0.50	Υ
05/17/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Draft IR on forward capacity auction, including review of capacity auction stakeholder material	0.75	0.75	Y
05/23/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Preparation of second IRs - OM&A budget for procurements	1.00	1.00	Υ
05/25/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review and make Jason's edits to IRs, draft cover letter, prepare and submit to OEB and parties	0.75	0.75	Υ
06/22/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Check-in with Sarah re: IESO IRRs and next steps for settlement conference. Draft update email to Jason/clients re: next steps	0.50	0.50	Υ
06/23/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Draft memo to clients outlining IESO's responses to our IRs and setting	0.50	0.50	Y

					out proposed focus for settlement conference			
06/26/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Attendance at settlement conference - day 1	6.00	6.00	Y
06/26/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Post-meeting call with Jason re: client instruction/next steps	0.50	0.50	Y
06/27/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Attendance at settlement conference - day 2	4.00	4.00	Υ
06/28/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Attendance at settlement conference - day 3	3.25	3.25	Υ
06/28/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Settlement conference - day 3 - discussion with Sarah re: strategy	0.25	0.25	Υ
06/28/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Settlement conference - day 3 - correspondence with Jason re updates/instruction	0.25	0.25	Y
06/28/2023	Power Advisory	T - Time & Materials	Sarah Simmons	Unassigned	Debrief call with A. Lipsitz; plus preparation	0.50	0.50	Y
06/29/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Meeting with IESO to receive IESO's final counterproposal on 3 outstanding issues	0.25	0.25	Y
06/29/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Meeting with IESO to present 3 outstanding issues	0.25	0.25	Y
07/17/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of draft settlement agreement, other intervenors' edits thereto, and correspondence with Jason re: instruction/approval	0.50	0.50	Υ
07/20/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review of revised settlement proposal (IESO's comments/changes and intervenors' further edits).	0.25	0.25	Υ
08/30/2023	Power Advisory	T - Time & Materials	Avi Lipsitz	Unassigned	Review OEB's decision and order. Draft update note to clients summarizing order/settlement,	0.50	0.50	Υ

	work done, and closing out file.		
	Totals For IESO Rev Req	28.00	28.00
 	Grand Total	28.00	28.00

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



#### **Canadian Renewable Energy Association**

Vittoria Bellissimo 240 Bank Street Suite 400 Ottawa, Ontario K2P 1X4

# Invoice 2308053

Date	Aug 31, 2023
Terms	N/A
Service Thru	Aug 31, 2023

In Reference To: IESO 2023-2025 Revenue Requirement (Labor)

Representation of the Canadian Renewable Energy Association (CanREA), Energy Storage Canada (ESC) and Ontario Waterpower Association (OWA), collectively referred to as REASCWA, in the IESO's application before the Ontario Energy Board seeking approval for its proposed 2023-2025 expenditure and revenue requirement. (EB -2022-0318)

Date	Services		Amount
08/31/2023	Application complete		\$ 2,310.00
		Labor	\$ 2,310.00
		Labor HST 81338 8691 RT001	\$ 300.30
		Total Labor	\$ 2,610.30
		Total Invoice Amount	\$ 2,610.30
		Previous Balance	\$ 0.00
		Balance (Amount Due)	\$ 2,610.30

#### Notes:

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

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 2308054

Date	Aug 31, 2023
Terms	N/A
Service Thru	Aug 31, 2023

In Reference To: IESO 2023-2025 Revenue Requirement (Labor)

Representation of the Canadian Renewable Energy Association (CanREA), Energy Storage Canada (ESC) and Ontario Waterpower Association (OWA), collectively referred to as REASCWA, in the IESO's application before the Ontario Energy Board seeking approval for its proposed 2023-2025 expenditure and revenue requirement. (EB -2022-0318)

Date	Services		Amount
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		Total Invoice Amount	\$ 2,610.30
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		Balance (Amount Due)	\$ 2,610.30

#### Notes:

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

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

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

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



#### **Ontario Waterpower Association**

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

# Invoice 2308055

Date	Aug 31, 2023
Terms	N/A
Service Thru	Aug 31, 2023

In Reference To: IESO 2023-2025 Revenue Requirement (Labor)

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#### Notes:

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**CONSULTATIONS** 

No

**DISBURSEMENTS** 

No

**CASE COST CLAIM INTERVENOR NAME PARTICIPANT** EB-2022-0318: Rates: EB-2022-0318:1: Avi Lipsitz, Avi; +1 (416) **CLAIM STATUS** Distribution: Independent Lipsitz 294-3117 Submitted alipsitz@poweradvisoryllc.co **Electricity System Operator NON-FILING NON-FILING** FILING PARTICIPANT NEW PARTICIPANT F. NAME PARTICIPANT L. NAME Lipsitz, Avi; +1 (416) 294-3117 **PARTICIPANT** alipsitz@poweradvisoryllc.com No **SERVICE PROVIDER TYPE\*** YEAR CALLED TO BAR\* **COMPLETED YEARS HOURLY RATE** Consultant PRACTICING/YEARS OF 230 **RELEVANT EXPERIENCE\*** 10 **HST RATE CHARGED\* CV STATUS (FOR** LAST CV DATE **OVERRIDE** 13.00 CONSULTANT/ANALYST) September 05, 2023 **HOURLY RATE** CV Attached No

**HEARINGS** 

Yes

# **HEARINGS**

**HST NUMBER** 

813388691RT0001

Hearings Hours 22.50	Hearings Subtotal (\$) 5,175.00		<b>Hearings Total</b> 672.78	Tax (\$)		ngs Total (\$) ,847.78
<u>Name</u>	<u>Hours</u>	Hourly Rate	Sub Total	HST Rate	<u>HST</u>	<u>Total</u>
REVIEW APPLICATION AND EVIDENCE Review Application and Evidence	- <del>-</del>	230	632.50	13.00	82.23	714.73
DISCOVERY Preparation of Interrogatories	2.75	230	632.50	13.00	82.23	714.73
Review Interrogatory Responses  Technical Conference Preparation		230 230	115.00	13.00 13.00	14.95	129.95
Technical Conference Attendance	ce	230		13.00		
Technical Conference Follow Up	)	230		13.00		
ISSUES LIST Preparation		230		13.00		
Attendance at Issues Conference	e	230		13.00		
INTERVENOR EVIDENCE Preparation		230		13.00		
Interrogatory Responses		230		13.00		
Preparation of Witness(es) for A at Hearing  SETTELEMENT CONFERENCE / ADR		230		13.00		
Preparation	1.00	230	230.00	13.00	29.90	259.90
Attendance	13.25	230	3,047.50	13.00	396.18	3,443.68

	<u>Name</u>	<u>Hours</u>	Hourly Rate	Sub Total	HST Rate	<u>HST</u>	<u>Total</u>
	Preparation of Settlement Proposal	0.75	230	172.50	13.00	22.43	194.93
	Attendance at Presentation to Panel	0.50	230	115.00	13.00	14.95	129.95
ORAI	L <b>HEARING</b> Preparation		230		13.00		
	Attendance at Oral Hearing		230		13.00		
SUBI	MISSIONS Written Submissions		230		13.00		
	Oral Submissions		230		13.00		
	Attendance at Oral Submissions		230		13.00		
OTHE	ER ATTENDANCE Other Attendance		230		13.00		
COM	MUNICATION With Client	0.75	230	172.50	13.00	22.43	194.93
	With Other Parties		230		13.00		
MOTI	ONS Preparation of Motion(s) Materials		230		13.00		
	Prepare Submissions on the Motion(s)		230		13.00		
	Attendance at Hearing on Motion(s)		230		13.00		
CONI	FIDENTIALITY Preparation of Application for Confidentiality		230		13.00		
	Prepare Submissions on Confidentiality		230		13.00		
	Attendance at Hearing on Confidentiality		230		13.00		
DECI	SION Review	0.25	230	57.50	13.00	7.48	64.98
RATE	E ORDER Review		230		13.00		
	Prepare Submission on Rate Order		230		13.00		
TOTA	L SERVICE PROVIDER FEES  Total Service Provider Fees:	22.50		5,175.00		672.78	5,847.78

Attachments General Attachments

Attachment CV - Avi Lipsitz.pdf **Document Type Import Message** 

CV

REASCWA invoices.pdf Invoice

REASCWA - PA time log.pdf Time Docket

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



#### **Canadian Renewable Energy Association**

Vittoria Bellissimo 240 Bank Street Suite 400 Ottawa, Ontario K2P 1X4

# Invoice 2308053

Date	Aug 31, 2023
Terms	N/A
Service Thru	Aug 31, 2023

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#### **Energy Storage Canada**

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

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#### **Ontario Waterpower Association**

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

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Service Thru	Aug 31, 2023

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