

EB-2022-0295 : 2 : Erika Lontoc

COST CLAIM NUMBER
2220

SUBMISSION DEADLINE DATE
July 22, 2024

CLAIM STATUS
Approved by Finance

EB#
EB-2022-0295: Initiatives: Policy Dev, CDM:
Ontario Energy Board

OTHER EB#S

PHASE #*
2

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

			Total (\$)	Total Hours	Participant Claim Status
New	Non-Filing Participant First, Last Name	Filing Participant			
No	,	Lontoc, Erika; +1 (416) 846-0004 elontoc01@gmail.com	15,941.50	42.75	Submitted

ATTACHMENTS

Attachment	Document Type	Import Message
Invoice 20240722 Time Docket.docx	Time Docket and Invoice	
CV OEB Jan 2023.pdf	CV	
EL EB-2022-0295 Cost Claim 071420242042.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES	TOTAL DISBURSEMENTS	TOTAL HST
14,107.50	0.00	1,834.00
TOTAL CLAIM	TOTAL AMOUNT AWARDED	
15,941.50		
TOTAL HOURS CLAIMED	TOTAL HOURS DISALLOWED	
42.75		
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
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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 July 14, 2024
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CASE EB-2022-0295: Initiatives: Policy Dev, CDM: Ontario Energy Board	COST CLAIM EB-2022-0295 : 2 : Erika Lontoc	INTERVENOR NAME Lontoc, Erika; +1 (416) 846-0004 elontoc01@gmail.com	PARTICIPANT CLAIM STATUS Submitted
FILING PARTICIPANT Lontoc, Erika; +1 (416) 846-0004 elontoc01@gmail.com	NEW PARTICIPANT No	NON-FILING PARTICIPANT F. NAME	NON-FILING PARTICIPANT L. NAME
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 July 14, 2024	OVERRIDE HOURLY RATE No
HST NUMBER 78302 2213 RT0001	HEARINGS No	CONSULTATIONS Yes	DISBURSEMENTS No

Attachments**Attachment**

CV OEB Jan 2023.pdf
Invoice 20240722 Time Docket.docx

Document Type

CV
Time Docket and Invoice

Import Message

CONSULTATION

Consultations		Consultations		Consultations		Consultations	
Hours		Subtotal (\$)		Total Tax (\$)		Total (\$)	
42.75		14,107.50		1,834.00		15,941.50	

Description	Maximum Hours	Hours	Hourly Rate	Sub Total	HST Rate	HST	Total
1 SAG Meeting #13 - November 9, 2023	3.75	3.75	330	1,237.50	13.00	160.88	1,398.38
2 Meeting with OEB Staff and Guidehouse on Achievable Potential Study (APS) scenarios - Nov 13 2023	0.75		330		13.00		
3 APS Sub Committee Meeting OEB APS - Residential Measure Characterization Sub-Committee - Nov 16 2023	3.00		330		13.00		
4 APS Sub Committee Meeting: OEB APS - Industrial Measure Characterization Sub-Committee - Nov 16 2023	4.50		330		13.00		
5 APS Sub Committee Meeting OEB APS - Residential Measure Characterization Sub-Committee - Nov 17 2023	4.50		330		13.00		
6 APS Sub Committee Meeting: Commercial Measure Characterization Tutorial - November 17, 2023	0.75	0.75	330	247.50	13.00	32.18	279.68
7 Review and Comment: OEB APS - Incentive Application Memo - November 17, 2023	0.50	0.50	330	165.00	13.00	21.45	186.45
8 SAG Meeting #14 - November 28, 2023	2.25	2.25	330	742.50	13.00	96.53	839.03
9 Review and Comment: OEB APS Commercial Measure Characterization: Applicability Factors - Dec 1 2023	4.50	4.50	330	1,485.00	13.00	193.05	1,678.05
10 APS Sub Committee Meeting: Scenario Finalization - December 4, 2023	1.50		330		13.00		
11 Review and Comment: SAG call with Guidehouse on APS Technical/Economic potentials - Dec 5 2023	1.50		330		13.00		
12 SAG Meeting #15 - December 7, 2023	4.50	4.50	330	1,485.00	13.00	193.05	1,678.05
13 Touch Point Call: APS call with OEB Staff - December 14, 2023	0.75		330		13.00		
14 APS Sub Committee Meeting: Technical/Economic Potential Review Meeting #1 - December 19, 2023	4.00		330		13.00		
15 SAG Meeting #16 - December 21, 2023	5.25	5.25	330	1,732.50	13.00	225.23	1,957.73
16 Review/Comment Responding to Guidehouse heat pump characterizations & follow-up meeting -Dec 22 2023	0.75		330		13.00		
17 APS Sub Committee Meeting: Technical/Economic Potential Review Meeting #2 - January 12, 2024	6.00		330		13.00		
18 Review and Comment: OEB APS - Technical/Economic Potential Discussion Follow-Up - January 17, 2024	2.00		330		13.00		
19 SAG Meeting #17 - January 18, 2024	4.50	4.50	330	1,485.00	13.00	193.05	1,678.05

	<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>
20	Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 1 - Jan 19 2024	4.00		330		13.00		
21	Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 2 - Jan 23 2024	4.00		330		13.00		
22	Review and Comment: OEB APS - Draft Industrial Achievable Potential Results - January 24, 2024	6.00		330		13.00		
23	APS Sub Committee Meeting: Industrial Achievable Roll-Out - January 26, 2024	1.00		330		13.00		
24	Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 3 - Jan 28 2023	4.00		330		13.00		
25	SAG Meeting #18 - February 1, 2024	1.50	1.50	330	495.00	13.00	64.35	559.35
26	APS Sub Committee Meeting: Technical/Economic Potential Review Meeting #3 - February 7, 2024	4.00		330		13.00		
27	APS Sub Committee Meeting: Sensitivity Analysis Planning - February 7, 2024	1.50		330		13.00		
28	APS Sub Committee Meeting: Commercial Coefficient of Performance - February 9, 2024	1.50		330		13.00		
29	Touch Point Call with OEB Staff and Enbridge Gas, Inc. on sensitivity scenarios - February 9, 2024	0.75		330		13.00		
30	Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 4 - Feb 13 2024	3.00		330		13.00		
31	Review and Comment: APS - Technical Suitability of Commercial Heat Pumps - Feb 28 2024	3.00		330		13.00		
32	APS Sub-Committee Meeting: Residential Achievable Roll-Out - March 1, 2024	0.50		330		13.00		
33	Review and Comment: OEB APS - Sensitivity Analysis Proposal - March 4, 2024	0.50		330		13.00		
34	Meeting: On Sensitivity Scenarios - March 12, 2024	1.50		330		13.00		
35	SAG Meeting #19 - March 14, 2024	1.50	1.50	330	495.00	13.00	64.35	559.35
36	Review and Comment: APS Data Walkthrough - March 14, 2024	1.00	0.50	330	165.00	13.00	21.45	186.45
37	Review and Comment: OEB APS - First Draft Residential Achievable Results - March 14, 2024	6.00		330		13.00		
38	Review: OEB APS - Payback Acceptance Curves - March 18, 2024	0.50		330		13.00		
39	Meeting: Enbridge Gas, Inc Intervenor Session - March 26, 2024	3.00	3.00	330	990.00	13.00	128.70	1,118.70
40	SAG Meeting #20 - March 28, 2024	4.50	4.50	330	1,485.00	13.00	193.05	1,678.05
41	Review and Comment: OEB APS - Residential Achievable Comment Disposition - March 28, 2024	3.00		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>
42	Review and Comment: OEB APS - Draft Commercial Achievable Potential Results - March 28, 2024	6.00	1.00	330	330.00	13.00	42.90	372.90
43	Review and Comment: OEB APS - Commercial Achievable Potential Intro - April 5, 2024	1.00		330		13.00		
44	Review and Comment: OEB APS - Commercial Hybrid Air Sourced Heat Pumps - April 11, 2024	1.50		330		13.00		
45	Review/Comment: OEB APS - Second Draft Residential Achievable Results for Review - April 16, 2024	3.00		330		13.00		
46	SAG Meeting #21 - April 18, 2024	3.75	3.75	330	1,237.50	13.00	160.88	1,398.38
47	Review and Comment: OEB APS - Commercial Achievable Potential - April 18, 2024	4.00	1.00	330	330.00	13.00	42.90	372.90
48	EAC Meeting #7 - November 6, 2023	2.25		330		13.00		
49	EAC Meeting #8 - November 14, 2023	3.50		330		13.00		
50	Review and Comment: Custom Sample Design Memos - November 22, 2023	1.50		330		13.00		
51	Review and Comment: Draft Technical Resource Manual (TRM) measures 1st Round - November 30, 2023	1.00		330		13.00		
52	Review and Comment: Draft TRM measures, 1st Round continued - December 6, 2023	1.00		330		13.00		
53	EAC Meeting #9 - December 12, 2023	2.50		330		13.00		
54	Review and Comment: 2022 Annual Verification Draft Report - Portion 1 - December 18, 2023	2.00		330		13.00		
55	Review and Comment: Residential Adaptive Thermostat Process Evaluation proposal - December 21, 2023	2.00		330		13.00		
56	EAC Meeting #10 - January 16, 2024	2.50		330		13.00		
57	Review and Comment: eTools Adjustment Factor - Draft Memo - January 31, 2024	1.50		330		13.00		
58	Review and Comment: TRM Review 2nd Round - February 1, 2024	1.00		330		13.00		
59	Review/Comment: 2022 Annual Verification Draft Report - Complete Draft (Post eTools) - Feb 14 2024	1.00		330		13.00		
60	Review and Comment: Spillover Scope of Work Draft - February 14, 2024	4.00		330		13.00		
61	Review and Comment: EAC Delphi panel proposal - February 15, 2024	1.50		330		13.00		
62	EAC Meeting #11 - February 27, 2024	2.25		330		13.00		
63	Review and Comment: Process evaluation reports - March 6, 2024	12.00		330		13.00		
64	Review and Comment: Custom Sample Design Memos - March 8, 2024	2.50		330		13.00		
65	EAC Meeting #12 - March 19, 2024	1.00		330		13.00		
66	Review/Comment: Spillover examples, data request, meeting slides & sample design plans - Mar 20 2024	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>
67	Review/Comment: Custom project savings verification (CPSV) Batch 1 Site Report - Mar 12 2024	0.50		330		13.00		
68	EAC Meeting #13 - April 2, 2024	2.25		330		13.00		
69	Review and Comment: TRM Review 3rd Round - April 4, 2024	1.00		330		13.00		
70	Review and Comment: CPSV Batch 2 site reports - April 15, 2024	1.50		330		13.00		
71	EAC Meeting #14 - April 16, 2024	1.00		330		13.00		
72	EAC Meeting #15 - April 30, 2024	2.25		330		13.00		
Total Legal/Consultant Fees			42.75		14,107.50		,834.00	15,941.50

Attachments

Attachment

Document Type

Import Message

Invoice 20240722 Time Docket.docx

CV OEB Jan 2023.pdf

Hearings, Consultations, Disbursements Attachments

Attachment

Document Type

Claim Type

Import Message

Invoice 20240722 Time Docket.docx

Consultations

CV OEB Jan 2023.pdf

Consultations

CV OEB Jan 2023.pdf

CV

Hearings

Invoice 20240722 Time Docket.docx

Time Docket and Invoice

Hearings

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.

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

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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.