

EB-2022-0295 : 1 : Erika Lontoc

COST CLAIM NUMBER 1765	SUBMISSION DEADLINE DATE December 12, 2023	CLAIM STATUS Approved by Finance
EB# EB-2022-0295: Initiatives: Policy Dev, CDM: Ontario Energy Board	OTHER EB#S	PHASE #* 1
INTERVENOR Lontoc, Erika; +1 (416) 846-0004 elontoc01@gmail.com	INTERVENOR COMPANY* Erika Lontoc, Markham: Sole Proprietor	INTERVENOR TYPE Other
HST RATE ONTARIO 13.00	EXCHANGE RATE	COUNTRY Canada
HST NUMBER 78302 2213 RT0001	LATE SUBMISSION ALLOWED No	EXTENSION DEADLINE DATE

PARTICIPANTS

New	Non-Filing Participant First, Last Name	Filing Participant	Total (\$)	Total Hours	Participant Claim Status
Yes	ERIKA , LONTOC		18,178.88	48.75	Submitted

ATTACHMENTS

Attachment	Document Type	Import Message
EL EB-2022-0295 Cost Claim 121120231533.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES 16,087.50	TOTAL DISBURSEMENTS 0.00	TOTAL HST 2,091.38
TOTAL CLAIM 18,178.88	TOTAL AMOUNT AWARDED	
TOTAL HOURS CLAIMED 48.75	TOTAL HOURS DISALLOWED	
REASON FOR DISALLOWANCE	REASON FOR DISALLOWANCE - 2	REASON FOR DISALLOWANCE - 3
MAKE CHEQUE PAYABLE TO Erika Lontoc		
SEND PAYMENT TO ADDRESS 2-210 ADAM SELLERS ST Markham, ON L6B1P2		ATTENTION

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
ERIKA LONTOC

DATE SUBMITTED
December 11, 2023

ERIKA LONTOC

CASE EB-2022-0295: Initiatives: Policy Dev, CDM: Ontario Energy Board	COST CLAIM EB-2022-0295 : 1 : Erika Lontoc	INTERVENOR NAME Lontoc, Erika; +1 (416) 846-0004 elontoc01@gmail.com	PARTICIPANT CLAIM STATUS Submitted
FILING PARTICIPANT	NEW PARTICIPANT Yes	NON-FILING PARTICIPANT F. NAME ERIKA	NON-FILING PARTICIPANT L. NAME LONTOC
SERVICE PROVIDER TYPE* Consultant	YEAR CALLED TO BAR*	COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE* 24	HOURLY RATE 330
HST RATE CHARGED* 13.00	CV STATUS (FOR CONSULTANT/ANALYST) CV Attached	LAST CV DATE December 08, 2023	OVERRIDE HOURLY RATE No
HST NUMBER 78302 2213 RT0001	HEARINGS No	CONSULTATIONS Yes	DISBURSEMENTS No

CONSULTATION

Consultation		Consultations		Consultations		Consultations	
Hours		Subtotal (\$)		Total Tax (\$)		Total (\$)	
48.75		16,087.50		2,091.38		18,178.88	

Description	Maximum Hours	Hours	Hourly Rate	Sub Total	HST Rate	HST	Total
1 April 11/23 - SAG Meeting #1	5.00	5.00	330	1,650.00	13.00	214.50	1,864.50
2 April 26/23 - SAG Meeting #2	5.00	5.00	330	1,650.00	13.00	214.50	1,864.50
3 May 12/23 - SAG Meeting #3	3.75	3.50	330	1,155.00	13.00	150.15	1,305.15
4 May 19/23 - SAG Sub-Committee Meeting: Industrial Measure Characterization #1	1.50		330		13.00		
5 May 19/23 - SAG Sub-Committee Meeting: Residential Measure Characterization #1	2.25		330		13.00		
6 May 23/23 - Review and Comment: Residential Sub-Committee - Preliminary	1.00		330		13.00		
7 May 24/23 - SAG Meeting #4	4.13	4.00	330	1,320.00	13.00	171.60	1,491.60
8 May 26/23 - SAG Sub-Committee Meeting: Commercial Measure Characterization	1.50	1.50	330	495.00	13.00	64.35	559.35
9 May 26/23 - Review and Comment: Commercial Sub-Committee - Measure List	1.00	1.00	330	330.00	13.00	42.90	372.90
10 May 26/23 - Review and Comment: Industrial Sub-Committee - Measure List and Definitions (1st Round)	1.00		330		13.00		
11 June 2/23 - SAG Sub-Committee Meeting: Residential Measure Characterization #2	1.50		330		13.00		
12 June 2/23 - SAG Sub-Committee Meeting: Industrial Measure Characterization #2	1.50		330		13.00		
13 June 7/23 - Review and Comment: Residential Sub-Committee - Measure List and Definitions (1st Round)	1.00		330		13.00		
14 June 8/23 - SAG Meeting #5	3.75		330		13.00		
15 June 9/23 - SAG Sub-Committee Meeting: Commercial Measure Characterization #2	1.50		330		13.00		
16 June 13/23 - Review and Comment: Commercial Sub-Committee - Measure List and Definitions (2nd Round)	0.50		330		13.00		
17 June 13/23 - Review and Comment: Industrial Sub-Committee - Measure List and Definitions (2nd Round)	0.50		330		13.00		
18 June 16/23 - SAG Sub-Committee Meeting: Residential Measure Characterization #3	1.50		330		13.00		
19 June 16/23 - SAG Sub-Committee Meeting: Industrial Measure Characterization #3	1.50		330		13.00		
20 June 22/23 - SAG Meeting #6	3.75		330		13.00		
21 June 22/23 - Review and Comment: Commercial Sub-Committee - Measure List and Definitions (3rd Round)	0.50		330		13.00		
22 June 23/23 - SAG Sub-Committee Meeting: Commercial Measure Characterization #3	1.50		330		13.00		

	<u>Description</u>	<u>Maximum Hours</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
23	Jul 6/23 - Review and Comment: Residential Sub-Committee - Measure List and Definitions (2nd Round)	1.00		330		13.00		
24	Jul 6/23 - Review and Comment: Commercial Sub-Committee - Measure List and Definitions (4th Round)	0.50	0.50	330	165.00	13.00	21.45	186.45
25	Jul 7/23 - Review/Comment: Industrial Sub-Committee - Measure Savings and Costs Batch #1 (1st Round)	1.00		330		13.00		
26	Jul 14/23 - SAG Sub-Committee Meeting: Industrial Savings Example	0.50		330		13.00		
27	Jul 19/23 - Review and Comment: Industrial Sub-Committee - Measure Savings Example	0.50		330		13.00		
28	Jul 24/23 - Review/Comment: Residential Sub-Committee - Measure Savings & Costs Batch #1 (1st Round)	1.00		330		13.00		
29	Jul 26/23 - SAG Meeting #7	3.00	3.00	330	990.00	13.00	128.70	1,118.70
30	Aug 1/23 - Review/Comment: Residential Sub-Committee - Measure Savings & Costs Batch #2 (1st Round)	1.00		330		13.00		
31	Aug 2/23 - Review/Comment: Commercial Sub-Committee - Measure List & Definitions (5th Round)	1.00	1.00	330	330.00	13.00	42.90	372.90
32	Aug 14/23 - Review/Comment: Commercial Sub-Committee - Measure Savings & Costs Batch #1 (1st Round)	1.00	1.00	330	330.00	13.00	42.90	372.90
33	Aug 15/23 - Review and Comment: APS Incentive Approach	1.00	0.50	330	165.00	13.00	21.45	186.45
34	Aug 17/23 - SAG Meeting #8	3.75	3.50	330	1,155.00	13.00	150.15	1,305.15
35	Aug 23/23 - Review and Comment: APS Base Year Disaggregation & Reference Forecast	1.00	0.50	330	165.00	13.00	21.45	186.45
36	Aug 23/23: Review/Comment: Industrial Sub-Committee - Measure Savings & Costs Batch #1 (2nd Round)	0.50		330		13.00		
37	Aug 29/23: Review/Comment: Commercial Sub-Committee - Measure Savings and Costs Batch #1 (2nd Round)	1.00	1.00	330	330.00	13.00	42.90	372.90
38	Sept 5/23: Review and Comment: Industrial Sub-Committee - Measure Savings & Costs Batch #2	1.00		330		13.00		
39	Sept 9/23: Review and Comment: APS Avoided Costs	1.00	0.50	330	165.00	13.00	21.45	186.45
40	Sept 14/23: SAG Meeting #9	3.75	3.50	330	1,155.00	13.00	150.15	1,305.15
41	Sept 21/23: Review/Comment: Residential Sub-Committee - Measure Savings & Costs Batch #2 (2nd Round)	1.50		330		13.00		
42	Sept 28/23: SAG Meeting #10	3.75	3.50	330	1,155.00	13.00	150.15	1,305.15
43	Oct 12/23: SAG Meeting #11	1.50	1.50	330	495.00	13.00	64.35	559.35
44	Oct 18/23: Review and Comment: DSM Framework Considerations	1.50	1.50	330	495.00	13.00	64.35	559.35
45	Oct 23/23: Review/Comment:SAG Sub-Committee: Industrial:Savings,Applicability,Tech & Econ Potential	2.50		330		13.00		
46	Oct 25/23: SAG Sub-Committee Meeting: Measure Characterization Applicability Tutorial	2.25	2.25	330	742.50	13.00	96.53	839.03
47	Oct 26/23: SAG Meeting #12	3.75	3.50	330	1,155.00	13.00	150.15	1,305.15

	<u>Description</u>	<u>Maximum Hours</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
48	Oct 27/23: Review and Comment: DSM Framework Considerations	1.50	1.50	330	495.00	13.00	64.35	559.35
49	Appendix B: Jul 10/23: EAC Meeting #1	1.50		330		13.00		
50	Appendix B: Jun 12/23: Review and Comment - EGI Industrial Process Evaluation Report	1.50		330		13.00		
51	Appendix B: Jun 20/23: Review and Comment - 2022 Annual Verification Work Plan	1.00		330		13.00		
52	Appendix B: Aug 3/23: EAC Meeting #2	1.50		330		13.00		
53	Appendix B: Aug 4/23: Review and Comment - FR Scope of Work #1	2.00		330		13.00		
54	Appendix B: Aug 25/23: Review and Comment - 2023-2025 EMV Plan	2.00		330		13.00		
55	Appendix B: Sept 13/23: EAC Meeting #3	2.25		330		13.00		
56	Appendix B: Sept 22/23: EAC Meeting #4	3.00		330		13.00		
57	Appendix B: Sept 27/23: Review and Comment - TRM Workplan	1.00		330		13.00		
58	Appendix B: Sept 29/23: Review and Comment - CPSV Scope of Work	1.50		330		13.00		
59	Appendix B: Oct 11/23: Review and Comment - Interview Guides, FR Scope of Work #2	2.00		330		13.00		
60	Appendix B: Oct 13/23: Review and Comment - FR Sample Design, Advance Letter	1.00		330		13.00		
61	Appendix B: Oct 24/23: EAC Meeting #5	2.25		330		13.00		
Total Legal/Consultant Fees			48.75		16,087.50		.091.38	18,178.88

Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
EL Lontoc Invoice 20231212 with Time Docket.pdf	Time Docket and Invoice	
EL CV OEB Jan 2023.pdf	CV	

Attachments

General Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
Lontoc Invoice 20231212 with Time Docket.pdf	Time Docket and Invoice	
CV OEB Jan 2023.pdf	CV	

Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
EL Lontoc Invoice 20231212 with Time Docket.pdf	Time Docket and Invoice	Consultations	
EL CV OEB Jan 2023.pdf	CV	Consultations	

Erika Lontoc
210-2 Adam Sellers St.
Markham, ON L6B 1P2
Phone 416.846.0004
Email elontoc01@gmail.com / elontoc1@outlook.com

INVOICE NO. 20231212

DATE 12/08/2023

BILL TO

Ontario Energy Board
P.O.Box 2319, 27th Floor
2300 Yonge Street
Toronto, ON M4P 1E4

DESCRIPTION	AMOUNT
OEB EB-2022-0295 DSM SAG Consulting	
48.75 hours @ \$330.00/hour	\$16,087.50
Detailed timesheet attached	
HST #78302 2213 RT0001	\$2,091.38
TOTAL DUE	\$18,178.88

Please remit payment to:

Erika Lontoc
210-2 Adam Sellers St.
Markham, ON L6B 1P2
Canada

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 Markham, ON L6B 1P2
Phone 416.846.0004 **Email** elontoc01@gmail.com / elontoc1@outlook.com

INVOICE NO. 20231212

DATE 12/08/2023

OEB EB-2022-0295
 DSM Stakeholder Advisory Group
 March 1 – October 31, 2023

TIME DOCKET

<u>DATE</u>	<u>ACTIVITY</u>	<u>HOURS</u>
April 11, 2023	SAG Mtng #1 - attendance/mtng prep/review/comments	5
April 26, 2023	SAG Mtng #2 - attendance/mtng prep/review/comments	5
May 11, 2023	SAG Mtng #3 - attendance/mtng prep/review/comments	3.5
May 24, 2023	SAG Mtng #4 - attendance/mtng prep/review/comments	4
May 26, 2023	SAG Comml Sub-cmte - commercial measure characterization #1	1.5
May 26, 2023	SAG Comml Sub-cmte - review and comment: measures list and definitions #1	1
July 6, 2023	SAG Comml Sub-cmte - review and comment: measures list and definitions #4	0.5
July 26, 2023	SAG Mtng #7 - attendance/mtng prep/review/comments	3
August 2, 2023	SAG Comml Sub-cmte - review and comment: measures list and definitions #5	1
August 14, 2023	SAG Comml Sub-cmte - review and comment: measures list and costs	1
August 15, 2023	APS Incentive Approach - review and comment	0.5
August 17, 2023	SAG Mtng #8 - attendance/mtng prep/review/comments	3.5
August 23, 2023	APS Base Year Disaggregation, Reference Forecast - review and comment	0.5
August 29, 2023	SAG Comml Sub-cmte - review and comment: measures list and costs	1
September 9, 2023	APS Avoided Costs - review and comment	0.5
September 14, 2023	SAG Mtng #9 - attendance/mtng prep/review/comments	3.5
September 28, 2023	SAG Mtng #10 - attendance/mtng prep/review/comments	3.5
October 12, 2023	SAG Mtng #11 - attendance/mtng prep/review/comments	1.5
October 18, 2023	DSM Framework Considerations - review and comment	1.5
October 25, 2023	SAG Sub-cmte mtng - measure characterization applicability tutorial	2.25
October 26, 2023	SAG Mtng #12 - attendance/mtng prep/review/comments	3.5
October 27, 2023	DSM Framework Considerations - review and comment	<u>1.5</u>
TOTAL HOURS		<u>48.75</u>

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INVOICE NO. 20231212

DATE 12/08/2023

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Ontario Energy Board
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2300 Yonge Street
Toronto, ON M4P 1E4

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OEB EB-2022-0295 DSM SAG Consulting	
48.75 hours @ \$330.00/hour	\$16,087.50
Detailed timesheet attached	
HST #78302 2213 RT0001	\$2,091.38
TOTAL DUE	\$18,178.88

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INVOICE NO. 20231212

DATE 12/08/2023

OEB EB-2022-0295
 DSM Stakeholder Advisory Group
 March 1 – October 31, 2023

TIME DOCKET

<u>DATE</u>	<u>ACTIVITY</u>	<u>HOURS</u>
April 11, 2023	SAG Mtng #1 - attendance/mtng prep/review/comments	5
April 26, 2023	SAG Mtng #2 - attendance/mtng prep/review/comments	5
May 11, 2023	SAG Mtng #3 - attendance/mtng prep/review/comments	3.5
May 24, 2023	SAG Mtng #4 - attendance/mtng prep/review/comments	4
May 26, 2023	SAG Comml Sub-cmte - commercial measure characterization #1	1.5
May 26, 2023	SAG Comml Sub-cmte - review and comment: measures list and definitions #1	1
July 6, 2023	SAG Comml Sub-cmte - review and comment: measures list and definitions #4	0.5
July 26, 2023	SAG Mtng #7 - attendance/mtng prep/review/comments	3
August 2, 2023	SAG Comml Sub-cmte - review and comment: measures list and definitions #5	1
August 14, 2023	SAG Comml Sub-cmte - review and comment: measures list and costs	1
August 15, 2023	APS Incentive Approach - review and comment	0.5
August 17, 2023	SAG Mtng #8 - attendance/mtng prep/review/comments	3.5
August 23, 2023	APS Base Year Disaggregation, Reference Forecast - review and comment	0.5
August 29, 2023	SAG Comml Sub-cmte - review and comment: measures list and costs	1
September 9, 2023	APS Avoided Costs - review and comment	0.5
September 14, 2023	SAG Mtng #9 - attendance/mtng prep/review/comments	3.5
September 28, 2023	SAG Mtng #10 - attendance/mtng prep/review/comments	3.5
October 12, 2023	SAG Mtng #11 - attendance/mtng prep/review/comments	1.5
October 18, 2023	DSM Framework Considerations - review and comment	1.5
October 25, 2023	SAG Sub-cmte mtng - measure characterization applicability tutorial	2.25
October 26, 2023	SAG Mtng #12 - attendance/mtng prep/review/comments	3.5
October 27, 2023	DSM Framework Considerations - review and comment	<u>1.5</u>
TOTAL HOURS		<u>48.75</u>

Erika C. Lontoc

2-210 Adam Sellers St.

Markham, ON L6B 1P2

Mobile: 416-846-0004

Email: elontoc01@gmail.com

KEY QUALIFICATIONS

- Over twenty years of progressive business experience in the energy and equipment financing sectors, with extensive exposure in business development, marketing, and operational facets of the business. Past fifteen years in a leadership role in energy efficiency, with specific focus on market development of gas and electric energy efficiency programming.
- Demonstrated experience in building strong connections with diverse stakeholder groups and an understanding of stakeholder and business perspectives.
- Strategic thinker and outcome oriented individual.
- Strong work ethic and high regard for personal accountability.
- Collaborative negotiator.

PROFESSIONAL EXPERIENCE

August 2012 to May 2022

Enbridge Gas Distribution Inc., Toronto, ON

DSM Partnerships Specialist, May 2016 to May 2022

Manager, Residential and New Construction Programs, May 2014 to May 2016

Manager, Low Income and Commercial Programs, August 2012 to May 2014

Provides thought leadership in pursuit of strategic partnerships to further the design, development, implementation and management of energy efficiency programs. Ensures cost recovery, minimize performance risk, and (over) achievement of program allocated demand-side management (DSM) performance targets.

- Leads the Company's collaboration efforts focused on increasing the scale and deepening the scope of DSM and electricity conservation and demand management (CDM) programs via identification of strategic program partnership opportunities; opportunity development; management of external stakeholder relationships such as the Independent Electricity System Operator (IESO), electric utilities, Natural Resource Canada (NRCAN), municipalities and sector organizations; and oversight of the Company's DSM-CDM program collaboration portfolio.
- Represents the Company and actively participates in sustainability, energy efficiency and conservation working groups with the IESO, NRCAN and municipalities.
- Over the past five years, developed market and program strategies for various market sectors and targeted customer segments aimed at increasing energy efficiency program participation and optimal energy savings.
- Developed, successfully defended and achieved regulatory approval for the DSM 2016-2020 Low Income Program (retrofit and new construction) comprising 23%, or \$65 million over 5 years, of total DSM budget. The Program was acknowledged for innovation, responsiveness, sound management, and at par with best practices in the industry.
- Provided oversight for several vendor contracts to support the implementation of the energy programs under my responsibility.

February 2008 to August 2012

Manager, DSM Administration and Low Income Programs

Re-hired by Enbridge as *Manager, DSM Reporting and Analysis*, responsible for managing the financial, operational and performance reporting processes of the Company's Demand Side Management (DSM) portfolio. Key to the role was to ensure the integrity and reliability of program savings results for purposes of evaluation and audit for corporate and regulatory requirements. The audited savings results are the basis for the Company's DSM revenue claim.

In 2011, all DSM program support and operations and administration processes were centralized as part of the role. Additionally, with the delivery of programs as part of the 2012-2014 DSM Guidelines for Natural Gas Utilities, the development and management of low income programs were added to my portfolio of responsibilities.

- Exceeded DSM savings targets for all programs within the portfolio responsibility
- Successfully led the negotiations for the low income program targets and budgets under the 2012-2014 DSM Guidelines for Natural Gas Utilities, and part of the negotiating team for full DSM Plan.
- Provided leadership and oversight of DSM results and tracking from 2008 to 2011; successfully contributed to the achievement of >5% audit adjustment on DSM results thereby protecting budgeted DSM revenues.
- Introduced and implemented operational process changes to increase efficiencies and productivity in the department.

February 2006 to February 2008

Manager, Multifamily and Low Income Programs, Ontario Power Authority, Toronto, ON

Responsible for the program design and execution of provincial conservation initiatives in the multifamily and low income sectors. Managed acquisition of resources to implement cost-effective energy efficiency investments within the sector responsibility. Routinely involved in interactions, including status reports and presentations, with high-level members of various stakeholder organizations, and internal management. Led negotiations, management of contracts with third parties, government and public agencies, and contractors; and direction of personnel.

- Successfully launched three conservation programs (aggregate budget ~ C\$15 million) with varying program design elements and delivery framework. Provided program oversight to external program managers to ensure contract compliance, delivery of performance results against targets, and financial budgets.
- Conceptualized, developed and successfully launched the first federal-provincial energy efficiency program, Canada-Ontario Affordable Housing Program. The program required complex contract negotiations, development and execution between the Ontario Power Authority, the Ontario Ministry of Municipal Affairs and Housing, and Natural Resources Energy Efficiency Office.
- Developed the business case and successfully obtained executive approval for a three year \$47 million budget for an integrated and comprehensive provincial multifamily buildings program.
- Undertook the program lead role in developing a provincial low income energy program in coordination with local electric and natural gas utilities, various levels of government and low income stakeholders.
- Developed procurement requirements and acted as business lead in the development of legal contracts related to the implementation of the programs and initiatives.

August 1998 to February 2006

Program Manager, Mass Markets, Enbridge Gas Distribution Inc., Toronto, ON

Responsibilities included the development and implementation of load growth and demand side management programs to residential and small business customers. Utilized marketing, technical, operational and communication resources to ensure programs success. In close coordination with the DSM group, monitored performance and performed analysis of all programs within the area of responsibility, including program budgets, performance tracking, identification of variances and gaps, and preparation of all periodic reports as required. Developed project proposals, participated in cross functional project teams, and assured quality and timeliness of

deliverables. Developed and maintained strong relationships with stakeholders, clients and funders to support business development efforts. Participated as company representative in public forums including presentations and panels.

- Designed, developed and executed a third party utility financing program, leading to the successful migration of the utility's commercial lending function from a self-funded business to a third party funding model thereby shifting associated credit and portfolio administration risks from the company. Seconded to a related business affiliate to recreate the same business model within the affiliate's business structure, and provide start up expertise.
- Directed a project team of market development, research and operations representatives to develop a mass markets small commercial initiative and successful launch of the company's Small Commercial Program in 2002. As part of the business case development, provided the definition of "small commercial" customer based on in-depth analysis of targeted customer usage consumption and segmentation, issues, and needs; and provided a program framework for planning and sales and channel development activities. Developed the small commercial program portfolio including the Spray 'n Save and Tankless Water Heater programs. Proactively sought funding partnerships with water utilities and Natural Resources Canada to support these programs.
- Developed and launched the Company's first low income program. Participated in extensive stakeholder consultations with different levels of government, advocacy groups and intervenors. Established framework of cooperation and common ground with stakeholders thereby serving mutual interests and objectives.
- In 2004-2005, managed the portfolio of residential mass markets and small commercial energy efficiency programs and directed the activities of operations, sales and delivery and marketing communications to meet the budget objectives of these programs. Through vigilant program performance and task budget monitoring, targets and budgets were surpassed. Awarded as Energy Star Utility of the Year for a successful natural high efficiency furnace program.

1995-1998

Financial Analyst, Office of the Chief Financial Officer, P&C Bank, Canadian Imperial Bank of Commerce, Toronto, ON

- Acted as assistant controller for one of the largest project initiatives of CIBC's Personal and Commercial Bank.
- Analyzed, designed, and developed numerous database and spreadsheet based reporting tools, providing for timely delivery of information for executive management decision making.
- Consolidated division budgets and participated in financial performance planning and reviews including business case preparation and monitoring of same upon approval.
- Transferred from CIBC Wood Gundy from 1995-1996, provided pricing and transaction analysis and execution support to asset based financing transactions. Developed business term sheets as a basis for development of complex financing agreements, eg. aircraft financing with Air Canada and Bombardier.

1990-1995

Syndication Manager, Capital Markets, AT&T Capital Canada, Toronto, ON

- Analyzed corporate credits and developed financing structures for syndication to institutional investors and funders.
- Collaborated with various internal departments (sales, legal, credit, finance and treasury) and client counterparts and institutional funders as it relates to financing agreements, documentation and funding.
- Recognized for proficiency in lease pricing and structuring, and transaction execution lead for large ticket and key accounts transaction.
- Administered financial contracts with borrower customers and institutional investors.
- Represented the company on Revenue Canada and institutional customer/funder audits.

EDUCATION AND PROFESSIONAL AFFILIATIONS

- Programs and Grant Committee Member, The Atmospheric Fund, June 2017 - Present
- Algonquin College, Energy Programs Advisory Council, May 2021 - Present
- DSM Committee Member, Ontario Energy Association, January 2018 – May 2022
- Building Code Conservation and Advisory Council, Ontario Ministry of Municipal Affairs, May 2017 – November 2019
- Board of Directors, Association of Energy Services Professionals (North America), January 2015 – December 2021
- Member, DSM Working Committee, Natural Resources Canada, 2016 - 2017
- Founding President, Association of Energy Services Professionals, Ontario Chapter, 2010-2013
- Markham City Council Appointed Member, Markham Environmental Advisory Committee, 2008-2011
- Certificate in Advanced Strategic Leadership, School for Continuing Studies, University of Toronto
- Bachelor of Arts in Business Administration (Dean's List), Maryknoll College Foundation, Quezon City, Philippines

References to be provided upon request.

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KEY QUALIFICATIONS

- Over twenty years of progressive business experience in the energy and equipment financing sectors, with extensive exposure in business development, marketing, and operational facets of the business. Past fifteen years in a leadership role in energy efficiency, with specific focus on market development of gas and electric energy efficiency programming.
- Demonstrated experience in building strong connections with diverse stakeholder groups and an understanding of stakeholder and business perspectives.
- Strategic thinker and outcome oriented individual.
- Strong work ethic and high regard for personal accountability.
- Collaborative negotiator.

PROFESSIONAL EXPERIENCE

August 2012 to May 2022

Enbridge Gas Distribution Inc., Toronto, ON

DSM Partnerships Specialist, May 2016 to May 2022

Manager, Residential and New Construction Programs, May 2014 to May 2016

Manager, Low Income and Commercial Programs, August 2012 to May 2014

Provides thought leadership in pursuit of strategic partnerships to further the design, development, implementation and management of energy efficiency programs. Ensures cost recovery, minimize performance risk, and (over) achievement of program allocated demand-side management (DSM) performance targets.

- Leads the Company's collaboration efforts focused on increasing the scale and deepening the scope of DSM and electricity conservation and demand management (CDM) programs via identification of strategic program partnership opportunities; opportunity development; management of external stakeholder relationships such as the Independent Electricity System Operator (IESO), electric utilities, Natural Resource Canada (NRCan), municipalities and sector organizations; and oversight of the Company's DSM-CDM program collaboration portfolio.
- Represents the Company and actively participates in sustainability, energy efficiency and conservation working groups with the IESO, NRCan and municipalities.
- Over the past five years, developed market and program strategies for various market sectors and targeted customer segments aimed at increasing energy efficiency program participation and optimal energy savings.
- Developed, successfully defended and achieved regulatory approval for the DSM 2016-2020 Low Income Program (retrofit and new construction) comprising 23%, or \$65 million over 5 years, of total DSM budget. The Program was acknowledged for innovation, responsiveness, sound management, and at par with best practices in the industry.
- Provided oversight for several vendor contracts to support the implementation of the energy programs under my responsibility.

February 2008 to August 2012

Manager, DSM Administration and Low Income Programs

Re-hired by Enbridge as *Manager, DSM Reporting and Analysis*, responsible for managing the financial, operational and performance reporting processes of the Company's Demand Side Management (DSM) portfolio. Key to the role was to ensure the integrity and reliability of program savings results for purposes of evaluation and audit for corporate and regulatory requirements. The audited savings results are the basis for the Company's DSM revenue claim.

In 2011, all DSM program support and operations and administration processes were centralized as part of the role. Additionally, with the delivery of programs as part of the 2012-2014 DSM Guidelines for Natural Gas Utilities, the development and management of low income programs were added to my portfolio of responsibilities.

- Exceeded DSM savings targets for all programs within the portfolio responsibility
- Successfully led the negotiations for the low income program targets and budgets under the 2012-2014 DSM Guidelines for Natural Gas Utilities, and part of the negotiating team for full DSM Plan.
- Provided leadership and oversight of DSM results and tracking from 2008 to 2011; successfully contributed to the achievement of >5% audit adjustment on DSM results thereby protecting budgeted DSM revenues.
- Introduced and implemented operational process changes to increase efficiencies and productivity in the department.

February 2006 to February 2008

Manager, Multifamily and Low Income Programs, Ontario Power Authority, Toronto, ON

Responsible for the program design and execution of provincial conservation initiatives in the multifamily and low income sectors. Managed acquisition of resources to implement cost-effective energy efficiency investments within the sector responsibility. Routinely involved in interactions, including status reports and presentations, with high-level members of various stakeholder organizations, and internal management. Led negotiations, management of contracts with third parties, government and public agencies, and contractors; and direction of personnel.

- Successfully launched three conservation programs (aggregate budget ~ C\$15 million) with varying program design elements and delivery framework. Provided program oversight to external program managers to ensure contract compliance, delivery of performance results against targets, and financial budgets.
- Conceptualized, developed and successfully launched the first federal-provincial energy efficiency program, Canada-Ontario Affordable Housing Program. The program required complex contract negotiations, development and execution between the Ontario Power Authority, the Ontario Ministry of Municipal Affairs and Housing, and Natural Resources Energy Efficiency Office.
- Developed the business case and successfully obtained executive approval for a three year \$47 million budget for an integrated and comprehensive provincial multifamily buildings program.
- Undertook the program lead role in developing a provincial low income energy program in coordination with local electric and natural gas utilities, various levels of government and low income stakeholders.
- Developed procurement requirements and acted as business lead in the development of legal contracts related to the implementation of the programs and initiatives.

August 1998 to February 2006

Program Manager, Mass Markets, Enbridge Gas Distribution Inc., Toronto, ON

Responsibilities included the development and implementation of load growth and demand side management programs to residential and small business customers. Utilized marketing, technical, operational and communication resources to ensure programs success. In close coordination with the DSM group, monitored performance and performed analysis of all programs within the area of responsibility, including program budgets, performance tracking, identification of variances and gaps, and preparation of all periodic reports as required. Developed project proposals, participated in cross functional project teams, and assured quality and timeliness of

deliverables. Developed and maintained strong relationships with stakeholders, clients and funders to support business development efforts. Participated as company representative in public forums including presentations and panels.

- Designed, developed and executed a third party utility financing program, leading to the successful migration of the utility's commercial lending function from a self-funded business to a third party funding model thereby shifting associated credit and portfolio administration risks from the company. Seconded to a related business affiliate to recreate the same business model within the affiliate's business structure, and provide start up expertise.
- Directed a project team of market development, research and operations representatives to develop a mass markets small commercial initiative and successful launch of the company's Small Commercial Program in 2002. As part of the business case development, provided the definition of "small commercial" customer based on in-depth analysis of targeted customer usage consumption and segmentation, issues, and needs; and provided a program framework for planning and sales and channel development activities. Developed the small commercial program portfolio including the Spray 'n Save and Tankless Water Heater programs. Proactively sought funding partnerships with water utilities and Natural Resources Canada to support these programs.
- Developed and launched the Company's first low income program. Participated in extensive stakeholder consultations with different levels of government, advocacy groups and intervenors. Established framework of cooperation and common ground with stakeholders thereby serving mutual interests and objectives.
- In 2004-2005, managed the portfolio of residential mass markets and small commercial energy efficiency programs and directed the activities of operations, sales and delivery and marketing communications to meet the budget objectives of these programs. Through vigilant program performance and task budget monitoring, targets and budgets were surpassed. Awarded as Energy Star Utility of the Year for a successful natural high efficiency furnace program.

1995-1998

Financial Analyst, Office of the Chief Financial Officer, P&C Bank, Canadian Imperial Bank of Commerce, Toronto, ON

- Acted as assistant controller for one of the largest project initiatives of CIBC's Personal and Commercial Bank.
- Analyzed, designed, and developed numerous database and spreadsheet based reporting tools, providing for timely delivery of information for executive management decision making.
- Consolidated division budgets and participated in financial performance planning and reviews including business case preparation and monitoring of same upon approval.
- Transferred from CIBC Wood Gundy from 1995-1996, provided pricing and transaction analysis and execution support to asset based financing transactions. Developed business term sheets as a basis for development of complex financing agreements, eg. aircraft financing with Air Canada and Bombardier.

1990-1995

Syndication Manager, Capital Markets, AT&T Capital Canada, Toronto, ON

- Analyzed corporate credits and developed financing structures for syndication to institutional investors and funders.
- Collaborated with various internal departments (sales, legal, credit, finance and treasury) and client counterparts and institutional funders as it relates to financing agreements, documentation and funding.
- Recognized for proficiency in lease pricing and structuring, and transaction execution lead for large ticket and key accounts transaction.
- Administered financial contracts with borrower customers and institutional investors.
- Represented the company on Revenue Canada and institutional customer/funder audits.

EDUCATION AND PROFESSIONAL AFFILIATIONS

- Programs and Grant Committee Member, The Atmospheric Fund, June 2017 - Present
- Algonquin College, Energy Programs Advisory Council, May 2021 - Present
- DSM Committee Member, Ontario Energy Association, January 2018 – May 2022
- Building Code Conservation and Advisory Council, Ontario Ministry of Municipal Affairs, May 2017 – November 2019
- Board of Directors, Association of Energy Services Professionals (North America), January 2015 – December 2021
- Member, DSM Working Committee, Natural Resources Canada, 2016 - 2017
- Founding President, Association of Energy Services Professionals, Ontario Chapter, 2010-2013
- Markham City Council Appointed Member, Markham Environmental Advisory Committee, 2008-2011
- Certificate in Advanced Strategic Leadership, School for Continuing Studies, University of Toronto
- Bachelor of Arts in Business Administration (Dean's List), Maryknoll College Foundation, Quezon City, Philippines

References to be provided upon request.