Appendix E   **LPDL Annual Shareholder Update - 202406**

1

Annual Shareholder Meeting

June 7, 2024

2023 CONSOLIDATED ANNUAL REVIEW
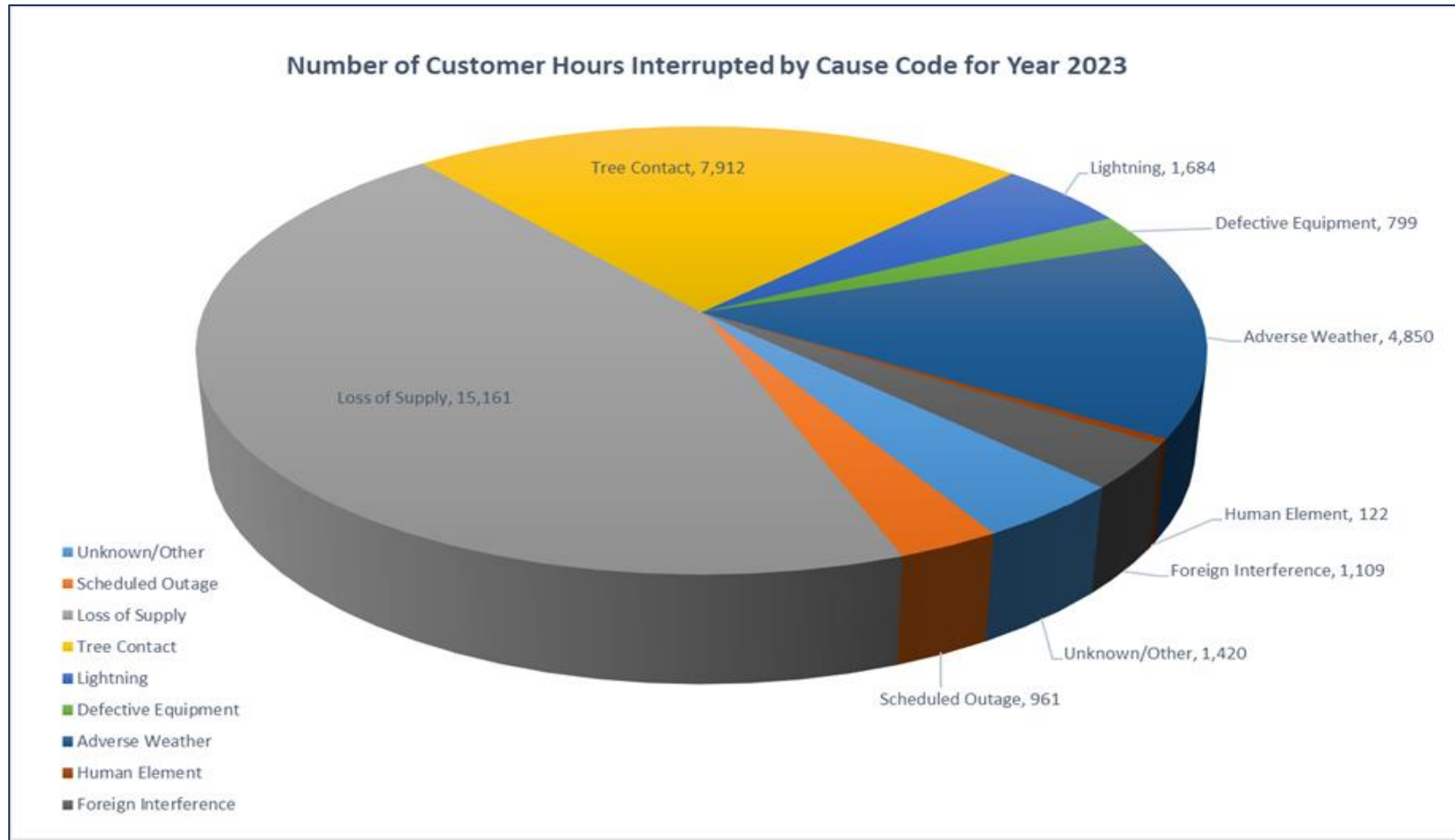
2023 SUBSIDIARY REVIEWS

Lakeland Power | 2023 Review

✓ 254 additional customers connected = 14,605 total

✓ Incentivized and gained 480 customers on Ebilling – lowers administrative costs

✓ Customers experienced improved average of 0.63 outages for 1 hour 11 minutes of outage time on Lakeland Power's system

✓ Tree trimming completed in Burk's Falls and Bracebridge – part of 6-year cycle

✓ TextPower & Chat introduced for improved customer service

✓ Customer Satisfaction Survey = 75% - understanding bill number one problem

✓ May disconnect moratorium ended = $650K accounts receivables collected

✓ 4 automated smart switches installed on distribution system

Lakeland Power | 2023 Review - Number of Customer Hours Interrupted by Cause Code 2023

Number of Customer Hours Interrupted by Cause Code for Year 2023

- Tree Contact, 7,912
- Lightning, 1,684
- Defective Equipment, 799
- Adverse Weather, 4,850
- Loss of Supply, 15,161
- Human Element, 122
- Foreign Interference, 1,109
- Unknown/Other, 1,420
- Scheduled Outage, 961

Legend:
- Unknown/Other
- Scheduled Outage
- Loss of Supply
- Tree Contact
- Lightning
- Defective Equipment
- Adverse Weather
- Human Element
- Foreign Interference

Balanced scorecard approach that is **SMART** (specific, measurable, achievable, relevant, and time bound) with additional KPI's.

Lakeland Mission Statement

LEVERAGING OUR TEAM, WE ARE DEDICATED TO GROWING RESPONSIBLY, SERVING OUR SHAREHOLDERS, CUSTOMERS AND COMMUNITIES WITH SAFE, RELIABLE, AND QUALITY SUSTAINABLE SOLUTIONS

Lakeland Power | Business Plan

- ▸ Improve reliability internally – capital, mtce, automation

- ▸ Top 10% of Province in lowest number of outages, duration, and controllable costs

- ▸ Improve communications for outage notifications and updates = TextPower

- ▸ Infrared study - proactive maintenance

- ▸ Safety Survey & Improve Customer Satisfaction Survey

- ▸ Install Smart Switches – faster restoration times

- ▸ Increase Ebilling

- ▸ Ontario Energy Board Cost of Service Application

CORPORATE GOVERNANCE REVIEW | Irene Zaguskin

KEY ACTIONS:

✓ Assessed Lakeland Board, Chair and Director performance

✓ Follow Good Governance Standards

✓ All Directors enrolled with Institute of Corporate Directors

✓ 2 Directors ICD certified and one obtaining certification

✓ 1 Director resigned and not replaced

BOARD OF DIRECTORS 2023/24 | Irene Zaguskin

<u>Lakeland Holding, Bracebridge Generation, Lakeland Energy/Networks</u>

Chair: Roger Alexander, Vice Chair: Sam Davidson

Directors: Eugene Roman, Mark Goldberg, Chris Litschko

<u>Lakeland Power</u>

Chair: Irene Zaguskin (Independent), Vice Chair: Phil Matthews (Independent) Directors: Cara Clairman (Independent), Mark Goldberg, Chris Litschko

Addendums

Board of Directors

Roger Alexander

Mr. Alexander was appointed to the Board of Parry Sound Hydro Corporation and subsidiaries in 2009 where he served as Chair. He joined Lakeland's board with the merger and Chaired the Human Resources Committee. He now serves as our Chair and also serves on other Boards including the West Parry Sound Health Centre. Mr. Alexander had a 22-year career with Siemens serving as division CEO/executive spanning a variety of industries such as energy, transportation, infrastructure, mining, medical and telecommunications. He was a member of the 6-member executive management group at Siemens Canada overseeing approximately $3B in revenue and 7000 employees. He was also CEO at Areva Canada with direct line responsibility for over 1,100 employees and sales revenue in excess of $500M including multiple manufacturing and mining sites across 14 locations in Canada. He holds an MBA from the Richard Ivey School of Business and is an Engineering Technologist (Ryerson). Mr. Alexander is also a graduate of the Director's Education Programme at the Institute of Corporate Directors where he maintains an ICD.D designation.

Phil Matthews

Mr. Matthews joined the Board in 2010 and is the immediate past Chair of the Board. He has a Master's degree in economics and is a CPA.CA. Mr. Matthews has over 50 years of business experience and retired from Ernst & Young in 2004, having served as a partner for 24 years. During his career, he dealt with a range of industries and businesses, from entrepreneurial startups to multinational public companies, providing a wide variety of services. Mr. Matthews served on the MAHC Board for 10 years and is a past Chair of MAHC.

Mark Goldberg

Mr. Goldberg was appointed to the Board in 2016 and Chairs the Environmental Health and Safety Committee. For 40 years, Mr. Goldberg has worked in telecommunications, building national networks and leading the development of competition in the industry, having held leadership roles at Bell Canada, AT&T Bell Labs, CNCP/Unitel and Sprint Canada, managing networks with annual capital budgets in the order of $1B. For more than 25 years, he has owned a consulting firm (Mark H Goldberg & Associates Inc.) and founded The Canadian Telecom Summit. He has a B.Sc. from Western and M.Sc. from Carleton in Mathematical Statistics.

lakeland

Board of Directors | cont'd

Sam Davidson

Mr. Davidson was appointed to the Board in 2015 and currently serves as Vice Chair and Chairs the Finance and Mergers & Acquisitions Committees. He is a CPA, CA and has a B. Comm and BA in economics. Mr. Davidson is a senior finance executive with 30+ years of experience having held roles in finance, operations and project management and has extensive experience in mergers and acquisitions. He has worked in the transportation, construction and building materials and real estate development industries for high growth companies ranging in size from $20 million to $1.3 billion. Mr. Davidson currently works as an independent finance consultant to a private equity company and advises on investments and development opportunities in its infrastructure and real estate investment arm.

Cara Clairman

Ms. Clairman was appointed to the Board in 2023 and Chairs the People & Culture Committee. She is President and CEO of Plug'n Drive, a non-profit that is accelerating the deployment of electric vehicles (EVs) to maximize their environmental and economic benefits. Ms. Clairman has taken Plug'n Drive from an idea to a thriving non-profit, recognized as a leader in the EV space. Focused on accelerating EV adoption through outreach and education for over 10 years, Plug'n Drive has developed a number of award-winning programs to encourage consumers and fleets to make the switch from gas to electric, including the EV Discovery Centre and the Mobile EV Education Trailer (MEET). Ms. Clairman has more than 25 years of experience working in the environmental and sustainability fields, including 12 years working at Ontario Power Generation, initially as OPG's environmental lawyer and later in the role Vice President of Sustainable Development. Prior to joining OPG, Ms. Clairman spent five years practicing environmental law with the Torys law firm. She holds a Bachelor of Laws from Osgoode Hall and a Masters in Environmental Studies from York University, as well as an Honours Bachelor of Science degree from Queen's University. She is the 2017 recipient of the Women in Renewable Energy 'Woman of the Year' award and the 2021 winner of the Al Cormier EV leadership award from Electric Mobility Canada. Ms. Clairman lives in a two EV household, including a Chevy Bolt and a Tesla Model 3.

Board of Directors | cont'd

Irene Zaguskin

Ms. Zaguskin, was appointed to the Board in 2019 and currently Chairs Lakeland Power. She has previously chaired the Human Resources & Nominating Committee for Lakeland Power. Ms. Zaguskin also serves on the board of PropTx Innovations Inc and is the Chief Information Officer for PwC Canada, an industry focused professional services organization. Ms. Zaguskin has experience in numerous industries including Retail, Telecom, Manufacturing, Professional services, Energy and Utility Sectors. She specializes in delivery of large-scale organization and digital transformations. Throughout her career, Ms. Zaguskin guided transformation initiatives at organizations such as Rogers, Loblaws and Canadian Tire, Enercare and TPH, harnessing digital technology to improve the experiences of millions of Canadian customers. She has also played a key role in M&As for these organizations, thereby enabling expedited growth and expansion across North America. Ms. Zaguskin holds an MBA, Computer Science and Economics undergraduate degrees, an MIT certificate in Management, and Chief Information Security Officer Certification. She is also a graduate of the Director's Education Program at the Institute of Corporate Directors, where she maintains the ICD.D designation.

Eugene Roman

Mr. Roman has served as a non-employee director of our Board since September 2022. He is currently the Principal at Design.ai Ltd, a consultancy formed in 2019 that is focused on applying design intelligence to business opportunities. He serves as Executive in Residence for AI and Applied Analytics at the Schulich School of Business in Toronto, where he conducts research on emerging areas of AI and is a mentor to students. From 2012 to 2018, Mr. Roman held the position of Executive Vice President, Digital Excellence and Technology Advisor for Canadian Tire Corporation. Mr. Roman started his career in telecommunications with Nortel Networks Corporation, Bell Canada Enterprises Inc., and OpenText Corporation, serving in senior technology and business roles in Canada, the U.S. and the U.K. Mr. Roman has extensive board experience with EPAM Ltd. and Community Trust Co Ltd. and has also been a member of the Board of Governors of York University since July 2017. Mr. Roman holds a master's degree in business administration and a bachelor's degree in economics and geography from the University of Toronto. He is a Certified Professional Accountant and a graduate of the Institute of Corporate Directors program.

Executive Team

Chris Litschko, Chief Executive Officer

Chris Litschko has a foundational role as the CEO and Board Director of Lakeland Holding and its subsidiaries, he has orchestrated notable improvements across various facets of the company. Under his leadership, expansion, strategic acquisitions, and automation have not only bolstered operational efficiency but also significantly enhanced health and safety standards, customer service quality, profitability, and shareholders' dividends. Annual revenues have grown to $74 million with total assets amounting to $168 million. His extensive management and executive experience traversing different regions of Ontario reflect a breadth of knowledge and adaptability. Furthermore, his team's accolades, spanning from environmental stewardship to energy innovation, underscore their commitment to excellence. Beyond his professional endeavors, Chris's involvement in diverse boards, committees, and his appointment to the Ontario Trillium Foundation's Grant Review Team illustrate a deep-rooted dedication to community service and philanthropy. His educational background, complemented by executive development programs, showcases a commitment to continuous learning and growth. Chris's support for a wide array of causes, including children's welfare, health initiatives, environmental conservation, anti-bullying efforts, women's safety, cancer research, and animal rehabilitation, exemplifies his compassionate nature and desire to make a positive impact beyond the corporate realm.

Vince Kulchycki, Chief Operating Officer

Vince Kulchycki, a native of Grimsby Ontario, graduated from Mohawk College with his certification from OACETT. His career began with electrical and PLC automation at Dofasco and quickly shifted gears to geographical information systems and distribution systems analysis with Milton Hydro. During this time, he was also running his own company, which he sold after 13 years. Vince moved on to Oakville Hydro where he was part of the team for meter shop accreditation with Measurement Canada. He joined Grimsby Hydro as an Engineering Technician responsible for all distribution system and consumer designs, GIS and designed and installed the first SCADA system in Grimsby. Mr. Kulchycki also facilitated Grimsby Power's affiliate companies design and implementation of its fibre optic network. Through his ambition for finding a growing, entrepreneurial organization, Vince made his way to Bracebridge in 2001 accepting the position of Manager of Operations for Lakeland. In 2006 he was promoted to Director of Operations & Generation and in the two years that followed became Chief Operating Officer for Lakeland Holding.   Team accomplishments include expanding the generation capacity 700%, creation of a fibre optic and communications company and power distribution system automation. Mr. Kulchycki has participated on various working groups with the Electricity Distributors Association, advisory groups for Hydro One and currently sits on the Board of Directors for the Ontario Waterpower Association.

Executive Team | cont'd

Darren Bechtel, Chief Financial Officer

Darren Bechtel was promoted to Chief Financial Officer on January 16, 2023. He was born and raised in Huntsville, received his Accounting degree from Wilfrid Laurier University and his MBA from Brock University with a specialty in Finance. Darren is a Chartered Professional Accountant and continues to be a mentor for upcoming CPA Ontario students. Prior to joining Lakeland in 2012, Darren was part of the audit department at BDO in Barrie where he worked with a diverse range of clients across Central Ontario. During his 10+ years at Lakeland, Darren has played an integral role assisting Lakeland with project expansions, regulatory reporting, financial restructuring and IFRS conversion. Darren continues to participate in several industry working groups including USF, CHEC and IVS.

Taylor Servos, People & Culture Officer

Taylor Servos received her Bachelor of Social Sciences from the University of Ottawa and her Post-Graduate Certificate of Human Resources Management from Fleming College. Taylor's Human Resources career began in Ottawa with lululemon where she was a part of the leadership team and became invested in people development, health & safety, goal setting, recruitment, succession planning, and building great culture. Taylor then became a Technical Recruitment Coordinator with Export Development Canada where she provided HR support for the Business Technology Solutions Team. She specialized in recruiting senior consultants for transformational finance and technology projects within the organization and was the chair of several Work Force Planning Teams to ensure employees were properly allocated and business needs were being met. Taylor relocated to Huntsville and joined Lakeland in 2019 and is an active member of the Human Resources Professionals Association and several HR committees. Taylor spends her down time with her husband who is a local carpenter, her dogs & her horse.

Appendix F   **OEB Appendix 2-AC Customer Engagement**

1

Appendix 2-AC
Ongoing Customer Engagement Activities Summary

Provide a list of customer engagement activities	Provide a list of customer needs and preferences identified through each engagement activity	Actions taken to respond to identified needs and preferences. If no action was taken, explain why.
ESA Public Safety Awareness Survey	LPDL safety awareness index good at 84%	- Surveys reviewed to identify safety knowledge gaps - Continue with current education - Continue to add/improve safety page on website, messaging on various media - Visit local schools for safety talks
Customer Satisfaction Survey	Identified key preferences of bill reduction, improved reliability (infrastructure upgrades, tree trimming), Improved outage communication	- Surveys reviewed to understand customers' priorities of cost, reliability, and outage communication. - Promoted assistance programs (LEAP/OESP/CEAP), local District office for other funding options and community supports - Promoted online portal for usage review to improve load shifting and choosing best rate plan - Improve website for accessibility standards - Promoted fraud protection re: hydro scams - Conversion work = line-losses reduction-> lower bills - Conversion work = reduced kW charges on monthly HONI bills -> lower costs - Investments in enhanced outage communication
Customer Care	Identified - need for more information/support on high bill inquiries, usage/load shifting education, rates, understanding the bill, outage information	- Assessed our website, improved navigation, self-serve options, forms, rates, and billing content, added more safety awareness content - Monthly education theme, consistent messaging across comms channels - Invested in 24/7 outage management solution - New customer portal
Education	Customer responses to bill messaging, bill inserts, social media	- Update website to communicate more details from education campaigns; industry messaging on programs (OESP, LEAP), rate changes, conservation, electrical safety. - Add to bill insert messaging.
Community Involvement through sponsorship	- Customers respond positively to LPDL support in the community - Small communities like local connections	- Pay it Forward campaign - Continue local sports sponsorships, supporting co-op/summer students - School visits - Look for engagement opportunities in the community
Bill Inserts	- Inquiries on Ebill, EPP, and OESP content	- Created online EPP form - Increased E-bill/OESP content in bill msg and social media

Application Specific Customer Engagement Activities Summary

Provide a list of customer engagement activities	Provide a list of customer needs and preferences identified through each engagement activity	Actions taken to respond to identified needs and preferences. If no action was taken, explain why.
DSP engagement survey	Key areas identified: - Affordable cost of electricity - Maintaining and upgrading equipment to ensure a safe and reliable electricity supply - Storm hardening (physical infrastructure improvements increasing resistance to weather) - New technology to support renewable energy generation, electric vehicles, etc. - Improved outage communication (outage map, social media, etc.)	Affordable cost of electricity: - Continued education on bill reduction through gov't & local programs, usage management, website education content - Capital work, conversions/upgrades - Tree trimming - Investment in outage communication solution - Asset Condition Assessment (ACA) – identify at-risk assets - Conversions – increased affordability through reduced line loss Maintaining and upgrading: - Conversions/capacity upgrades – to meet growth capacity & stay reliable - Asset replacement – use ACA to prioritize at-risk infrastructure - SCADA improvements – increases visibility, reduces response times/outage duration, Storm Hardening: - Infrared scanning of switches & connections, porcelain switch replacement to reduces fires & increase reliability New technology: - SCADA improvements – increases flexibility to add renewable generation, facilitates comms with Hydro One Improved outage communication: - Investment in 24/7 outage management solution

Appendix G	**Customer Satisfaction Surveys 2019, 2021, 2023**

1

ADVANIS for **LakelandPower**

2023 Customer Satisfaction Survey

March 2023

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Deliverables

Advanis is pleased to provide **this report with results of the 2023 Customer Satisfaction study**.

- We include comparisons to previous years of the study, where applicable.

In addition to this report, you have access to **Advanis' Online Reporting Environment** (ORE) which allows you to:

- create charts and tables like those contained in this report
  - you will be able to do much more analysis than we had space for in this overall report (e.g., look at results comparing segments of the annual consumption index or the regions within your LDC, if applicable)
- review the verbatim responses to:
  - the open-ended question "Is there anything you would like your LDC to do to improve its services to you?".
  - Note that you can export the verbatim responses to Excel at the click of a button; and
  - search for key words or filter the results by different segments (e.g., customer type, region) or other questions in the survey.

To access the ORE, visit this link: portal.advanis.net and enter your username in the format firstname_lastname. If you've forgotten your password, there is a link to reset it on the login page. If you have any questions, please contact Gary.Offenberger@advanis.net.
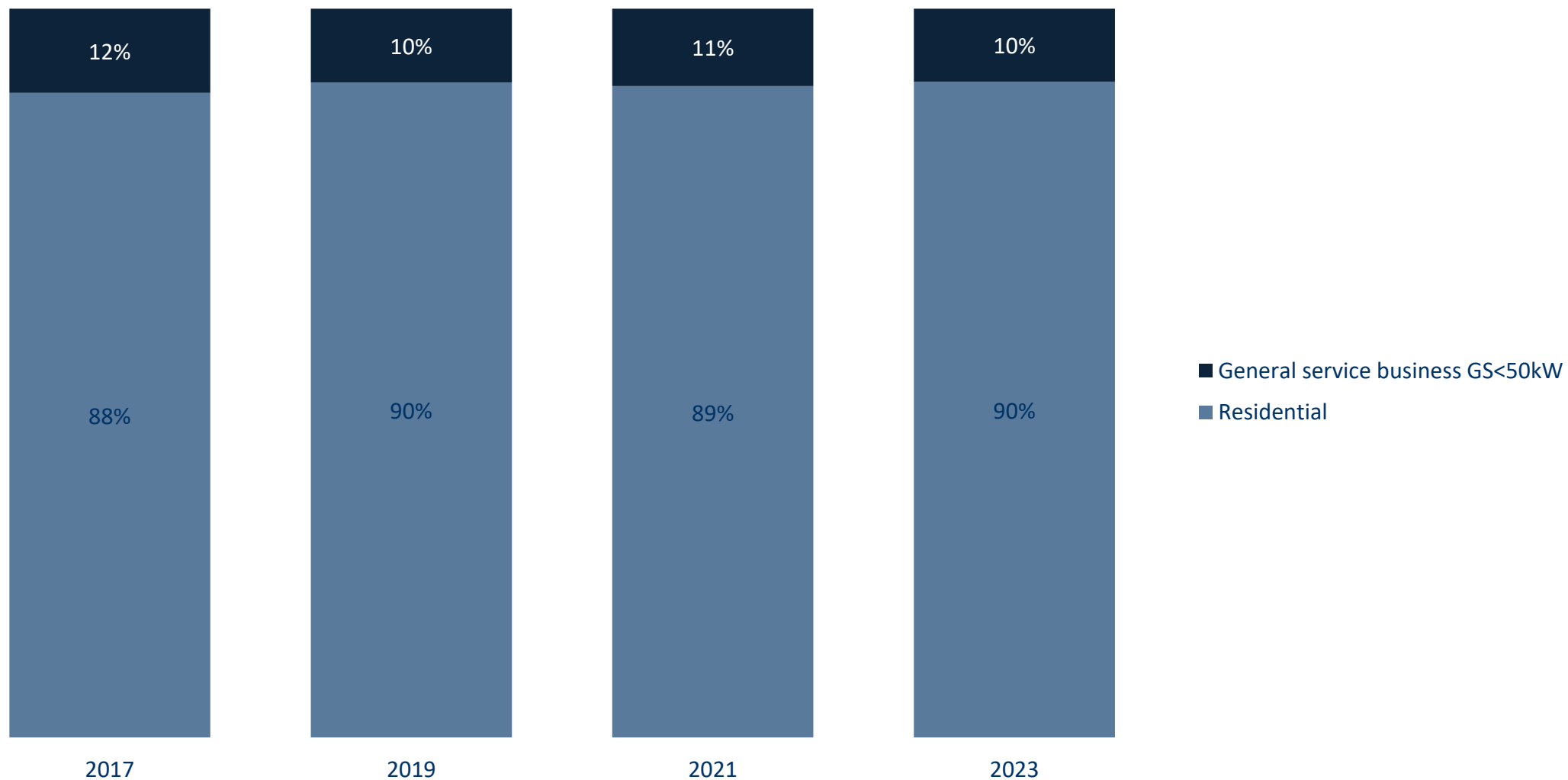
Contents

Lead Consultant: Gary.Offenberger@advanis.net // 780.229.1140

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Customer (i.e., Survey Respondent) Profile

Customer Type - information provided by Lakeland Power

General service business GS<50kW
Residential

	2017	2019	2021	2023
General service business GS<50kW	12%	10%	11%	10%
Residential	88%	90%	89%	90%

Weight: Aggregate weight for LDC based on customer_type
Filters: LDC: Lakeland Power

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Region - information provided by Lakeland Power
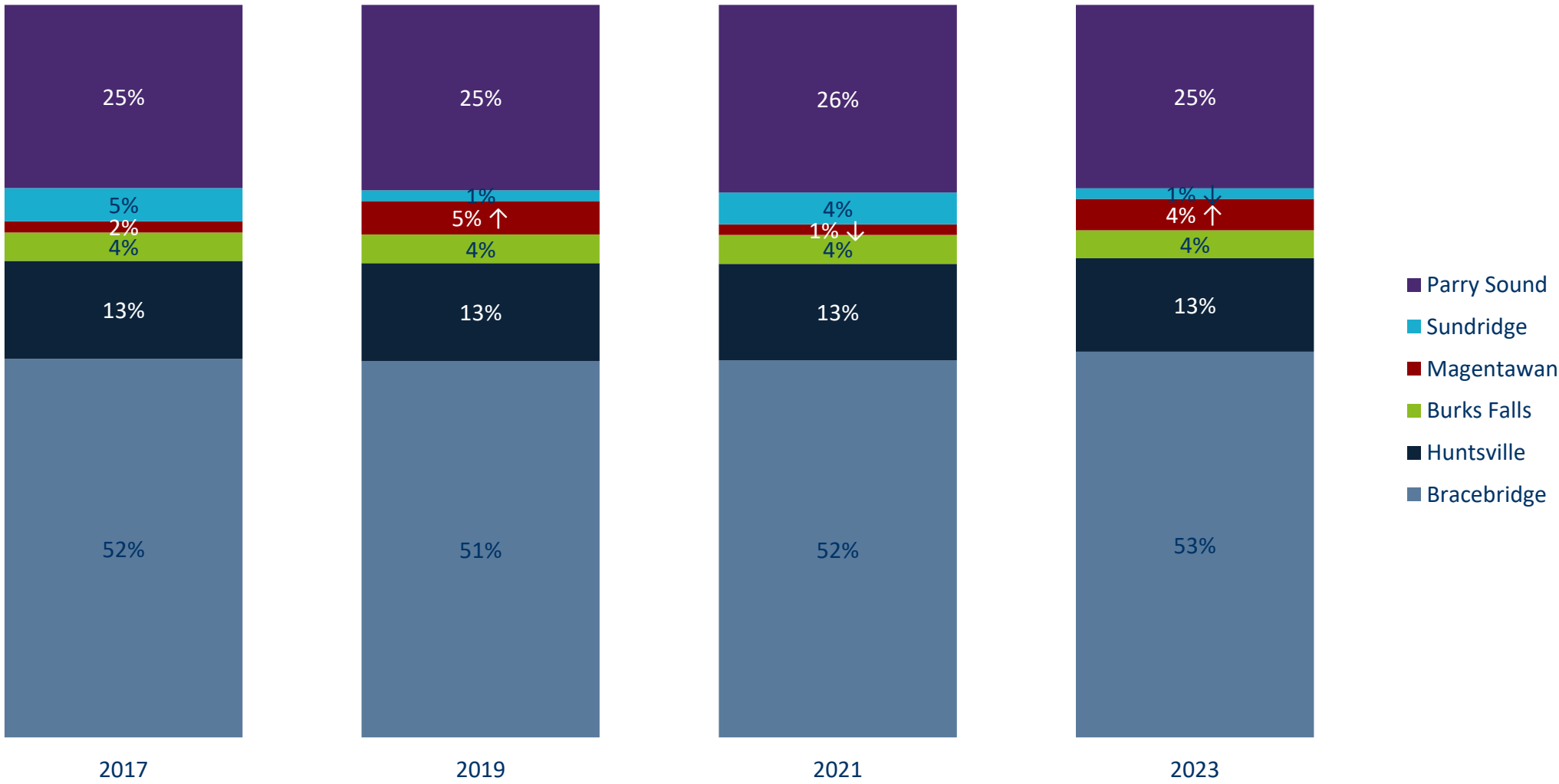
Weight: Aggregate weight for LDC based on customer_type
Filters: LDC: Lakeland Power

Indexed score of annual consumption (Only have GS data for 2023 onwards) - information provided by Lakeland Power

2017
- 38%
- 28%
- 34%

2019
- 44%
- 25%
- 31%

2021
- 32% ↓
- 28%
- 40% ↑

2023
- 33%
- 35% ↑
- 31% ↓

Legend:
- ■ High consumption
- ■ Medium consumption
- ■ Low consumption

Weight: Aggregate weight for LDC based on customer_type
Filters: LDC: Lakeland Power

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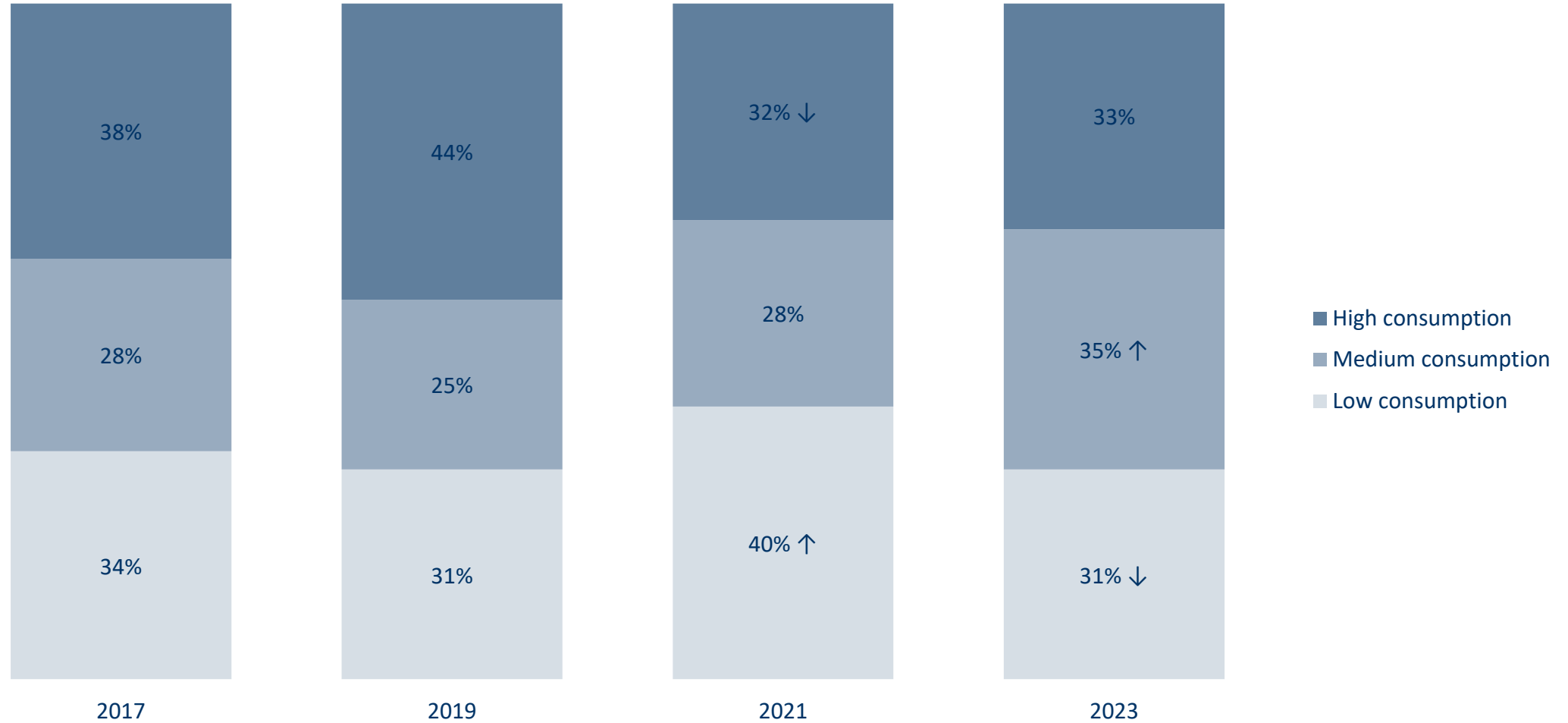
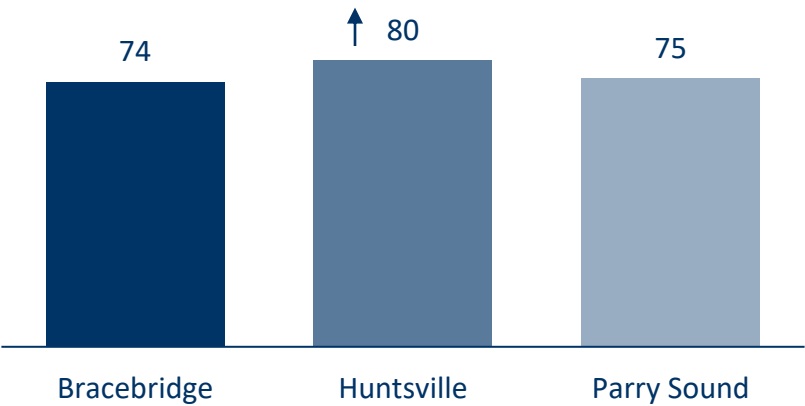# Customer Satisfaction Index Score –
2023 Results & Trend

Customer Satisfaction Index: Lakeland Power for 2023

CSI Score – Total and by Customer Type
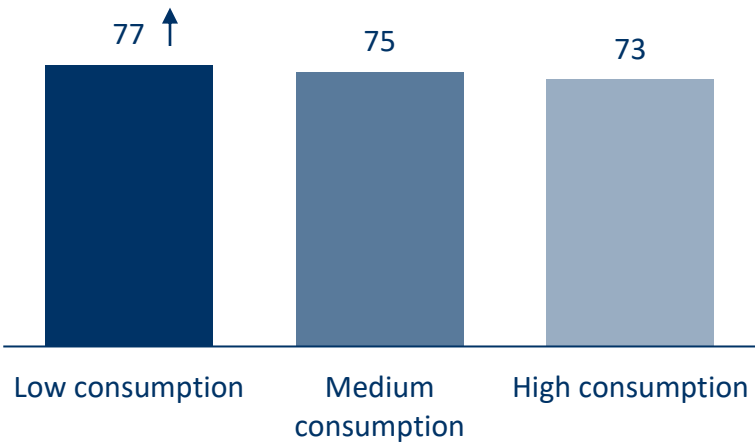
Total	75
Residential	75
General service business GS<50kW	74
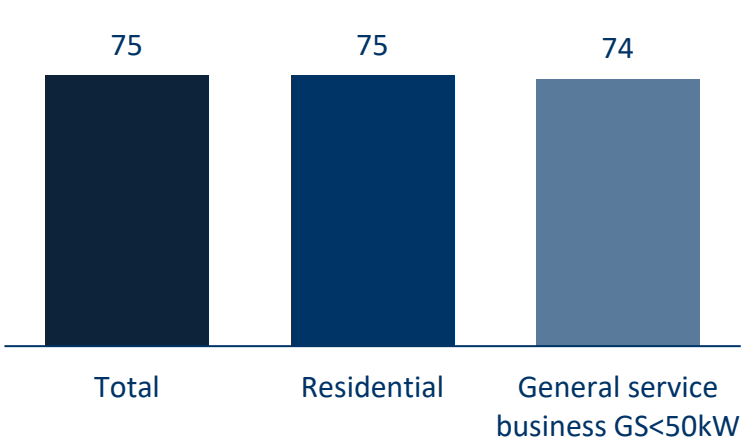
CSI Score by Region
(only regions with ~40 or more completed surveys)

Bracebridge	74
Huntsville	↑ 80
Parry Sound	75

CSI Score by Annual Consumption Index

Low consumption	77 ↑
Medium consumption	75
High consumption	73

CSI Score for each segment of agreement with:
"Customers are well served by the electricity system in Ontario"

Strongly Agree	83 ↑↑↑
Somewhat Agree	74 ↑↑
Somewhat Disagree	68
Strongly Disagree	63
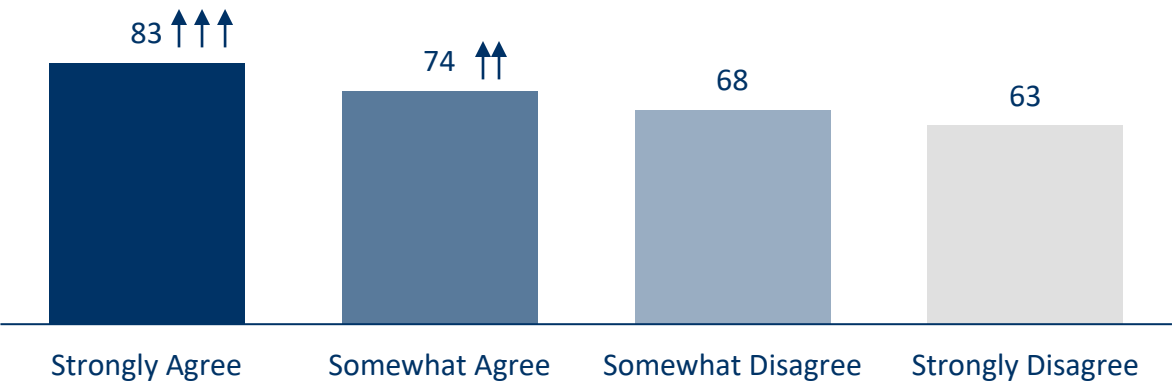
CSI Score for each segment of agreement with:
"The cost of my electricity bill has a major impact [on my personal finances] / [the bottom line of my organization]"
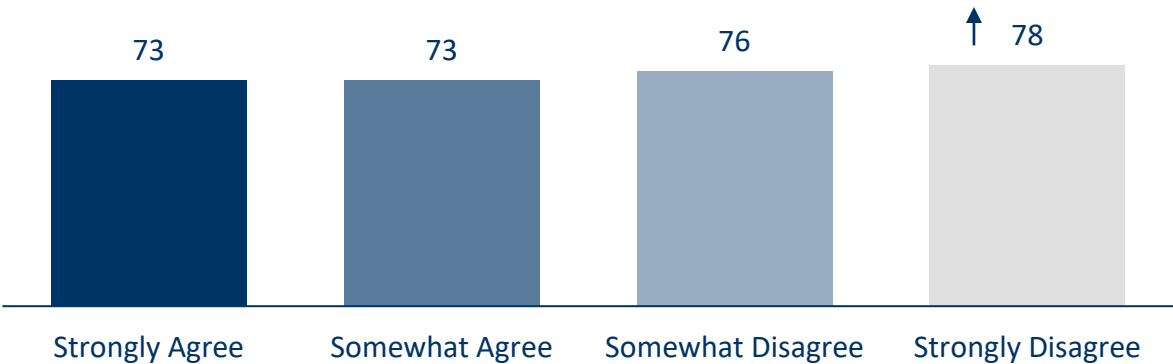
Strongly Agree	73
Somewhat Agree	73
Somewhat Disagree	76
Strongly Disagree	↑ 78

Weight: Aggregate weight for LDC based on customer_type
Filters: Year of Data Collection: 2023; LDC: Lakeland Power
Note: Arrows denote statistically higher than other segment(s) at 95% confidence level; sometimes an apparent difference is not statistically significant because of low base size in a segment

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Customer Satisfaction Index: Compared to Other CHEC Members

- In 2023, Lakeland's score of 75 is *statistically* the same as that of 2 other LDCs.
- Lakeland's score is *statistically* lower than that of 10 other LDCs.

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Lakeland Power's Customer Satisfaction Index by Year

Statistically the same as the previous three waves

74 — 2017
76 — 2019
77 — 2021
75 — 2023

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Core (OEB) Survey Questions – 2023 Results

How familiar are you with Lakeland Power, which operates the electricity distribution system in your community?

Legend:
- NET Familiar
- Very familiar
- Somewhat familiar
- Not familiar
- Don't know/Not sure
- Refused

Total
- NET Familiar: 74%
- Very familiar: 27%
- Somewhat familiar: 47%
- Not familiar: 15%
- Don't know/Not sure: 10%
- Refused: 0%

Residential
- NET Familiar: 72%
- Very familiar: 28%
- Somewhat familiar: 44%
- Not familiar: 17%
- Don't know/Not sure: 11%
- Refused: 1%

General service business GS<50kW
- NET Familiar: 91%
- Very familiar: 18%
- Somewhat familiar: 73%
- Not familiar: 4%
- Don't know/Not sure: 6%
- Refused: 0%

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Thinking specifically about the services provided to you and your community by Lakeland Power, OVERALL, how satisfied are you with the services that you receive?

Legend:
- NET Satisfied
- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Very dissatisfied
- Don't know

Total: 82%, 45%, 38%, 7%, 6%, 2%, 2%

Residential: 82%, 44%, 38%, 7%, 6%, 2%, 2%

General service business GS<50kW: 82%, 46%, 36%, 5%, 6%, 2%, 6%

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How satisfied are you with the electrical service that you receive from Lakeland Power - based on the RELIABILITY of your electrical service as judged by the number of outages you experience?

Legend:
- NET Satisfied
- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know

Total: 74%, 41%, 34%, 6%, 12%, 6%, 2%

Residential: 75%, 40%, 35%, 5%, 12%, 6%, 2%

General service business GS<50kW: 65%, 42%, 23%, 15%, 5%, 5%, 9%

How satisfied are you with the electrical service that you receive from Lakeland Power - based on the amount of TIME IT TAKES TO RESTORE POWER when outages occur?

Legend:
- NET Satisfied
- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know
- Refused

Total: 71%, 32%, 39%, 8%, 9%, 6%, 6%, 0%

Residential: 72%, 32%, 40%, 8%, 8%, 6%, 5%, 0%

General service business GS<50kW: 61%, 31%, 30%, 5%, 17%, 4%, 13%, 0%

Weight: Aggregate weight for LDC based on customer_type
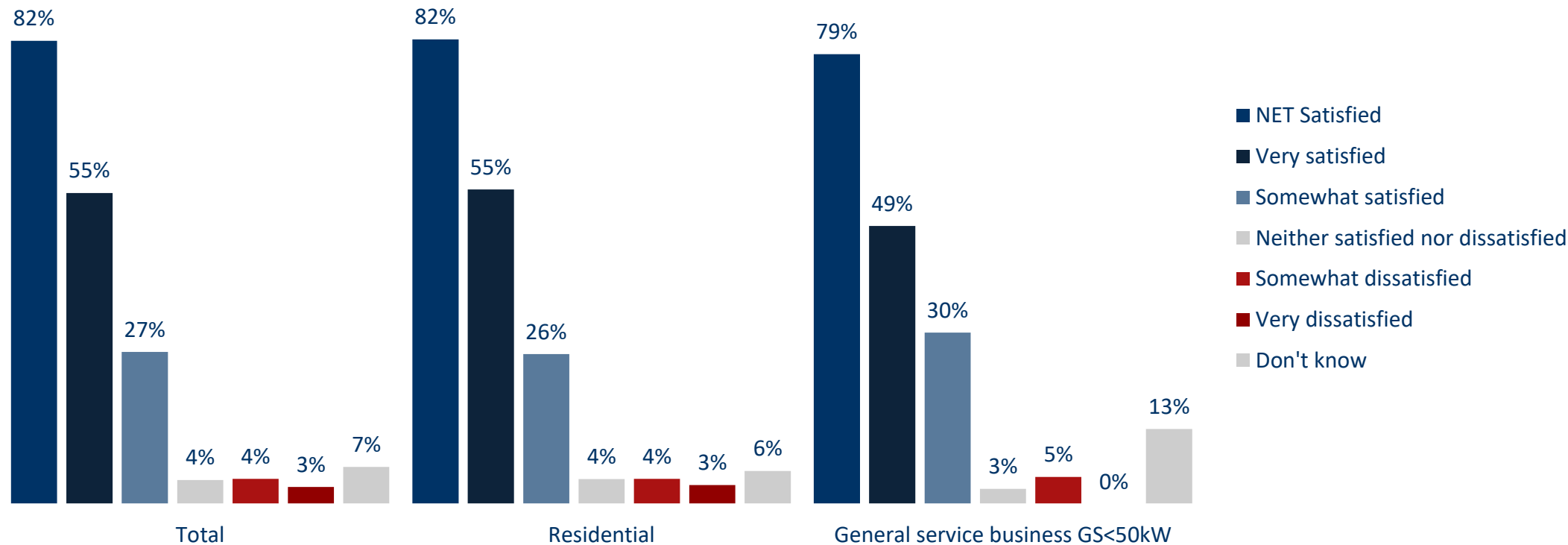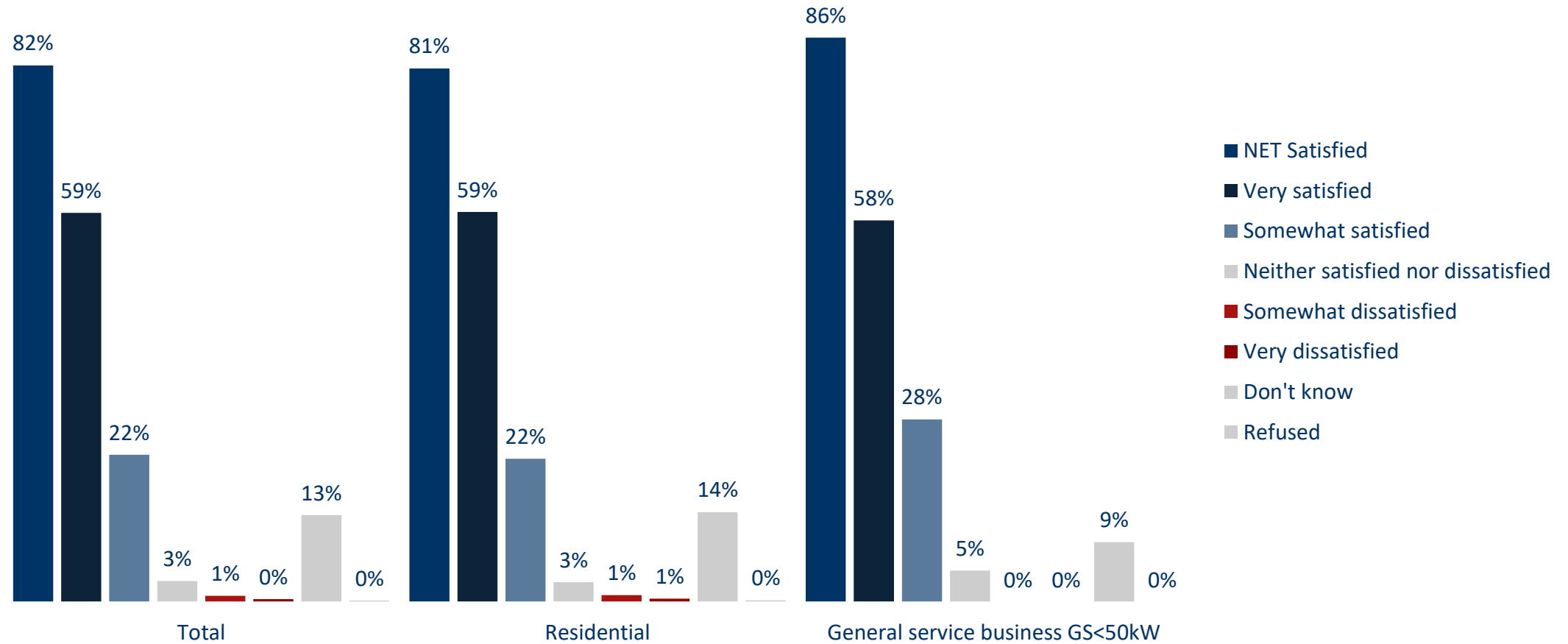**Filters:** Year of Data Collection: 2023, LDC: Lakeland Power

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How satisfied are you with the electrical service that you receive from Lakeland Power - based on the QUALITY OF THE POWER delivered to you as judged by the absence of voltage fluctuations that can result in flickering/dimming of lights / an affect on equ

Legend:
- NET Satisfied
- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know

Total: 82%, 55%, 27%, 4%, 4%, 3%, 7%

Residential: 82%, 55%, 26%, 4%, 4%, 3%, 6%

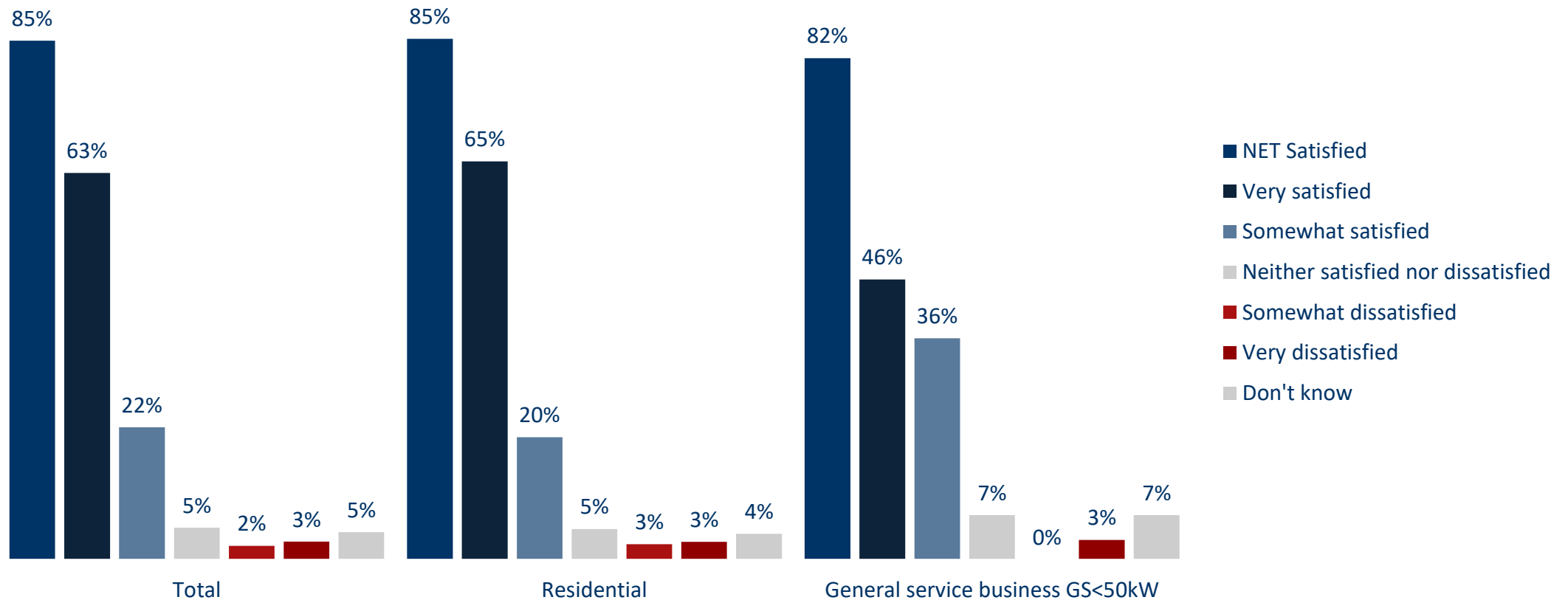General service business GS<50kW: 79%, 49%, 30%, 3%, 5%, 0%, 13%

How satisfied are you with the bills that you receive from Lakeland Power - based on them providing ACCURATE BILLS?

Legend:
- NET Satisfied
- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know
- Refused

Total
- NET Satisfied: 82%
- Very satisfied: 59%
- Somewhat satisfied: 22%
- Neither satisfied nor dissatisfied: 3%
- Somewhat dissatisfied: 1%
- Very dissatisfied: 0%
- Don't know: 13%
- Refused: 0%

Residential
- NET Satisfied: 81%
- Very satisfied: 59%
- Somewhat satisfied: 22%
- Neither satisfied nor dissatisfied: 3%
- Somewhat dissatisfied: 1%
- Very dissatisfied: 1%
- Don't know: 14%
- Refused: 0%

General service business GS<50kW
- NET Satisfied: 86%
- Very satisfied: 58%
- Somewhat satisfied: 28%
- Neither satisfied nor dissatisfied: 5%
- Somewhat dissatisfied: 0%
- Very dissatisfied: 0%
- Don't know: 9%
- Refused: 0%

Weight: Aggregate weight for LDC based on customer_type
Filters: Year of Data Collection: 2023, LDC: Lakeland Power

ADVANIS
Confidential

How satisfied are you with the bills that you receive from Lakeland Power - based on them providing CONVENIENT OPTIONS TO RECEIVE AND PAY BILLS?

Legend:
- ■ NET Satisfied
- ■ Very satisfied
- ■ Somewhat satisfied
- ■ Neither satisfied nor dissatisfied
- ■ Somewhat dissatisfied
- ■ Very dissatisfied
- ■ Don't know
- ■ Refused

Total: NET Satisfied 89%, Very satisfied 68%, Somewhat satisfied 22%, Neither satisfied nor dissatisfied 2%, Somewhat dissatisfied 2%, Very dissatisfied 1%, Don't know 4%, Refused 1%

Residential: NET Satisfied 89%, Very satisfied 68%, Somewhat satisfied 21%, Neither satisfied nor dissatisfied 2%, Somewhat dissatisfied 2%, Very dissatisfied 1%, Don't know 4%, Refused 1%

General service business GS<50kW: NET Satisfied 89%, Very satisfied 63%, Somewhat satisfied 26%, Neither satisfied nor dissatisfied 7%, Somewhat dissatisfied 0%, Very dissatisfied 0%, Don't know 4%, Refused 0%

ADVANIS

Confidential

How satisfied are you with the CUSTOMER SERVICE you have received when dealing with employees of Lakeland Power, whether on the telephone, via email, in person or through online conversations including social media?
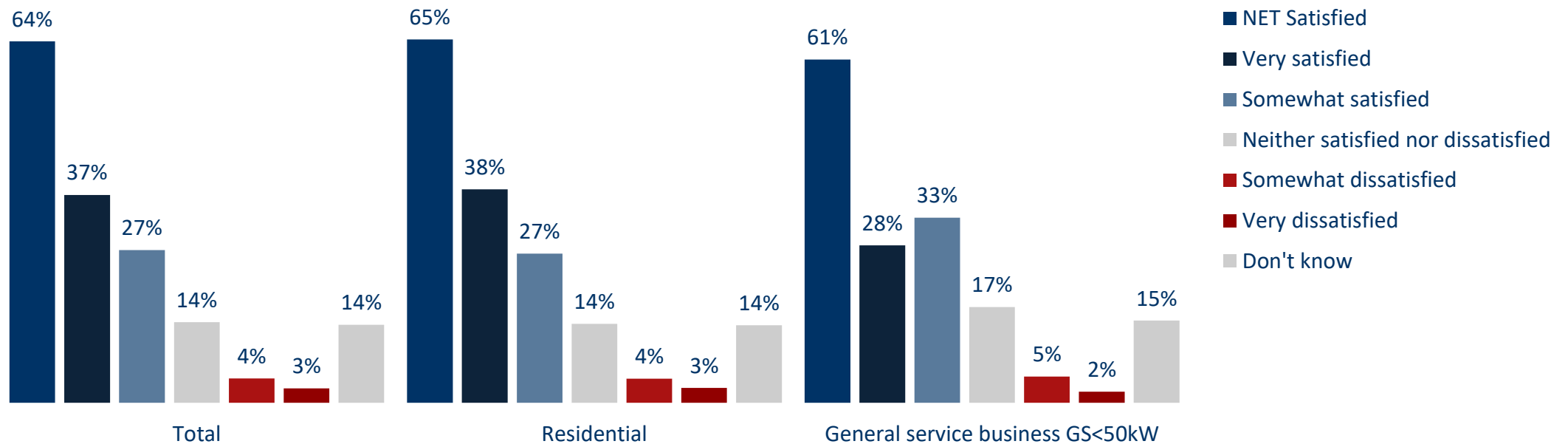

Legend:
- NET Satisfied
- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know

Total
- NET Satisfied: 85%
- Very satisfied: 63%
- Somewhat satisfied: 22%
- Neither satisfied nor dissatisfied: 5%
- Somewhat dissatisfied: 2%
- Very dissatisfied: 3%
- Don't know: 5%

Residential
- NET Satisfied: 85%
- Very satisfied: 65%
- Somewhat satisfied: 20%
- Neither satisfied nor dissatisfied: 5%
- Somewhat dissatisfied: 3%
- Very dissatisfied: 3%
- Don't know: 4%

General service business GS<50kW
- NET Satisfied: 82%
- Very satisfied: 46%
- Somewhat satisfied: 36%
- Neither satisfied nor dissatisfied: 7%
- Somewhat dissatisfied: 0%
- Very dissatisfied: 3%
- Don't know: 7%

ADVANIS
Confidential

How satisfied are you with the COMMUNICATIONS that you may receive from Lakeland Power without talking directly to an employee, including information found on their website, bill inserts, advertising, notices, emails, or social media sites?
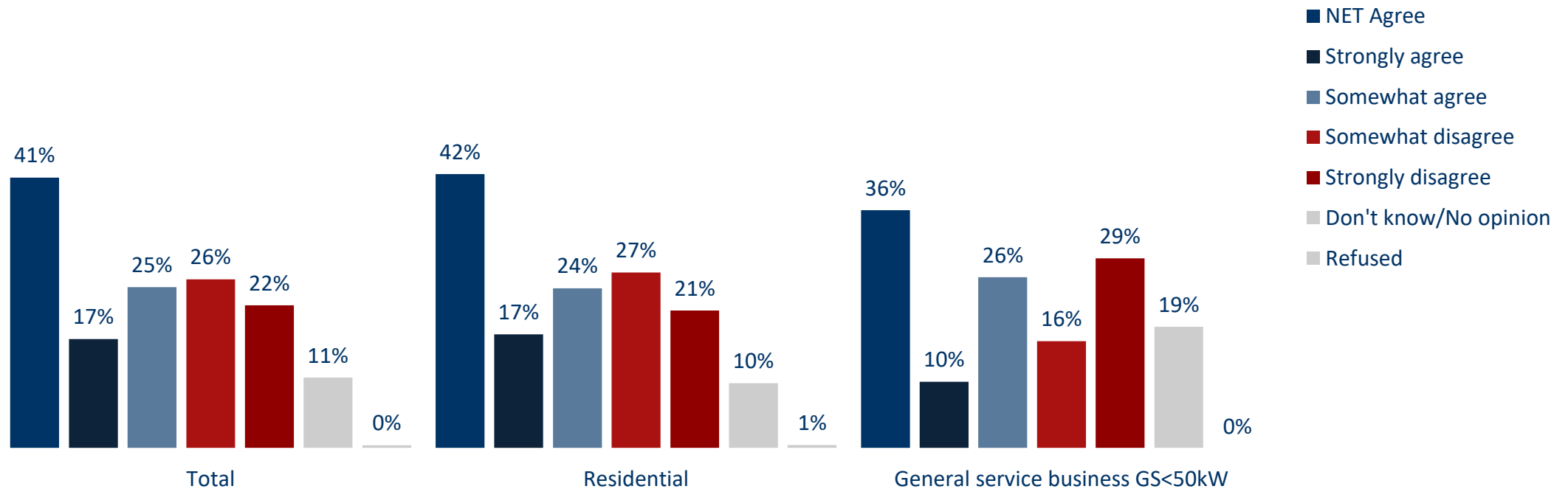

Legend:
- NET Satisfied
- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know

Total
- 64%
- 37%
- 27%
- 14%
- 4%
- 3%
- 14%

Residential
- 65%
- 38%
- 27%
- 14%
- 4%
- 3%
- 14%

General service business GS<50kW
- 61%
- 28%
- 33%
- 17%
- 5%
- 2%
- 15%

Weight: Aggregate weight for LDC based on customer_type
Filters: Year of Data Collection: 2023, LDC: Lakeland Power

ADVANIS
Confidential

How familiar are you with the percentage of your electricity bill that went to Lakeland Power? So, NOT the portions allocated to power generation companies, transmission companies, the provincial government and regulatory agencies.

Legend:
- NET Familiar
- Very familiar
- Somewhat familiar
- Not familiar
- Don't know/Not sure

Total
- NET Familiar: 29%
- Very familiar: 9%
- Somewhat familiar: 19%
- Not familiar: 59%
- Don't know/Not sure: 13%

Residential
- NET Familiar: 29%
- Very familiar: 10%
- Somewhat familiar: 19%
- Not familiar: 58%
- Don't know/Not sure: 12%

General service business GS<50kW
- NET Familiar: 23%
- Very familiar: 3%
- Somewhat familiar: 21%
- Not familiar: 60%
- Don't know/Not sure: 16%

ADVANIS
Confidential

Do you feel that the percentage of your total electricity bill that you pay to Lakeland Power for the services they provide is...?

Legend:
- NET Reasonable
- Very reasonable
- Somewhat reasonable
- Somewhat unreasonable
- Very unreasonable
- Don't know
- Refused

Total
- NET Reasonable: 56%
- Very reasonable: 21%
- Somewhat reasonable: 36%
- Somewhat unreasonable: 9%
- Very unreasonable: 3%
- Don't know: 30%
- Refused: 1%

Residential
- NET Reasonable: 58%
- Very reasonable: 21%
- Somewhat reasonable: 36%
- Somewhat unreasonable: 9%
- Very unreasonable: 4%
- Don't know: 28%
- Refused: 1%

General service business GS<50kW
- NET Reasonable: 45%
- Very reasonable: 14%
- Somewhat reasonable: 32%
- Somewhat unreasonable: 7%
- Very unreasonable: 0%
- Don't know: 47%
- Refused: 0%

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To what extent do you agree with "The cost of my electricity bill has a major impact [on personal finances OR bottom line of organization]"?

Legend:
- NET Agree
- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know/No opinion
- Refused

Total
- NET Agree: 41%
- Strongly agree: 17%
- Somewhat agree: 25%
- Somewhat disagree: 26%
- Strongly disagree: 22%
- Don't know/No opinion: 11%
- Refused: 0%

Residential
- NET Agree: 42%
- Strongly agree: 17%
- Somewhat agree: 24%
- Somewhat disagree: 27%
- Strongly disagree: 21%
- Don't know/No opinion: 10%
- Refused: 1%

General service business GS<50kW
- NET Agree: 36%
- Strongly agree: 10%
- Somewhat agree: 26%
- Somewhat disagree: 16%
- Strongly disagree: 29%
- Don't know/No opinion: 19%
- Refused: 0%

ADVANIS
Confidential

To what extent do you agree with "Customers are well served by the electricity system in Ontario"?

Legend:
- NET Agree
- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know/No opinion
- Refused

Total: NET Agree 64%, Strongly agree 26%, Somewhat agree 37%, Somewhat disagree 8%, Strongly disagree 5%, Don't know/No opinion 23%, Refused 1%

Residential: NET Agree 64%, Strongly agree 27%, Somewhat agree 37%, Somewhat disagree 7%, Strongly disagree 6%, Don't know/No opinion 23%, Refused 1%

General service business GS<50kW: NET Agree 67%, Strongly agree 25%, Somewhat agree 42%, Somewhat disagree 13%, Strongly disagree 0%, Don't know/No opinion 20%, Refused 0%

ADVANIS
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Core (OEB) Survey Questions – Trend over Time

How familiar are you with Lakeland Power, which operates the electricity distribution system in your community?

Thinking specifically about the services provided to you and your community by Lakeland Power, OVERALL, how satisfied are you with the services that you receive?

Legend:
- Refused
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

2017
- 3%
- 3%
- 5%
- 9%
- 36%
- 44%

2019
- 5%
- 5%
- 38%
- 50%

2021
- 5%
- 4%
- 34%
- 54%

2023
- 7%
- 6%
- 38%
- 45%

How satisfied are you with the electrical service that you receive from Lakeland Power - based on the RELIABILITY of your electrical service as judged by the number of outages you experience?

2017
- 3% Refused/Don't know
- 3% Very dissatisfied
- 8% Somewhat dissatisfied
- 35% Somewhat satisfied
- 48% Very satisfied

2019
- 4%
- 9%
- 5%
- 40%
- 40%

2021
- 4%
- 5%
- 14%
- 3%
- 33%
- 41%

2023
- 6%
- 12%
- 6%
- 34%
- 41%

Legend:
- Refused
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

How satisfied are you with the electrical service that you receive from Lakeland Power - based on the amount of TIME IT TAKES TO RESTORE POWER when outages occur?

	2017	2019	2021	2023
Refused		4%	5%	6%
Very dissatisfied	3%	4%	3%	6%
Somewhat dissatisfied	7%	6%	10%	9%
Neither satisfied nor dissatisfied	5%	6%	5%	8%
Somewhat satisfied	35%	39%	35%	39%
Very satisfied	41%	40%	42%	32%
Don't know	8%			

Legend:
- Refused
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

How satisfied are you with the electrical service that you receive from Lakeland Power - based on the QUALITY OF THE POWER delivered to you as judged by the absence of voltage fluctuations that can result in flickering/dimming of lights / an affect on equ

2017
- 6%
- 4%
- 29%
- 57%

2019
- 6%
- 5%
- 3%
- 32%
- 52%

2021
- 7%
- 4%
- 3%
- 29%
- 56%

2023
- 7%
- 3%
- 4%
- 4%
- 27%
- 55%

Legend:
- Refused
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

Weight: Aggregate weight for LDC based on customer_type
Filters: LDC: Lakeland Power

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How satisfied are you with the bills that you receive from Lakeland Power - based on them providing ACCURATE BILLS?

Legend:
- Refused
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

2017: 13%, 3%, 25%, 55%

2019: 11%, 4%, 26%, 57%

2021: 8%, 23%, 66%

2023: 13%, 3%, 22%, 59%

How satisfied are you with the bills that you receive from Lakeland Power - based on them providing CONVENIENT OPTIONS TO RECEIVE AND PAY BILLS?

2017
- 3%
- 4%
- 27%
- 61%

2019
- 4%
- 4%
- 21%
- 65%

2021
- 4%
- 20%
- 72%

2023
- 4%
- 22%
- 68%

Legend:
- Refused
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

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Confidential

How satisfied are you with the CUSTOMER SERVICE you have received when dealing with employees of Lakeland Power, whether on the telephone, via email, in person or through online conversations including social media?

2017
- 3%
- 5%
- 5%
- 6%
- 26%
- 55%

2019
- 3%
- 4%
- 5%
- 6%
- 26%
- 57%

2021
- 3%
- 6%
- 6%
- 18%
- 66%

2023
- 5%
- 3%
- 5%
- 22%
- 63%

Legend:
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

How satisfied are you with the COMMUNICATIONS that you may receive from Lakeland Power without talking directly to an employee, including information found on their website, bill inserts, advertising, notices, emails, or social media sites?

Category	2017	2019	2021	2023
Refused	17%	14%	16%	14%
Very dissatisfied	4%		4%	3%
Somewhat dissatisfied	4%			4%
Don't know	9%	12%	12%	14%
Somewhat satisfied	32%	32%	26%	27%
Very satisfied	34%	36%	42%	37%

Legend:
- Refused
- Don't know
- Very dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Very satisfied

ADVANIS
Confidential

How familiar are you with the percentage of your electricity bill that went to Lakeland Power? So, NOT the portions allocated to power generation companies, transmission companies, the provincial government and regulatory agencies.

Year	Very familiar	Somewhat familiar	Not familiar	Don't know/Not sure
2017	10%	21%	49%	19%
2019	10%	20%	52%	17%
2021	8%	16%	58%	18%
2023	9%	19%	59%	13%

■ Very familiar ■ Somewhat familiar ■ Not familiar ■ Don't know/Not sure ■ Refused

Do you feel that the percentage of your total electricity bill that you pay to Lakeland Power for the services they provide is…?

2017
- Refused / Don't know: 35%
- Very unreasonable: 6%
- Somewhat unreasonable: 7%
- Somewhat reasonable: 33%
- Very reasonable: 18%

2019
- Refused / Don't know: 41%
- Very unreasonable: 3%
- Somewhat unreasonable: 9%
- Somewhat reasonable: 30%
- Very reasonable: 16%

2021
- Refused / Don't know: 47%
- Very unreasonable: 4%
- Somewhat unreasonable: 6%
- Somewhat reasonable: 25%
- Very reasonable: 18%

2023
- Refused / Don't know: 30%
- Very unreasonable: 3%
- Somewhat unreasonable: 9%
- Somewhat reasonable: 36%
- Very reasonable: 21%

Legend:
- Refused
- Don't know
- Very unreasonable
- Somewhat unreasonable
- Somewhat reasonable
- Very reasonable

Weight: Aggregate weight for LDC based on customer_type
Filters: LDC: Lakeland Power

ADVANIS
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To what extent do you agree with "The cost of my electricity bill has a major impact [on personal finances OR bottom line of organization]"?

Legend:
- Refused
- Don't know/No opinion
- Strongly disagree
- Somewhat disagree
- Somewhat agree
- Strongly agree

2017
- 9% (Refused)
- 9% (Strongly disagree)
- 17% (Somewhat disagree)
- 26% (Somewhat agree)
- 37% (Strongly agree)

2019
- 5% (Refused)
- 9% (Don't know/No opinion)
- 17% (Strongly disagree)
- 19% (Somewhat disagree)
- 30% (Somewhat agree)
- 21% (Strongly agree)

2021
- 8% (Don't know/No opinion)
- 24% (Strongly disagree)
- 27% (Somewhat disagree)
- 20% (Somewhat agree)
- 18% (Strongly agree)

2023
- 11% (Don't know/No opinion)
- 22% (Strongly disagree)
- 26% (Somewhat disagree)
- 25% (Somewhat agree)
- 17% (Strongly agree)

To what extent do you agree with "Customers are well served by the electricity system in Ontario"?

2017
- 19% (Refused / Don't know/No opinion)
- 19% (Strongly disagree)
- 14% (Somewhat disagree)
- 31% (Somewhat agree)
- 16% (Strongly agree)

2019
- 24%
- 6%
- 13%
- 38%
- 16%

2021
- 19%
- 7%
- 7%
- 37%
- 28%

2023
- 23%
- 5%
- 8%
- 37%
- 26%

Legend:
- Refused
- Don't know/No opinion
- Strongly disagree
- Somewhat disagree
- Somewhat agree
- Strongly agree

Methodology

Methodology Summary

Commissioned by	Lakeland Power
Sample size	400 randomly selected customers
Margin of error	±4.8 percentage points, 19 times out of 20
Survey mode	Random telephone survey of customer base, CATI data collection
Survey sample	Residential and GS <50kWh customer lists provided by Lakeland Power
Time of calling	4PM-9PM Weekdays, 10AM-5PM Saturdays, scheduled callbacks
In-field dates	January 9-February 17, 2023
Language	English only
Survey author	Innovative Research/Electricity Distributors Association
Question Order	Core (OEB) questions then LDC-specific questions
Question Wording	Questions shown in report largely as asked; exact questionnaire available upon request
Survey Company	Advanis Gary.Offenberger@advanis.net

Methodology Details (1/4)

Target Respondents

The respondents of the survey were Ontario residents who are the primary bill payer or share the responsibility if residential or the person in-charge of managing the electricity bill at the organization if general service, and who resided within one of LDC's service territory(ies). Service territories were determined based on customer lists provided by the LDC.

Sample Size and Statistical Reliability

The final total completed surveys by LDC, and the associated margin of error for each, are shown below.

All margins of error are shown at a 95% confidence level.

> ➤ E.g., the margin of error associated with a sample size of 400 for a large (infinite) population is ±4.9 percentage points, 19 times out of 20.

Since each LDC has a finite population, we used the specific population sizes (i.e., the number of sample records received from each LDC) in the calculation of margin of error. Doing so is more accurate, and results in a narrower margin of error than if we simply assumed large (infinite) population for each.

Sample sizes were set according to the *LDC Customer Satisfaction Survey: Methodology & Survey Implementation Guide*, prepared for the Electrical Distributors Association (April 19, 2016 revision):

  Where possible, sample size of n=400.
  Distributors with 3000 to 4999 customers (residential + GS<50), n=300
  Distributors with <3000 customers (residential + GS<50), n=200

Methodology Details (2/4)

Sampling Methodology

Advanis was provided sample lists from each LDC. Customer lists included all basic information required such as name, telephone number, region (where applicable), customer type (residential or GS<50), LDC fee, Annual or Monthly consumption values. Redhead then calculated which quartile group each resident belonged to by evenly dividing them into four groups within each region and customer type. These quartiles were calculated based on annual consumption value.

To minimize low response:

➢ Sample was loaded in batches to ensure the sample was fully utilized before moving onto fresh sample records;
➢ Calls were made between the hours of 4pm and 9pm ET; and
➢ Call backs were scheduled and honored between the hours of 9am and 9pm ET.

Sample Cleaning

Redhead cleaned the customer lists individually once received from each LDC to ensure the customer list counts reflected actual individual records that could be called. The following steps were taken during sample cleaning.

➢ All records with no phone numbers were removed.
➢ All phone numbers were checked to see if they were valid numbers (i.e., 10 digits, all numerical, etc.) and any bad cases were removed.
➢ When duplicates were detected based on phone number, the average of the consumption value was calculated and kept for one consolidated record. All others were removed.
➢ Residential and GS<50KW were separated into their own lists to be loaded and managed separately in the calling system.

Regions within each customer list were given a numerical value to be used for calling quotas.

Methodology Details (3/4)

Questionnaire

The survey instrument was provided by the Electricity Distributors Association (EDA) developed in conjunction with Innovative Research. The survey consisted of an introduction, overall satisfaction, power quality and reliability, billing and payment, customer service experience, communications, price, optional deeper dive questions, and final personal finance / sector mood measures. Additional questions were provided individually by some LDCs. These questions are not required as part of the survey and, as outlined in the methodology guideline, were asked after all the standard and required questions.

Data Collection

Computer aided telephone interviews (CATI) were conducted from **January 9-February 17, 2023.**

Quality Control

➢ Advanis trained its interviewers to understand the study's objectives;
➢ Detailed call records are kept by the automated CATI system, and are supplemented by output files to SPSS for productivity analysis (i.e., not subject to human error);
➢ The survey was soft launched in LDCs that had the most available sample, and the data was then checked before calling began in full for each;
➢ 100% of all surveys are digitally recorded for potential review (see next bullet);
➢ Advanis' Quality Assurance team listened to the actual recordings of five-ten percent of completed surveys and compared the responses to those entered by the interviewer to ensure that responses from respondents are properly recorded;
➢ Team Supervisors conduct regular more formal evaluations with each interviewer, in addition to nightly monitoring of each interviewer on their team;
➢ Project Managers closely monitored the progress of data collection, including call record dispositions;
➢ All SPSS code is reviewed by a more senior researcher;
➢ All report output is reviewed by a more senior researcher; and
➢ All values in the report are reviewed by another team member to ensure accuracy.

Methodology Details (4/4)

Analysis of Findings & Data Weighting

Results were weighted to match the proportion of low volume rate class records as provided to Advanis after cleaning of the sample file. Where a region flag was also provided, results were weighted to the low volume rate class within each region and regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

The Customer Satisfaction index scores have been highlighted and were calculated as described below, based on instructions in the Survey Methodology Guidelines. The "response values" referenced in the description below were also determined and provided by the survey authors.

Data analysis and cross-tabulation have been conducted using SPSS and Advanis' proprietary Online Reporting Environment software.

This **index score** is calculated using the following process:

Step 1: Weight data to n=400 with each low volume rate class proportionate to its share of LDC customer base.

Step 2: Rescale the index score variables onto the 0 to 1 scale as indicated by the response values detailed below.

Step 3: The average result of the questions asked for each OEB topic and the overall satisfaction score will be added together[3].

$$
\begin{array}{ll}
 & \text{B5} \\
+ & \text{[C6+C7+C8] divided by 3} \\
+ & \text{[D9+D10] divided by 2} \\
+ & \text{E11} \\
+ & \text{F12} \\
+ & \text{G14} \\
= & \textbf{Total cumulative scores}
\end{array}
$$

Step 4: The total cumulative score from Step 2 will be divided by 6 to generate the **Customer Satisfaction Index Score** (bound between 0-1).

The chart on the following page illustrates how the **Customer Satisfaction Index Score** will be calculated.

As noted above, LDCs without a region flag were weighted to their low volume rate class proportion based on the cleaned sample file. LDCs with a region flag were weighted to their low volume rate class proportion within each region based on the cleaned sample file, and then regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

Specific values of the number of sample records, estimated population proportions, and final weighted sample counts within LDC are provided on the next slide.
The sum of the regional population proportions within an LDC may not equal 100% due to rounding.

Methodology Tables

Margin of error

LDC	Clean Customer Records from LDC	Completed Surveys	Sample Size as % of Customer list	Margin of Error @ 95% confidence level
Lakeland Power	10,582	400	3.78%	+/- 4.8%

* Since each LDC has a finite population, we used the specific population sizes (i.e., the number of sample records received from each LDC) in the calculation of margin of error. Doing so is more accurate, and results in a narrower margin of error than if we simply assumed large (infinite) population for each.

Sample weighting

Lakeland Power						
Regions Flagged in Sample	Low Volume Rate Class	Sample Received (Cleaned, Deduplicated)	Rate Class Proportion	Estimated Customer Proportion	Weighted Sample Count	Unweighted Sample Count
Bracebridge	Residential	5,123	92%	53%	194	190
	General Service < 50 kW	454	8%		17	16
Huntsville	Residential	1,165	86%	13%	44	44
	General Service < 50 kW	186	14%		7	5
Parry Sound	Residential	2,354	89%	25%	13	13
	General Service < 50 kW	291	11%		2	3
Burk's Falls	Residential	352	88%	4%	15	16
	General Service < 50 kW	49	12%		2	2
Sundridge	Residential	137	89%	1%	5	5
	General Service < 50 kW	17	11%		1	1
Magnetawan	Residential	395	87%	4%	89	92
	General Service < 50 kW	59	13%		11	13
TOTAL	**Residential**	**9,526**	**90%**	**100%**	**360**	**360**
	General Service < 50 kW	**1056**	**10%**		**40**	**40**
					400	**400**

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2021 Lakeland Power Customer Satisfaction Survey

Introduction and Summary

Thank you for selecting Redhead Media Solutions Inc. for this important project for Lakeland Power. We appreciate your confidence in us to provide you with data on Customer Satisfaction that provides both a current snapshot and can be used to compare with previous surveys in 2017, 2019 and among other LDCs that we work with.

It is our goal to always be improving our deliverables and provide value to our clients. To supplement this report, we have also included a stand-alone section on comparable data and verbatims for question G15 (open comments) in spreadsheet format. The methodology guide, as well as residential and general service questionnaires are also included as appendices B, C and D for your reference.

Should there be any specific data or breakouts that you require we would be happy to provide them. Please contact us to discuss how we can assist you and ensure you are getting the most from this project.

Sincerely,

Graydon Smith
President

LakelandPower

REDHEAD INC
MEDIA SOLUTIONS

Introduction and Summary

Redhead Media Solutions Inc. (Redhead), partnering with ADVANIS for data collection and reporting, has been retained (via an RFP process by Cornerstone Hydro Electric Concepts Inc. - CHEC) to conduct a 2021 Customer Satisfaction Survey for Lakeland Power. This survey is a required part of an LDC's Balanced Scorecard and other reporting and regulatory requirements for the Ontario Energy Board (OEB).

The complete group of participating CHEC LDCs are as follows:

➢ Centre Wellington Hydro
➢ EPCOR
➢ ERTH Power
➢ Grimsby Power
➢ Lakefront Utilities
➢ Lakeland Power Distribution
➢ Niagara-on-the-Lake Hydro
➢ Orangeville Hydro
➢ Ottawa River Power
➢ Renfrew Hydro
➢ Rideau St. Lawrence Distribution
➢ Tillsonburg Hydro
➢ Wasaga Distribution
➢ Wellington North Power

REDHEAD INC
MEDIA SOLUTIONS

Introduction and Summary

This final report contains data specifically for Lakeland Power.

The survey is comprised of 404 randomly selected interviews of Lakeland Power customers among the low volume customer base (residential customers and general service under 50kW customers; GS<50kW). Residential customers were asked to confirm that they receive an electricity or hydro bill from Lakeland Power and that they are the primary payer of that bill or share the responsibility.

GS<50kW customers were also asked to confirm they receive an electricity or hydro bill from Lakeland Power, and additionally to confirm that the person who manages the organization's electricity bill was the one to complete the interview. The sample frame is stratified on region (where applicable) and consumption quartiles by rate class in accordance with the "Survey Implementation Requirements" on page 4 of the "EDA/Innovative Customer Satisfaction Scorecard: Methodology & Survey Implementation Guide" which is contained in Appendix B of this report.

The objective of the survey is to provide an Overall Customer Satisfaction index score for Lakeland Power. This is a calculated aggregate value based on responses of to 9 core measures in the survey instrument. In some cases, additional questions were asked but not included in the calculation of the Customer Satisfaction Index Score.

Lakeland Power's 2021 Customer Satisfaction Index Score is 77%, This is 1% greater than the 2019 score (76%) and 2% less than the average of all LDCs (79%).

This falls within a very tight spectrum of index scores we processed for all LDCs that participated in the 2019 survey via Redhead. When the confidence interval is applied to all index scores, there is significant overlap between LDCs which underlines the statistical similarity of performance and satisfaction among participants. Statistically, Lakeland Power is similar to all other LDCs surveyed.

The following report contains graphic data and tables for all core questions as well as any additional questions supplied by the LDC, which were asked after the core questions were completed.

Question scoring and index methodologies were prescribed by the EDA/Innovative. As such, there has been limited additional analysis provided beyond the direction provided to meet the reporting guidelines. Should you wish further analysis of the data please contact our office to discuss.

REDHEAD INC
MEDIA SOLUTIONS

PARTICIPANT INFORMATION
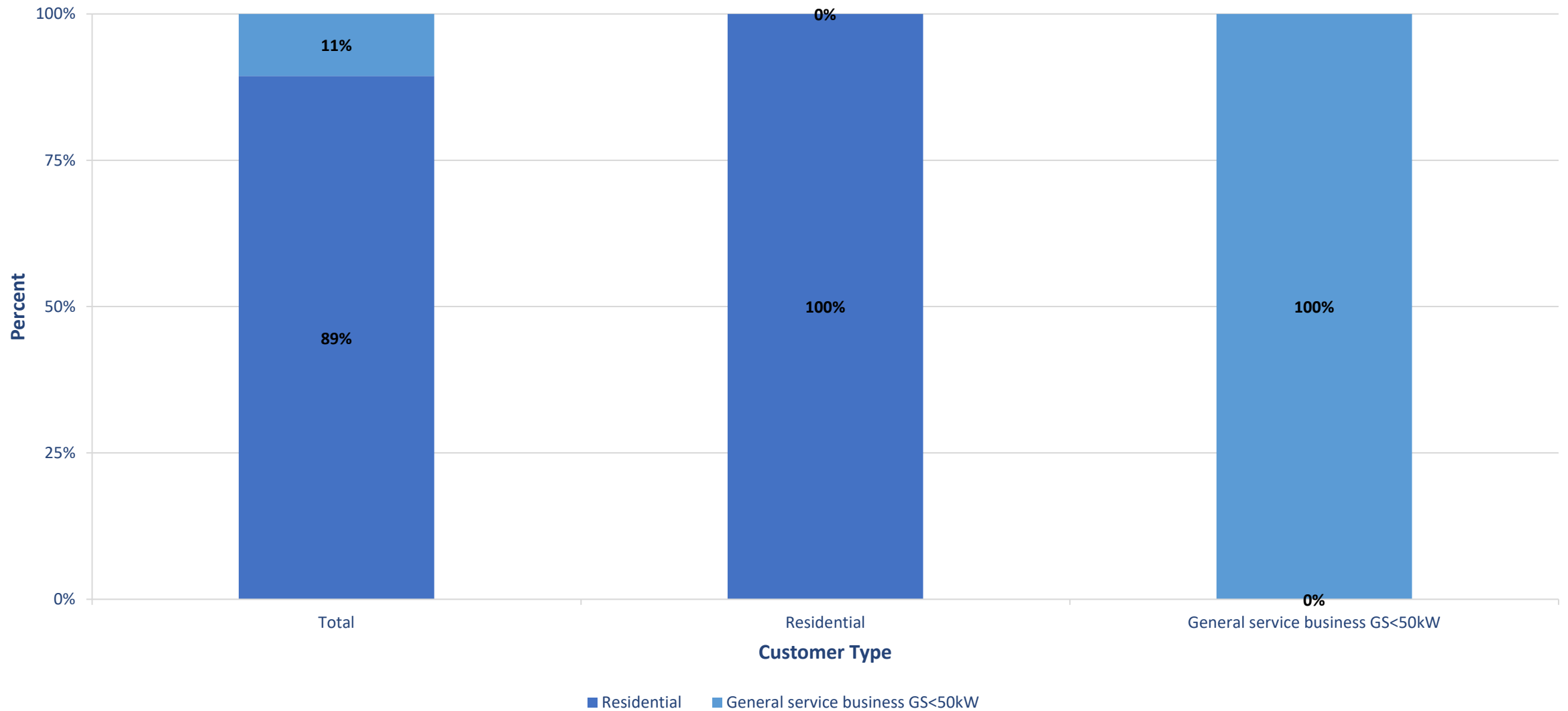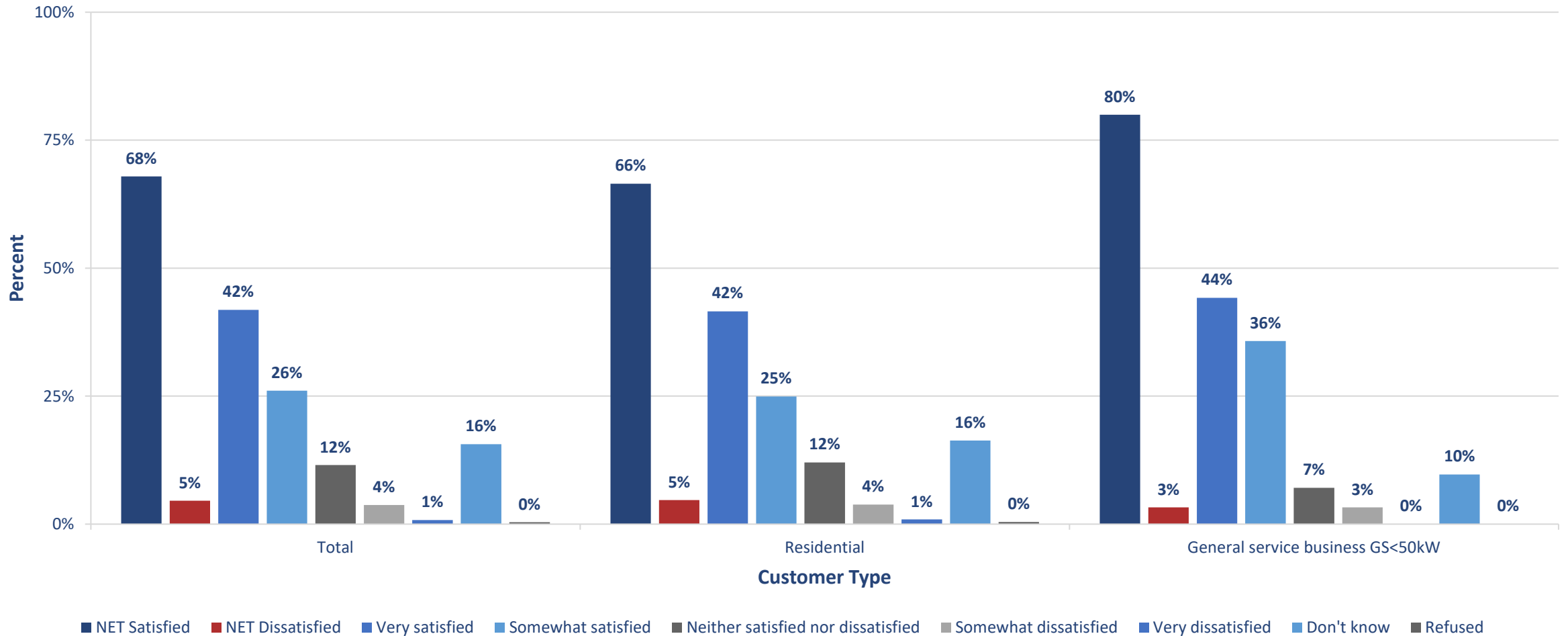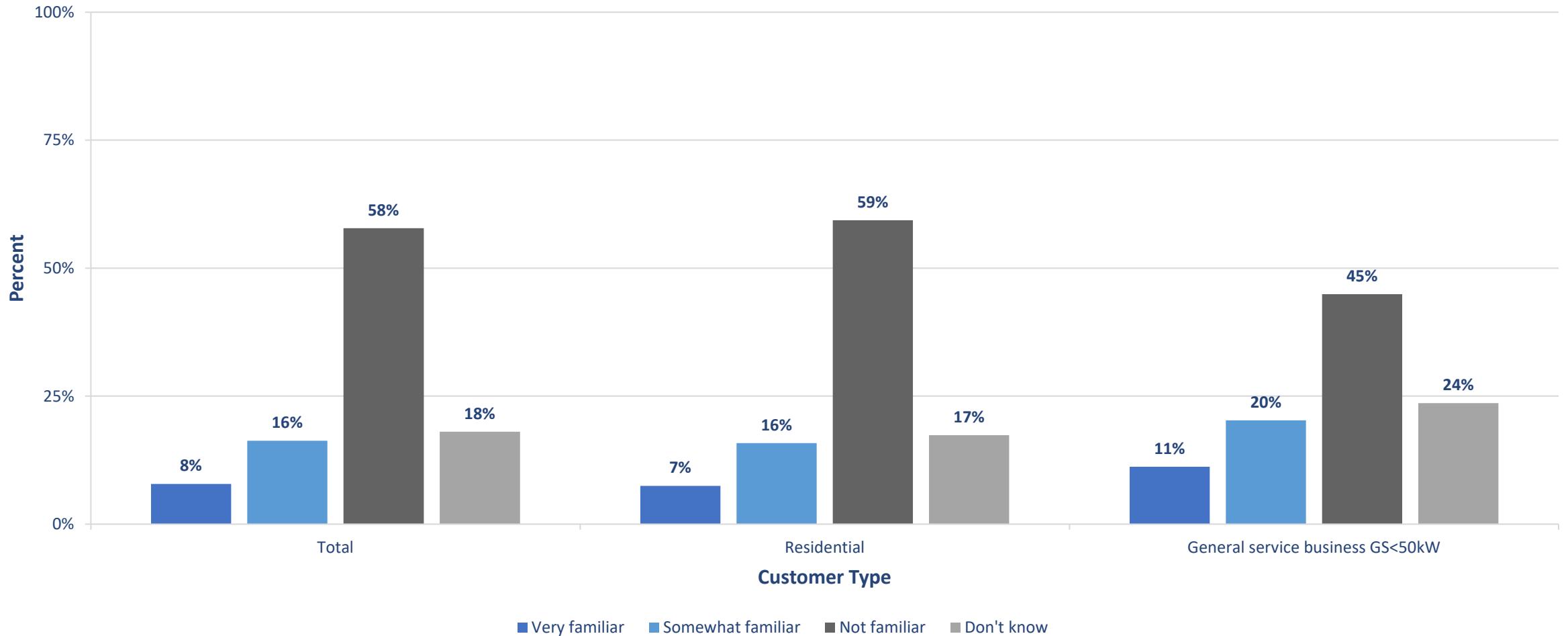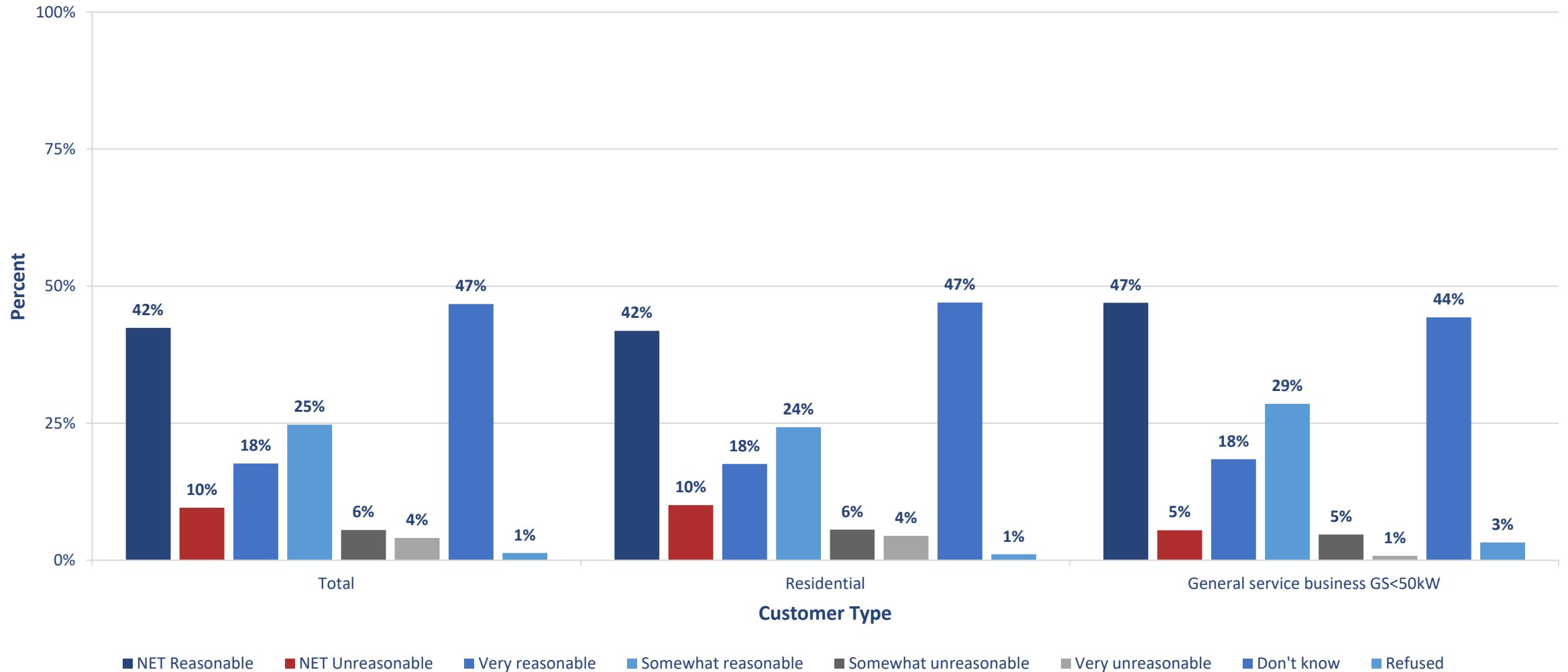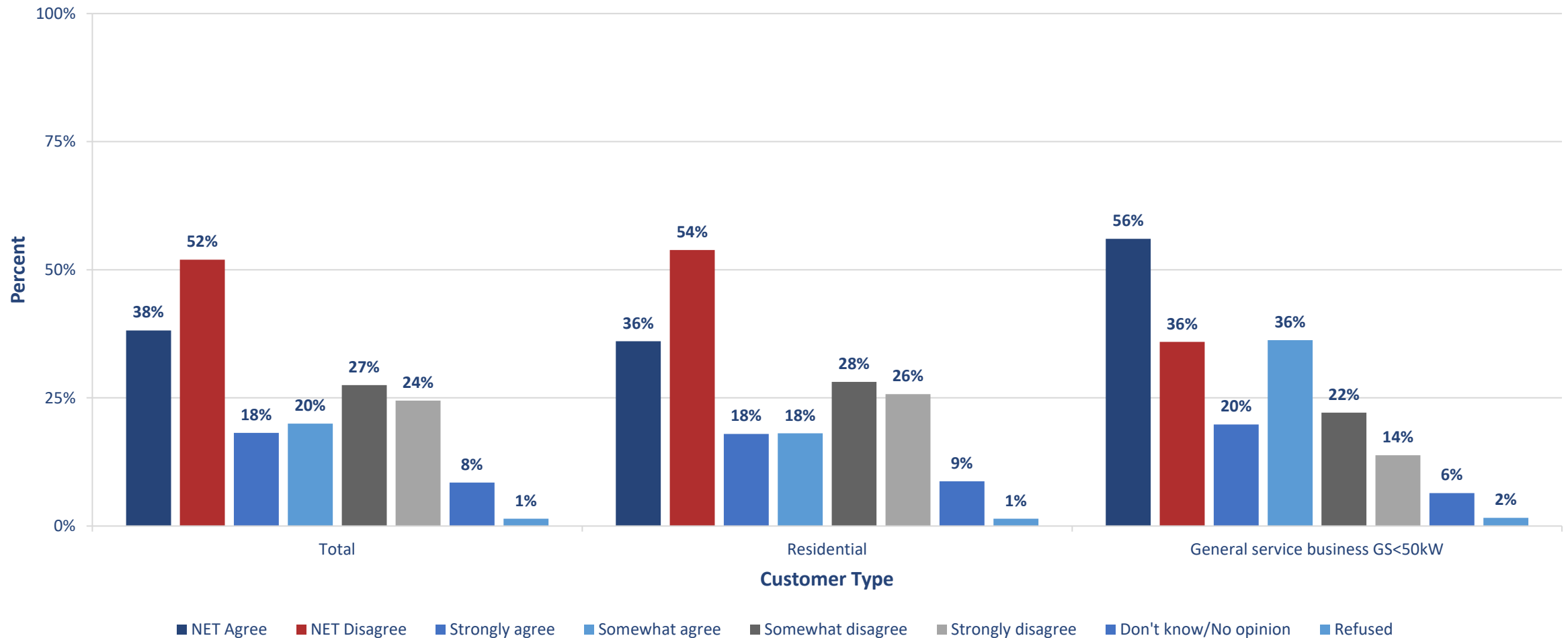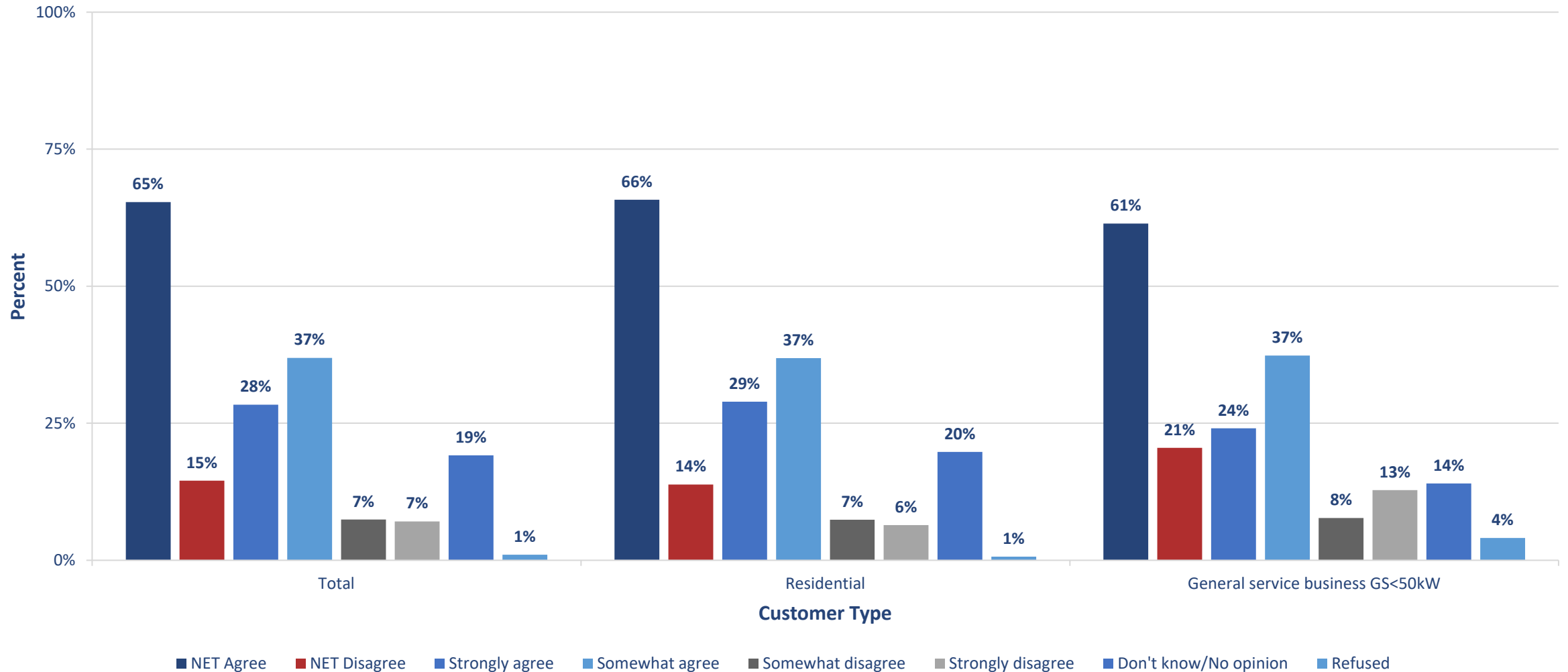
REDHEAD INC
MEDIA SOLUTIONS

Customer Type

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 12-February 17, 2021, n=404, accurate 4.8 percentage points plus or minus, 19 times out of 20.

QUESTIONS/DATA

Thinking specifically about the services provided to you and your community by Lakeland Power, overall, how satisfied are you with the services that you receive from Lakeland Power?

The reliability of your electricity service – as judged by the number of power outages you experience: How satisfied are you with the electrical service that you receive from Lakeland Power based on...?

Legend: NET Satisfied · NET Dissatisfied · Very satisfied · Somewhat satisfied · Neither satisfied nor dissatisfied · Somewhat dissatisfied · Very dissatisfied · Don't know

Total: 74%, 19%, 41%, 33%, 3%, 14%, 5%, 4%
Residential: 74%, 20%, 41%, 32%, 3%, 15%, 5%, 4%
General service business GS<50kW: 73%, 14%, 36%, 37%, 9%, 11%, 3%, 4%

X-axis: Customer Type · Y-axis: Percent

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Highlighted Breakout

The reliability of your electricity service – as judged by the number of power outages you experience: How satisfied are you with the electrical service that you receive from Lakeland Power based on...?

The amount of time it takes to restore power when power outages occur: How satisfied are you with the electrical service that you receive from Lakeland Power based on...?

The quality of the power delivered to you as judged by the absence of voltage fluctuations that can result in [flickering/dimming of lights OR have an affect on equipment]: How satisfied are you with the electrical service that you receive from Lakeland Power based on...?

Total

- NET Satisfied: 85%
- NET Dissatisfied: 5%
- Very satisfied: 56%
- Somewhat satisfied: 29%
- Neither satisfied nor dissatisfied: 3%
- Somewhat dissatisfied: 4%
- Very dissatisfied: 1%
- Don't know: 7%
- Refused: 0%

Residential

- NET Satisfied: 85%
- NET Dissatisfied: 5%
- Very satisfied: 56%
- Somewhat satisfied: 29%
- Neither satisfied nor dissatisfied: 3%
- Somewhat dissatisfied: 4%
- Very dissatisfied: 1%
- Don't know: 7%
- Refused: 0%

General service business GS<50kW

- NET Satisfied: 88%
- NET Dissatisfied: 3%
- Very satisfied: 57%
- Somewhat satisfied: 31%
- Neither satisfied nor dissatisfied: 0%
- Somewhat dissatisfied: 3%
- Very dissatisfied: 0%
- Don't know: 6%
- Refused: 3%

Customer Type

Legend: NET Satisfied, NET Dissatisfied, Very satisfied, Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied, Don't know, Refused

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Providing accurate bills: How satisfied are you with the bills that you receive from Lakeland Power based on them...?

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 12-February 17, 2021, n=404, accurate 4.8 percentage points plus or minus, 19 times out of 20.
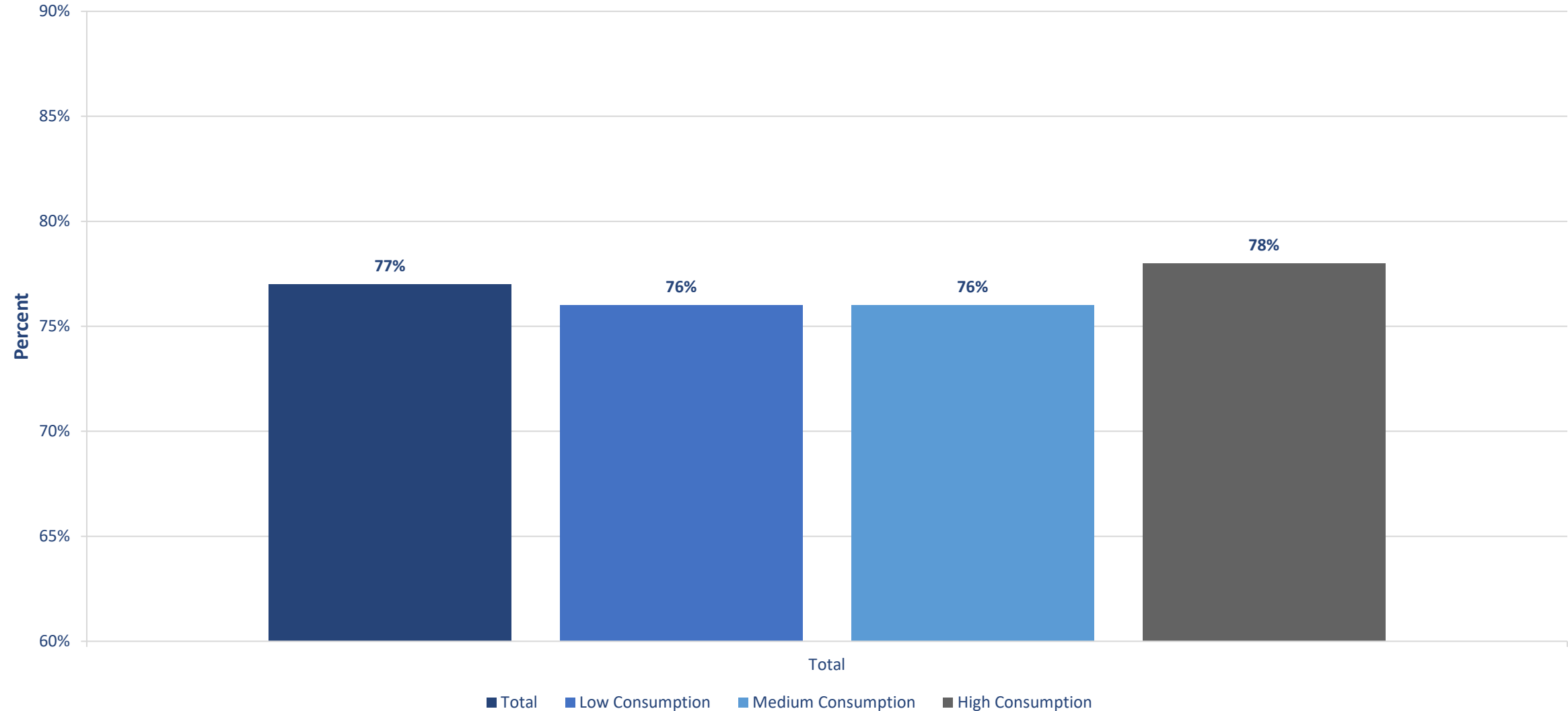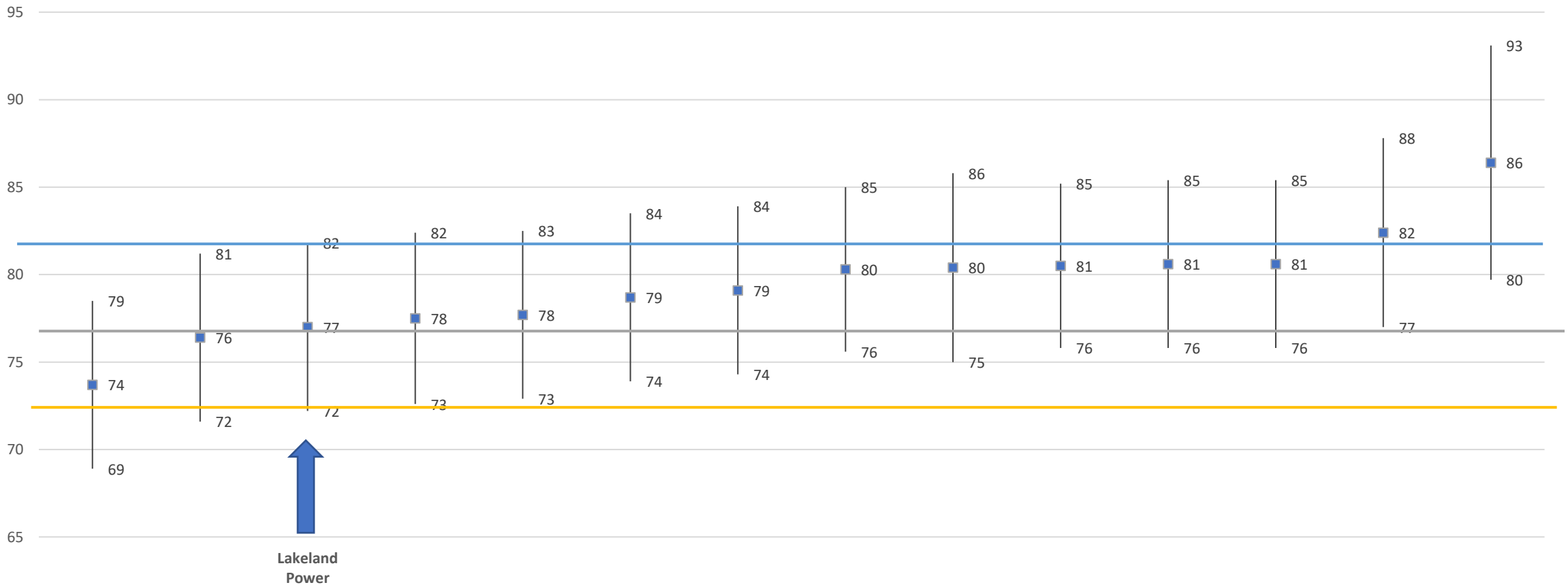
Providing convenient options to both receive and pay your bills: How satisfied are you with the bills that you receive from Lakeland Power based on them...?

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 12-February 17, 2021, n=404, accurate 4.8 percentage points plus or minus, 19 times out of 20.

How satisfied are you with the customer service you have received when dealing with employees of Lakeland Power, whether on the telephone, via email, in person or through online conversations including social media?

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 12-February 17, 2021, n=404, accurate 4.8 percentage points plus or minus, 19 times out of 20.
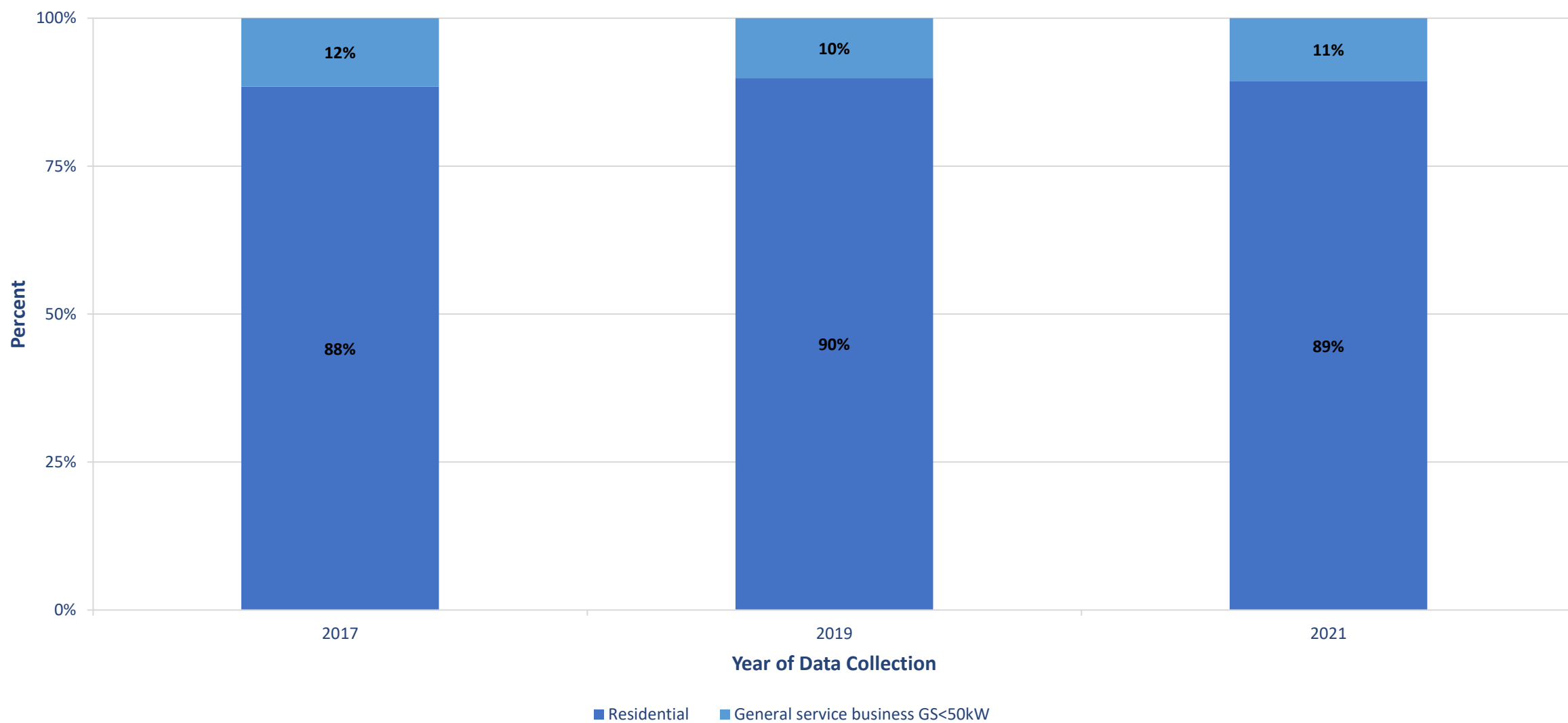
How satisfied are you with the communications that you may receive from Lakeland Power without talking directly to an employee, including information found on their website, bill inserts, advertising, notices, emails, or social media sites?

How familiar are you with the percentage of your electricity bill that went to Lakeland Power? So, NOT the portions allocated to power generation companies, transmission companies, the provincial government and regulatory agencies.

Do you feel that the percentage of your total electricity bill that you pay to Lakeland Power for the services they provide is...?

Customer Type

Legend: NET Reasonable | NET Unreasonable | Very reasonable | Somewhat reasonable | Somewhat unreasonable | Very unreasonable | Don't know | Refused

The cost of my electricity bill has a major impact [on personal finances OR bottom line of organization]: To what extent do you agree with the following statements regarding the electricity system in Ontario?

Customers are well served by the electricity system in Ontario: To what extent do you agree with the following statements regarding the electricity system in Ontario?

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 12-February 17, 2021, n=404, accurate 4.8 percentage points plus or minus, 19 times out of 20.

CUSTOMER SATISFACTION INDEX

2021 Customer Satisfaction Index Score
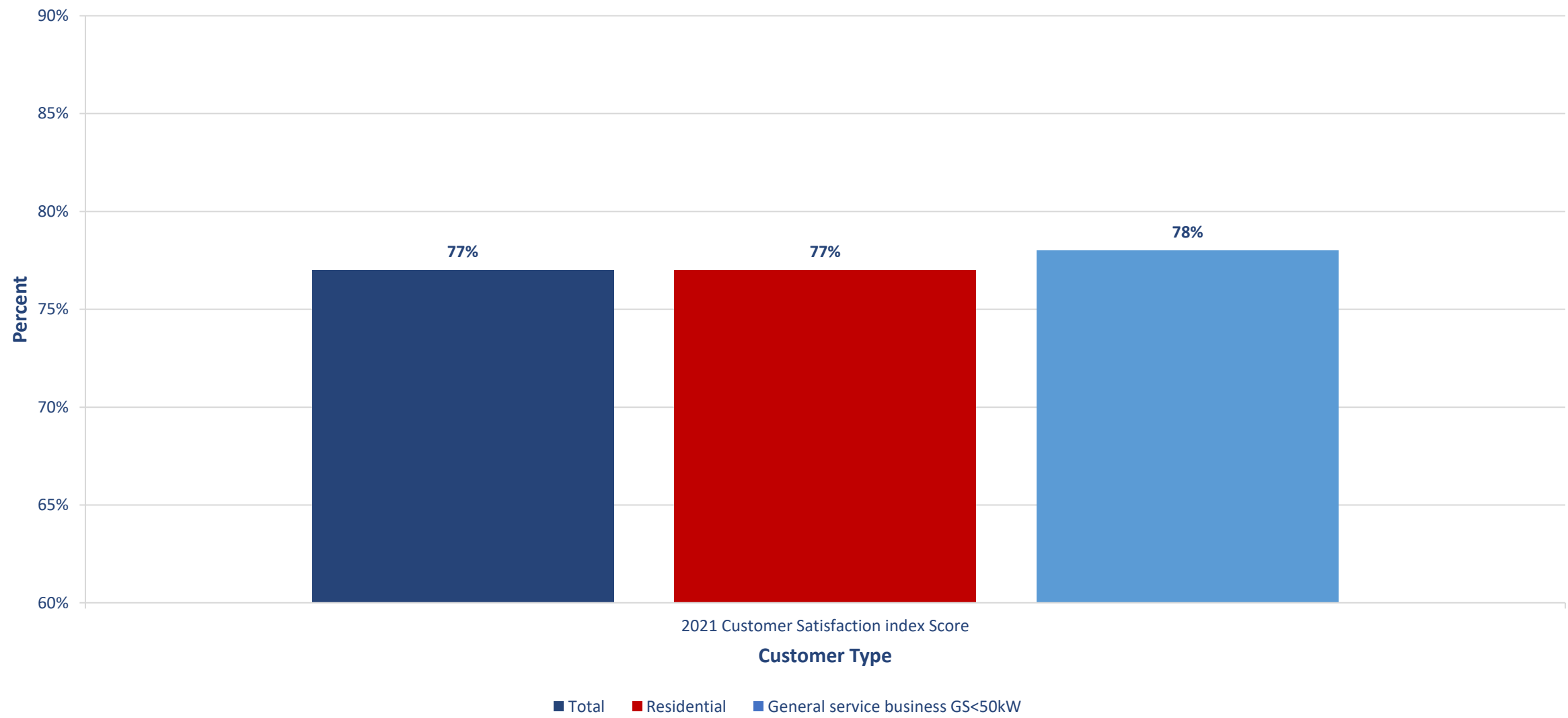
2021 Customer Satisfaction index Score

Customer Type

■ Total   ■ Residential   ■ General service business GS<50kW

2021 Customer Satisfaction Index Score by Region
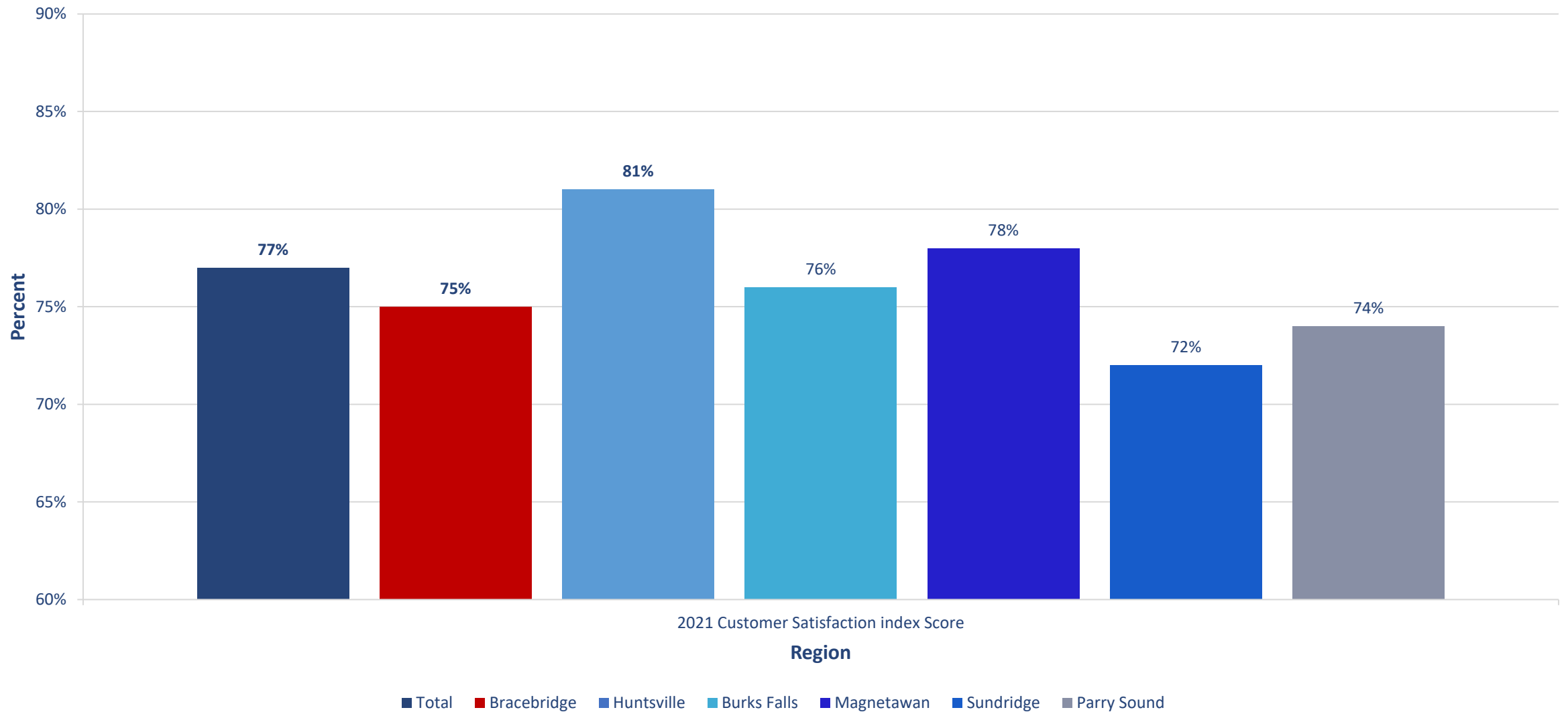
Source: Redhead Media Solutions/Advanis telephone random customer survey, January 15-February 24, 2021, n=404, accurate 4.9 percentage points plus or minus, 19 times out of 20.

Customer Satisfaction Index by the following statement:

The cost of my electricity bill has a major impact on [my personal finances/bottom line]
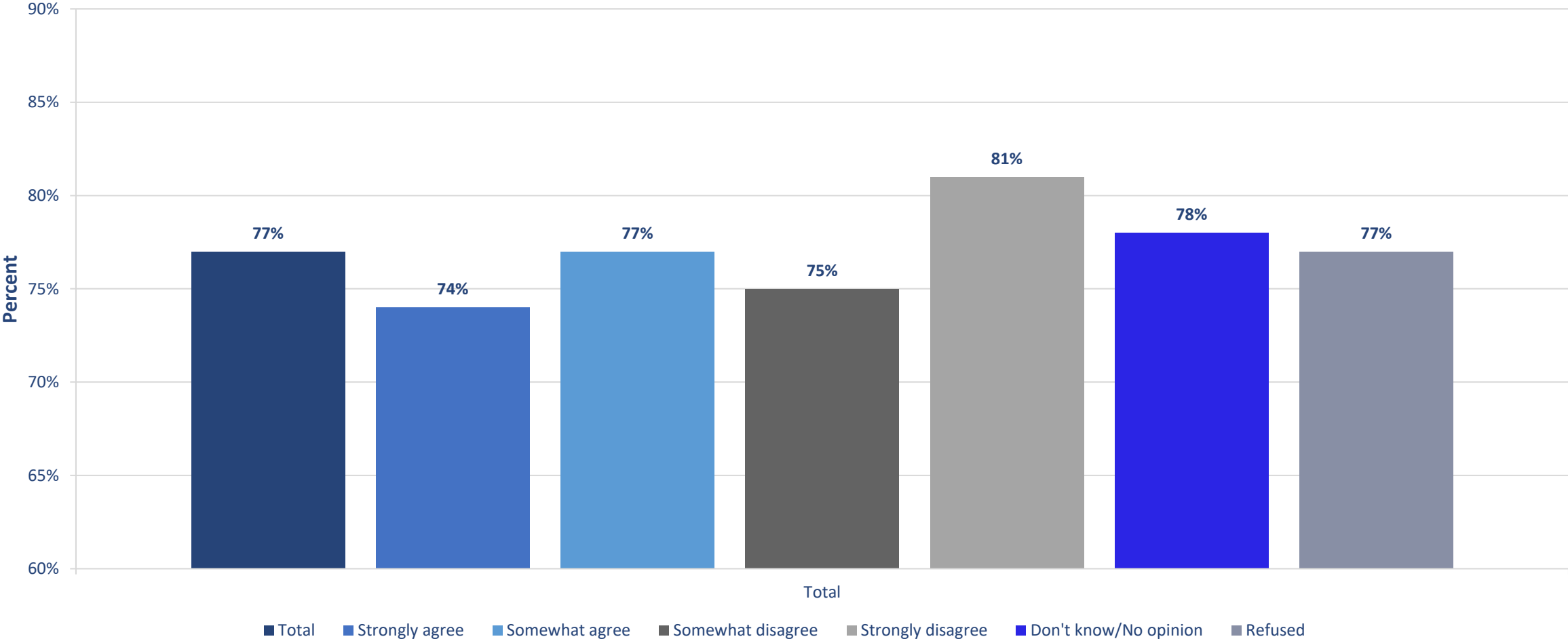
Customer Satisfaction Index by the following statement:

Customers are well served by the electricity system in Ontario
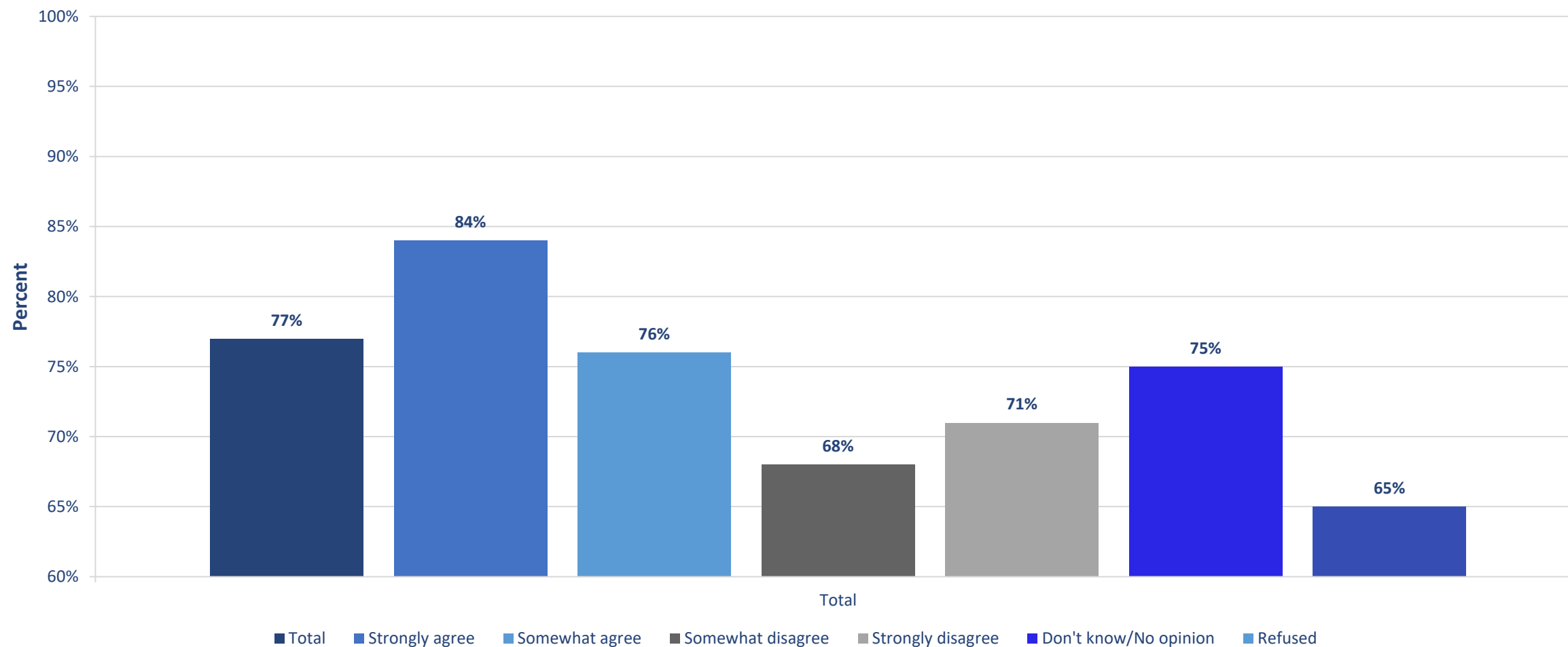
Source: Redhead Media Solutions/Advanis telephone random customer survey, January 12-February 17, 2021, n=404, accurate 4.8 percentage points plus or minus, 19 times out of 20.

Customer Satisfaction Index Score Comparison to External LDCs
Upper and Lower Bound

- The lines denote Lakeland Power's upper and lower bound based on the CSI Score.
- Almost all LDCs confidence intervals overlap, similar to 2019.
- Lakeland Power overlaps with all LDCs, indicating statistical uniformity.

CORE COMPARATIVE DATA 2017-2021

How familiar are you with Lakeland Power, which operates the electricity distribution system in your community?

Thinking specifically about the services provided to you and your community by Lakeland Power, overall, how satisfied are you with the services that you receive from Lakeland Power?

The reliability of your electricity service – as judged by the number of power outages you experience: How satisfied are you with the electrical service that you receive from Lakeland Power based on...?

The amount of time it takes to restore power when power outages occur: How satisfied are you with the electrical service that you receive from Lakeland Power based on...?

The quality of the power delivered to you as judged by the absence of voltage fluctuations that can result in [flickering/dimming of lights OR have an affect on equipment]: How satisfied are you with the electrical service that you receive from Lakeland Power based on...?

Providing accurate bills: How satisfied are you with the bills that you receive from Lakeland Power based on them...?
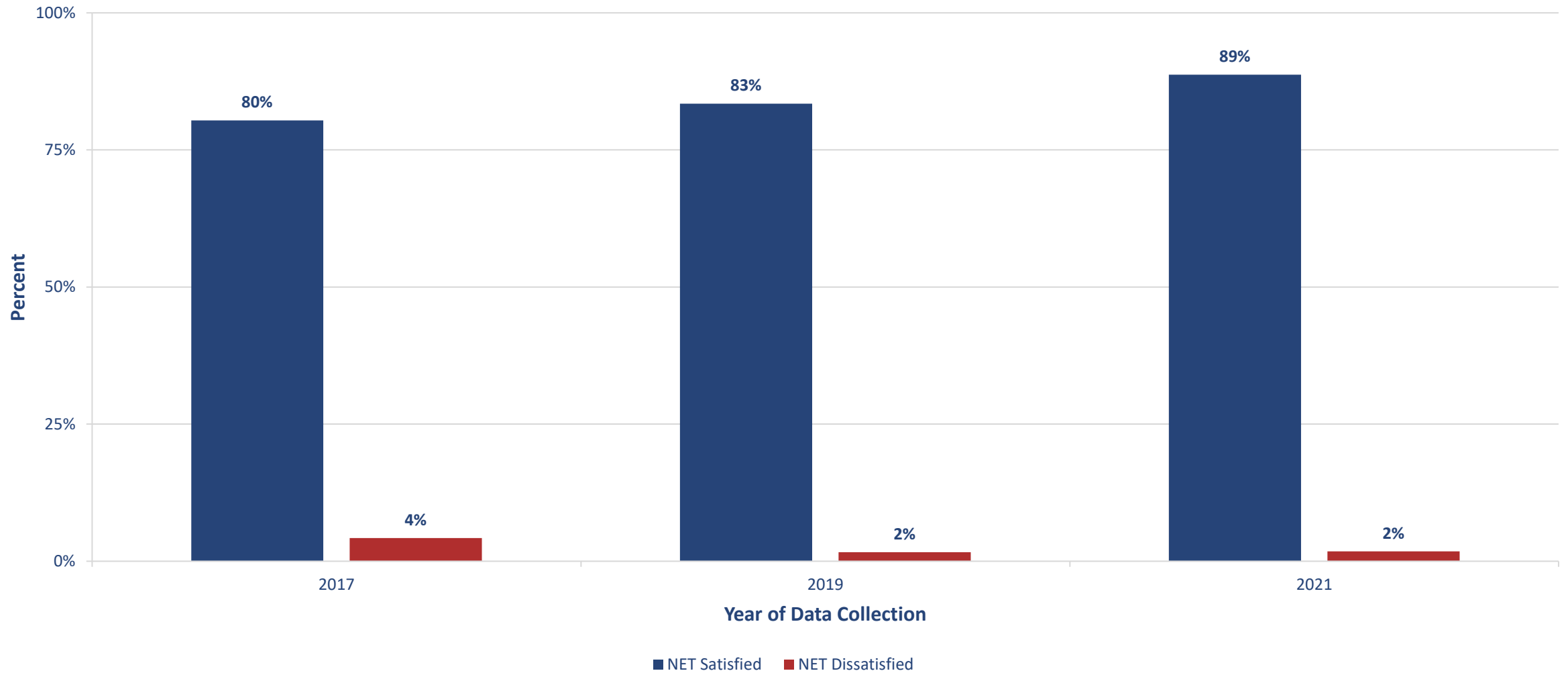
Providing convenient options to both receive and pay your bills: How satisfied are you with the bills that you receive from Lakeland Power based on them...?

How satisfied are you with the customer service you have received when dealing with employees of Lakeland Power, whether on the telephone, via email, in person or through online conversations including social media?
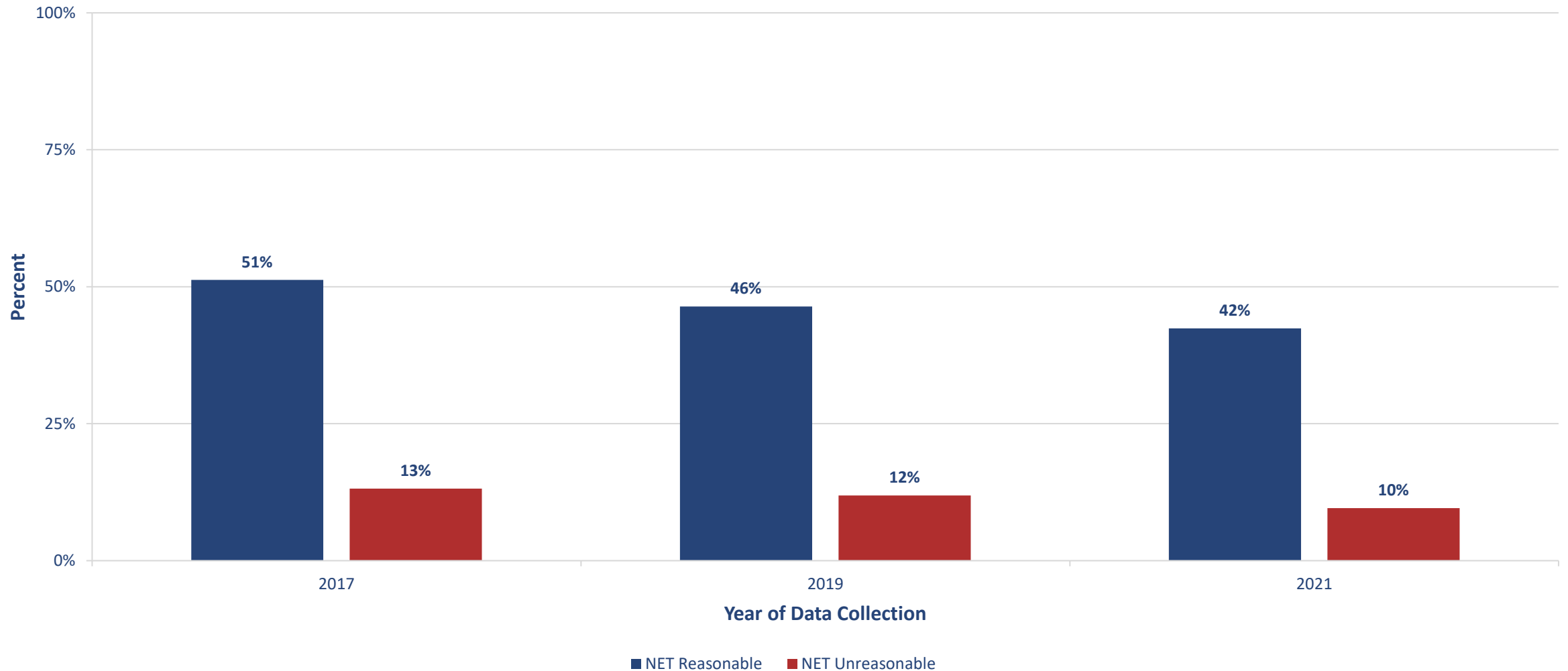

NET Satisfied — NET Dissatisfied

Year of Data Collection	NET Satisfied	NET Dissatisfied
2017	61%	8%
2019	59%	6%
2021	61%	5%

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How satisfied are you with the communications that you may receive from Lakeland Power without talking directly to an employee, including information found on their website, bill inserts, advertising, notices, emails, or social media sites?
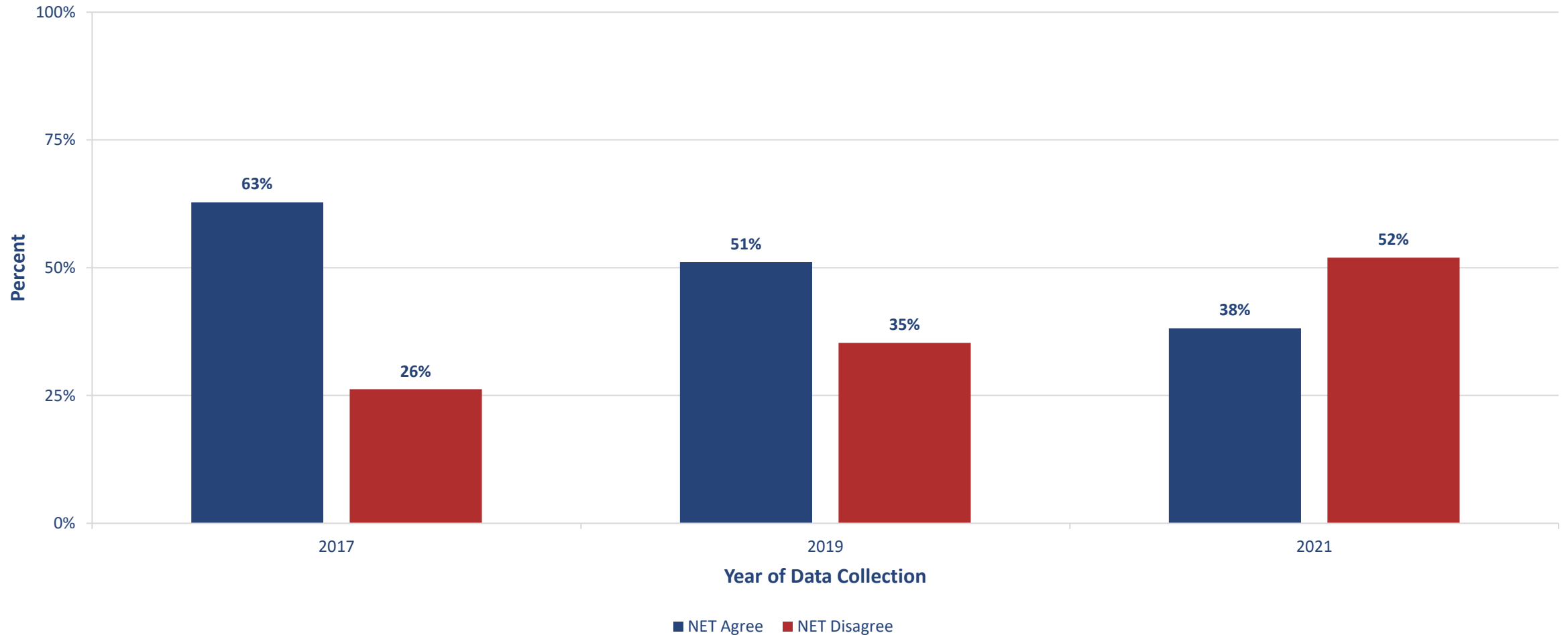
How familiar are you with the percentage of your electricity bill that went to Lakeland Power? So, NOT the portions allocated to power generation companies, transmission companies, the provincial government and regulatory agencies.
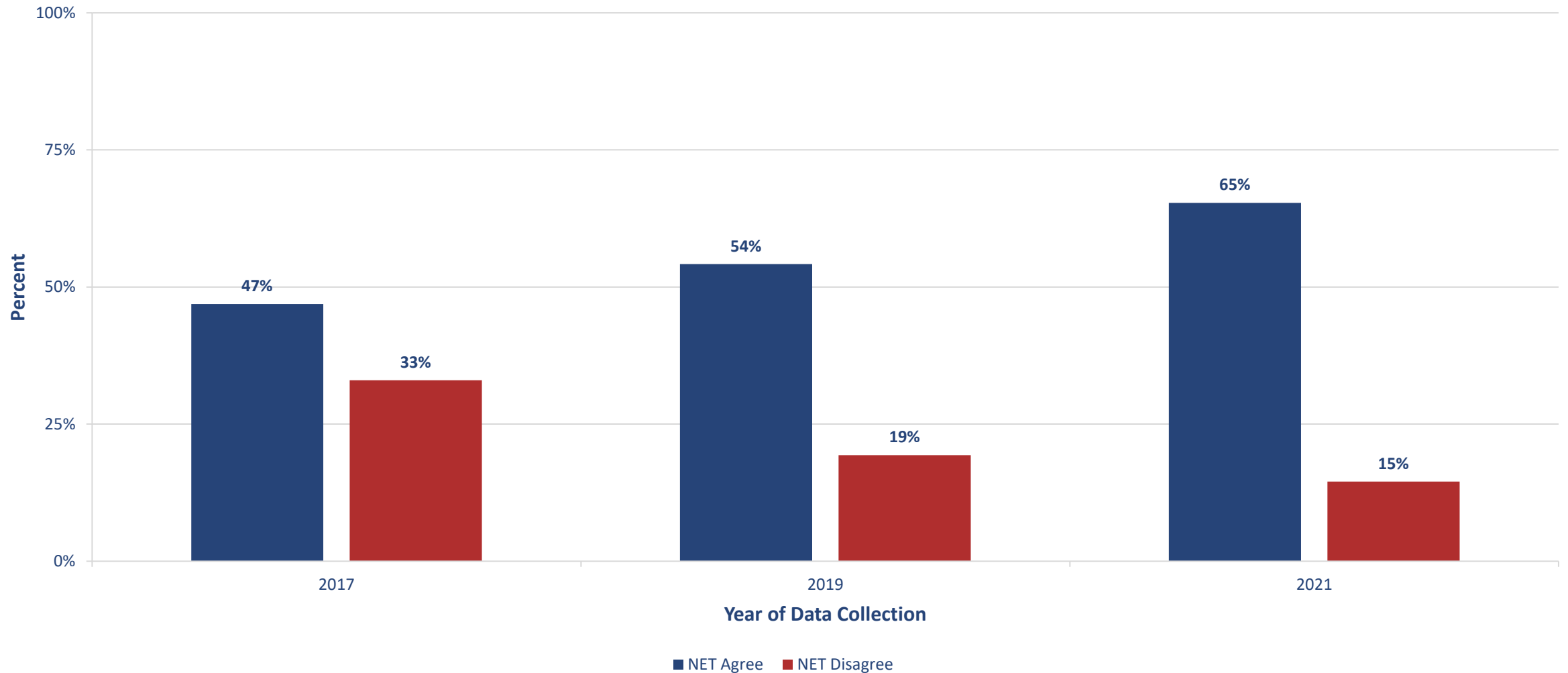

Year of Data Collection	Very familiar	Somewhat familiar	Not familiar	Don't know	Refused
2017	10%	21%	49%	19%	0%
2019	10%	20%	52%	17%	0%
2021	8%	16%	58%	18%	0%

Percent

Do you feel that the percentage of your total electricity bill that you pay to Lakeland Power for the services they provide is...?

Percent

	2017	2019	2021
NET Reasonable	51%	46%	42%
NET Unreasonable	13%	12%	10%

Year of Data Collection

■ NET Reasonable   ■ NET Unreasonable

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The cost of my electricity bill has a major impact [on personal finances OR bottom line of organization]: To what extent do you agree with the following statements regarding the electricity system in Ontario?

Customers are well served by the electricity system in Ontario: To what extent do you agree with the following statements regarding the electricity system in Ontario?

METHODOLOGY

Methodology Summary

Commissioned by	Lakeland Power Inc.
Sample size	404 randomly selected customers
Margin of error	±4.8 percentage points, 19 times out of 20
Survey mode	Random telephone survey of customer base, CATI data collection
Survey sample	Residential and GS <50kWh customer lists provided by Lakeland Power
Time of calling	4PM-9PM Weekdays, 10AM-5PM Saturdays, scheduled callbacks
In-field dates	January 12-February 17, 2021
Language	English only
Survey author	Innovative Research/Electricity Distributors Association
Question Order	Report shown in order
Question Wording	Questions shown in report as asked
Survey Company	Redhead Media Solutions Inc/Advanis

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Methodology Details

Target Respondents

The respondents of the survey were Ontario residents who are the primary bill payer or share the responsibility if residential or the person in-charge of managing the electricity bill at the organization if general service, and who resided within one of Lakeland Power's service territory(ies). Service territories were determined based on customer lists provided by Lakeland Power.

Sample Size and Statistical Reliability

The final total completed surveys by LDC, and the associated margin of error for each, are shown below.

All margins of error are shown at a 95% confidence level.

➢ E.g., the margin of error associated with a sample size of 400 for a large (infinite) population is ±4.8 percentage points, 19 times out of 20.

Since Lakeland Power has a finite population, we used the specific population sizes (i.e., the number of samples records received from Lakeland Power) in the calculation of margin of error. Doing so is more accurate, and results in a narrower margin of error than if we simply assumed large (infinite) population for each.

Sample sizes were set according to the *LDC Customer Satisfaction Survey: Methodology & Survey Implementation Guide*, prepared for the Electrical Distributors Association (April 19, 2016 revision):

Where possible, sample size of n=400.
Distributors with 3000 to 4999 customers (residential + GS<50), n=300
Distributors with <3000 customers (residential + GS<50), n=200

REDHEAD INC
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Methodology Details

Sampling Methodology

Redhead was provided sample lists from Lakeland Power. Customer lists included all basic information required such as name, telephone number, region (where applicable), customer type (residential or GS<50), LDC fee, Annual or Monthly consumption values. Redhead then calculated which quartile group each resident belonged to by evenly dividing them into four groups within each region and customer type. These quartiles were calculated based on annual consumption value.

To minimize low response:

➢ Sample was loaded in batches to ensure the sample was fully utilized before moving onto fresh sample records;
➢ Calls were made between the hours of 4pm and 9pm ET; and
➢ Call backs were scheduled and honored between the hours of 9am and 9pm ET.

Sample Cleaning

Redhead cleaned the customer lists individually once received from each LDC to ensure the customer list counts reflected actual individual records that could be called. The following steps were taken during sample cleaning.

➢ All records with no phone numbers were removed.
➢ All phone numbers were checked to see if they were valid numbers (i.e. 10 digits, all numerical, etc.) and any bad cases were removed.
➢ When duplicates were detected based on phone number, the average of the consumption value was calculated and kept for one consolidated record. All others were removed.
➢ Residential and GS<50KW were separated into their own lists to be loaded and managed separately in the calling system.

Regions within each customer list were given a numerical value to be used for calling quotas.

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Methodology Details

Questionnaire

The survey instrument was provided by the Electricity Distributors Association (EDA) developed in conjunction with Innovative Research. The survey consisted of an introduction, overall satisfaction, power quality and reliability, billing and payment, customer service experience, communications, price, optional deeper dive questions, and final personal finance / sector mood measures. Additional questions were provided individually by Lakeland Power. These questions are not required as part of the survey and, as outlined in the methodology guideline, were asked after all the standard and required questions.

Data Collection

Computer aided telephone interviews (CATI) were conducted from January 12-February 17, 2021.

Quality Control

➢ Advanis, on behalf of Redhead, trained the interviewers to understand the study's objectives;
➢ Detailed call records are kept by the automated CATI system, and are supplemented by output files to SPSS for productivity analysis (i.e., not subject to human error);
➢ The survey was soft launched in LDCs that had the most available sample, and the data was then checked before calling began in full for Lakeland Power;
➢ 100% of all surveys are digitally recorded for potential review (see next bullet);
➢ Advanis' Quality Assurance team listened to the actual recordings of five percent of completed surveys and compared the responses to those entered by the interviewer to ensure that responses from respondents are properly recorded;
➢ Team Supervisors conduct regular more formal evaluations with each interviewer, in addition to nightly monitoring of each interviewer on their team;
➢ Project Managers closely monitored the progress of data collection, including call record dispositions;
➢ All SPSS code is reviewed by a more senior researcher;
➢ All Report Builder output is reviewed by a more senior researcher; and
➢ All values in the report are reviewed by another team member to ensure accuracy.

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Methodology Details

Analysis of Findings & Data Weighting

Results were weighted to match the proportion of low volume rate class records as provided to Redhead after cleaning of the sample file. Where a region flag was also provided, results were weighted to the low volume rate class within each region and regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

The Customer Satisfaction index scores have been highlighted and were calculated as described below, based on instructions in the Survey Methodology Guidelines. The "response values" referenced in the description below were also determined and provided by the survey authors.

Data analysis and cross-tabulation have been conducted using SPSS and Report Builder software.

This **index score** is calculated using the following process:

Step 1: Weight data to n=400 with each low volume rate class proportionate to its share of LDC customer base.

Step 2: Rescale the index score variables onto the 0 to 1 scale as indicated by the response values detailed below.

Step 3: The average result of the questions asked for each OEB topic and the overall satisfaction score will be added together[3].

	B5
+	[C6+C7+C8] divided by 3
+	[D9+D10] divided by 2
+	E11
+	F12
+	G14
=	**Total cumulative scores**

Step 4: The total cumulative score from Step 2 will be divided by 6 to generate the **Customer Satisfaction Index Score** (bound between 0-1).

The chart on the following page illustrates how the **Customer Satisfaction Index Score** will be calculated.

As noted above, LDCs without a region flag were weighted to their low volume rate class proportion based on the cleaned sample file. LDCs with a region flag were weighted to their low volume rate class proportion within each region based on the cleaned sample file, and then regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

Specific values of the number of sample records, estimated population proportions, and final weighted sample counts within Lakeland Power are provided below. The sum of the regional population proportions within an LDC may not equal 100% due to rounding.

Methodology Tables

Margin of error

LDC	Customer Records from LDC	Completed Surveys	Sample Size as % of Customer list	Margin of Error @ 95% confidence level
Lakeland Power	11,676	404	3.46%	+/- 4.8%

Sample weighting

Lakeland Power						
Regions Flagged in Sample	Low Volume Rate Class	Clean, Deduplicated Sample Received	Rate Class Proportion	Estimated Customer Proportion	Weighted Sample Count	Unweighted Sample Count
Bracebridge	Residential	5,495	91%	52%	190	129
	General Service < 50 kW	524	9%		18	13
Huntsville	Residential	1,306	85%	13%	45	145
	General Service < 50 kW	227	15%		8	23
Parry Sound	Residential	2,648	89%	26%	14	7
	General Service < 50 kW	338	11%		2	2
Burk's Falls	Residential	404	87%	4%	5	8
	General Service < 50 kW	59	13%		1	1
Sundridge	Residential	438	86%	4%	15	12
	General Service < 50 kW	71	14%		2	2
Magnetawan	Residential	146	88%	1%	92	55
	General Service < 50 kW	20	12%		12	7
TOTAL	**Residential**	**10,437**	**89%**	100%	**361**	**356**
	General Service < 50 kW	**1239**	**11%**		**43**	**48**
					404	404

Thank You

We greatly appreciate working on this important project for Lakeland Power and hope we have met or exceeded your expectations.

We are happy to present this data to your staff or Board members upon request. If you wish to do so, please contact us for an appointment.

We look forward to working with you on future projects, including the Electricity Safety Awareness Survey later in 2021. Please note if you have any other projects that we may be able to help you with, don't hesitate to be in touch.

Graydon Smith - President
Redhead Media Solution Inc.
505 Hwy 118 W.
Suite 416
Bracebridge, ON
P1L 2G7

Thank you for selecting Redhead Media Solutions Inc. for this important project for Lakeland Power Distribution (Lakeland). We appreciate your confidence in us to provide you with data on Customer Satisfaction that can now be used to compare with the previous survey in 2017 and among other LDCs.

We have restructured our reporting to you this year, replacing the traditional single report with tables and transitioning to a more robust and informative graphics based style that gives you the ability to see differences "at a glance" as opposed to simply comparing numbers. To supplement this report, we have also included the full set of 2019 tables, comparative 2017/2019 tables and comments for question G15 (open comments) in spreadsheet format, allowing you easy access to the data we have generated. You can find this as part of the email we sent labelled "Appendix A". The methodology guide, as well as residential and general service questionnaires are also included as appendices B, C and D for your reference.

Should there be any specific data or breakouts that you require, please contact us to discuss.

Graydon Smith
President

LakelandPower

REDHEAD INC
MEDIA SOLUTIONS

Introduction and Summary

Redhead Media Solutions Inc. (Redhead), partnering with ADVANIS for data collection and reporting, has been retained (via an RFP process by Cornerstone Hydro Electric Concepts Inc. - CHEC) to conduct a 2019 Customer Satisfaction Survey for Lakeland Power. This survey is a required part of an LDC's Balanced Scorecard and other reporting and regulatory requirements for the Ontario Energy Board (OEB).

The complete group of participating CHEC LDCs are as follows:

➢ Centre Wellington Hydro
➢ EPCOR
➢ Grimsby Power
➢ Lakefront Utilities
➢ Lakeland Power Distribution
➢ Niagara-on-the-Lake Hydro
➢ Orangeville Hydro
➢ Ottawa River Power
➢ Renfrew Hydro
➢ Rideau St. Lawrence Distribution
➢ Tillsonburg Hydro
➢ Wasaga Distribution
➢ Wellington North Power

Additionally, Redhead also provided services for this project outside the CHEC group of LDCs.

REDHEAD INC
MEDIA SOLUTIONS

Introduction and Summary

This final report contains data specifically for Lakeland Power.

The survey is comprised of 400 randomly selected interviews of Lakeland Power customers among the low volume customer base (residential customers and general service under 50kW customers; GS<50kW). Residential customers were asked to confirm that they receive an electricity or hydro bill from Lakeland Power and that they are the primary payer of that bill, or share the responsibility.

GS<50kW customers were also asked to confirm they receive an electricity or hydro bill from Lakeland Power, and additionally to confirm that the person who manages the organization's electricity bill was the one to complete the interview. The sample frame is stratified on region (where applicable) and consumption quartiles by rate class in accordance with the "Survey Implementation Requirements" on page 4 of the "EDA/Innovative Customer Satisfaction Scorecard: Methodology & Survey Implementation Guide", contained in Appendix B of this report.

The objective of the survey is to provide an Overall Customer Satisfaction index score for Lakeland Power. This is a calculated aggregate value based on responses of to 9 core measures in the survey instrument. In some cases, additional questions were asked but not included in the calculation of the Customer Satisfaction Index Score.

Lakeland Power' 2019 Customer Satisfaction Index Score is 75.5%, This is a 1.0% increase over the 2017 score (74.5%) and 3.9% less than the mean average of all LDCs surveyed (79.4%).

This falls within a very tight spectrum of index scores we processed for all LDCs that participated in the 2019 survey via Redhead. When the confidence interval and margin of error is applied to all index scores, there is significant overlap between LDCs which underlines the statistical similarity of performance and satisfaction among participants. Statistically, Lakeland Power is similar to all the other LDC surveyed.

The following report contains graphic data and tables for all prescribed questions as well as year-over-year comparative data (internal) and comparative scoring data (external). Additional data is available in the attached spreadsheet sheets and tables. (Appendix A)

Question scoring and index methodologies were prescribed by the EDA/Innovative. As such, there has been limited additional analysis provided beyond the direction provided to meet the reporting guidelines. Should you wish further analysis of the data please contact our office to discuss.
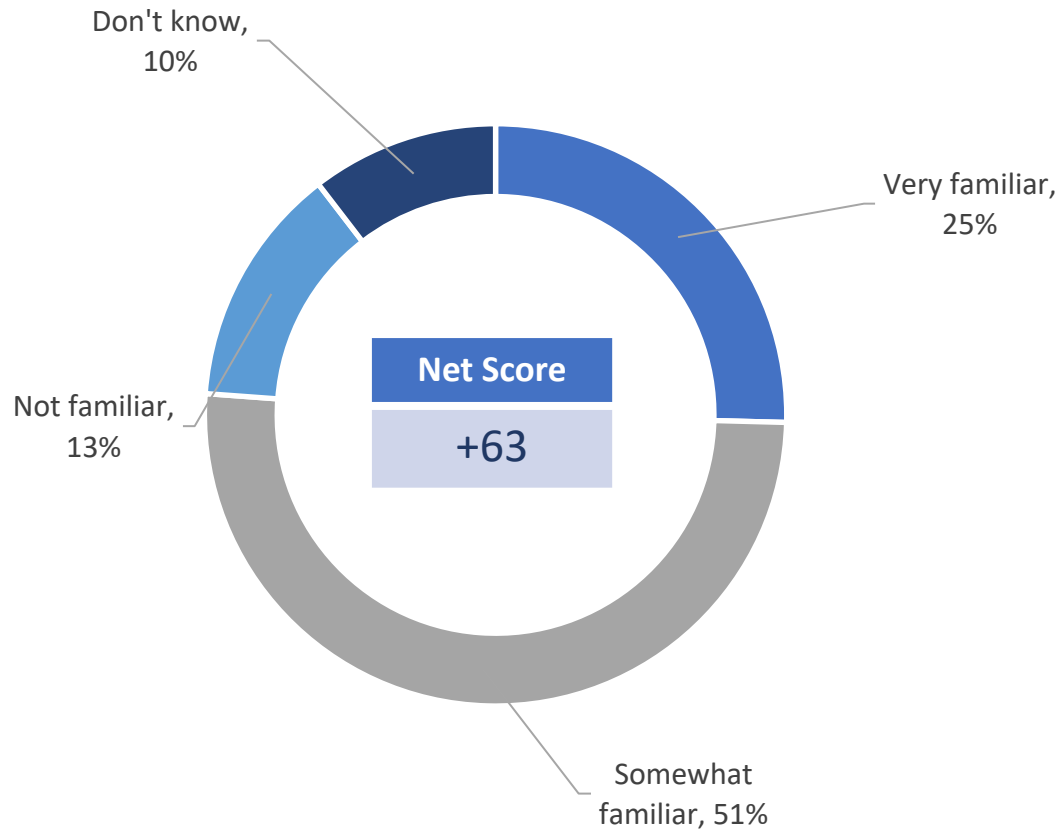
Customer Type: Low Volume Rate Class

GS < 50 kWh, 10%

2019
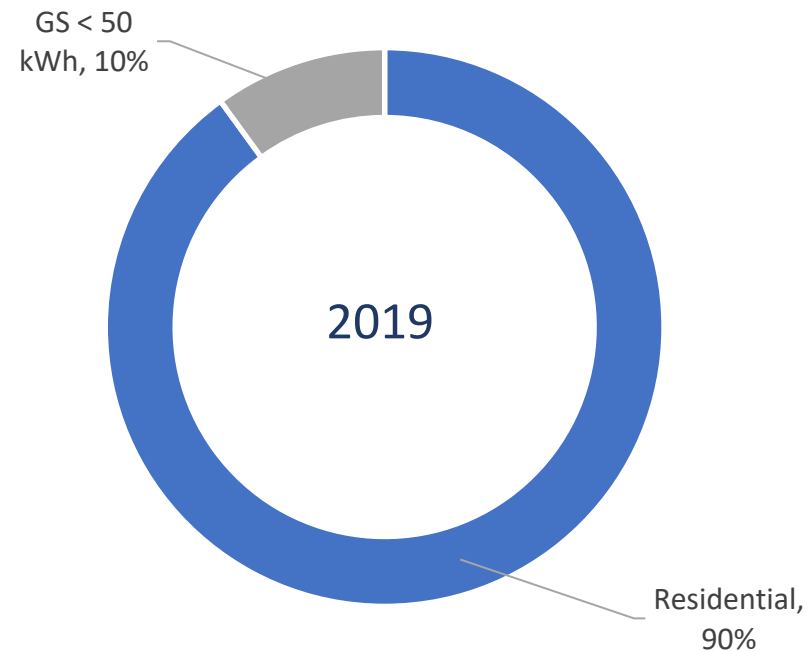
Residential, 90%

	Total	Residential	General service business GS<50kWh
Base: Total answering	400	355	45
Residential	90%	100%	0%
General service business GS<50kWh	10%	0%	100%

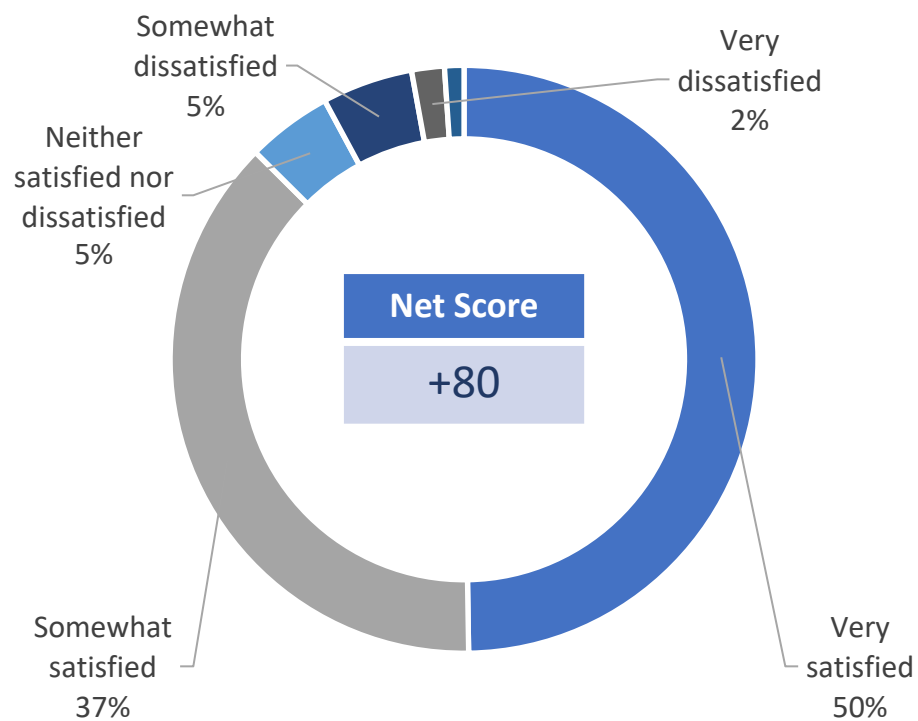*Note: Charts and tables may not add up to 100% due to rounding

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B4: How familiar are you with Lakeland Power, which operates the electricity distribution system in your community?

Don't know, 10%

Very familiar, 25%

Not familiar, 13%

Somewhat familiar, 51%

Net Score

+63

	Total	Residential	General service business GS<50kWh
Base: Total answering	400	355	45
Very familiar	25%	24%	37%
Somewhat familiar	51%	51%	47%
Not familiar	13%	13%	12%
Don't know	10%	11%	5%
Refused	0%	0%	0%

*Note: Charts and tables may not add up to 100% due to rounding

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B5: Thinking specifically about the services provided to you and your community by Lakeland Power, overall, how satisfied are you with the services that you receive from Lakeland Power?

Net Score

+80

	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very satisfied	50%	48%	61%
Somewhat satisfied	37%	38%	32%
Neither satisfied nor dissatisfied	5%	5%	2%
Somewhat dissatisfied	5%	6%	0%
Very dissatisfied	2%	2%	0%
Don't know	1%	1%	4%
Refused	0%	0%	1%

*Note: Charts and tables may not add up to 100% due to rounding

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C6: Satisfaction with the reliability of your electricity service – as judged by the number of outages you experience.

Don't know 4%

Somewhat dissatisfied 9%

Net Score +69

Very satisfied 40%

Neither satisfied nor dissatisfied 5%

Somewhat satisfied 40%
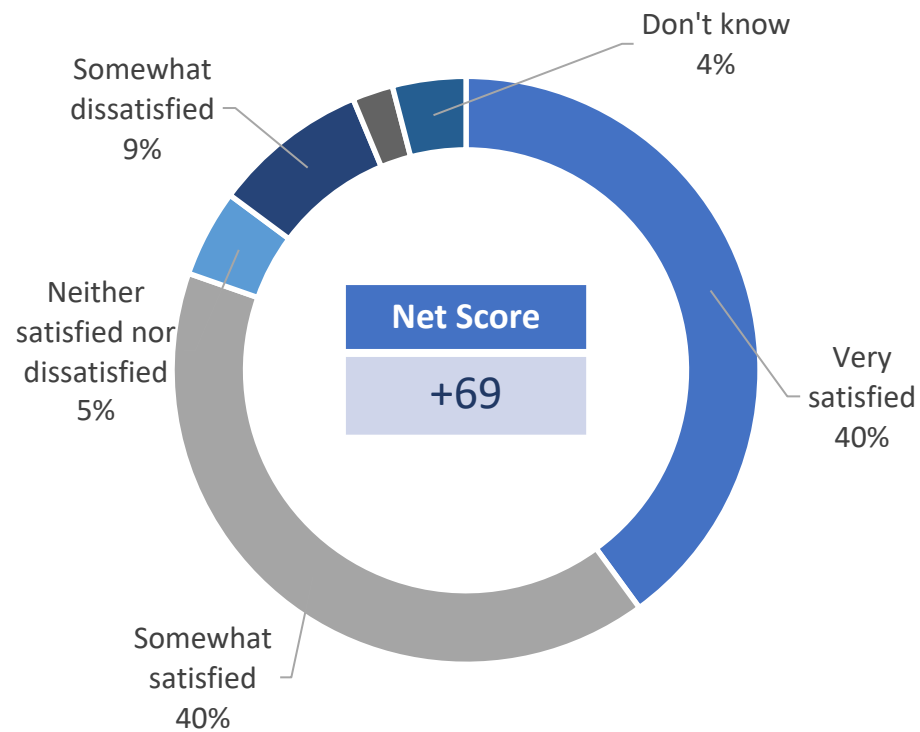
	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very satisfied	40%	39%	51%
Somewhat satisfied	40%	42%	28%
Neither satisfied nor dissatisfied	5%	5%	1%
Somewhat dissatisfied	9%	9%	6%
Very dissatisfied	2%	2%	0%
Don't know	4%	3%	10%
Refused	0%	0%	4%

*Note: Charts and tables may not add up to 100% due to rounding

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8

C7: Satisfaction with the amount of time it takes when outages occur.
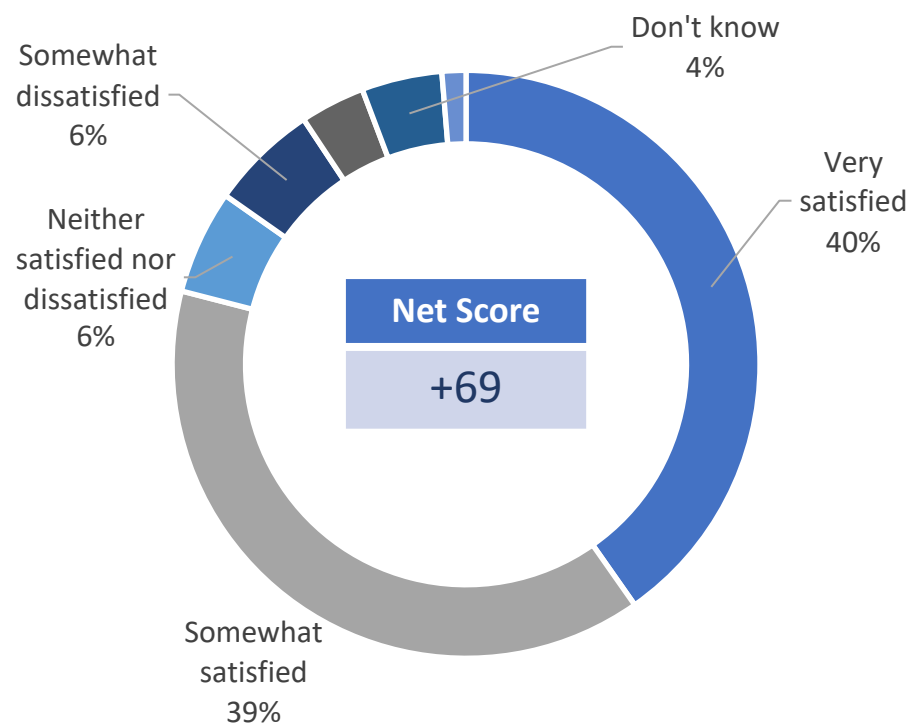
Somewhat dissatisfied 6%

Don't know 4%

Very satisfied 40%

Neither satisfied nor dissatisfied 6%

Net Score

+69

Somewhat satisfied 39%

	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very satisfied	40%	40%	42%
Somewhat satisfied	39%	39%	41%
Neither satisfied nor dissatisfied	6%	6%	1%
Somewhat dissatisfied	6%	7%	1%
Very dissatisfied	4%	4%	1%
Don't know	4%	3%	15%
Refused	1%	1%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 7-Febuary 13, 2019, n=400, accurate 4.8 percentage points plus or minus, 19 times out of 20.

9

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C8: Satisfaction with the quality of power delivered to you as judged by the absence of voltage fluctuations that can result in the flickering or diming of lights or may affect your equipment.
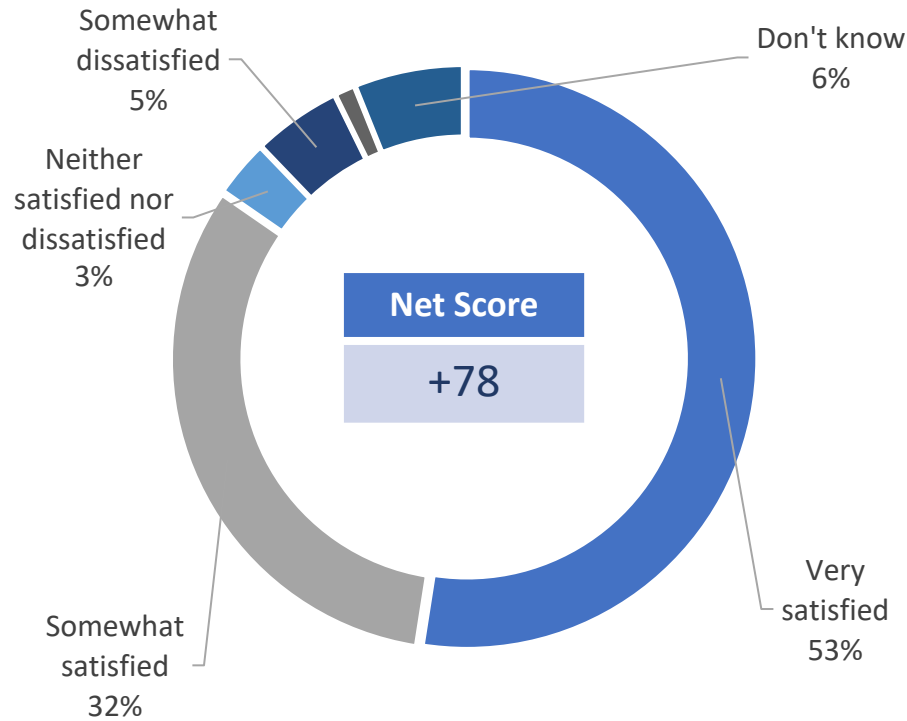
Net Score
+78

	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very satisfied	52%	52%	57%
Somewhat satisfied	32%	33%	25%
Neither satisfied nor dissatisfied	3%	3%	1%
Somewhat dissatisfied	5%	5%	8%
Very dissatisfied	1%	1%	0%
Don't know	6%	6%	9%
Refused	0%	0%	0%

*Note: Charts and tables may not add up to 100% due to rounding

REDHEAD INC
MEDIA SOLUTIONS
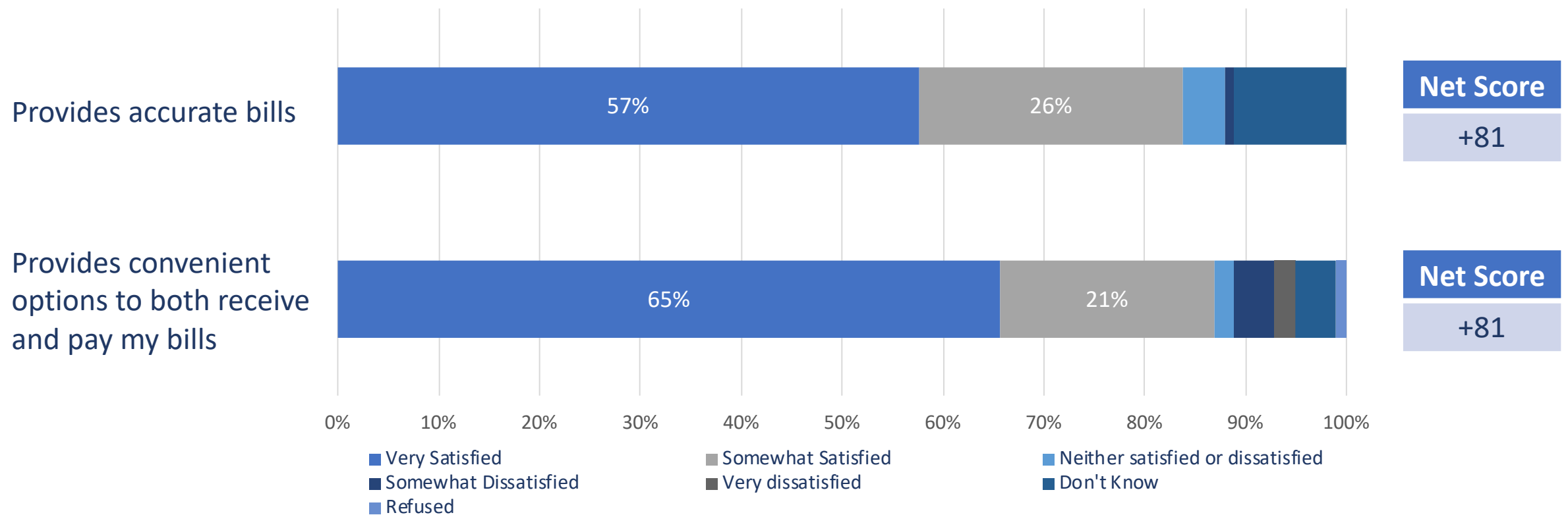
E11: Overall, how satisfied are you with the customer service provided by Lakeland Power?
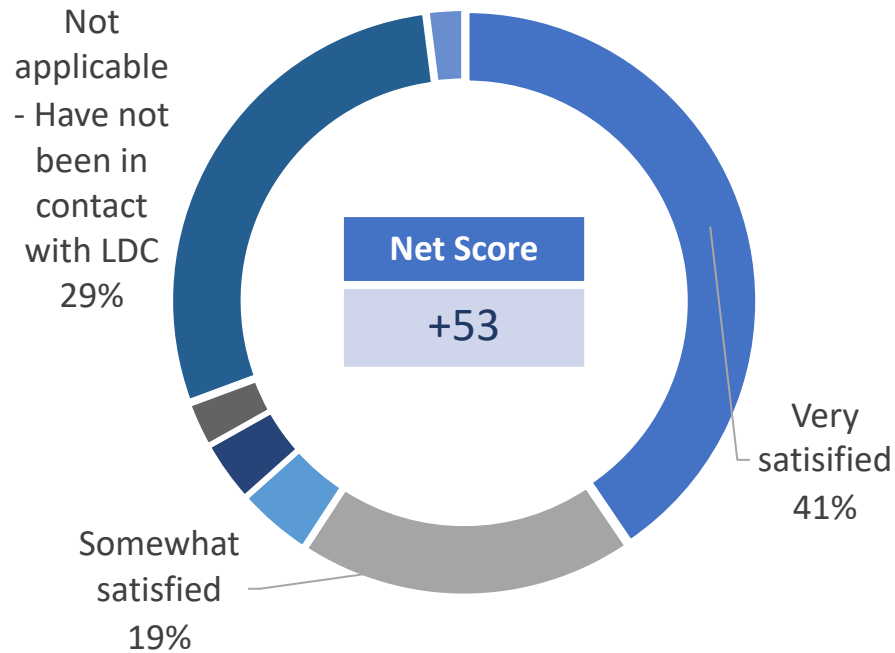
Net Score
+53

Not applicable - Have not been in contact with LDC
29%

Very satisified
41%

Somewhat satisfied
19%

	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very satisfied	41%	40%	47%
Somewhat satisfied	19%	18%	27%
Neither satisfied nor dissatisfied	4%	4%	5%
Somewhat dissatisfied	3%	4%	1%
Very dissatisfied	3%	3%	0%
Not applicable - Have not been in contact with LDC	29%	30%	19%
Don't know	2%	2%	2%

*Note: Charts and tables may not add up to 100% due to rounding

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F12: Overall, how satisfied are you with the communications that you receive from Lakeland Power related specifically to your electrical service?
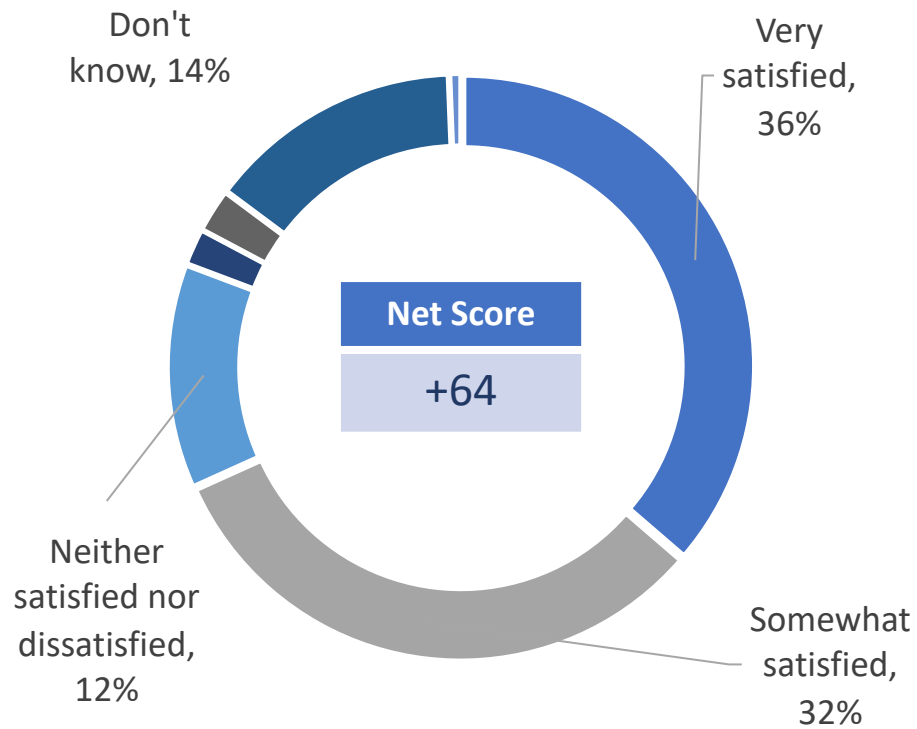
Don't know, 14%

Very satisfied, 36%

Net Score

+64

Neither satisfied nor dissatisfied, 12%

Somewhat satisfied, 32%

	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very satisfied	36%	36%	42%
Somewhat satisfied	32%	32%	32%
Neither satisfied nor dissatisfied	12%	13%	10%
Somewhat dissatisfied	2%	2%	0%
Very dissatisfied	2%	3%	2%
Don't know	14%	14%	14%
Refused	1%	1%	0%

*Note: Charts and tables may not add up to 100% due to rounding

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G13: Before this survey, how familiar with you with the percentage of your (household/organization)'s electricity bill that went to Lakeland Power?
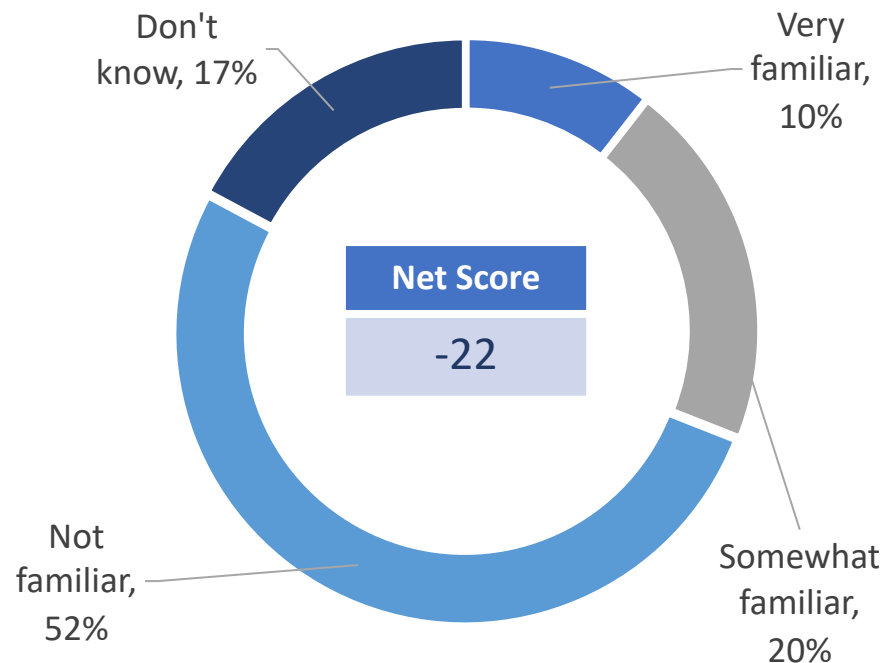
Don't know, 17%

Very familiar, 10%

Net Score

-22

Not familiar, 52%

Somewhat familiar, 20%

	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very familiar	10%	10%	13%
Somewhat familiar	20%	21%	15%
Not familiar	52%	52%	50%
Don't know	17%	17%	17%

*Note: Charts and tables may not add up to 100% due to rounding

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14

G14: Do you feel that the percentage of your (household/organizations)'s total electricity bill that you pay to Lakeland Power for the services they provide is…?
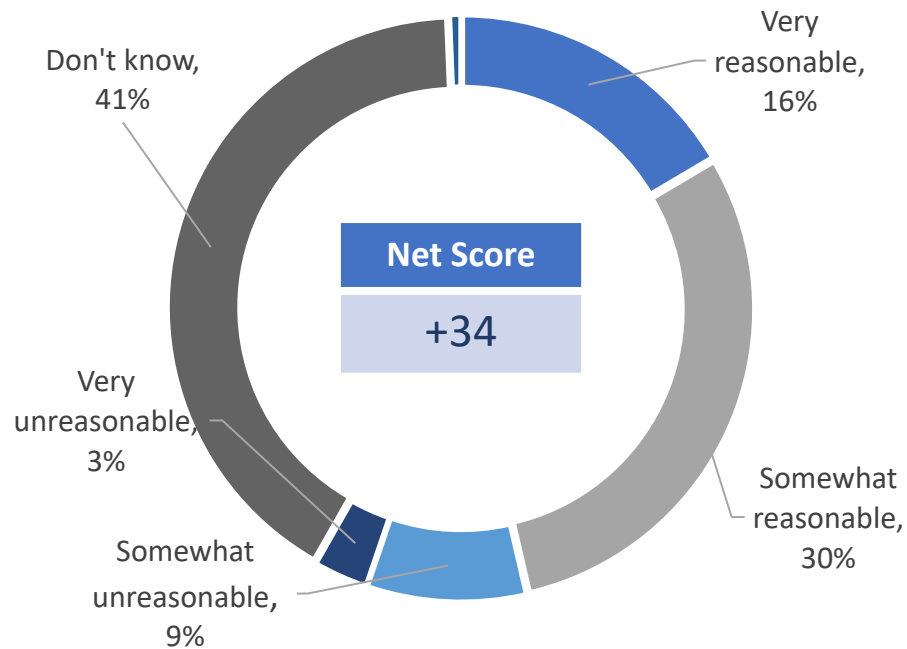
	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Very reasonable	16%	15%	26%
Somewhat reasonable	30%	31%	18%
Somewhat unreasonable	9%	9%	4%
Very unreasonable	3%	3%	0%
Don't know	41%	40%	47%
Refused	1%	0%	4%

Net Score +34

Don't know, 41%
Very reasonable, 16%
Somewhat reasonable, 30%
Somewhat unreasonable, 9%
Very unreasonable, 3%

*Note: Charts and tables may not add up to 100% due to rounding

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H16: The cost of my electricity bill has a major impact on (my finances and requires I do without some other important priorities)/(on the bottom line of my organization and results in some important spending priorities and investments being put off.
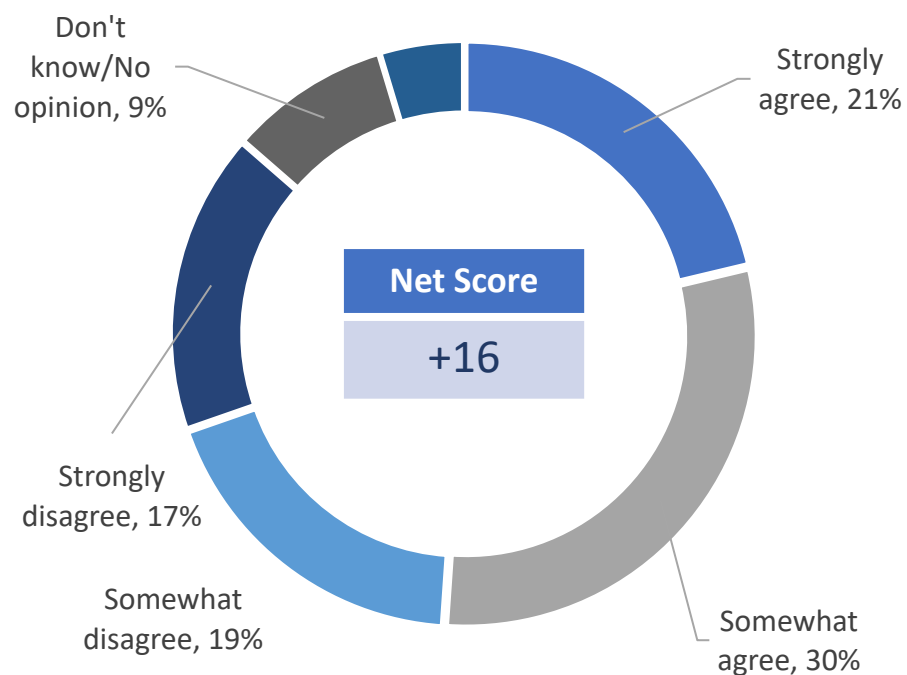
Don't know/No opinion, 9%

Strongly agree, 21%

Net Score

+16

Strongly disagree, 17%

Somewhat disagree, 19%

Somewhat agree, 30%

	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Strongly agree	21%	19%	38%
Somewhat agree	30%	30%	30%
Somewhat disagree	19%	19%	14%
Strongly disagree	17%	18%	9%
Don't know/No opinion	9%	9%	5%
Refused	5%	5%	4%

*Note: Charts and tables may not add up to 100% due to rounding

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16

H17: Customers are well served by the electricity system in Ontario.

Don't know/No opinion, 24%

Strongly agree, 16%

Strongly disagree, 6%

Net Score

+35

Somewhat agree, 38%

Somewhat disagree, 13%
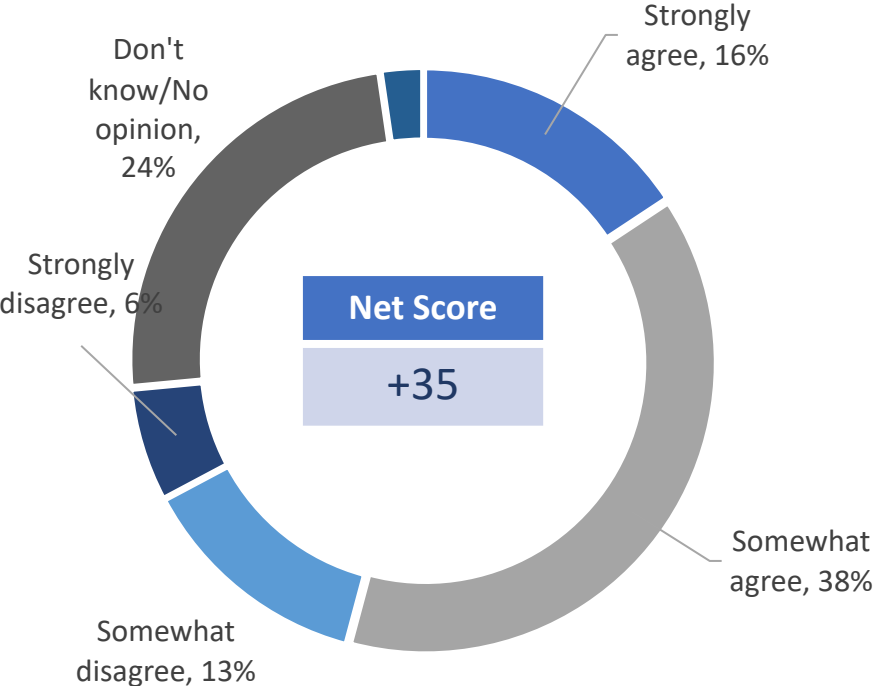
	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Strongly agree	16%	15%	21%
Somewhat agree	38%	37%	49%
Somewhat disagree	13%	14%	9%
Strongly disagree	6%	7%	3%
Don't know/No opinion	24%	25%	16%
Refused	2%	2%	2%

*Note: Charts and tables may not add up to 100% due to rounding

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Customer Satisfaction Index Score
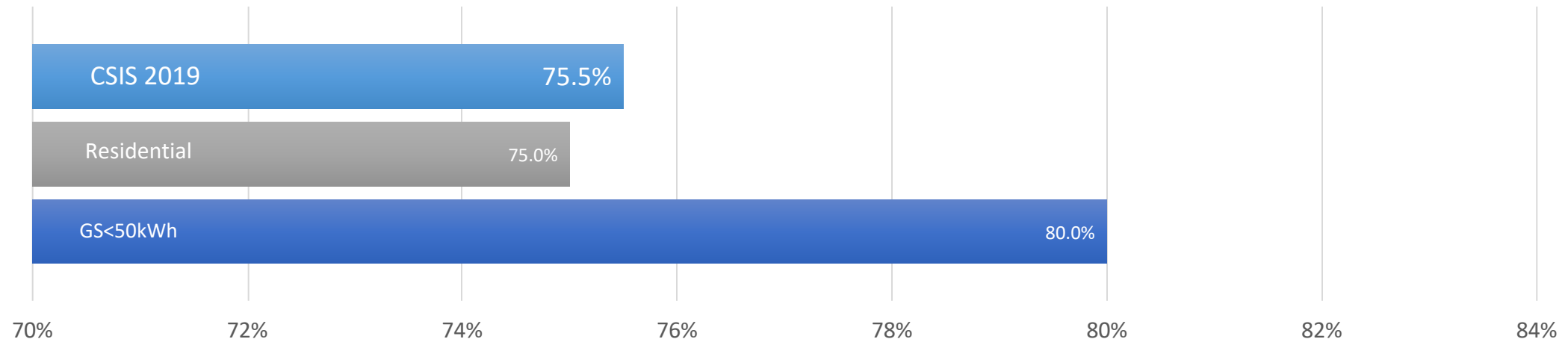
	Total	Residential	General service business GS<50kWh
Base: Total Answering	400	355	45
Customer Satisfaction index score	75.5%	75.0%	80.0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 7-Febuary 13, 2019, n=400, accurate 4.8 percentage points plus or minus, 19 times out of 20.
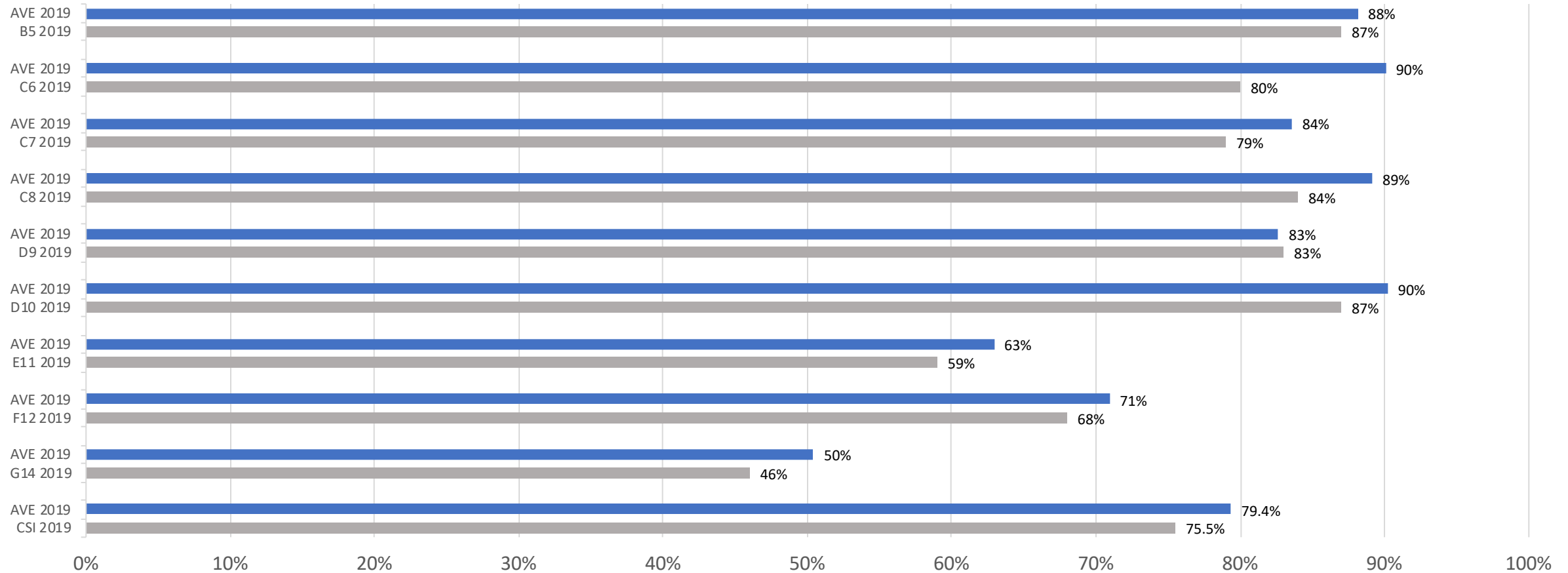
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Customer Satisfaction Index Score by reply to question H16 (Electricity bill impact on finances)
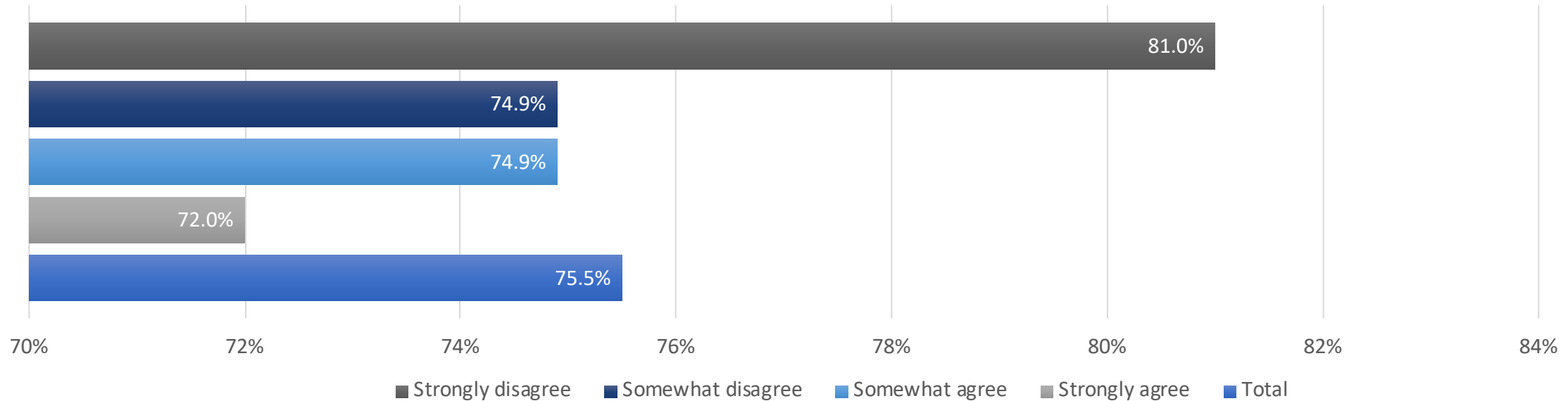
	Total	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
Base: Total Answering	400	87	107	87	67
Customer Satisfaction index score	75.5%	72.0%	74.9%	74.9%	81.0%

*Note: Charts and tables may not add up to 100% due to rounding

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Customer Satisfaction Index Score by reply to question H17
(Well served by electricity system)
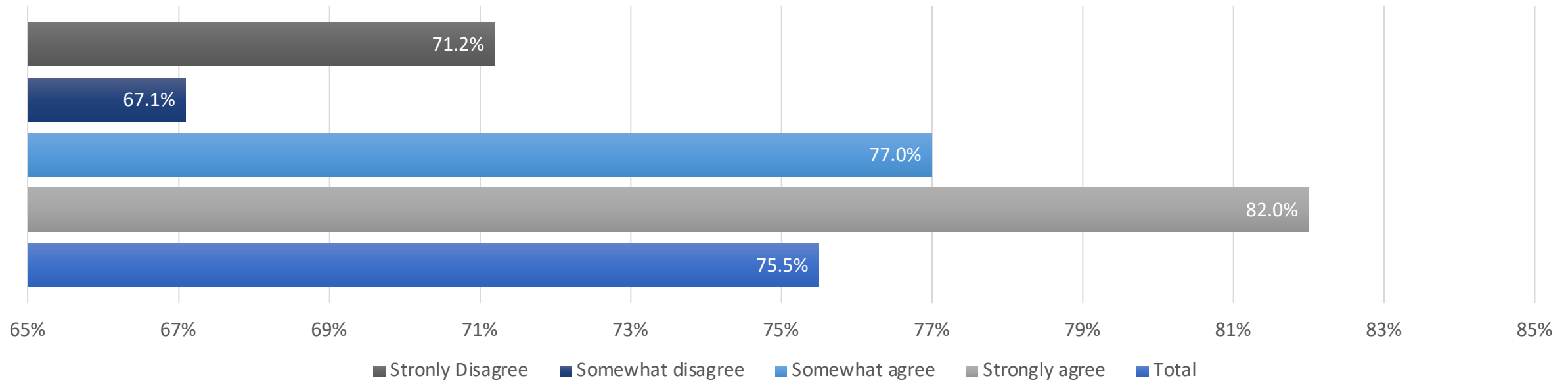
	Total	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
Base: Total Answering	400	65	157	45	27
Customer Satisfaction index score	75.5%	82.0%	77.0%	67.1%	71.2%

*Note: Charts and tables may not add up to 100% due to rounding

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Customer Satisfaction Index Score by consumption tranches (residential)
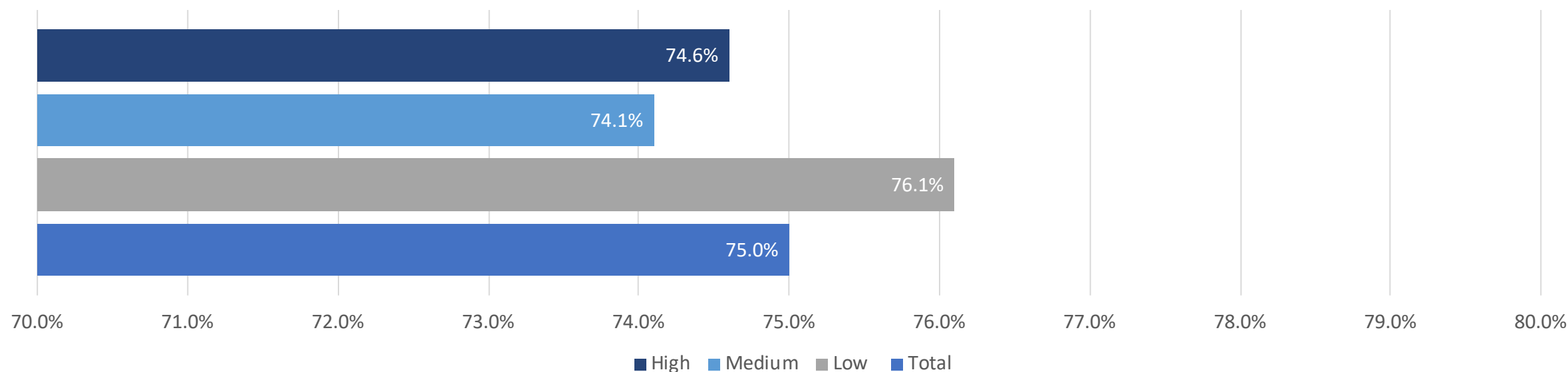
	Total	Low consumption	Medium consumption	High consumption
Base: Residential customers	355	113	91	151
Customer Satisfaction index score	75.0%	76.1%	74.1%	74.6%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 7-Febuary 13, 2019, n=355.

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Comparative Data – Core CSI Questions 2017/2019
Net Satisfied Response
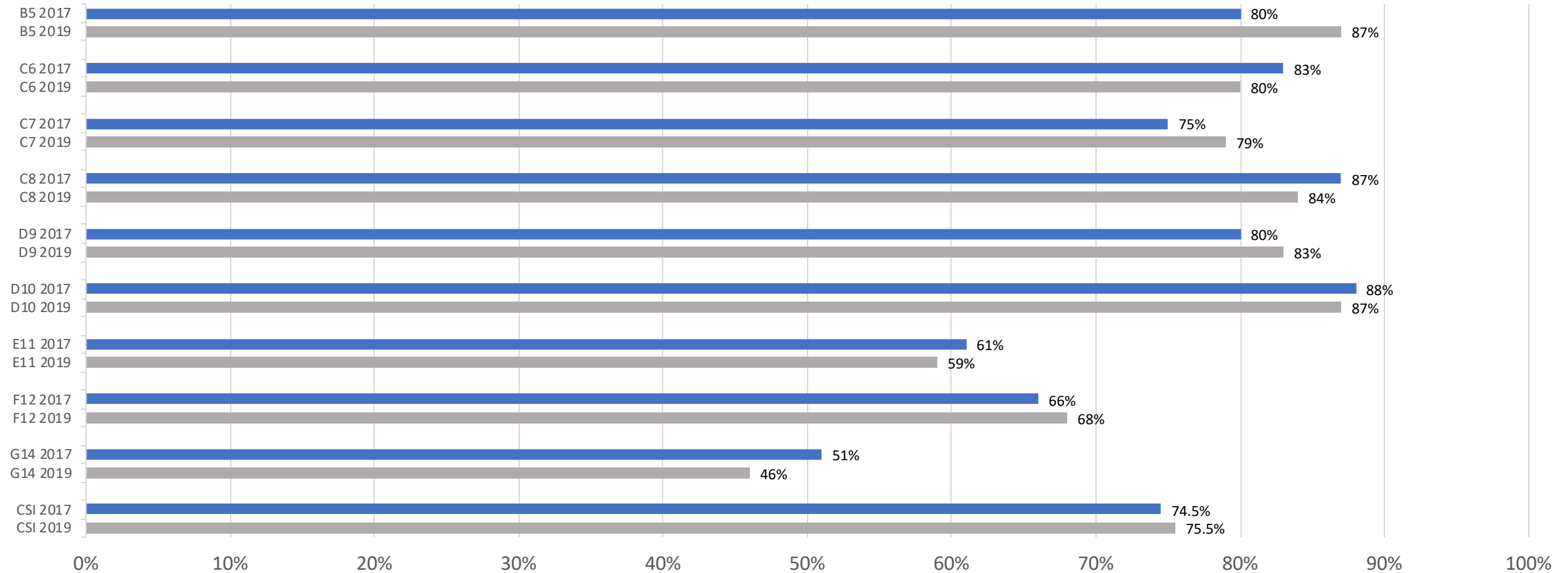
Category	2017	2019
B5	80%	87%
C6	83%	80%
C7	75%	79%
C8	87%	84%
D9	80%	83%
D10	88%	87%
E11	61%	59%
F12	66%	68%
G14	51%	46%
CSI	74.5%	75.5%

*Note: Charts and tables may not add up to 100% due to rounding

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Comparative Data – Core CSI Questions Participant Ave/Lakeland Power Net Satisfied Response

	AVE 2019	Other 2019
B5 2019	88%	87%
C6 2019	90%	80%
C7 2019	84%	79%
C8 2019	89%	84%
D9 2019	83%	83%
D10 2019	90%	87%
E11 2019	63%	59%
F12 2019	71%	68%
G14 2019	50%	46%
CSI 2019	79.4%	75.5%

*Note: Charts and tables may not add up to 100% due to rounding

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Customer Satisfaction Index Score Comparison
Upper and Lower Bound
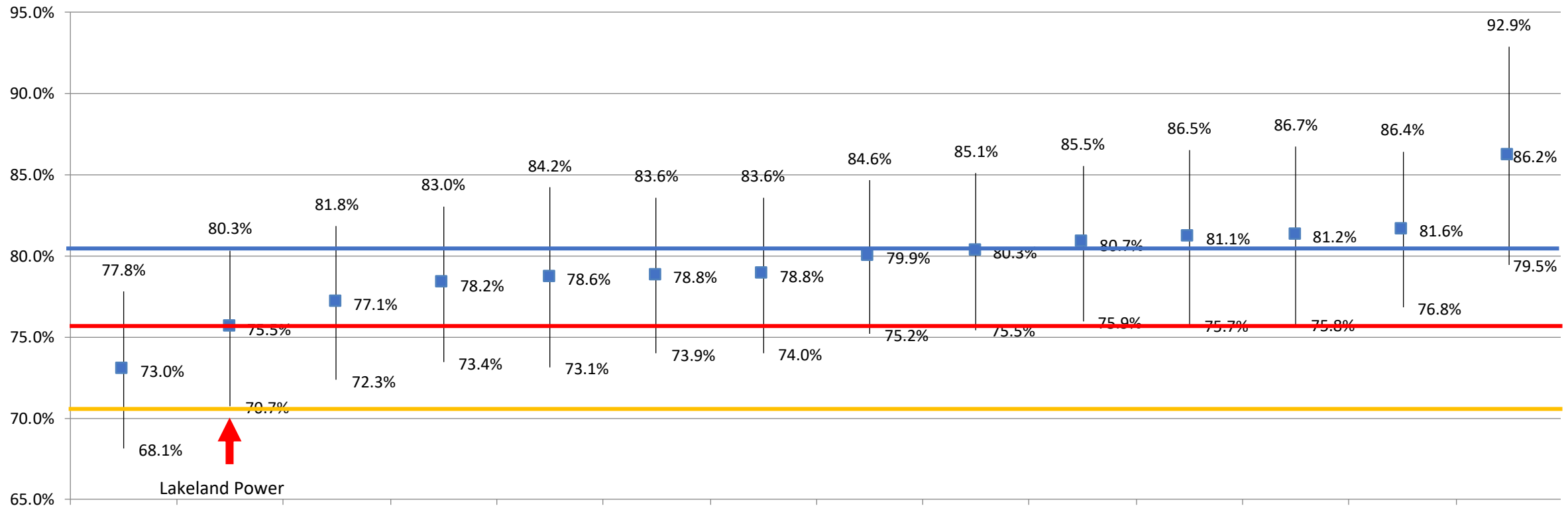
- The lines denote Lakeland Power's upper and lower bound based on the CSI Score.
- Almost all LDCs confidence intervals overlap, similar to 2017.
- Lakeland Power overlaps with all LDCs, which indicates a statistical similarity.

Methodology Summary

Commissioned by	Lakeland Power
Sample size	400 randomly selected customers
Margin of error	±4.8 percentage points, 19 times out of 20
Survey mode	Random telephone survey of customer base, CATI data collection
Survey sample	Residential and GS <50kWh customer lists provided by Lakeland Power
Time of calling	4PM-9PM Weekdays, 10AM-5PM Saturdays, scheduled callbacks
In-field dates	Jan 7-Feb 13, 2019
Language	English only
Survey author	Innovative Research/Electricity Distributors Association
Question Order	Report shown in order
Question Wording	Questions shown in report as asked
Survey Company	Redhead Media Solutions Inc/Advanis

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Methodology Details

Target Respondents

The respondents of the survey were Ontario residents who are the primary bill payer or share the responsibility if residential or the person in-charge of managing the electricity bill at the organization if general service, and who resided within one of Lakeland Power's service territory(ies). Service territories were determined based on customer lists provided by Lakeland Power.

Sample Size and Statistical Reliability

The final total completed surveys by LDC, and the associated margin of error for each, are shown below.

All margins of error are shown at a 95% confidence level.

> ➢ E.g., the margin of error associated with a sample size of 400 for a large (infinite) population is ±4.9 percentage points, 19 times out of 20.

Since Lakeland Power has a finite population, we used the specific population sizes (i.e., the number of samples records received from Lakeland Power) in the calculation of margin of error. Doing so is more accurate, and results in a narrower margin of error than if we simply assumed large (infinite) population for each.

Sample sizes were set according to the *LDC Customer Satisfaction Survey: Methodology & Survey Implementation Guide*, prepared for the Electrical Distributors Association (April 19, 2016 revision):

Where possible, sample size of n=400.
Distributors with 3000 to 4999 customers (residential + GS<50), n=300
Distributors with <3000 customers (residential + GS<50), n=200

Methodology Details

Sampling Methodology

Redhead was provided sample lists from Lakeland Power. Customer lists included all basic information required such as name, telephone number, region (where applicable), customer type (residential or GS<50), LDC fee, Annual or Monthly consumption values. Redhead then calculated which quartile group each resident belonged to by evenly dividing them into four groups within each region and customer type. These quartiles were calculated based on annual consumption value.

To minimize low response:

➢ Sample was loaded in batches to ensure the sample was fully utilized before moving onto fresh sample records;
➢ Calls were made between the hours of 4pm and 9pm ET; and
➢ Call backs were scheduled and honored between the hours of 9am and 9pm ET.

Sample Cleaning

Redhead cleaned the customer lists individually once received from each LDC to ensure the customer list counts reflected actual individual records that could be called. The following steps were taken during sample cleaning.

➢ All records with no phone numbers were removed.
➢ All phone numbers were checked to see if they were valid numbers (i.e. 10 digits, all numerical, etc.) and any bad cases were removed.
➢ When duplicates were detected based on phone number, the average of the consumption value was calculated and kept for one consolidated record. All others were removed.
➢ Residential and GS<50KW were separated into their own lists to be loaded and managed separately in the calling system.

Regions within each customer list were given a numerical value to be used for calling quotas.

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Methodology Details

Questionnaire

The survey instrument was provided by the Electricity Distributors Association (EDA) developed in conjunction with Innovative Research. The survey consisted of an introduction, overall satisfaction, power quality and reliability, billing and payment, customer service experience, communications, price, optional deeper dive questions, and final personal finance / sector mood measures. Additional questions were provided individually by Lakeland Power. These questions are not required as part of the survey and, as outlined in the methodology guideline, were asked after all the standard and required questions.

Data Collection

Computer aided telephone interviews (CATI) were conducted from January 7-February 13, 2019.

Quality Control

➢ Advanis, on behalf of Redhead, trained the interviewers to understand the study's objectives;
➢ Detailed call records are kept by the automated CATI system, and are supplemented by output files to SPSS for productivity analysis (i.e., not subject to human error);
➢ The survey was soft launched in LDCs that had the most available sample, and the data was then checked before calling began in full for Lakeland Power;
➢ 100% of all surveys are digitally recorded for potential review (see next bullet);
➢ Advanis' Quality Assurance team listened to the actual recordings of five percent of completed surveys and compared the responses to those entered by the interviewer to ensure that responses from respondents are properly recorded;
➢ Team Supervisors conduct regular more formal evaluations with each interviewer, in addition to nightly monitoring of each interviewer on their team;
➢ Project Managers closely monitored the progress of data collection, including call record dispositions;
➢ All SPSS code is reviewed by a more senior researcher;
➢ All Report Builder output is reviewed by a more senior researcher; and
➢ All values in the report are reviewed by another team member to ensure accuracy.

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Methodology Details

Analysis of Findings & Data Weighting

Results were weighted to match the proportion of low volume rate class records as provided to Redhead after cleaning of the sample file. Where a region flag was also provided, results were weighted to the low volume rate class within each region and regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

The Customer Satisfaction index scores have been highlighted and were calculated as described below, based on instructions in the Survey Methodology Guidelines. The "response values" referenced in the description below were also determined and provided by the survey authors.

Data analysis and cross-tabulation have been conducted using SPSS and Report Builder software.

This **index score** is calculated using the following process:

Step 1: Weight data to n=400 with each low volume rate class proportionate to its share of LDC customer base.

Step 2: Rescale the index score variables onto the 0 to 1 scale as indicated by the response values detailed below.

Step 3: The average result of the questions asked for each OEB topic and the overall satisfaction score will be added together[3].

$$
\begin{aligned}
& B5 \\
+\ & [C6+C7+C8] \text{ divided by } 3 \\
+\ & [D9+D10] \text{ divided by } 2 \\
+\ & E11 \\
+\ & F12 \\
+\ & G14 \\
=\ & \textbf{Total cumulative scores}
\end{aligned}
$$

Step 4: The total cumulative score from Step 2 will be divided by 6 to generate the **Customer Satisfaction Index Score** (bound between 0-1).

The chart on the following page illustrates how the **Customer Satisfaction Index Score** will be calculated.

As noted above, LDCs without a region flag were weighted to their low volume rate class proportion based on the cleaned sample file. LDCs with a region flag were weighted to their low volume rate class proportion within each region based on the cleaned sample file, and then regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

Specific values of the number of sample records, estimated population proportions, and final weighted sample counts within Lakeland Power are provided below. The sum of the regional population proportions within an LDC may not equal 100% due to rounding.

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Methodology Tables

Margin of error

LDC	Customer Records from LDC	Completed Surveys	Sample Size as % of Customer list	Margin of Error @ 95% confidence level
Lakeland Power	11074	400	3.61%	+/- 4.8%

Sample Weighting

Lakeland Power Distribution						
Regions Flagged in Sample	Low Volume Rate Class	Sample Received	Rate Class Proportion	Estimated Population Proportion	Weighted Sample Count	Unweighted Sample Count
Bracebridge	Residential	5,204	91%		188	148
	General Service < 50 kW	490	9%	35%	18	12
Huntsville	Residential	1,276	86%		46	128
	General Service < 50 kW	204	14%	43%	7	22
Parry Sound	Residential	2516	90%		91	51
	General Service < 50 kW	285	10%	14%	10	6
Burk's Falls	Residential	386	89%		14	8
	General Service < 50 kW	49	11%	2%	2	2
Sundridge	Residential	431	86%		16	8
	General Service < 50 kW	71	14%	2%	3	1
Magnetawan	Residential	142	88%		5	12
	General Service < 50 kW	20	12%	4%	1	2
TOTAL	Residential	9,955	90%		360	355
	General Service < 50 kW	1119	10%	100%	41	45
					401	400

Thank You

We greatly appreciate working on this important project for Lakeland Power and hope we have met or exceeded your expectations.

We are happy to present this data to your staff or Board members upon request. If you wish to do so, please contact us for an appointment.

We look forward to working with you on future projects, including the Electricity Safety Awareness Survey later in 2019. Please note if you have any other projects that we may be able to help you with, don't hesitate to be in touch.

Graydon Smith - President
Redhead Media Solution Inc.
505 Hwy 118 W.
Suite 416
Bracebridge, ON
P1L 2G7

| Appendix H | **Electrical Safety Awareness Surveys 2020, 2022, 2024** |

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ADVANIS **for** **lakeland** POWER

2024 Electrical Safety Awareness Survey

March 2024

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Contents

Lead Consultant: Gary.Offenberger@advanis.net // 780.229.1140

Introduction and Summary

Advanis has been retained by Cornerstone Hydro Electric Concepts Inc. (CHEC) to conduct a 2024 Electrical Safety Awareness Survey for Lakeland Power. This survey is a required part of an LDC's Balanced Scorecard and other reporting and regulatory requirements for the Ontario Energy Board (OEB).

The complete group of participating CHEC LDCs is as follows:

1. Centre Wellington Hydro
2. ERTH Power
3. Grimsby Power
4. Lakefront Utilities
5. Lakeland Power Distribution
6. Niagara-on-the-Lake Hydro
7. Orangeville Hydro
8. Ottawa River Power
9. Renfrew Hydro
10. Rideau St. Lawrence Distribution
11. Tillsonburg Hydro
12. Wasaga Distribution
13. Wellington North Power

This report contains data specifically for Lakeland Power.

Advanis is consulting on behalf of Lakeland Power to conduct the Electrical Safety Authority's Public Awareness survey for 2024. This survey is a required part of the LDC Balanced Scorecard for reporting to the Ontario Energy Board (OEB).

This survey is comprised of 400 randomly sampled telephone interviews with Ontario residents who are 18 years or older and reside in the Lakeland Power service territory. The sample frame is stratified by age group and gender within each the territory, and the data is weighted to be representative of the adult population within the territory.

The objective of the survey is to provide an Electrical Safety Awareness (ESA) index score. This is a calculated aggregate value based on the responses of individuals to six core measures in the survey instrument.

Lakeland Power's 2024 Electrical Safety Awareness Score is 84.0%, which is not statistically different than the 2022 score of 82.6%. Lakeland's 2024 score is statistically the same as that of 10 other LDCs, higher than that of 1 other LDC, and lower than 1.

The following report shows detailed results for all core OEB questions for 2024 and compared to previous years. It also includes results based on the additional questions supplied by Lakeland.

Question scoring and index methodologies were prescribed by the ESA/Innovative. As such, there has been limited additional analysis provided beyond the direction provided to meet the reporting guidelines. Should you wish further analysis of the data, we would be pleased to discuss.

Customer (i.e., Survey Respondent) Profile

Age of respondent (based on A2, A2a)

- Data is weighted to population proportions for the "NET" groups below; that is, the NET percentages below match the census data for the LDC.
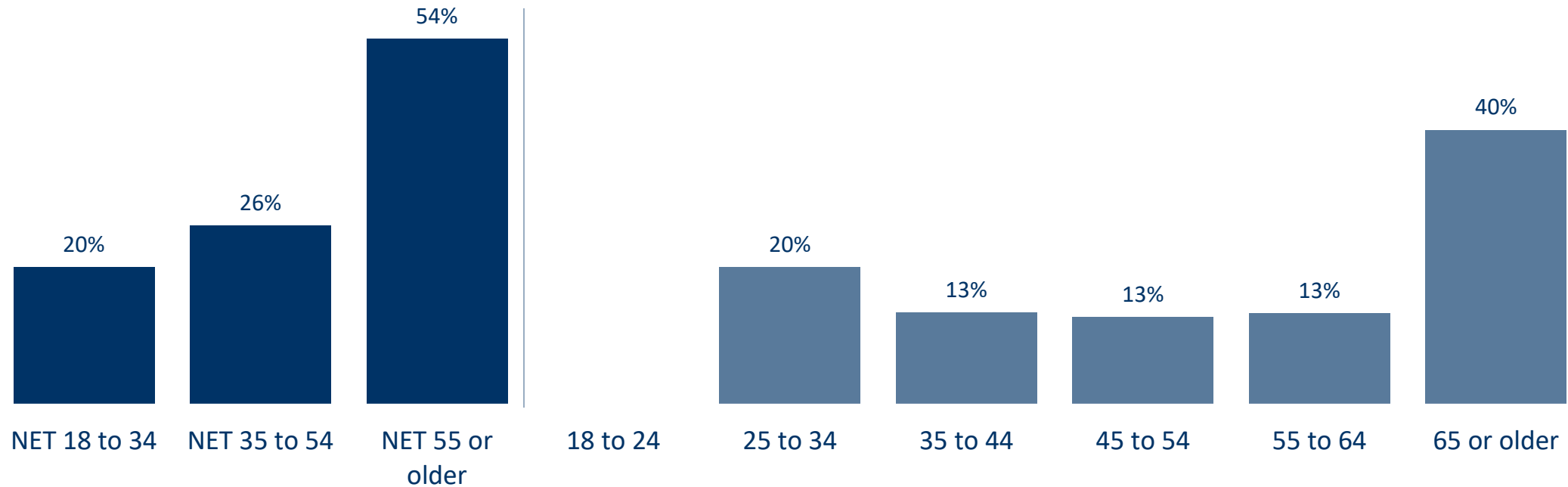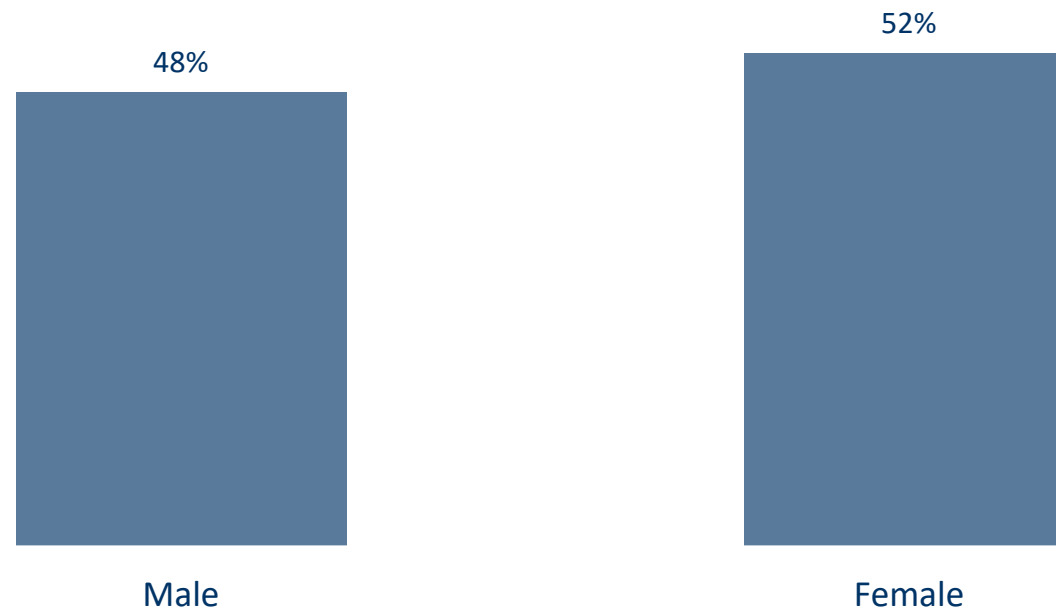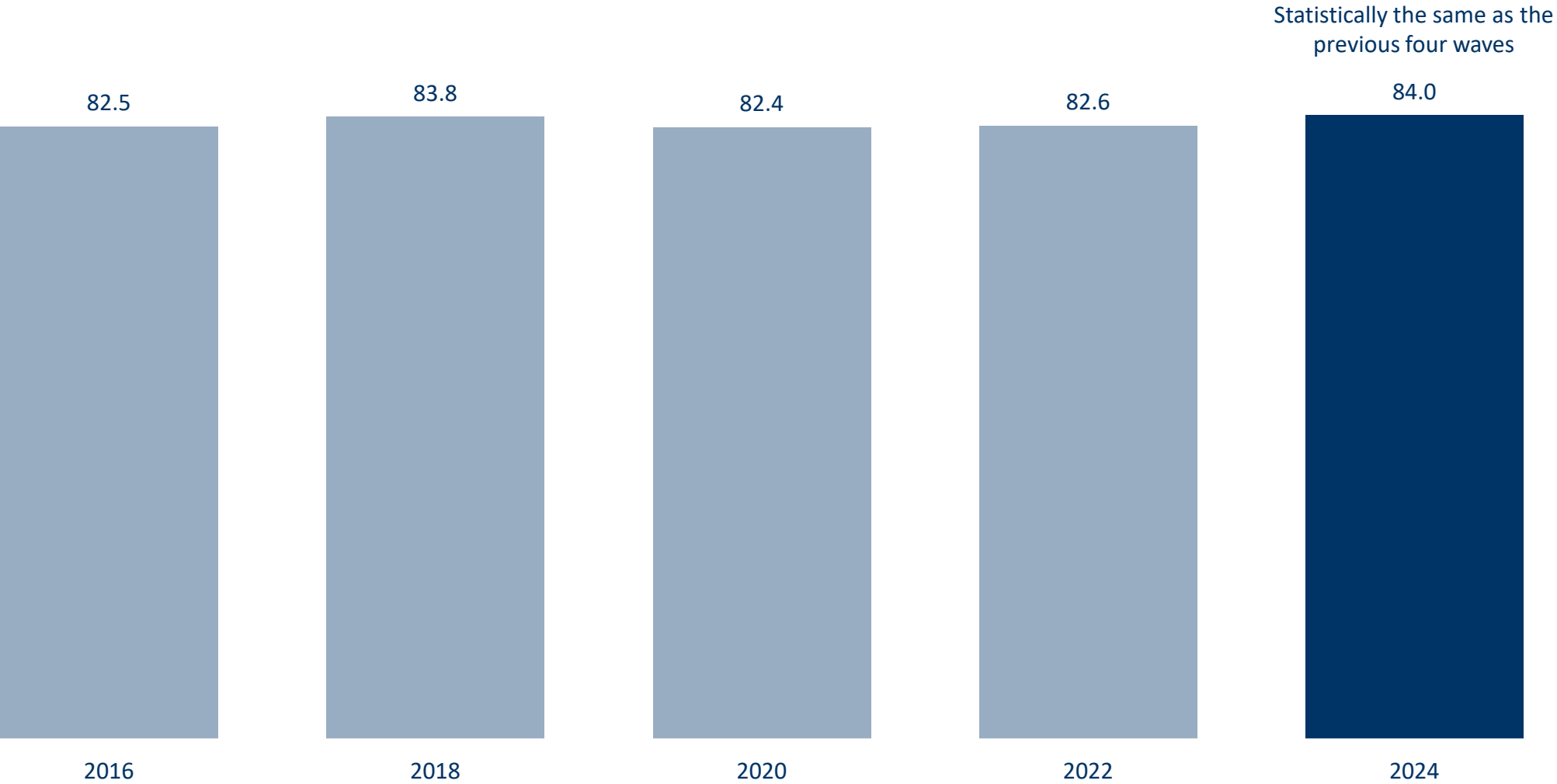
Gender

- Data is weighted to population proportions for gender; that is, the percentages below match the census data for the LDC.
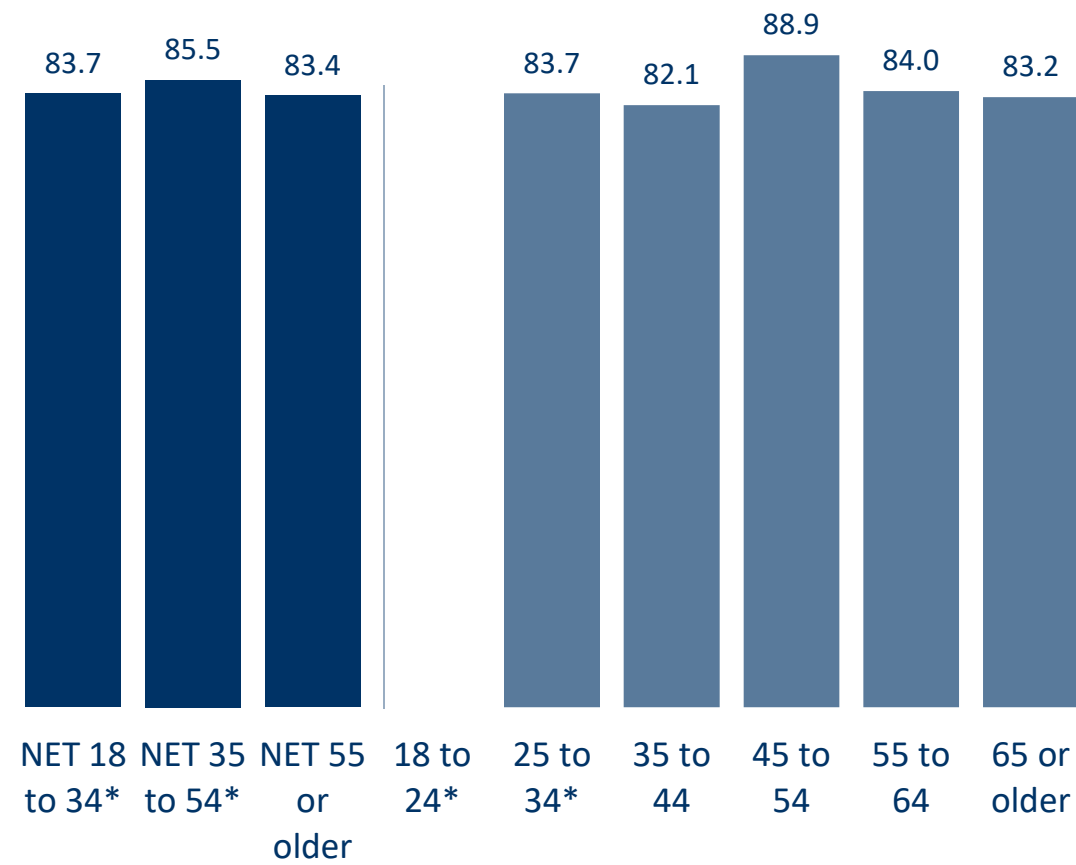

48% Male

52% Female

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Electrical Safety Awareness Index Score – 2024 Results & Trend

Lakeland Power's Safety Awareness Index by Year

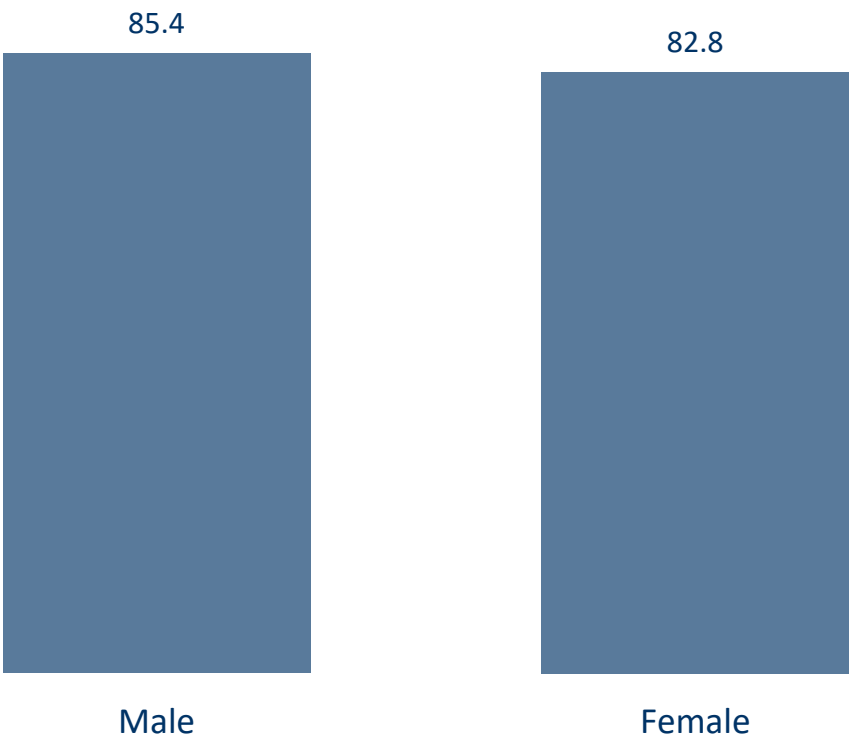Statistically the same as the previous four waves

82.5 — 2016
83.8 — 2018
82.4 — 2020
82.6 — 2022
84.0 — 2024

ESA Index Scores by Age Category

NET 18 to 34*	NET 35 to 54*	NET 55 or older	18 to 24*	25 to 34*	35 to 44	45 to 54	55 to 64	65 or older
83.7	85.5	83.4		83.7	82.1	88.9	84.0	83.2

ESA Index Scores by Gender

Male	Female
85.4	82.8

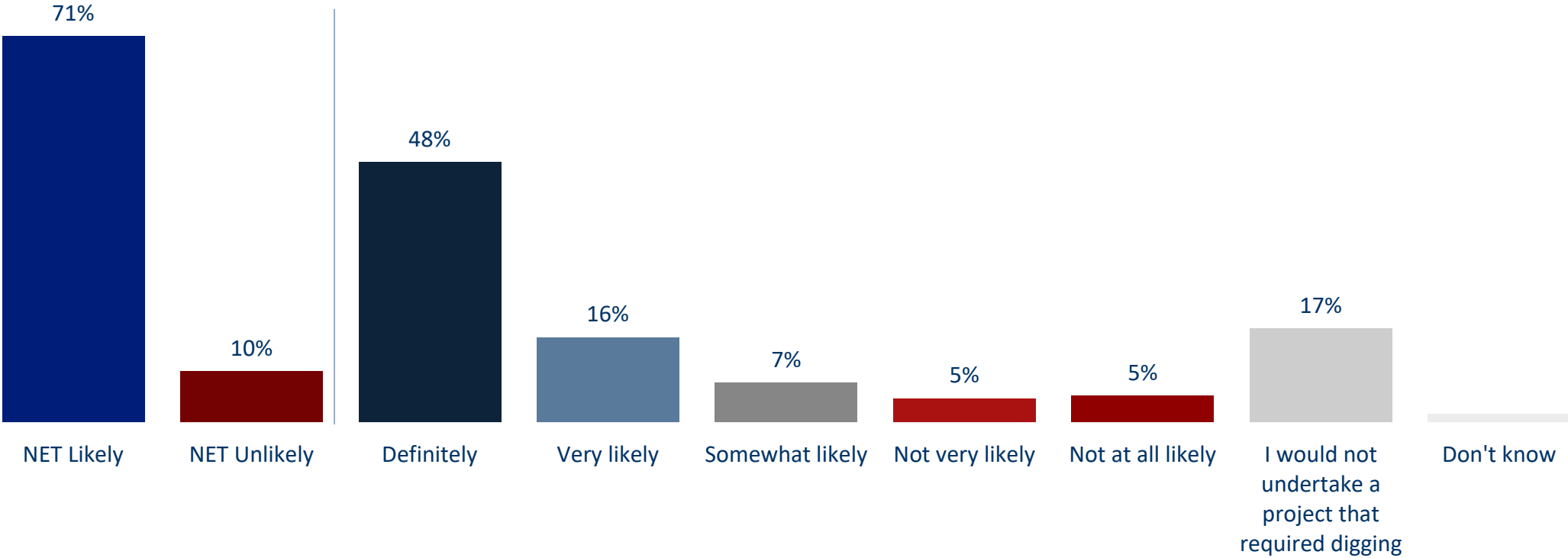# Safety Awareness Index: Compared to Other CHEC Members

- In 2024, Lakeland's score of 84.0 is statistically the **same** as that of 10 other LDCs.
- Its score is statistically **higher** than that of 1 other LDC and **lower** than 1 other LDC.
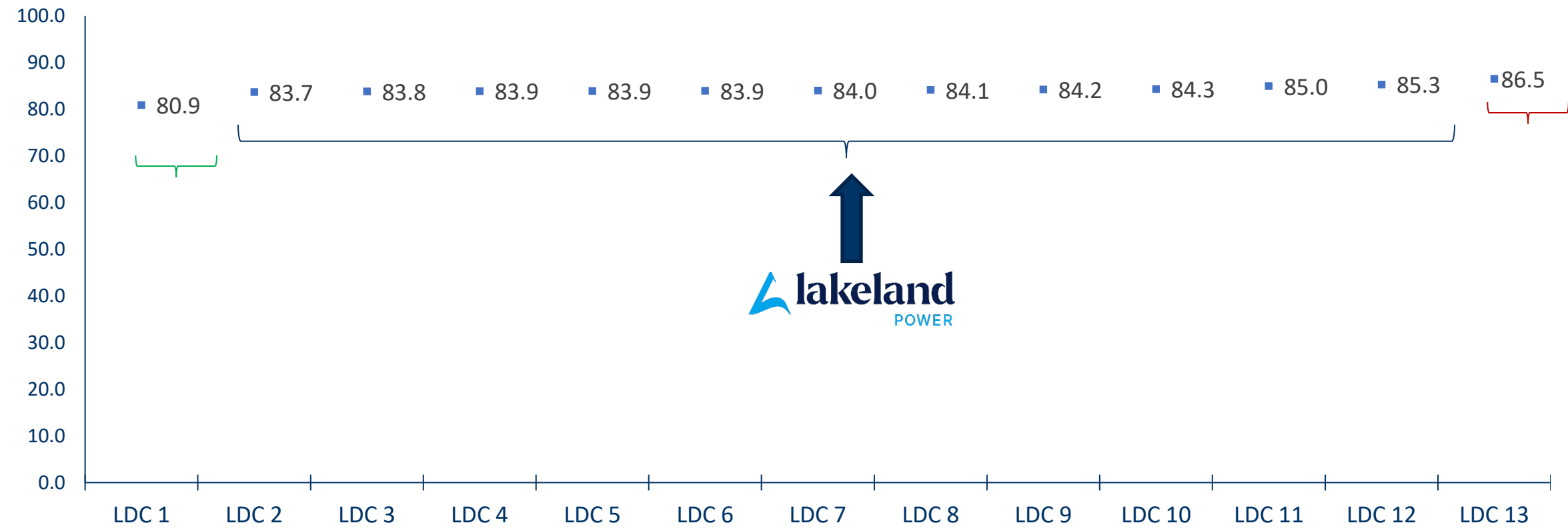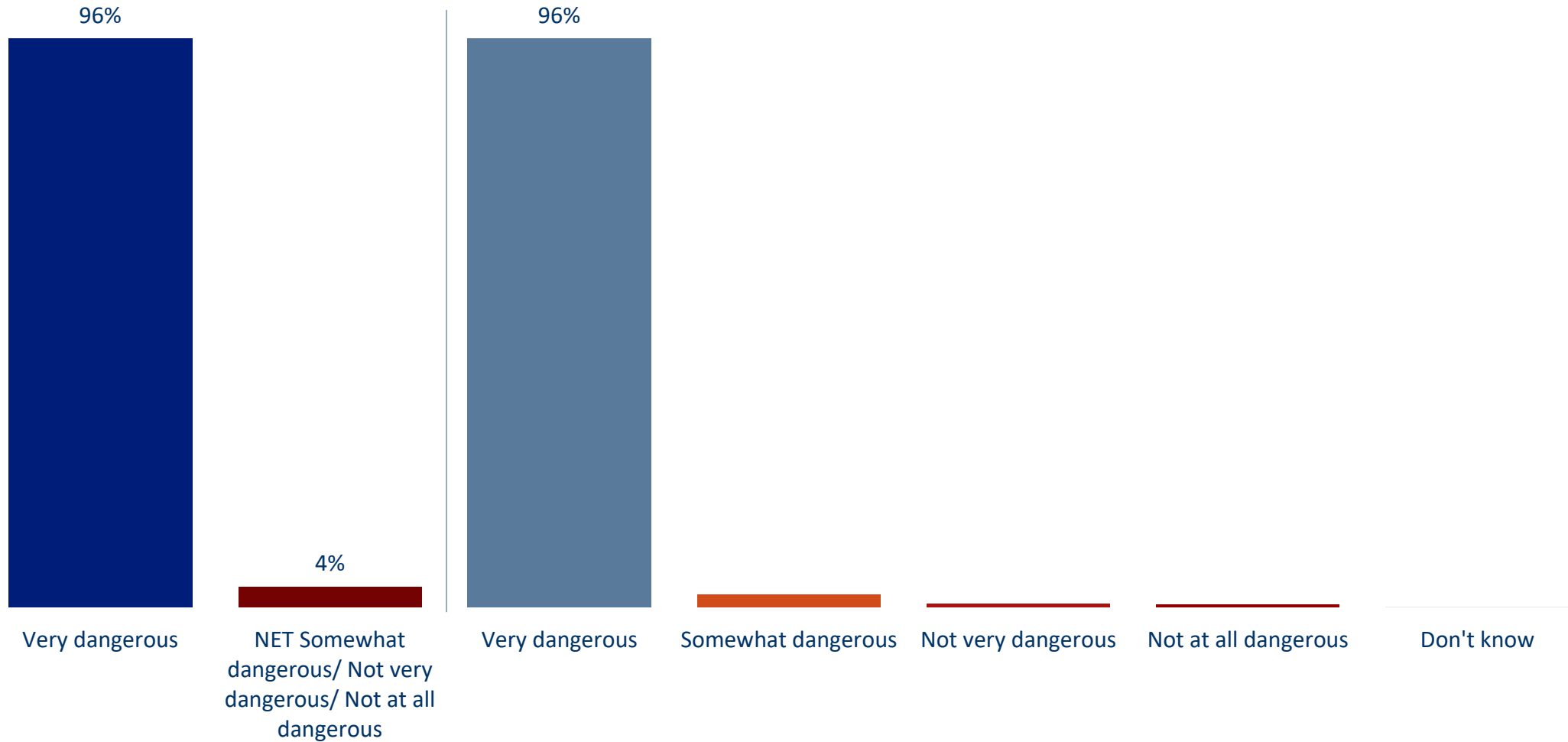

Weight: Weighting individually by LDC based on gender and age
Filters: Survey year: 2024

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Core (OEB) Survey Questions – 2024 Results

If you were to undertake a household project that required digging – such as planting a tree or building a deck – how likely are you to call to locate electrical or other underground lines?

NET Likely	NET Unlikely	Definitely	Very likely	Somewhat likely	Not very likely	Not at all likely	I would not undertake a project that required digging	Don't know
71%	10%	48%	16%	7%	5%	5%	17%	

How dangerous do you believe it is to touch - with your body or any object - an overhead power line?

When undertaking outdoor activities, how closely do you believe you can safely come to an overhead power line with your body or an object?
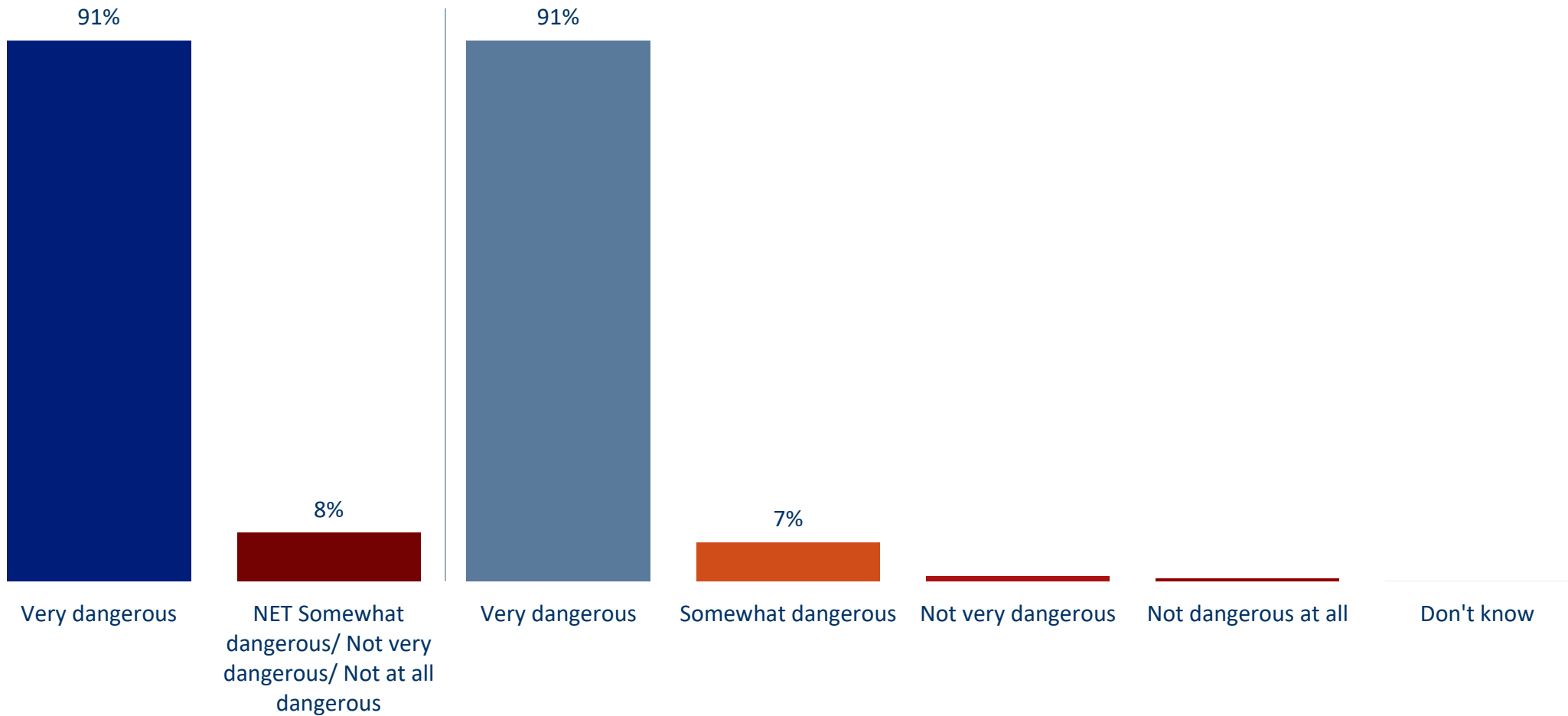

72%	19%		3%	15%	20%	52%	10%
NET Correct	NET Incorrect	You can safely touch an overhead power line	Less than 1 metre (i.e. less than 3 feet)	1 to less than 3 metres (i.e. 3 to less than 10 feet)	3 metres to less than 6 metres (i.e. 10 feet to less than 20 feet)	You should maintain a distance of 6 metres or more (i.e. 20 feet or more)	Don't know

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How dangerous do you believe it is to try to open, remove contents, or touch the equipment inside locked electrical utility equipment?

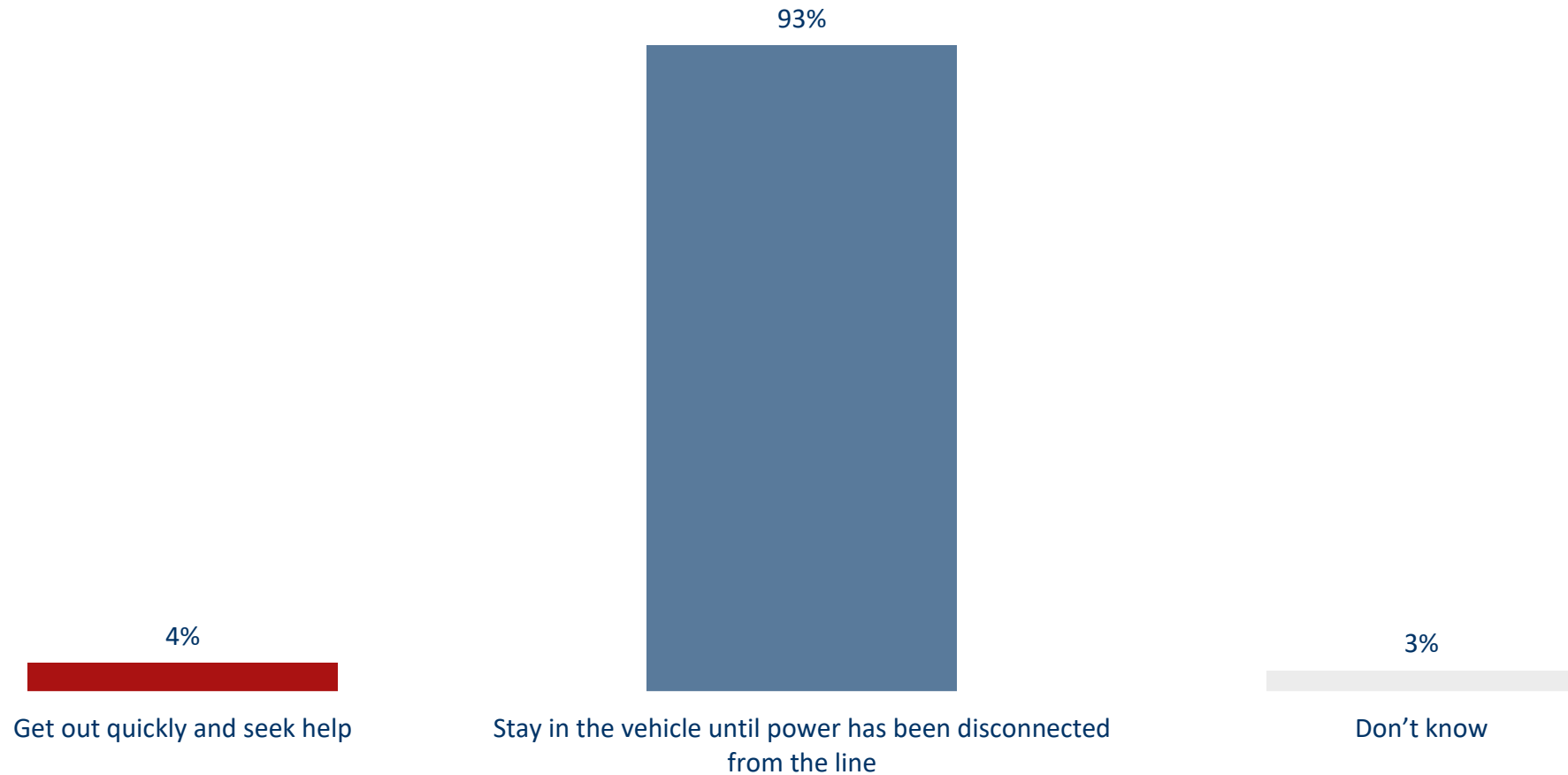|					
91%		**91%**			
	8%		**7%**		
Very dangerous	NET Somewhat dangerous/ Not very dangerous/ Not at all dangerous	Very dangerous	Somewhat dangerous	Not very dangerous	Not dangerous at all	Don't know

How closely do you believe you can safely come to a downed overhead power line, such as a downed line caused by a storm or accident?

NET Correct	NET Incorrect	You can safely touch a downed overhead power line	Less than 1 metre (i.e. less than 3 feet)	1 to less than 5 metres (i.e. 3 to less than 16 feet)	5 metres to less than 10 metres (i.e. 16 feet to less than 33 feet)	You should maintain a distance of 10 metres or more (i.e. 33 feet or more)	Don't know
83%	14%			5%	8%	83%	3%

How closely do you believe you can safely come to a downed overhead power line, such as a downed line caused by a storm or accident?
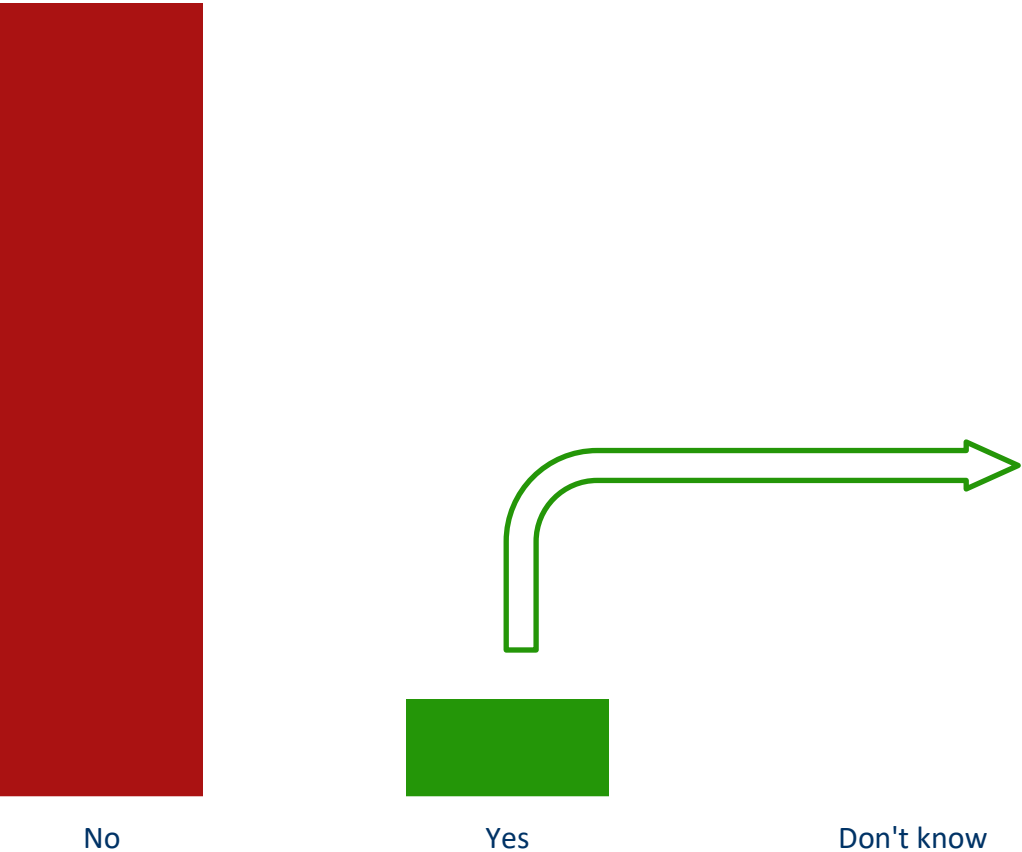**Weight:** Weighting individually by LDC based on gender and age
Filters: LDC: Lakeland Power, Survey year: 2024
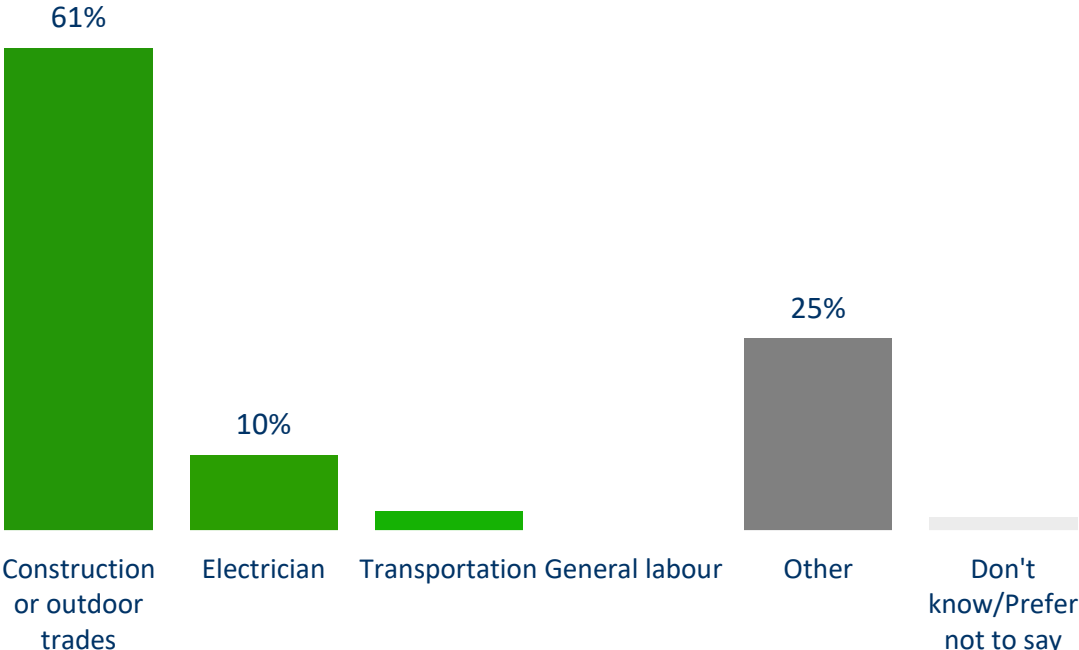**Base Size:** 400

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18

If you were in a vehicle – such as a car, bus, or truck – and an overhead power line came down on top of it, which of the following options do you believe is generally safer?

93%

4%

3%

Get out quickly and seek help

Stay in the vehicle until power has been disconnected from the line

Don't know

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Does your job regularly cause you to come close to energized power lines?

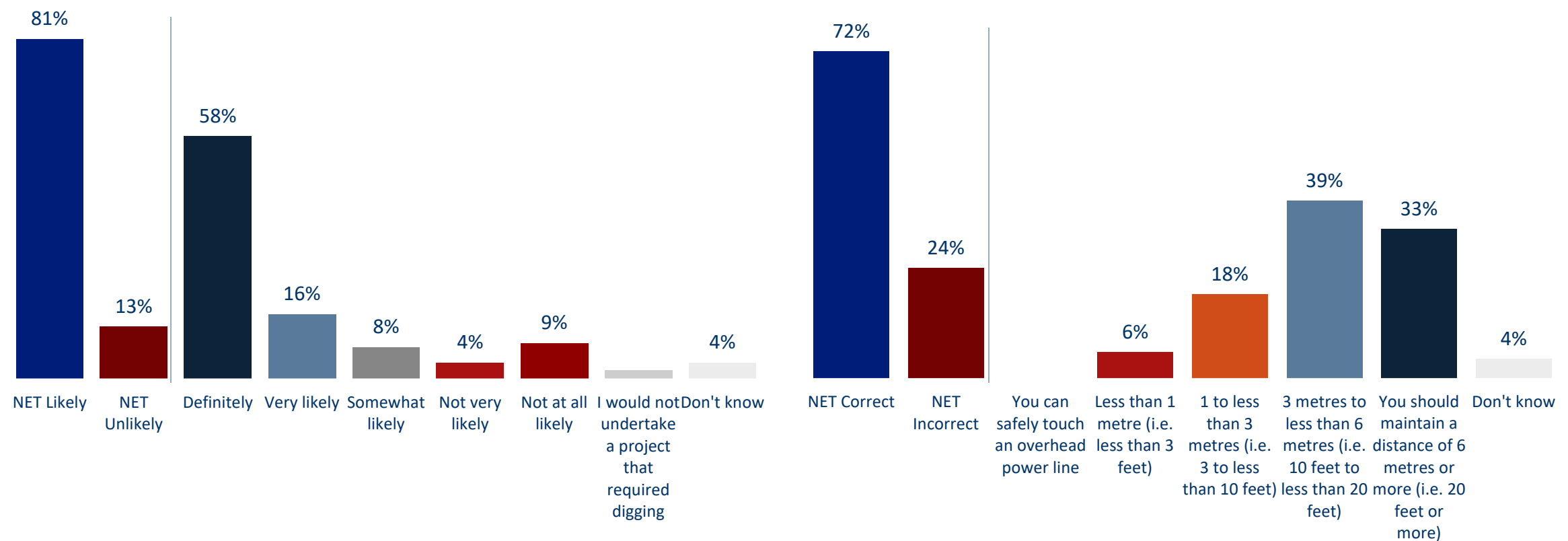**Do you work in any of the following fields?**
[Among those with a job featuring close contact to energized power lines]

No

Yes

Don't know

61%
Construction or outdoor trades

10%
Electrician

Transportation

General labour

25%
Other

Don't know/Prefer not to say

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All of these charts focus on those whose job regularly causes them to come close to energized power lines (i.e., 11% of people surveyed, as shown on previous slide)
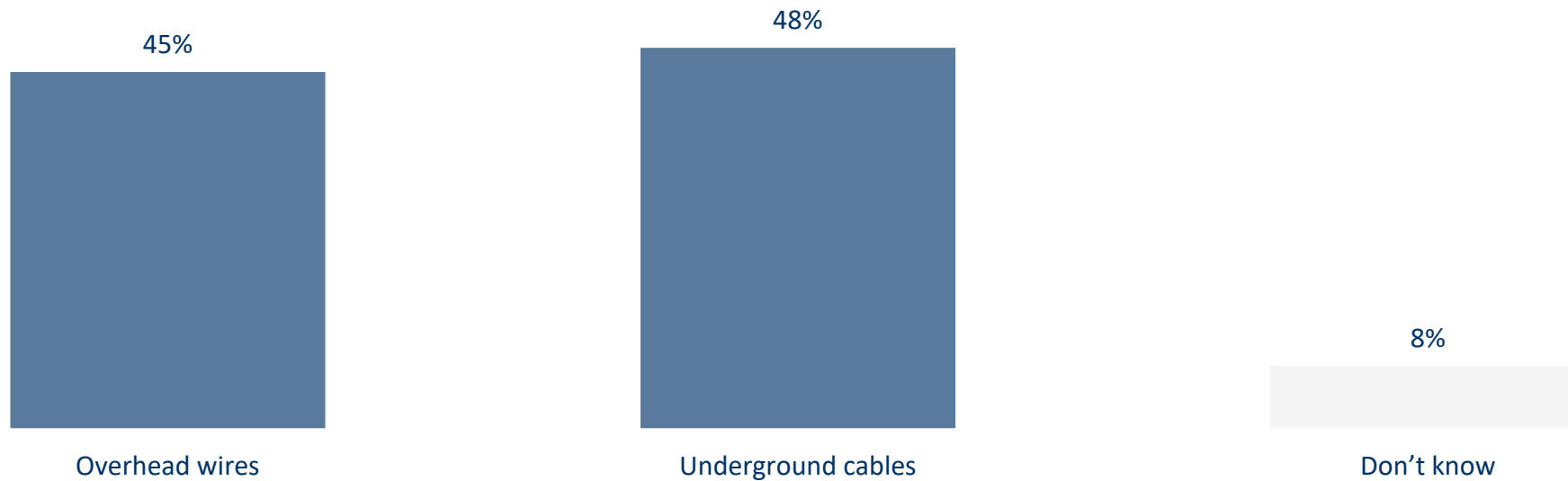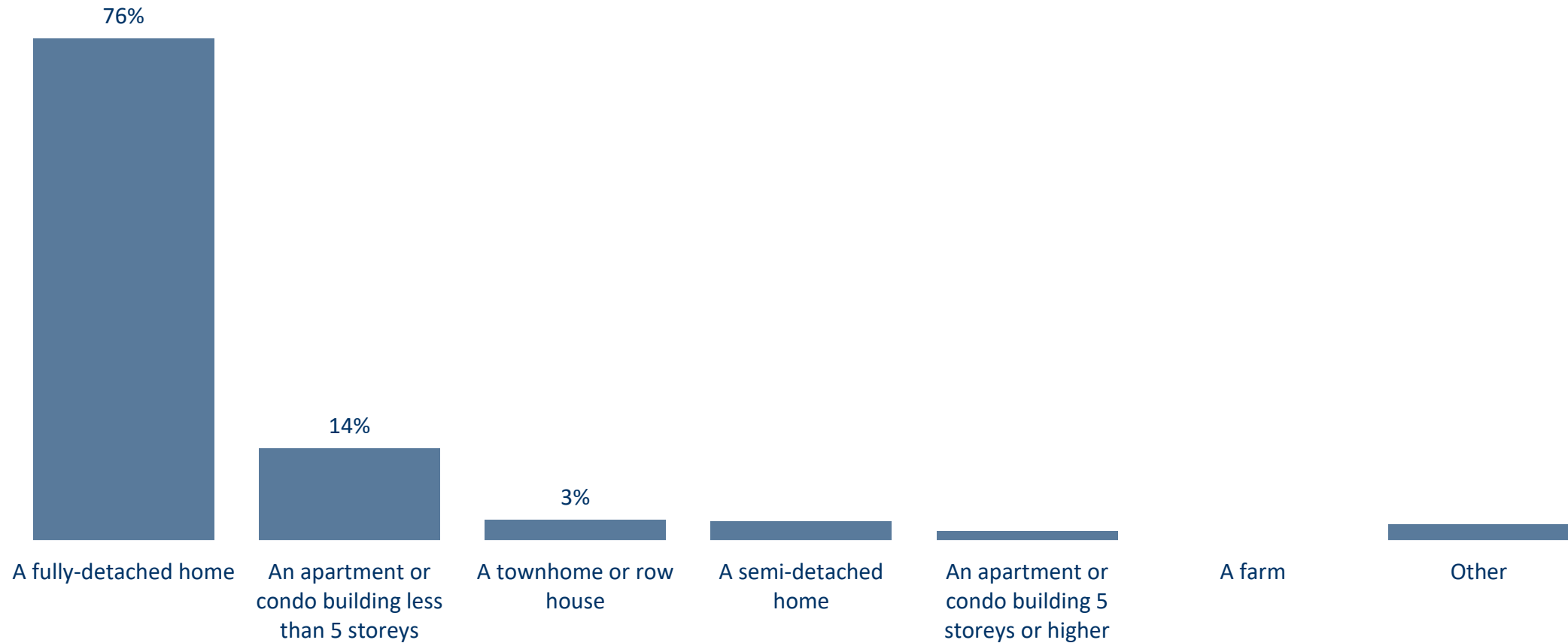
If you were to undertake a household project that required digging – such as planting a tree or building a deck – how likely are you to call to locate electrical or other underground lines?

When undertaking outdoor activities, how closely do you believe you can safely come to an overhead power line with your body or an object?

Left chart:
- NET Likely: 81%
- NET Unlikely: 13%
- Definitely: 58%
- Very likely: 16%
- Somewhat likely: 8%
- Not very likely: 4%
- Not at all likely: 9%
- I would not undertake a project that required digging: (small)
- Don't know: 4%

Right chart:
- NET Correct: 72%
- NET Incorrect: 24%
- You can safely touch an overhead power line: (0)
- Less than 1 metre (i.e. less than 3 feet): 6%
- 1 to less than 3 metres (i.e. 3 to less than 10 feet): 18%
- 3 metres to less than 6 metres (i.e. 10 feet to less than 20 feet): 39%
- You should maintain a distance of 6 metres or more (i.e. 20 feet or more): 33%
- Don't know: 4%

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21

Does your primary residence receive electricity through overhead wires or underground cables?

45%	48%	8%
Overhead wires	Underground cables	Don't know

How would you describe your primary residence?

76%
14%
3%

A fully-detached home | An apartment or condo building less than 5 storeys | A townhome or row house | A semi-detached home | An apartment or condo building 5 storeys or higher | A farm | Other

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Does your primary residence receive electricity through overhead wires or underground cables?
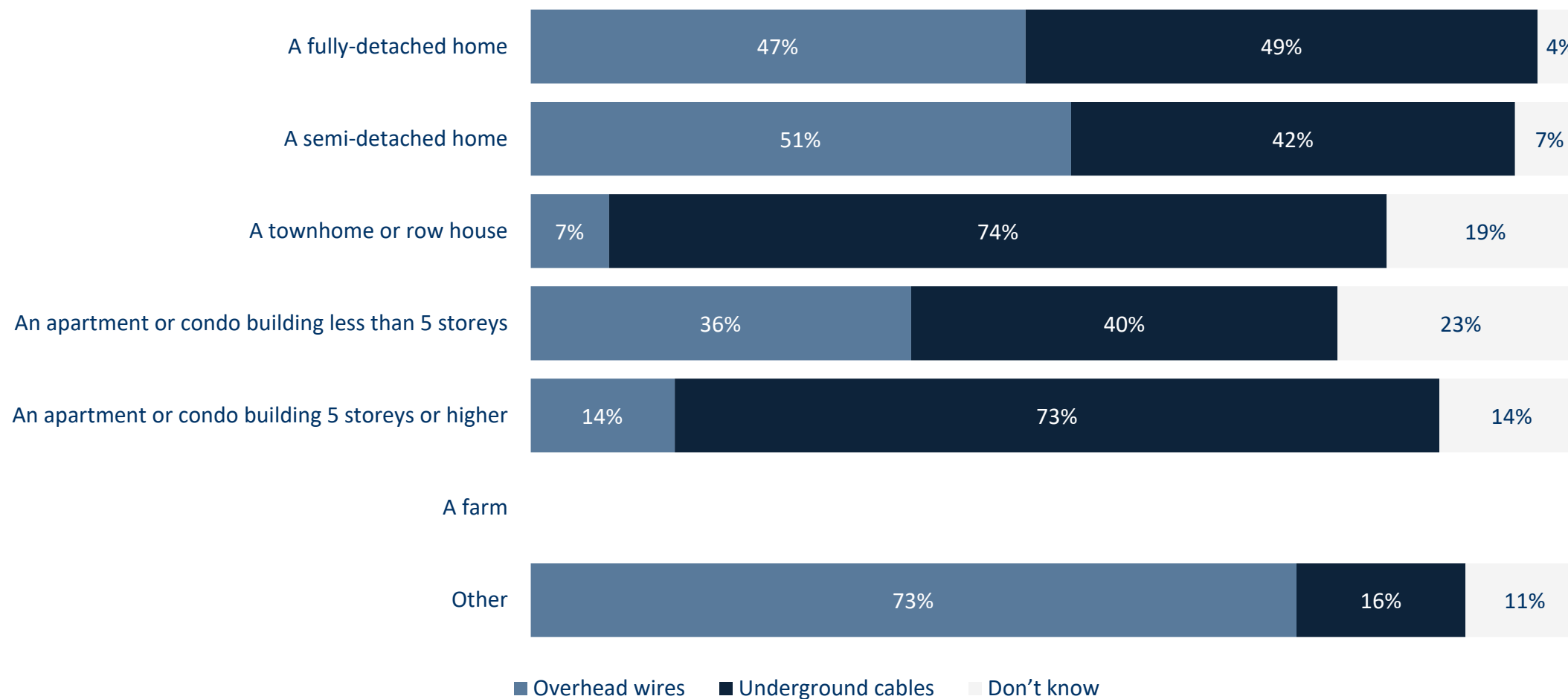
Does your primary residence receive electricity through overhead wires or underground cables?
Weight: Weighting individually by LDC based on gender and age
Filters: LDC: Lakeland Power, Survey year: 2024
*Caution, small base (<=50).

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24

Lakeland Power's Custom Survey Questions – 2024 Results

*Just by looking at the two different cables, could you tell the difference between a **communication** cable and a **high voltage electricity** cable?*
Communication cables carry telephone, internet, and cable TV signals.
Electricity cables to your house provide your lights and plugs with power.
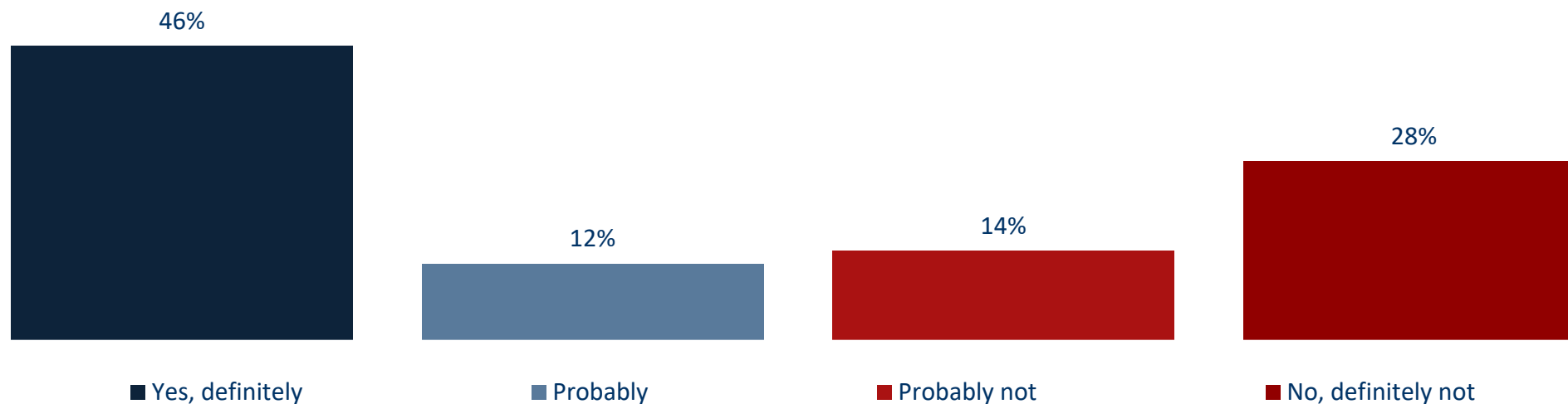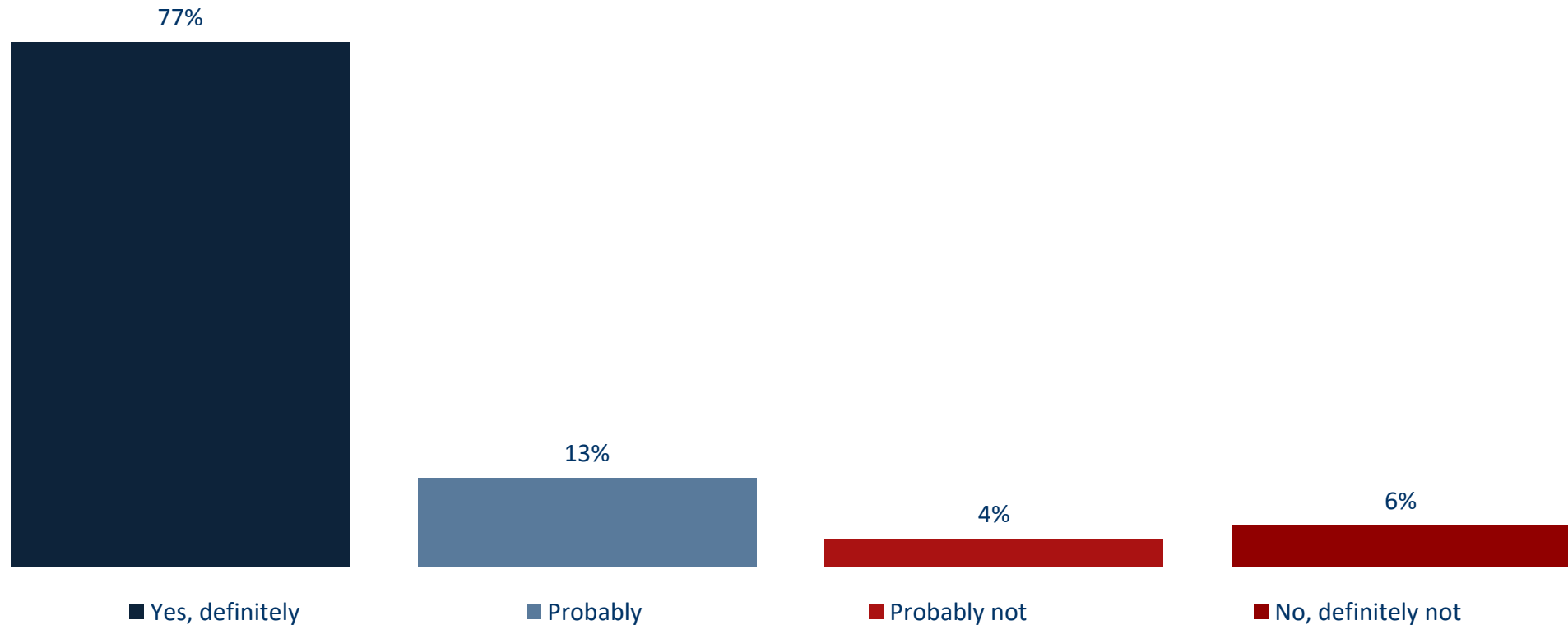
46%

28%

12%

14%

■ Yes, definitely   ■ Probably   ■ Probably not   ■ No, definitely not

Just by looking at the two different cables, could you tell the difference between a communication cable and a high voltage electricity cable?
Weight: Weighting individually by LDC based on gender and age
Filters: LDC: Lakeland Power
Caution, small base (<=50).

Do you think there are potential worker hazards created when access is blocked to these **transformers** by things like trees, shrubs, and sheds?

These are the big green or gray metal boxes you see on some property. Not every house or business has a transformer; one is needed for only every six or so houses or buildings.

- 77% — Yes, definitely
- 13% — Probably
- 4% — Probably not
- 6% — No, definitely not

Do you think there are potential worker hazards created when access is blocked to the **meter base** by things like trees, shrubs, and sheds?
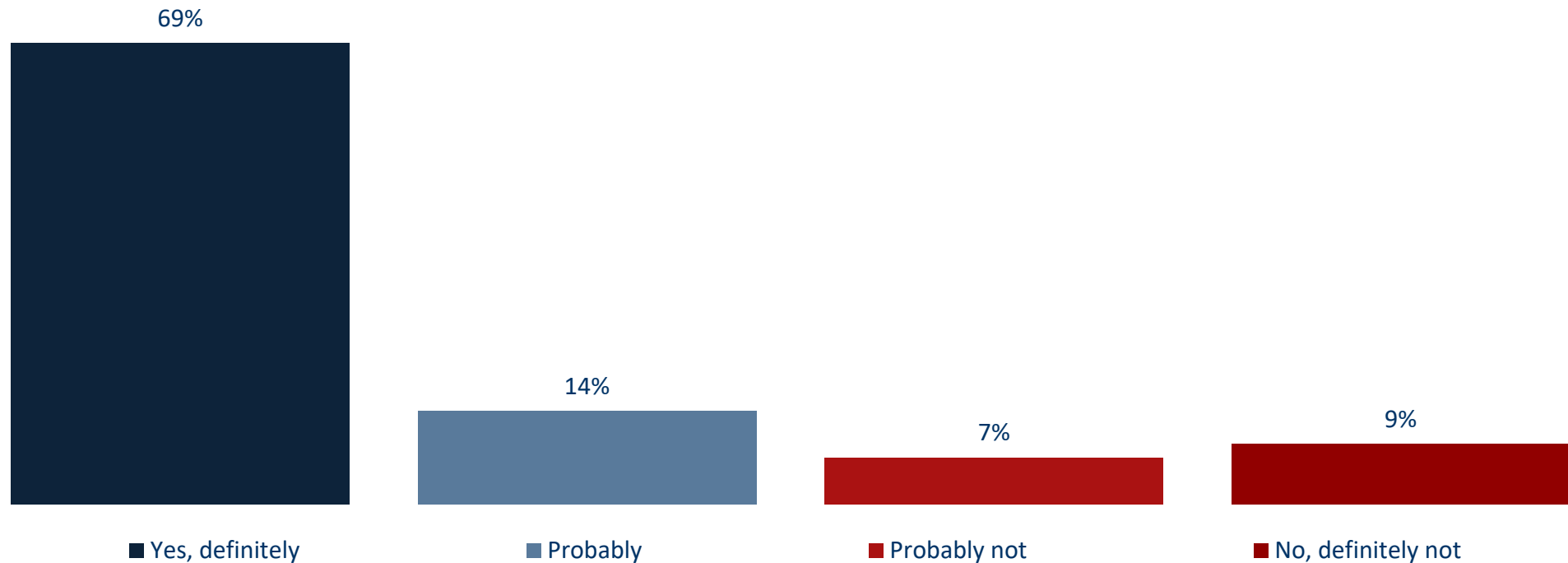The meter base is the main point of entry to buildings for the electricity cables, and it's where the utility company measures the amount of electricity used by the customer. The meter base is usually mounted on the outside of the building and is made of metal or plastic.

- Yes, definitely — 69%
- Probably — 14%
- Probably not — 7%
- No, definitely not — 9%

Core (OEB) Survey Questions – Trend over Time

If you were to undertake a household project that required digging – such as planting a tree or building a deck – how likely are you to call to locate electrical or other underground lines?

Year	NET Likely	NET Unlikely
2016	64%	15%
2018	67%	17%
2020	71%	14%
2022	72%	9%
2024	71%	10%
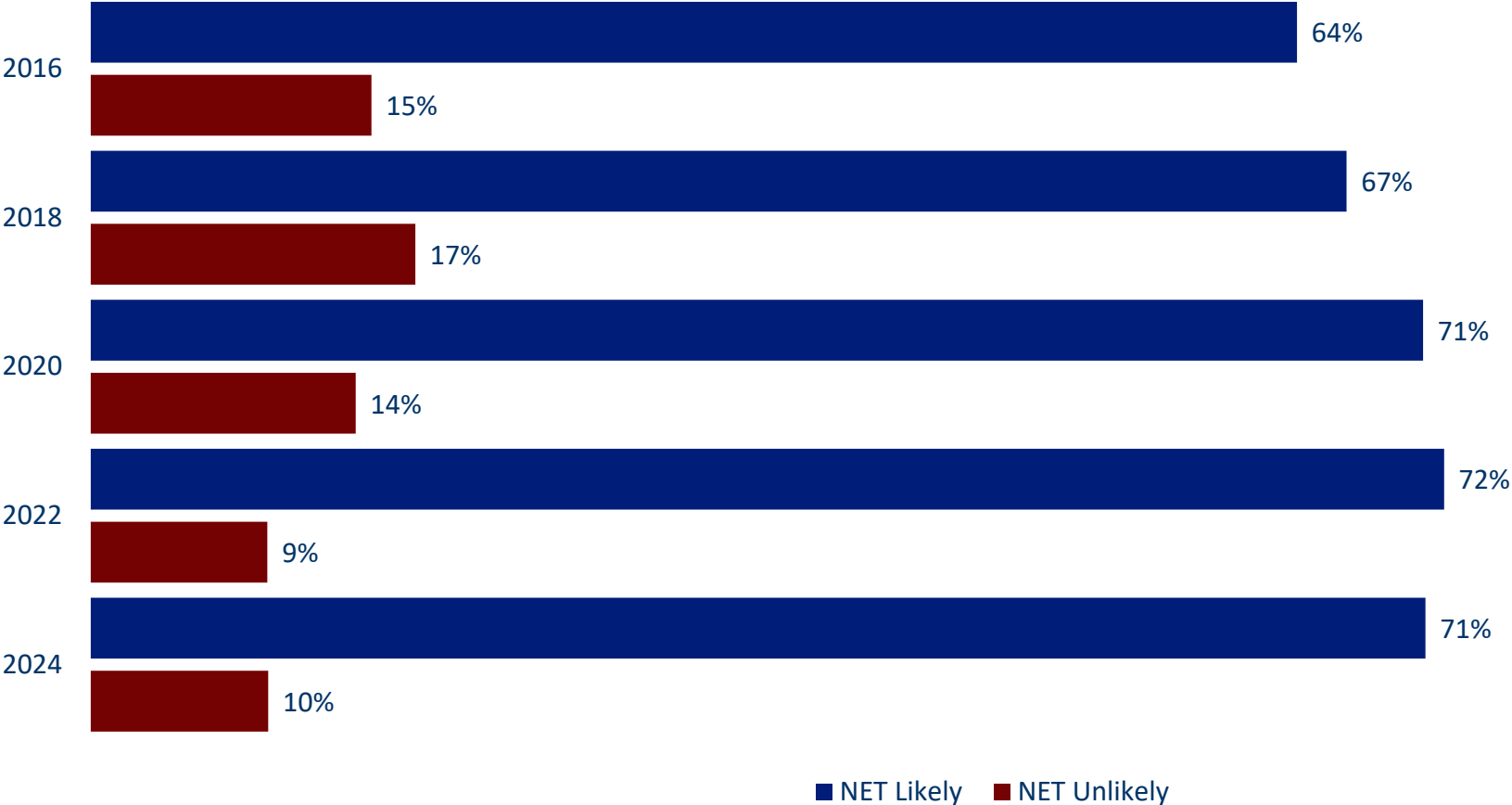
■ NET Likely   ■ NET Unlikely

How dangerous do you believe it is to touch - with your body or any object - an overhead power line?

Year	Very Dangerous	NET Somewhat dangerous/ Not very dangerous/ Not at all dangerous
2016	96%	4%
2018	94%	5%
2020	95%	5%
2022	95%	5%
2024	96%	4%

■ Very Dangerous ■ NET Somewhat dangerous/ Not very dangerous/ Not at all dangerous

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When undertaking outdoor activities, how closely do you believe you can safely come to an overhead power line with your body or an object?

Year	You can safely touch an overhead power line	Less than 1 metre (i.e., less than 3 feet)	1 to less than 3 metres (i.e., 3 to less than 10 feet)	3 metres to less than 6 metres (i.e., 10 feet to less than 20 feet)	You should maintain a distance of 6 metres or more (i.e., 20 feet or more)	Don't know
2016	7%	17%	20%		47%	9%
2018		9%	20%		60%	9%
2020	6%	17%	27%		43%	7%
2022	5%	19%	20%		48%	8%
2024	3%	15%	20%		52%	10%

How dangerous do you believe it is to try to open, remove contents, or touch the equipment inside locked electrical utility equipment?

- **Very Dangerous**
- **NET Somewhat dangerous/ Not very dangerous/ Not at all dangerous**

2016 — 91% / 8%
2018 — 94% / 5%
2020 — 93% / 6%
2022 — 95% / 4%
2024 — 91% / 8%

Weight: Weighting individually by LDC based on gender and age
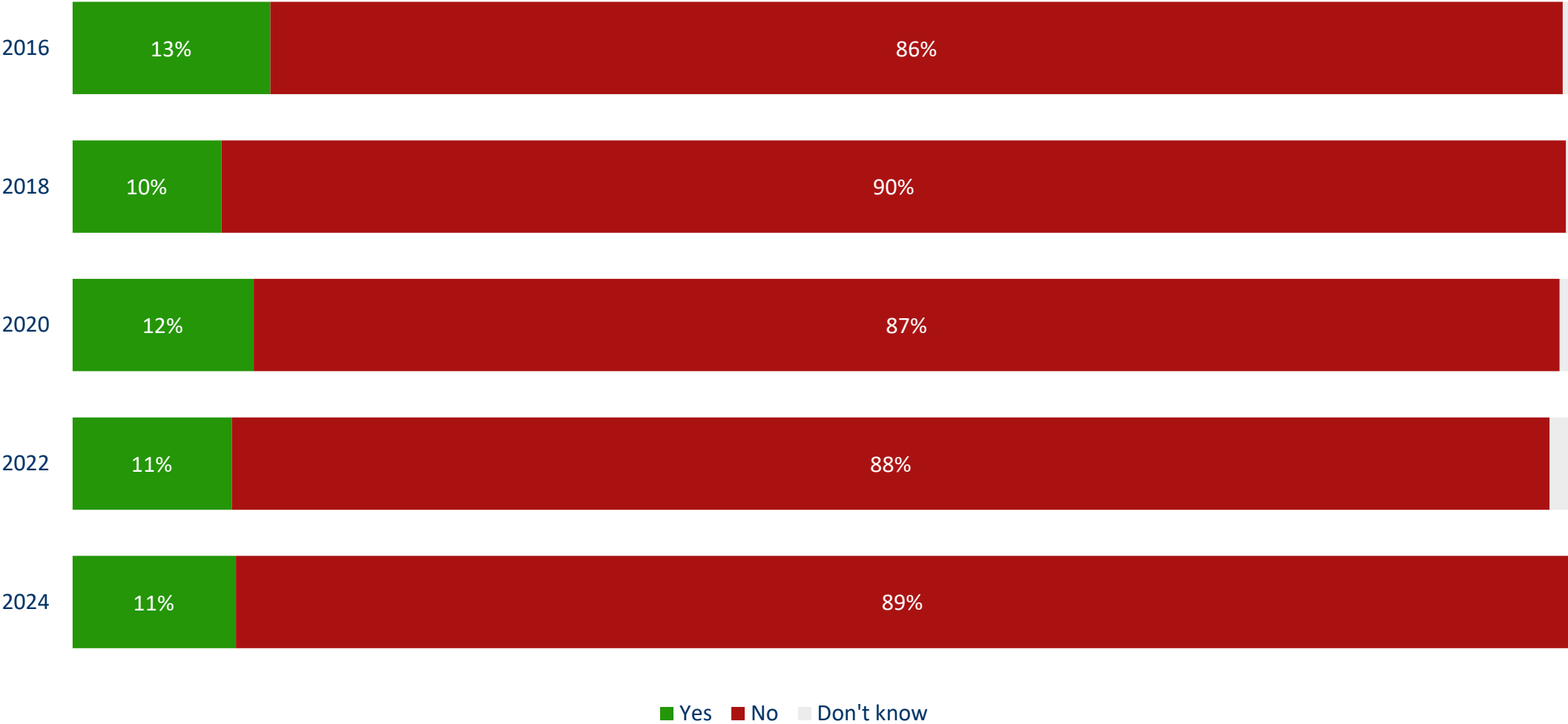**Filters:** LDC: Lakeland Power

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How closely do you believe you can safely come to a downed overhead power line, such as a downed line caused by a storm or accident?

Year				
2016	3%	9%	84%	
2018	5%	8%	83%	4%
2020	7%	13%	76%	
2022	6%	14%	75%	4%
2024	5%	8%	83%	3%

Legend:
- You can safely touch an overhead power line
- Less than 1 metre (i.e., less than 3 feet)
- 1 to less than 5 metres (i.e., 3 to less than 16 feet)
- 5 metres to less than 10 metres (i.e., 16 feet to less than 33 feet)
- You should maintain a distance of 10 metres or more (i.e. 33 feet or more)
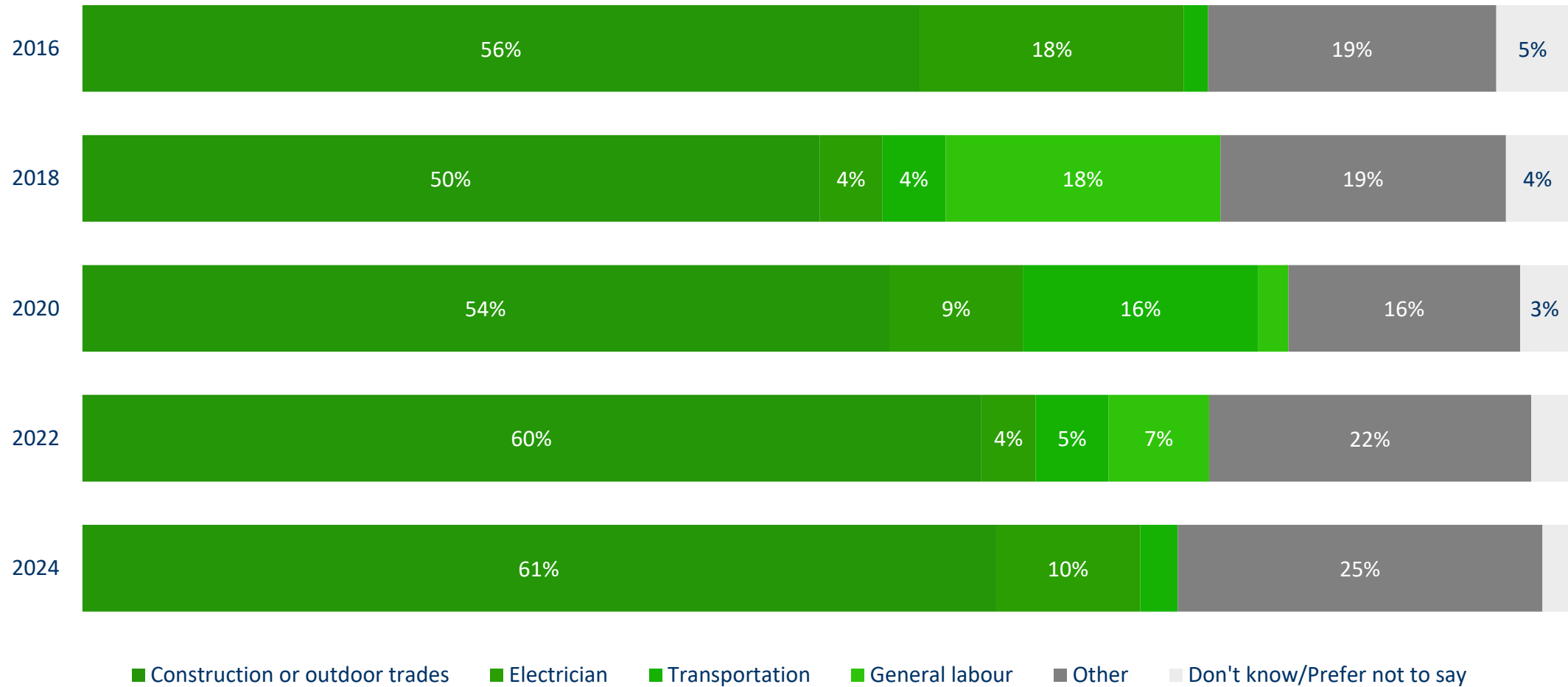- Don't know

If you were in a vehicle – such as a car, bus, or truck – and an overhead power line came down on top of it, which of the following options do you believe is generally safer?

2016	5%	94%
2018	5%	94%
2020	4%	94%
2022	4%	95%
2024	4%	93%	3%

■ Get out quickly and seek help   ■ Stay in the vehicle until power has been disconnected from the line   ■ Don't know

Does your job regularly cause you to come close to energized power lines?

Year	Yes	No
2016	13%	86%
2018	10%	90%
2020	12%	87%
2022	11%	88%
2024	11%	89%

■ Yes ■ No □ Don't know

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Do you work in any of the following fields?
[Among those with a job featuring close contact to energized power lines]

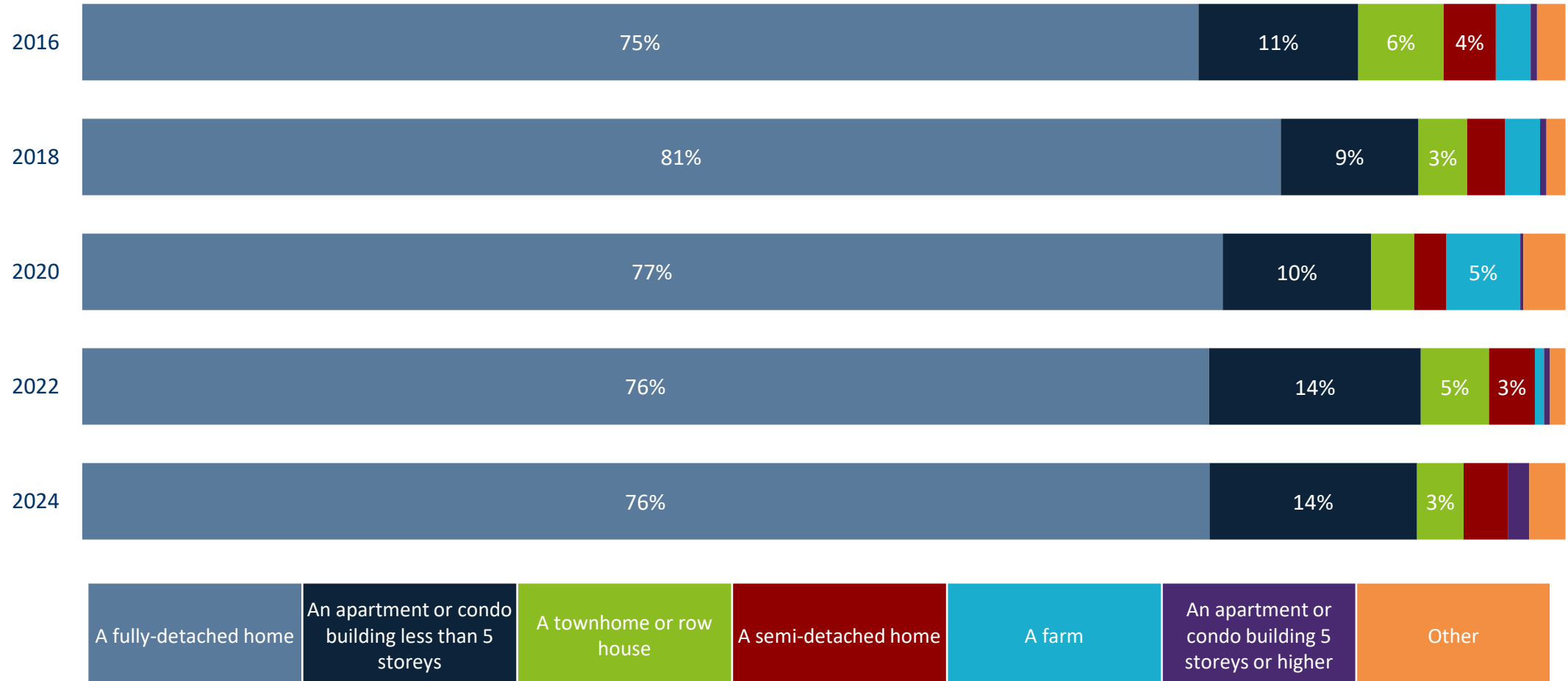| Year	Construction or outdoor trades	Electrician	Transportation	General labour	Other	Don't know/Prefer not to say
2016	56%	18%			19%	5%
2018	50%	4%	4%	18%	19%	4%
2020	54%	9%	16%		16%	3%
2022	60%	4%	5%	7%	22%	
2024	61%	10%			25%	

■ Construction or outdoor trades   ■ Electrician   ■ Transportation   ■ General labour   ■ Other   ■ Don't know/Prefer not to say

How would you describe your primary residence?

Year	A fully-detached home	An apartment or condo building less than 5 storeys	A townhome or row house	A semi-detached home	A farm	An apartment or condo building 5 storeys or higher	Other
2016	75%	11%	6%	4%			
2018	81%	9%	3%				
2020	77%	10%			5%		
2022	76%	14%	5%	3%			
2024	76%	14%	3%				

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Does your primary residence receive electricity through overhead wires or underground cables?

Year	Overhead wires	Underground cables	Don't know
2016	49%	46%	6%
2018	55%	40%	5%
2020	53%	44%	4%
2022	55%	38%	7%
2024	45%	48%	8%

■ Overhead wires ■ Underground cables □ Don't know

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Methodology

Methodology Summary

Commissioned by	Lakeland Power
Sample size	400 randomly selected customers
Margin of error	±4.9 percentage points, 19 times out of 20
Survey mode	Random telephone survey of customer base, CATI data collection
Survey sample	Residential customer list provided by Lakeland Power
Time of calling	5PM-8PM Weekdays, 10AM-5PM Saturdays, plus callbacks scheduled per respondent
In-field dates	January 8-February 20, 2024
Language	English only
Survey author	Innovative Research/Ontario Energy Board
Question Order	Core (OEB) questions then LDC-specific questions
Question Wording	Questions shown in report largely as asked; exact questionnaire available upon request
Survey Company	Advanis Gary.Offenberger@advanis.net

Methodology Details (1/3)

Target Respondents

The respondents of the survey were Ontario residents who reside within LDC's service territory(ies). Target areas were determined based on a list of postal codes provided by LDC. Service territories were determined based on customer lists provided by the LDC.

Sampling Methodology

This survey is comprised of randomly selected interviews with Ontario residents who are 18 years or older and reside in the required service territory.
The sample frame is stratified by age group and gender within each the territory, and the data is weighted to be representative of the adult population within the territory.

To minimize low response:
 ➢ Sample was loaded in batches to ensure the sample was fully utilized before moving onto fresh sample records;
 ➢ Calls were made between the hours of 5pm and 8pm ET; and
 ➢ Call backs were scheduled and honored between the hours of 9am and 8pm ET.

Sample Size and Statistical Reliability

Sample sizes were set according to the *Component A Public Awareness of Electrical Safety Measure for Licensed Electricity Distributors*, prepared by the Ontario Energy Board (OEB) on November 25, 2015:

  A minimum sample size of n=400.
  Distributors with 3000 to 4999 customers, n=300.
  Distributors with <3000 customers, n=200.

Since each LDC has a finite population, we used the specific population sizes (i.e., the number of sample records received from each LDC) in the calculation of margin of error. Doing so is more accurate, and results in a narrower margin of error than if we simply assumed large (infinite) population for each.

Methodology Details (2/3)

Questionnaire

The survey instrument was provided by the Ontario Energy Board (OEB) developed in conjunction with Innovative Research. The survey consisted of an introduction, electrical safety, and demographic questions. Electrical safety questions include likelihood to "call before you dig", impact of touching a power line, proximity to overhead power line, danger of tampering with electrical equipment, proximity to downed power line, and actions taken in vehicle in contact with wires. Additional questions were provided individually by some LDCs. These questions are not required as part of the survey and, as outlined in the methodology guideline, were asked after all the standard and required questions.

Quality Control

➢ Advanis trained its interviewers to understand the study's objectives;
➢ Detailed call records are kept by the automated CATI system, and are supplemented by output files to SPSS for productivity analysis (i.e., not subject to human error);
➢ The survey was soft launched in LDCs that had the most available sample, and the data was then checked before calling began in full for each;
➢ 100% of all surveys are digitally recorded for potential review (see next bullet);
➢ Advanis' Quality Assurance team listened to the actual recordings of five-ten percent of completed surveys and compared the responses to those entered by the interviewer to ensure that responses from respondents are properly recorded;
➢ Team Supervisors conduct regular more formal evaluations with each interviewer, in addition to nightly monitoring of each interviewer on their team;
➢ Project Managers closely monitored the progress of data collection, including call record dispositions;
➢ All data code is reviewed by a more senior researcher;
➢ All report output is reviewed by a more senior researcher; and
➢ All values in the report are reviewed by another team member to ensure accuracy.

Methodology Details (3/3)

Analysis of Findings & Data Weighting

Results were weighted to match the proportion of the general population residing in LDC's service territory based on StatsCan's 2021 census data.

The Public Awareness of Electrical Safety Index Scores have been highlighted and were calculated as described below, based on instructions in the Scorecard Methodology and Implementation Guide. The "response values" referenced in the description below were also determined and provided by the survey authors.

Data analysis and cross-tabulation have been conducted using Advanis' proprietary Online Reporting Environment software.

Specific values of the number of sample records, estimated population proportions, and final weighted sample counts within LDC are provided on the next slide.

The sum of the regional population proportions within an LDC may not equal 100% due to rounding.

All section points bound between 0 and 1

Section	Points
Likelihood to *"call before you dig"*	0 to 1pts
Impact of touching a power line	0 to 1pts
Proximity to overhead power line	0 to 1pts
Danger of tampering with electrical equipment	0 to 1pts
Proximity to downed power line	0 to 1pts
Actions taken in vehicle in contact with wires	0 to 1pts

Step 1 — Add all section values for individual survey respondents = **Individual Respondent's Cumulative Score**

Step 2 — Divide **Individual Respondent's Cumulative Score** / 6 "core" sections = **Respondent Standardized Score**

Step 3 — Summation of all **Respondent Standardized Scores** / n-size = **Raw Index Score**

Step 4 — Raw Index Score x 100 = **Public Safety Awareness Index Score** (Bound between 0-100%)

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Lead Project Consultant
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2022 Lakeland Power Electrical Safety Awareness Survey Final Report

Introduction and Summary

Thank you for selecting Redhead Media Solutions for this important project for Lakeland Power. We appreciate your confidence in us to provide you with data on Electrical Safety Awareness (ESA) in your region which provides both a current snapshot and can be used to compare with previous surveys and among other LDCs in Ontario that we work with.

It is always our goal to improving our deliverables and provide value to our clients. This report contains data for 2022 as well as historical data for 2016, 2018 and 2020 as well as comparative data where appropriate.

Should there be any specific data or breakouts that you require we would be happy to provide them. Please contact us to discuss how we can assist you and ensure you are getting the most from this project.

Sincerely,

Graydon Smith
President
Redhead Media Solutions Inc.

Introduction and Summary

Redhead Media Solutions Inc. (Redhead), partnering with ADVANIS for data collection and reporting, has been retained by Cornerstone Hydro Electric Concepts Inc. (CHEC) to conduct a 2022 Electrical Safety Awareness Survey for Lakeland Power. This survey is a required part of an LDC's Balanced Scorecard and other reporting and regulatory requirements for the Ontario Energy Board (OEB).

The complete group of participating CHEC LDCs are as follows:

➢ Centre Wellington Hydro
➢ EPCOR
➢ ERTH Power
➢ Grimsby Power
➢ Lakefront Utilities
➢ Lakeland Power Distribution
➢ Niagara-on-the-Lake Hydro
➢ Orangeville Hydro
➢ Ottawa River Power
➢ Renfrew Hydro
➢ Rideau St. Lawrence Distribution
➢ Tillsonburg Hydro
➢ Wasaga Distribution
➢ Wellington North Power

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Introduction and Summary

<u>This final report contains data specifically for Lakeland Power.</u>

Redhead Media Solutions, partnering with Advanis for data collection, is consulting on behalf of Lakeland Power to conduct the Electrical Safety Authority's Public Awareness survey for 2022. This survey is a required part of the LDC Balanced Scorecard for reporting to the Ontario Energy Board (OEB).

This survey is comprised of 401 randomly selected interviews with Ontario residents who are 18 years or older and reside in the required Lakeland Power service territory. The sample frame is stratified by age group and gender within each the territory, and the data is weighted to be representative of the adult population within the territory.

The objective of the survey is to provide an Electrical Safety Awareness (ESA) index score for Lakeland Power. This is a calculated aggregate value based on the responses of individuals to six core measures in the survey instrument.

Lakeland Power's 2022 Electrical Safety Awareness Score is 82.6%, This is a 0.2% increase over the 2020 score (82.4%) and 1.2% less than the average of all LDCs (83.8%). This is not a statistically significant difference from previous surveys or other LDCs.
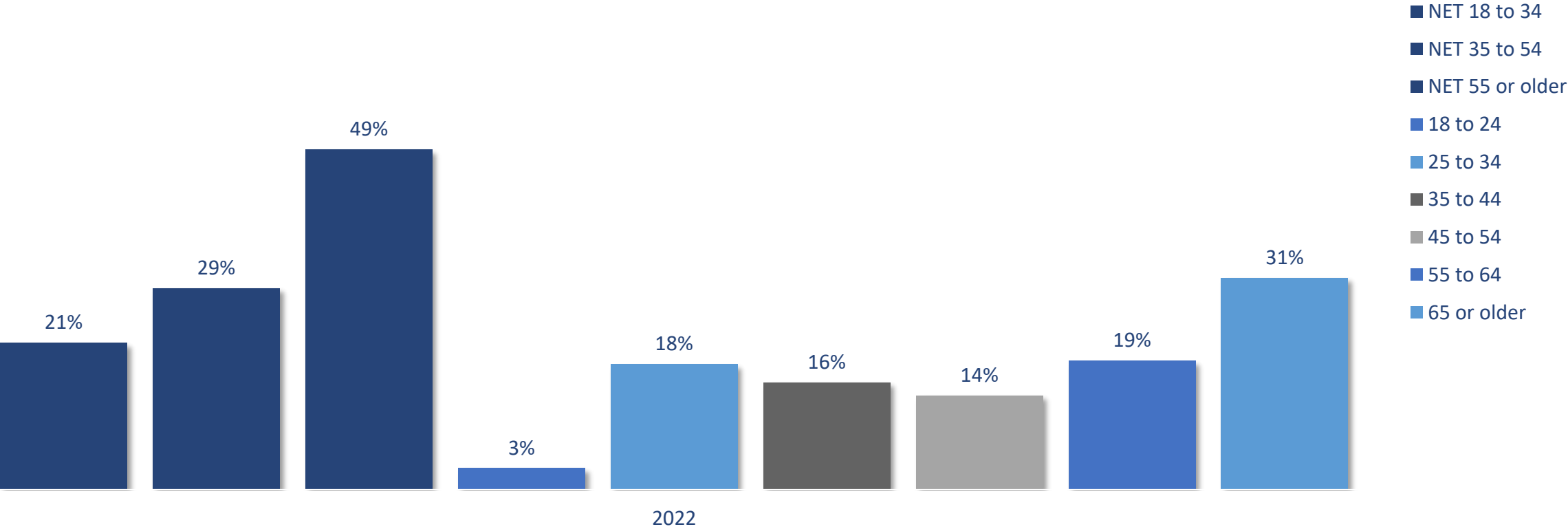
This falls within a very tight spectrum of index scores we processed for all LDCs that participated in the 2022 survey via Redhead. When the confidence interval and margin of error is applied to all index scores, there is significant overlap between LDCs which underlines the similarity of electrical safety awareness among participants.

The following report contains data and for all core questions as well as any additional questions supplied by the LDC (optional), asked after the core questions.

Question scoring and index methodologies were prescribed by the ESA/Innovative. As such, there has been limited additional analysis provided beyond the direction provided to meet the reporting guidelines. Should you wish further analysis of the data please contact our office to discuss.
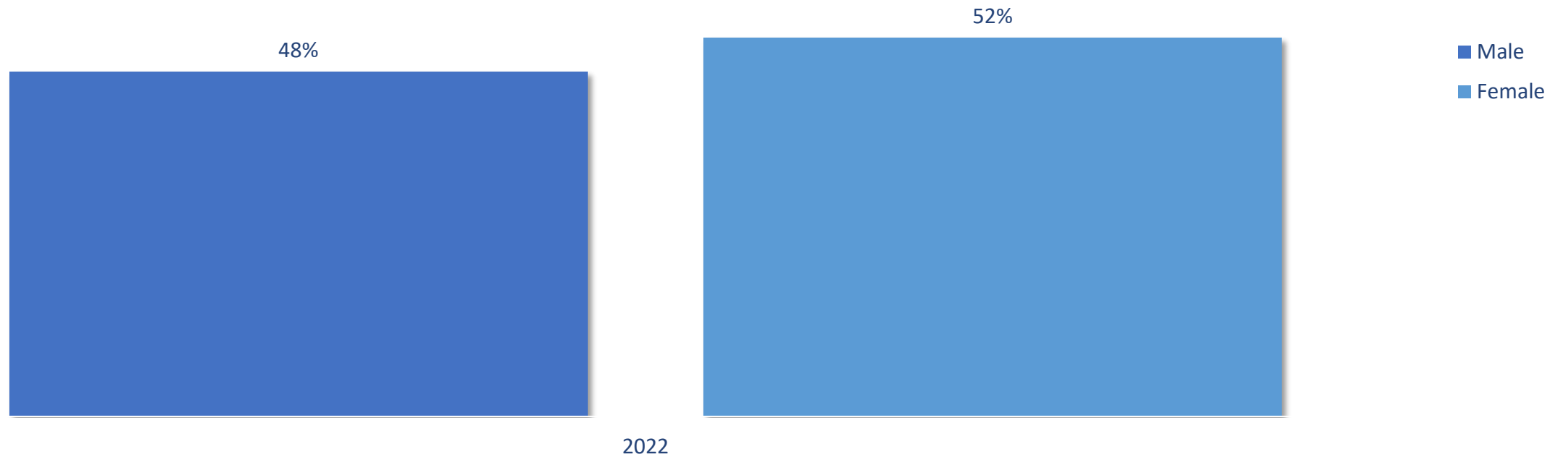
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DEMOGRAPHICS

age_r - Age of respondent (based on A2, A2a)

a4 - Gender

48%

52%
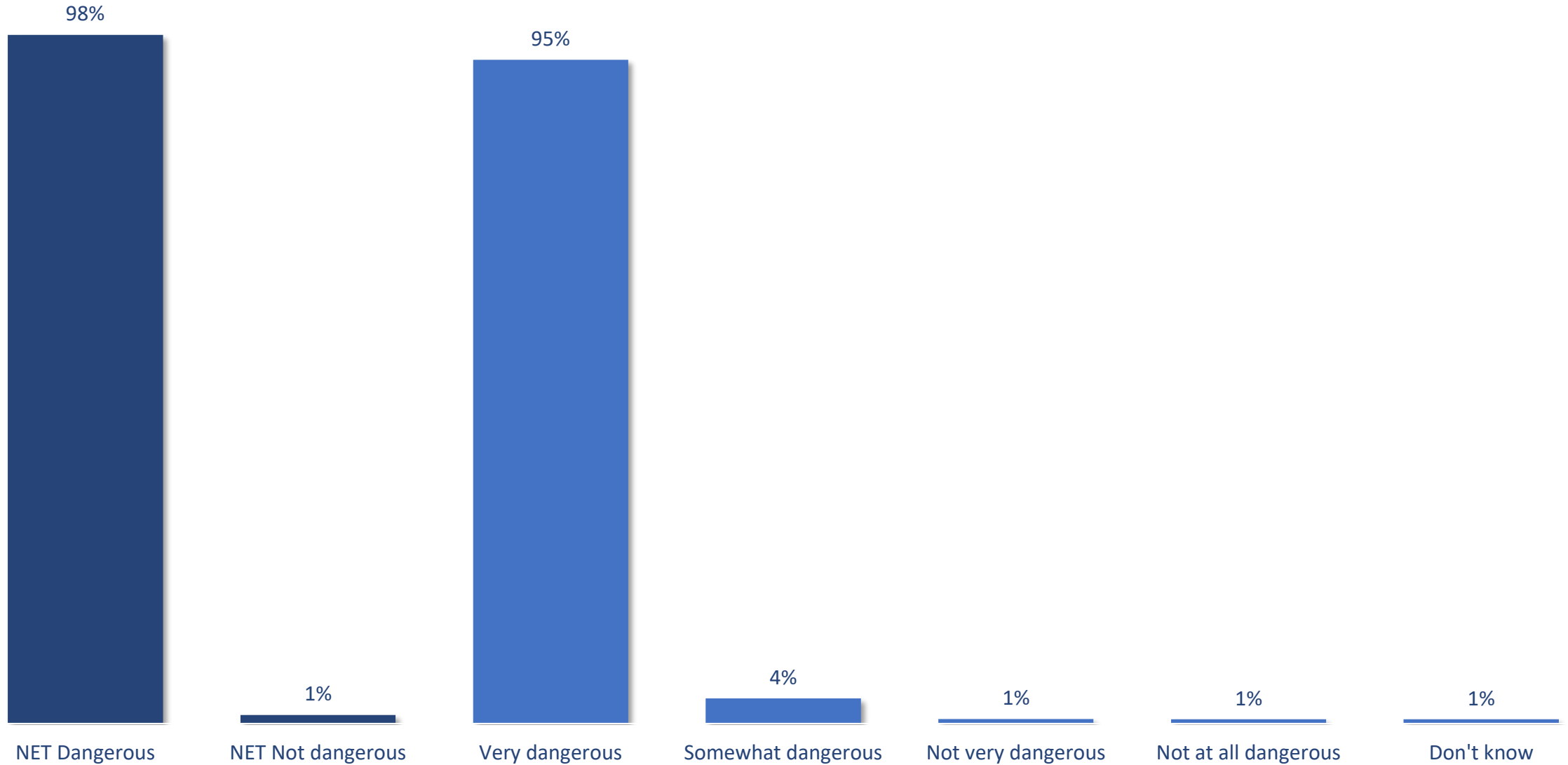
Male
Female

2022

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QUESTIONS/DATA

b5 - If you were to undertake a household project that required digging, such as planting a tree or building a deck, how likely are you to call to locate electrical or other underground lines?
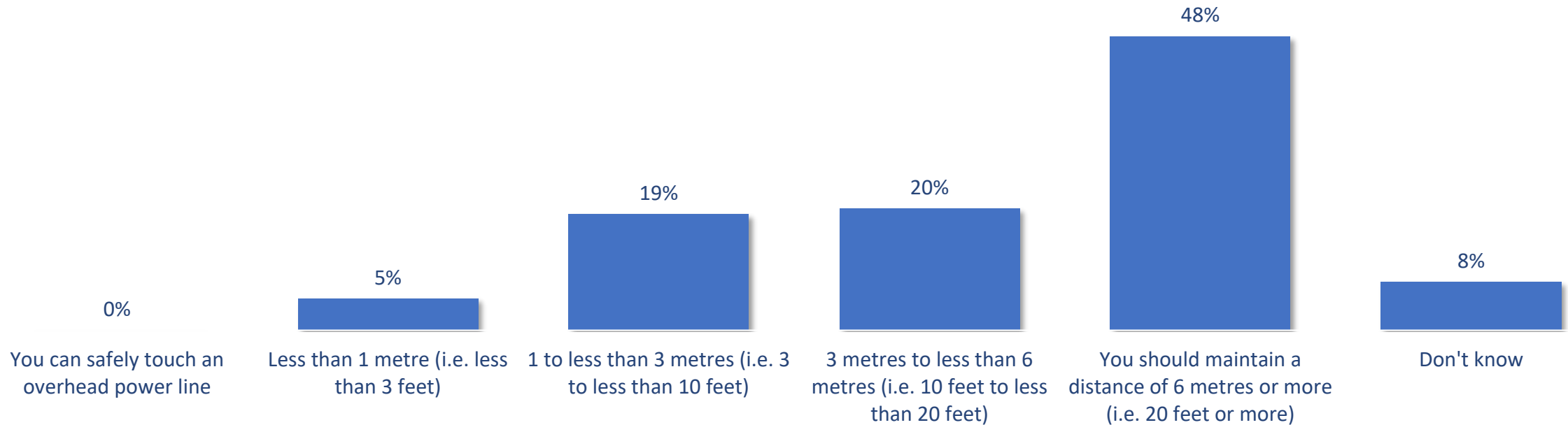
NET Likely: 72%
NET Unlikely: 9%
Definitely: 44%
Very likely: 19%
Somewhat likely: 10%
Not very likely: 6%
Not at all likely: 4%
I would not undertake a project that required digging: 17%
Don't know: 1%

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b6 - How dangerous do you believe it is to touch - with your body or any object - an overhead power line?

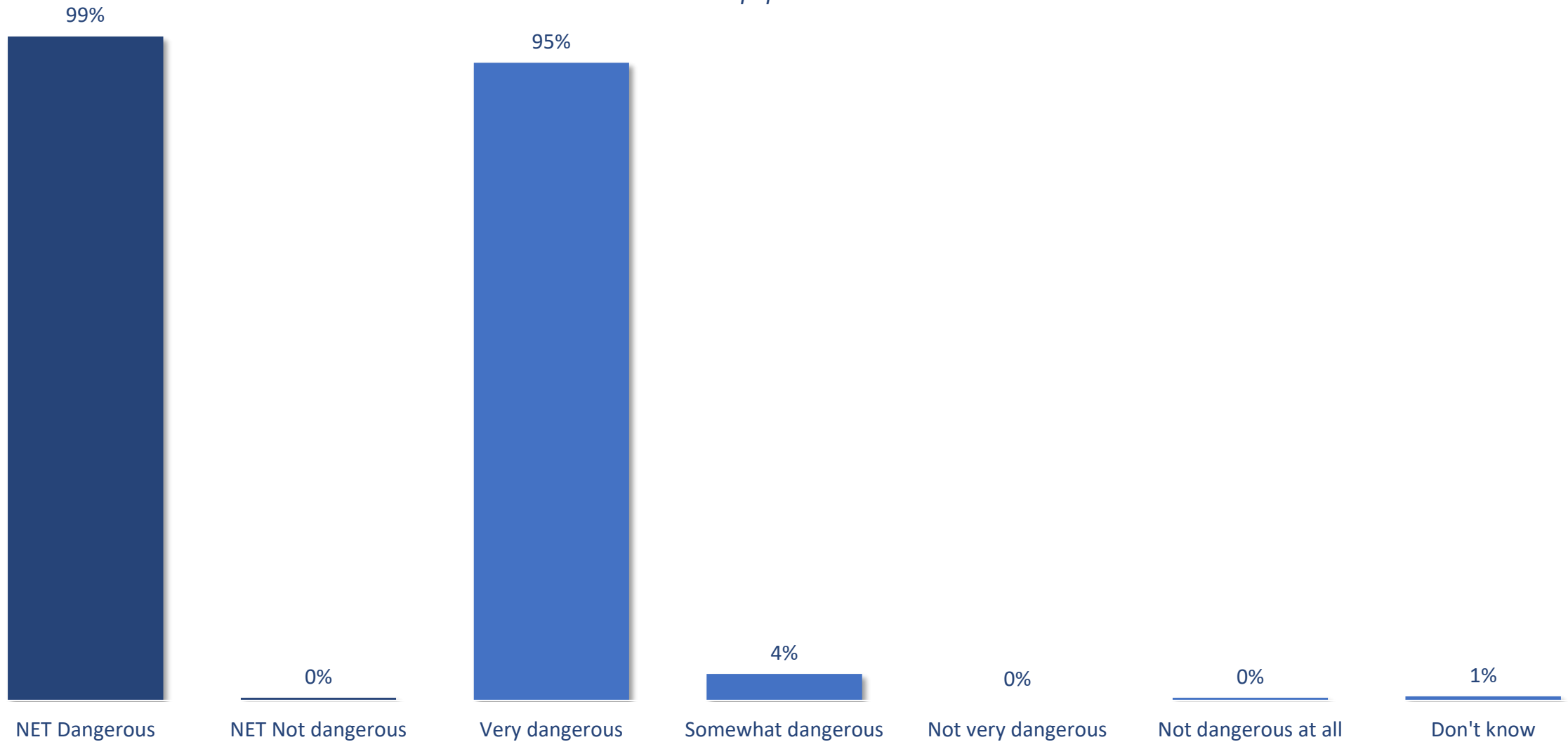| NET Dangerous	NET Not dangerous	Very dangerous	Somewhat dangerous	Not very dangerous	Not at all dangerous	Don't know
98%	1%	95%	4%	1%	1%	1%

b7 - When undertaking outdoor activities, how closely do you believe you can safely come to an overhead power line with your body or an object?

You can safely touch an overhead power line	Less than 1 metre (i.e. less than 3 feet)	1 to less than 3 metres (i.e. 3 to less than 10 feet)	3 metres to less than 6 metres (i.e. 10 feet to less than 20 feet)	You should maintain a distance of 6 metres or more (i.e. 20 feet or more)	Don't know
0%	5%	19%	20%	48%	8%

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b8 - How dangerous do you believe it is to try to open, remove contents, or touch the equipment inside locked electrical utility equipment?

b9 - How closely do you believe you can safely come to a downed overhead power line, such as a downed line caused by a storm or accident?

b10 - If you were in a vehicle, such as a car, bus, or truck, and an overhead power line came down on top of it, which of the following options do you believe is generally safer?

95%

4%

1%

Get out quickly and seek help

Stay in the vehicle until power has been disconnected from the line

Don't know

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b11 - Does your job regularly cause you to come close to energized power lines?

88%

11%

1%

Yes   No   Don't know

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b12 - [Among those with a job featuring close contact to energized power lines] Do you work in any of the following fields?

60% — Construction or outdoor trades
7% — General labour
5% — Transportation
4% — Electrician
22% — Other
3% — Don't know/Prefer not to say

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b13 - How would you describe your primary residence?

A fully-detached home	An apartment or condo building less than 5 storeys	A townhome or row house	A semi-detached home	A farm	An apartment or condo building 5 storeys or higher	Other
76%	14%	5%	3%	1%	0%	1%

REDHEAD INC
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b14 - Does your primary residence receive electricity through overhead wires or underground cables?

55%

38%

7%

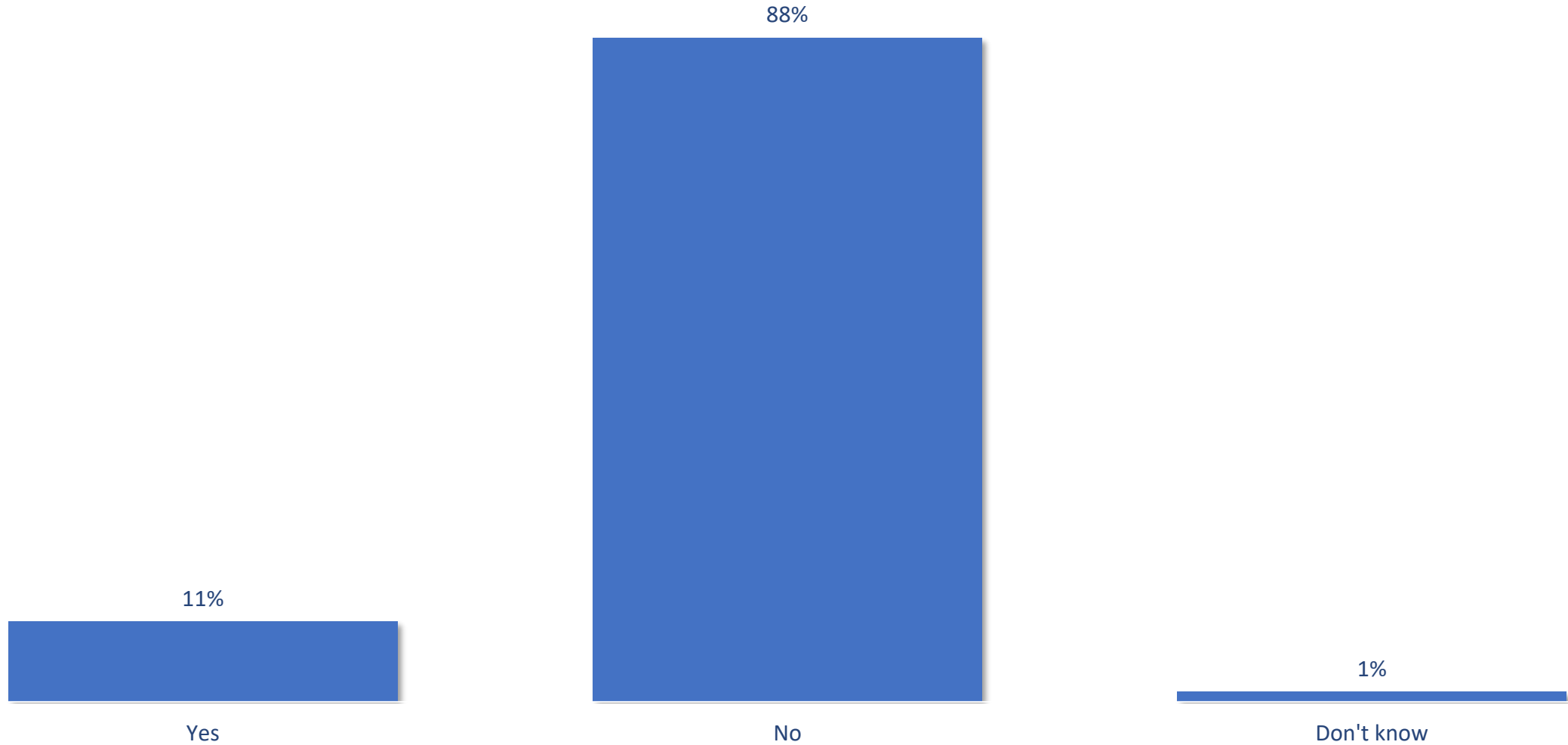Overhead wires   Underground cables   Don't know

Source: Redhead Media Solutions/Advanis telephone survey of 18-year-old + individuals residing in the service territory, January 4-February 24, 2022, n=401, accurate 4.9 percentage points plus or minus, 19 times out of 20.

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CUSTOMER SATISFACTION INDEX

ESA Index Score
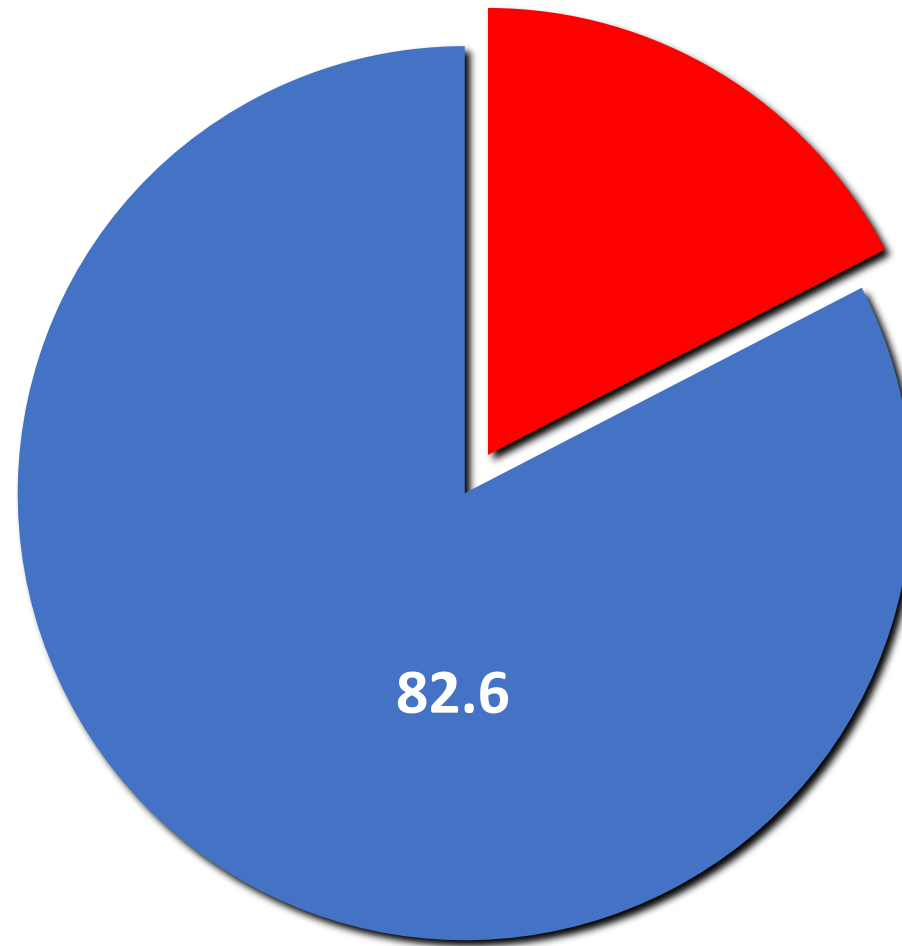
82.6

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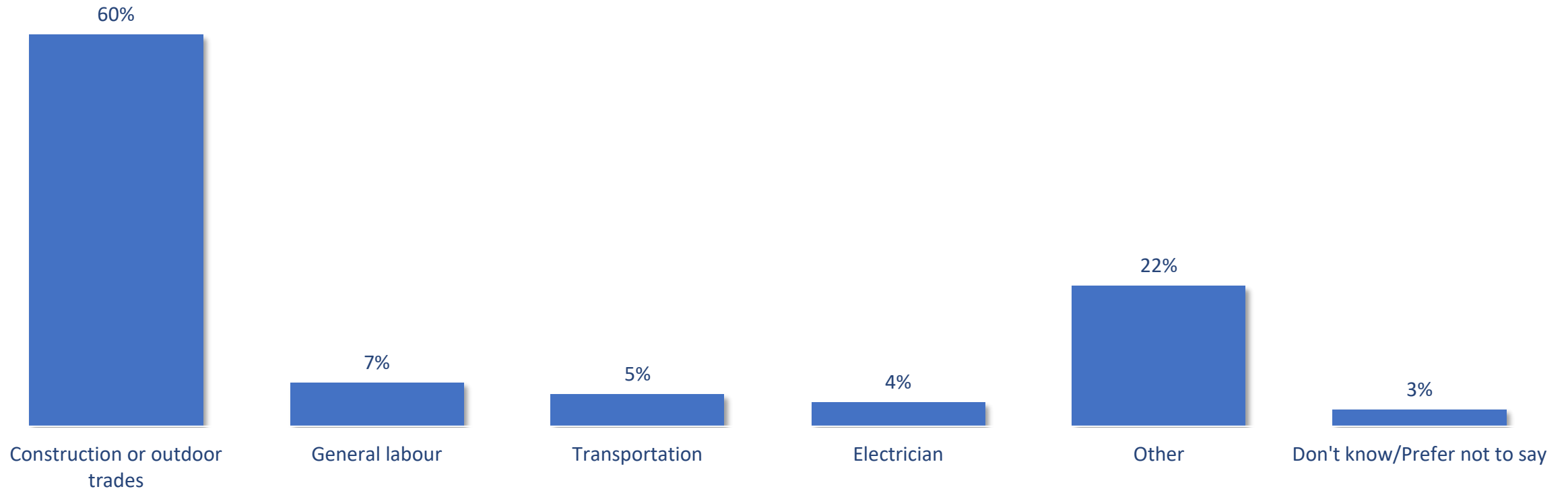
ESA Index Score by Age Category
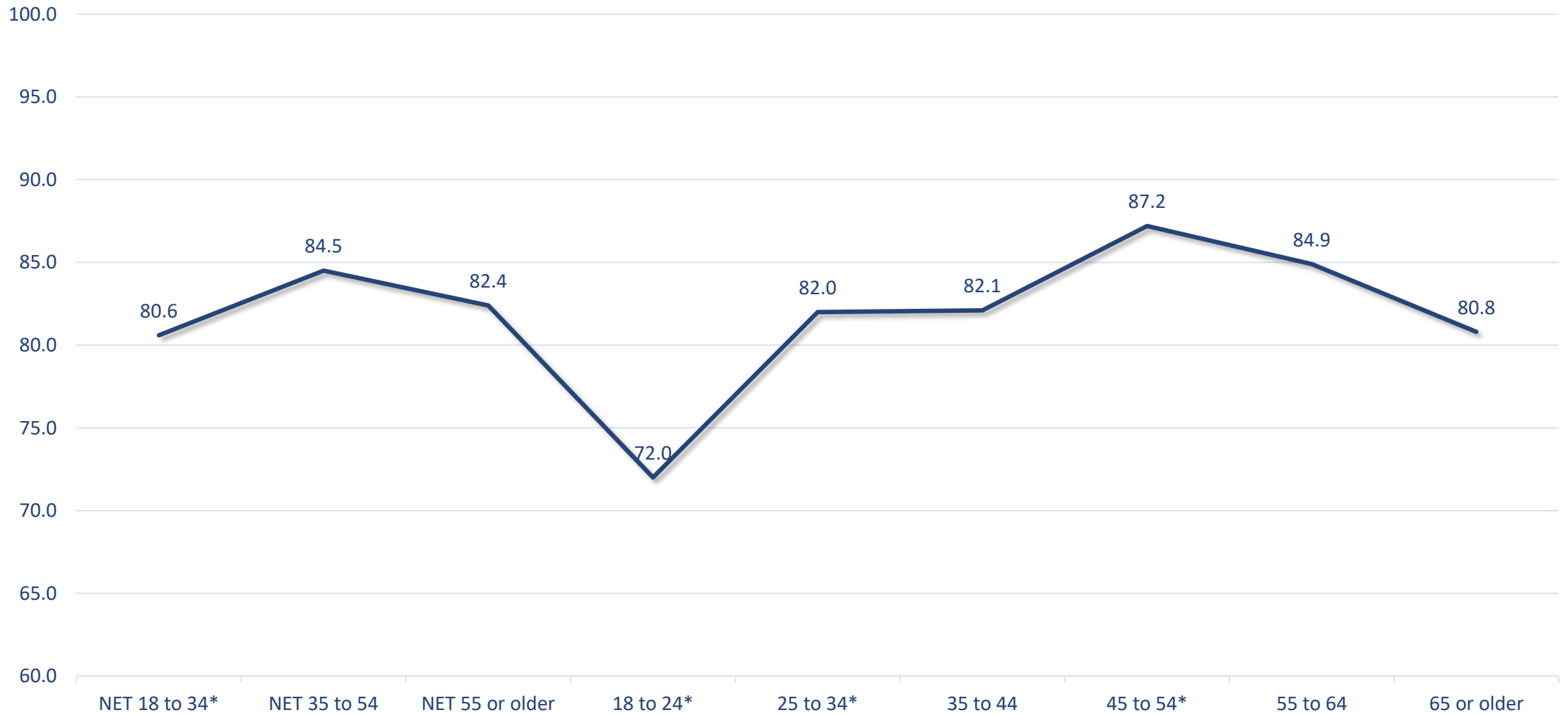
Source: Redhead Media Solutions/Advanis telephone survey of 18-year-old + individuals residing in the service territory, January 4-February 24, 2022, n=401, accurate 4.9 percentage points plus or minus, 19 times out of 20. *Caution base size <50.

ESA Index Score by Gender
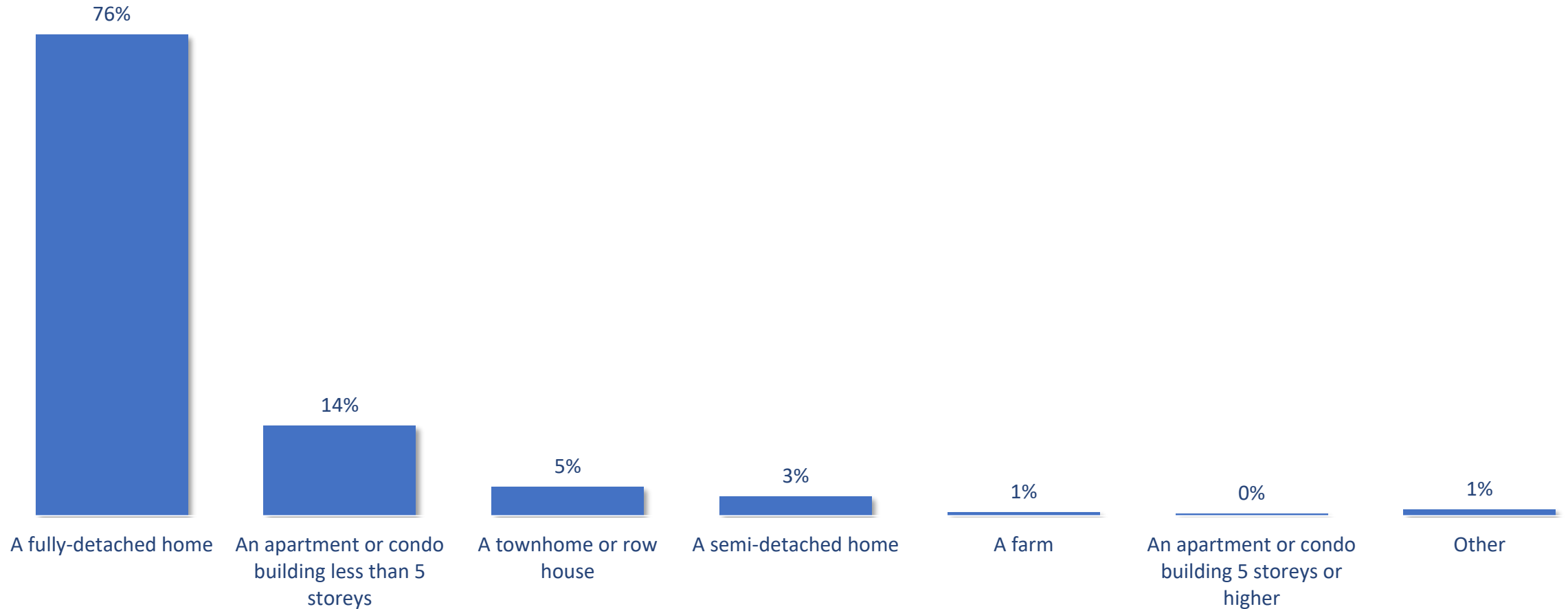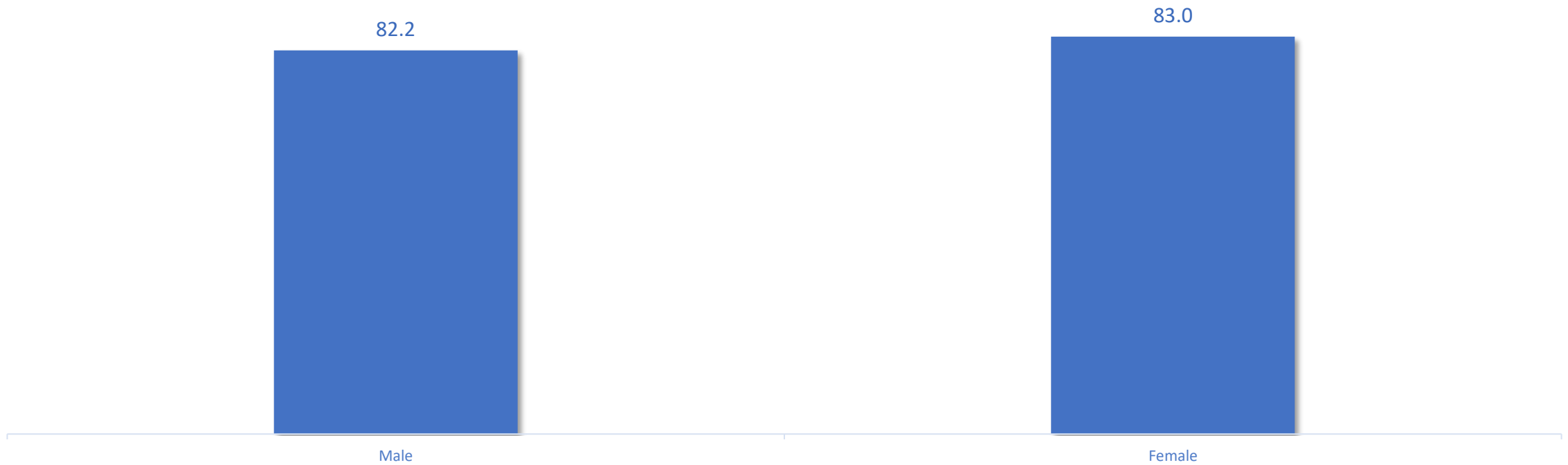
82.2 — Male

83.0 — Female

Source: Redhead Media Solutions/Advanis telephone survey of 18-year-old + individuals residing in the service territory, January 4-February 24, 2022, n=401, accurate 4.9 percentage points plus or minus, 19 times out of 20.

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ESA Index Score Comparison to External LDCs
Upper and Lower Bound
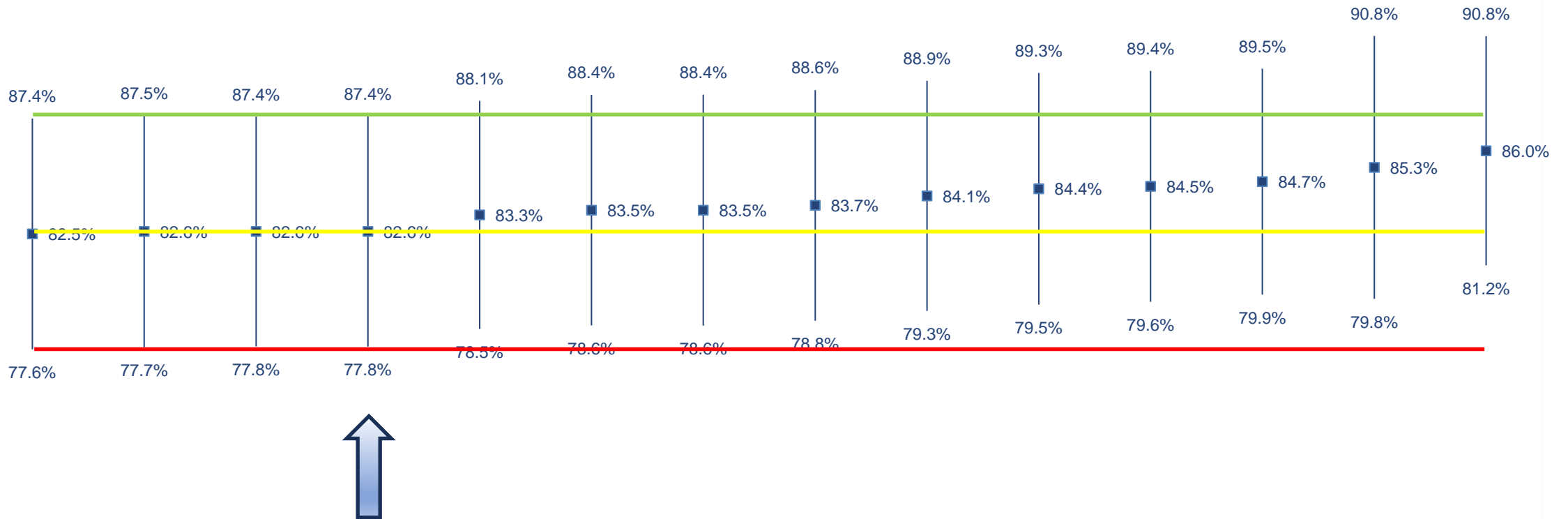
- The lines denote Lakeland Power's upper and lower bound based on the Public Safety Awareness Score.
- All LDCs confidence intervals overlap, similar to 2020.
- CWH overlaps with all other LDCs, indicating statistical uniformity.

CORE COMPARATIVE DATA 2016-2022

b5 - If you were to undertake a household project that required digging, such as planting a tree or building a deck, how likely are you to call to locate electrical or other underground lines?

Year	NET Likely	NET Unlikely
2016	64%	15%
2018	67%	17%
2020	71%	14%
2022	72%	9%

■ NET Likely   ■ NET Unlikely

b6 - How dangerous do you believe it is to touch - with your body or any object - an overhead power line?

2016 — NET Dangerous 97%, NET Not dangerous 2%
2018 — NET Dangerous 96%, NET Not dangerous 2%
2020 — NET Dangerous 97%, NET Not dangerous 2%
2022 — NET Dangerous 98%, NET Not dangerous 1%

■ NET Dangerous   ■ NET Not dangerous

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b7 - When undertaking outdoor activities, how closely do you believe you can safely come to an overhead power line with your body or an object?

Year	You can safely touch an overhead power line	Less than 1 metre	1 to less than 3 metres	3 metres to less than 6 metres	You should maintain a distance of 6 metres or more	Don't know
2016	0%	7%	17%	20%	47%	9%
2018	0%	1%	9%	20%	60%	9%
2020	0%	6%	17%	27%	43%	7%
2022	0%	5%	19%	20%	48%	8%

Legend:
- You can safely touch an overhead power line
- Less than 1 metre (i.e. less than 3 feet)
- 1 to less than 3 metres (i.e. 3 to less than 10 feet)
- 3 metres to less than 6 metres (i.e. 10 feet to less than 20 feet)
- You should maintain a distance of 6 metres or more (i.e. 20 feet or more)
- Don't know

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b8 - How dangerous do you believe it is to try to open, remove contents, or touch the equipment inside locked electrical utility equipment?

2016: NET Dangerous 97%, NET Not dangerous 2%
2018: NET Dangerous 99%, NET Not dangerous 0%
2020: NET Dangerous 98%, NET Not dangerous 1%
2022: NET Dangerous 9%, NET Not dangerous 0%

■ NET Dangerous   ■ NET Not dangerous

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b9 - How closely do you believe you can safely come to a downed overhead power line, such as a downed line caused by a storm or accident?

Year						
2016	1%	1%	3%	9%	84%	2%
2018	0%		5%	8%	83%	4%
2020	0%	1%	7%	13%	76%	3%
2022	0%	1%	6%	14%	75%	4%

Legend:
- You can safely touch a downed overhead power line
- Less than 1 metre (i.e. less than 3 feet)
- 1 to less than 5 metres (i.e. 3 to less than 16 feet)
- 5 metres to less than 10 metres (i.e. 16 feet to less than 33 feet)
- You should maintain a distance of 10 metres or more (i.e. 33 feet or more)
- Don't know

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b10 - If you were in a vehicle, such as a car, bus, or truck, and an overhead power line came down on top of it, which of the following options do you believe is generally safer?

Year	Get out quickly and seek help	Stay in the vehicle until power has been disconnected from the line	Don't know
2016	5%	94%	1%
2018	5%	94%	1%
2020	4%	94%	2%
2022	4%	95%	1%

■ Get out quickly and seek help   ■ Stay in the vehicle until power has been disconnected from the line   ■ Don't know

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b11 - Does your job regularly cause you to come close to energized power lines?

2016	13%	86%	0%
2018	10%	90%	0%
2020	12%	87%	1%
2022	11%	88%	1%

■ Yes ■ No ■ Don't know

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b12 - [Among those with a job featuring close contact to energized power lines] Do you work in any of the following fields?

Year	Construction or outdoor trades	Electrician	Transportation	General labour	Other	Don't know/Prefer not to say
2016	56%	18%	2%	0%	19%	5%
2018	50%	4%	4%	18%	19%	4%
2020	54%	9%	16%	2%	16%	3%
2022	60%	4%	5%	7%	22%	3%

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b13 - How would you describe your primary residence?

Year	A fully-detached home	An apartment or condo building less than 5 storeys	A townhome or row house	A semi-detached home	A farm	An apartment or condo building 5 storeys or higher	Other
2016	75%	11%	6%	4%	2%	0%	1%
2018	81%	9%	3%	3%	2%	0%	1%
2020	77%	10%	3%	2%	5%	0%	3%
2022	76%	14%	5%	3%	1%	0%	1%

Legend:
- A fully-detached home
- An apartment or condo building less than 5 storeys
- A townhome or row house
- A semi-detached home
- A farm
- An apartment or condo building 5 storeys or higher
- Other

b14 - Does your primary residence receive electricity through overhead wires or underground cables?

Year	Overhead wires	Underground cables	Don't know
2016	49%	46%	6%
2018	55%	40%	5%
2020	53%	44%	4%
2022	55%	38%	7%

■ Overhead wires ■ Underground cables ■ Don't know

ESA Index Score by Year

82.5　　　83.8　　　82.4　　　82.6

■ 2016　■ 2018　■ 2020　■ 2022

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MEDIA SOLUTIONS

METHODOLOGY

Methodology Summary

Commissioned by	Lakeland Power
Sample size	401 18-year-old + individuals residing in the service territory
Margin of error	±4.9 percentage points, 19 times out of 20
Survey mode	Random telephone survey of customer base, CATI data collection
Survey sample	Residents 18 years of age + who reside in the service territory of the Lakeland Power
Time of calling	4PM-9PM ET Weekdays, callbacks scheduled 9AM-9PM ET
In-field dates	January 4-February 24, 2022
Language	English only
Survey author	Innovative Research/Electrical Safety Authority
Question Order	Report shown in order
Question Wording	Questions shown in report as asked
Survey Company	Redhead Media Solutions Inc/Advanis

REDHEAD INC
MEDIA SOLUTIONS

Methodology Details

Target Respondents

The respondents of the survey were Ontario residents 18 years of age or older who reside within Lakeland Power's service territory. Target areas were determined based on a list of postal codes provided by Lakeland Power.

Sample Size and Statistical Reliability

All margins of error (MoE) are shown at a 95% confidence level.

➢ E.g., the margin of error associated with a sample size of 400 for a large (infinite) population is ±4.9 percentage points, 19 times out of 20.
➢ Because Lakeland Power's service area has a smaller adult (18+) population, and MoE is a function of the relationship between sample size and population, it is appropriate to apply a finite population correction factor when calculating MoE. When sample size is a higher percentage of the population, the MoE may narrow.

Sample sizes were set according to the *Public Awareness of Electrical Safety: Methodology & Survey Implementation Guide*, prepared for the Electrical Safety Authority by Innovative Research (November 2015):

➢ Where possible, sample size of n=400.
➢ For LDCs with a service territory population of less than 5,000, a minimum sample size of n=300 is appropriate.
➢ For LDCs with a service territory population of less than 3,000, a minimum sample size of n=200 is appropriate.

Methodology Details

Sampling Methodology

Redhead was provided service territory postal codes from Lakeland Power. Both landline and wireless sample were used. The landline sample used listed numbers only, the wireless sample was drawn randomly from the most recent working cell phone lists in rate centers in or around the specified area(s). We then sampled from these lists randomly using Advanis' proprietary sample server.

To minimize low response:

➢ Sample was loaded in batches to ensure the sample was fully utilized before moving onto fresh sample records;
➢ Calls were made between the hours of 4pm and 9pm ET on weekdays; and
➢ Call backs were scheduled and honored between the hours of 9am and 9pm ET.

Questionnaire

The survey instrument was provided by the Electrical Safety Authority (ESA) developed in conjunction with Innovative Research. The survey consisted of an introduction, electrical safety core questions and demographic information.

Data Collection

Computer aided telephone interviews (CATI) were conducted from January 4-February 24, 2022.

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Methodology Details

Quality Control

The accuracy and integrity of results is of the highest importance for Redhead/Advanis. As such, several controls are implemented to ensure the highest quality output is achieved:

➢ Advanis, on behalf of Redhead, trained the interviewers to understand the study's objectives;
➢ Detailed call records are kept by the automated CATI system, and are supplemented by output files to SPSS for productivity analysis (i.e., not subject to human error);
➢ The survey was soft launched in select markets. The data was then checked before calling began in full for Lakeland Power;
➢ 100% of all surveys are digitally recorded for potential review;
➢ Advanis' Quality Assurance team listened to the actual recordings of five percent of completed surveys and compared the responses to those entered by the interviewer to ensure that responses from respondents are properly recorded;
➢ Team Supervisors conduct regular more formal evaluations with each interviewer, in addition to nightly monitoring of each interviewer on their team;
➢ Project Managers closely monitored the progress of data collection, including call record dispositions;
➢ All SPSS code is reviewed by a more senior researcher;
➢ All Report Builder output is reviewed by a more senior researcher; and
➢ All values in the report are reviewed by another team member to ensure accuracy.

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Methodology Details

Analysis of Findings & Data Weighting

Within each LDC, results were weighted to match corresponding population proportions from the most recent Statistics Canada census data for these six combinations of gender and age:

- Males 18-34
- Females 18-34
- Males 35-54
- Females 35-54
- Males 55 and older
- Females 55 and older

As noted above, the service territory was specified by postal code. Since census data is not available by postal code, Redhead provided Advanis with the municipalities covered by the LDC, and the population numbers for the Census Subdivisions that most closely matched those municipalities were totaled to arrive at the LDC population proportions for each of the six gender/age combinations.

This **index score** is calculated using the following formulas:

Step 1: Add each individual respondent's key measurement questions using the provided response values.

	B5
+	B6
+	B7
+	B8
+	B9
+	B10
=	**Individual respondent's cumulative score**

Step 2:
Individual respondent's cumulative score / # of sections
= Respondent Standardized Score

Step 3:
Summation of all "Respondent Standardized Scores" / n-size (i.e. total sample size)
= Raw Index Score

Step 4:
Raw Index Score × 100 = Index Score (bound between 0-100%)

The Public Safety Awareness index scores have been highlighted and were calculated as described below, based on instructions from the Electrical Safety Authority (ESA). The "provided response values" referenced in the description below were also determined and provided by the ESA. Data analysis and cross-tabulation have been conducted using SPSS and Report Builder software.

Methodology Tables

Margin of error

LDC	Completed Surveys	Sample Size as % of population	Assuming Large Population	Using Actual 18+ Population
Lakeland Power	401	1.1%	+/- 4.9%	+/- 4.9%

Sample weighting

LDC	Total Postal Codes in Service Territory	Forward Sortation Areas Covered	Number of Local Delivery Units in Each FSA
Lakeland Power	741	P0A	3
		P1H	110
		P1L	253
		P2A	375

Thank You

We greatly appreciate working on this important project for Lakeland Power and hope we have met or exceeded your expectations.
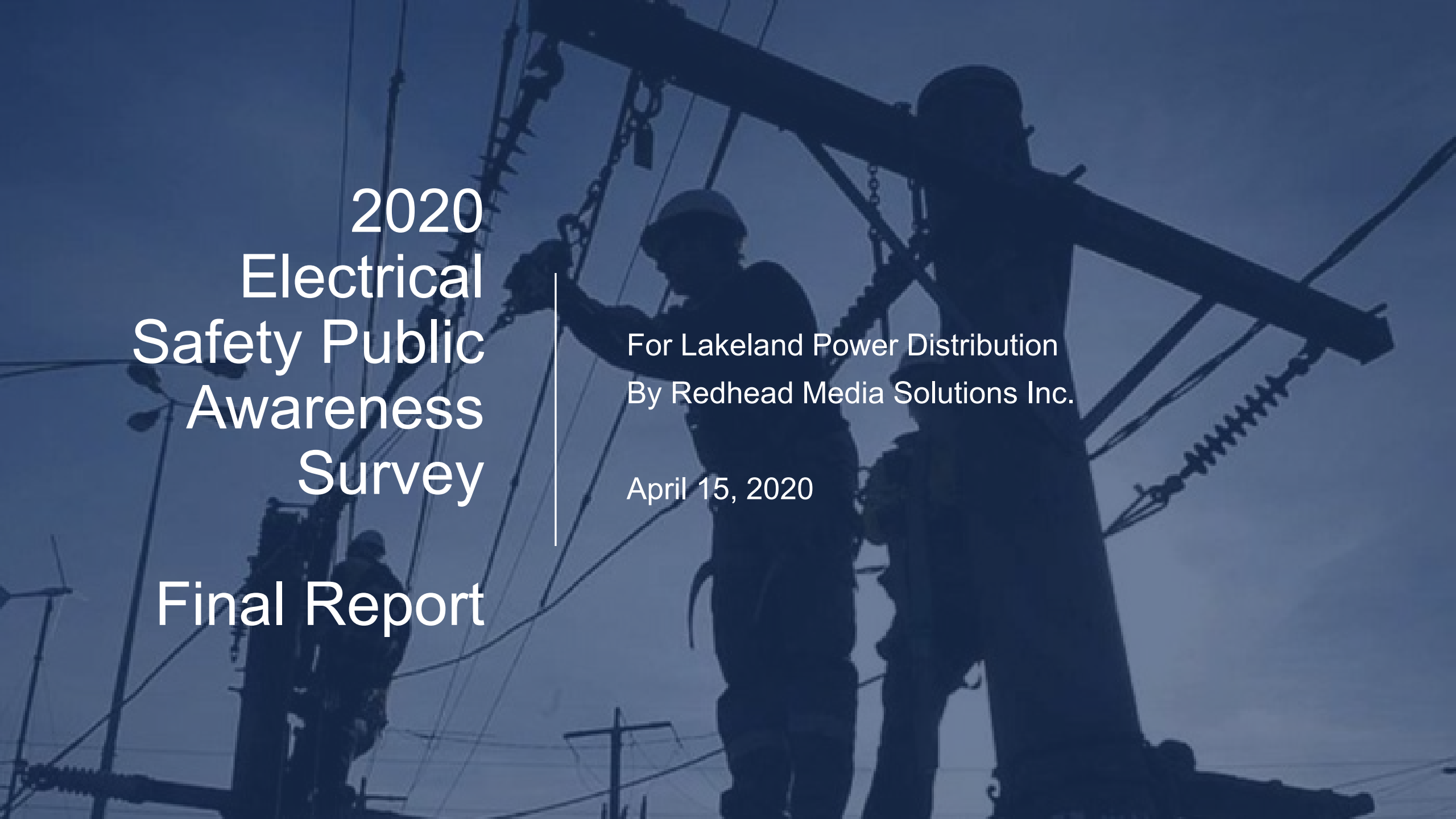
We are happy to present this data to your staff or Board members upon request. If you wish to do so, please contact us for an appointment.

We look forward to working with you on future projects, including the Customer Satisfaction Survey later in 2022. Please note if you have any other projects that we may be able to help you with, don't hesitate to be in touch.

Graydon Smith - President
Redhead Media Solution Inc.
3-200 Manitoba St.
Suite 416
Bracebridge, ON
P1L 2E2

REDHEAD INC
MEDIA SOLUTIONS

2020 Electrical Safety Public Awareness Survey

Final Report

For Lakeland Power Distribution
By Redhead Media Solutions Inc.

April 15, 2020

Thank you for selecting Redhead Media Solutions Inc. for this important project for Lakeland Power Distribution. We appreciate your confidence in us to provide you with data on Electrical Safety Awareness that can now be used to compare with previous surveys and among other LDCs.

We have restructured our reporting to you this year, replacing the traditional single report with tables and transitioning to a more robust and informative graphics-based style that gives you the ability to see responses and information "at a glance" as opposed to simply comparing numbers.

To supplement this report, we have also included the full set of 2020 tables and comparative 2016/2018/2020 tables in spreadsheet format, allowing you easy access to the data we have generated. You can find this in "Appendix A". The methodology guide and questionnaire are also included as appendices B, C for your reference.

Should there be any specific data or breakouts that you require, please contact us to discuss.

Graydon Smith
President

Introduction and Summary

Redhead Media Solutions Inc. (Redhead), partnering with ADVANIS for data collection and statistics, has been retained (via a 2017 RFP process by Cornerstone Hydro Electric Concepts Inc. - CHEC) to conduct the 2020 Electrical Safety Public Awareness Survey for Lakeland Power. This survey is a required part of an LDC's Balanced Scorecard and other reporting and regulatory requirements for the Ontario Energy Board (OEB).

The complete group of participating CHEC LDCs are as follows:

➢ Centre Wellington Hydro
➢ EPCOR
➢ Grimsby Power
➢ Lakefront Utilities
➢ Lakeland Power Distribution
➢ Niagara-on-the-Lake Hydro
➢ Orangeville Hydro
➢ Ottawa River Power
➢ Renfrew Hydro
➢ Rideau St. Lawrence Distribution
➢ Tillsonburg Hydro
➢ Wasaga Distribution
➢ Wellington North Power

Additionally, Redhead also provided services for this project outside the CHEC group of LDCs.

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Introduction and Summary

<u>This final report contains data specifically for Lakeland Power.</u>

This survey is comprised of approximately 400 randomly selected interviews of with Ontario residents who are 18 years or older and reside in the Lakeland Power service territory. The sample frame is stratified by age group and gender within each territory and the data is also weighted to be representative of the adult population within each territory.

The objective of the survey is to provide a Public Safety Awareness (PSA) index score for Lakeland Power. This is a calculated aggregate value based on the responses of individuals to six core measures in the survey instrument.

The 2020 PSA Index Score is 82.4%.
The median score for participating LDCs is 83.3%.
The 2016-2020 delta = -1.4 % which is within the margins of error.
The 2018-2020 delta = -0.1% which is within the margins of error.

The 2020 score sits within a very tight spectrum of scores we calculated for all participating LDCs. When the confidence interval and margin of error is applied to all index scores, there is significant overlap between LDCs which underlines the statistical similarity of performance and electrical safety awareness among participants. Statistically, Lakeland Power is similar to all other LDCs surveyed.

The following report contains graphic data and tables for all core questions as well as year-over-year comparative data (internal) and comparative scoring data (external). Additional data is available in the attached spreadsheet sheets and tables. (Appendix A)

Questions and scoring methodology was prescribed by the survey authors, Electrical Safety Authority/Innovative Research. As such, there has been limited additional analysis provided beyond the direction provided to meet the reporting guidelines. Should you wish further analysis of the data please contact our office to discuss.

REDHEAD INC
MEDIA SOLUTIONS

DEMOGRAPHICS

Age of Respondent
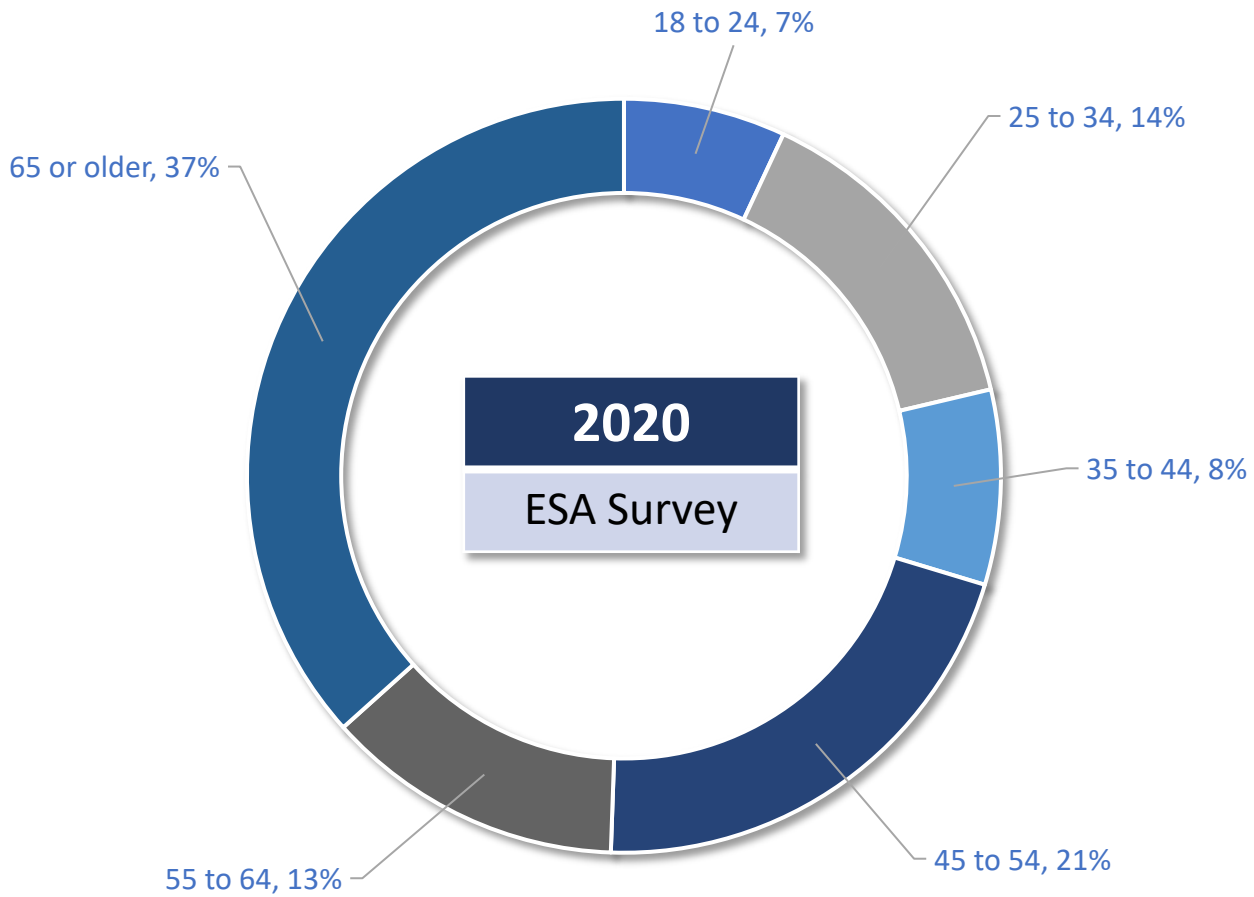
	Total
Base: Total Answering	400
18 to 24	7%
25 to 34	14%
35 to 44	8%
45 to 54	21%
55 to 64	13%
65 or older	37%

*Note: Charts and tables may not add up to 100% due to rounding

Gender of Respondent

2020
ESA Survey
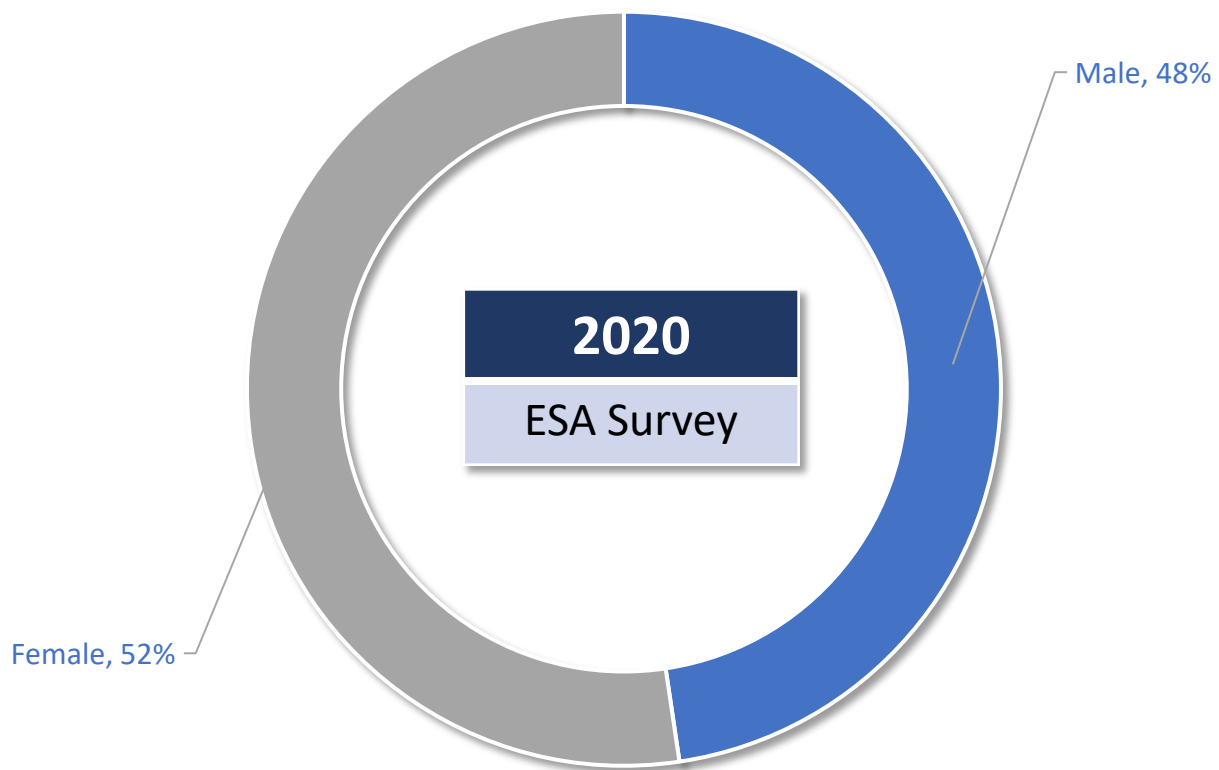
Male, 48%

Female, 52%

	Total
Base: Total Answering	400
Male	48%
Female	52%

*Note: Charts and tables may not add up to 100% due to rounding

REDHEAD
MEDIA SOLUTIONS

QUESTIONS

B5: If you were to undertake a household project that required digging, such as planting a tree or building a deck, how likely are you to call to locate electrical or other underground lines?

Net Score

+49
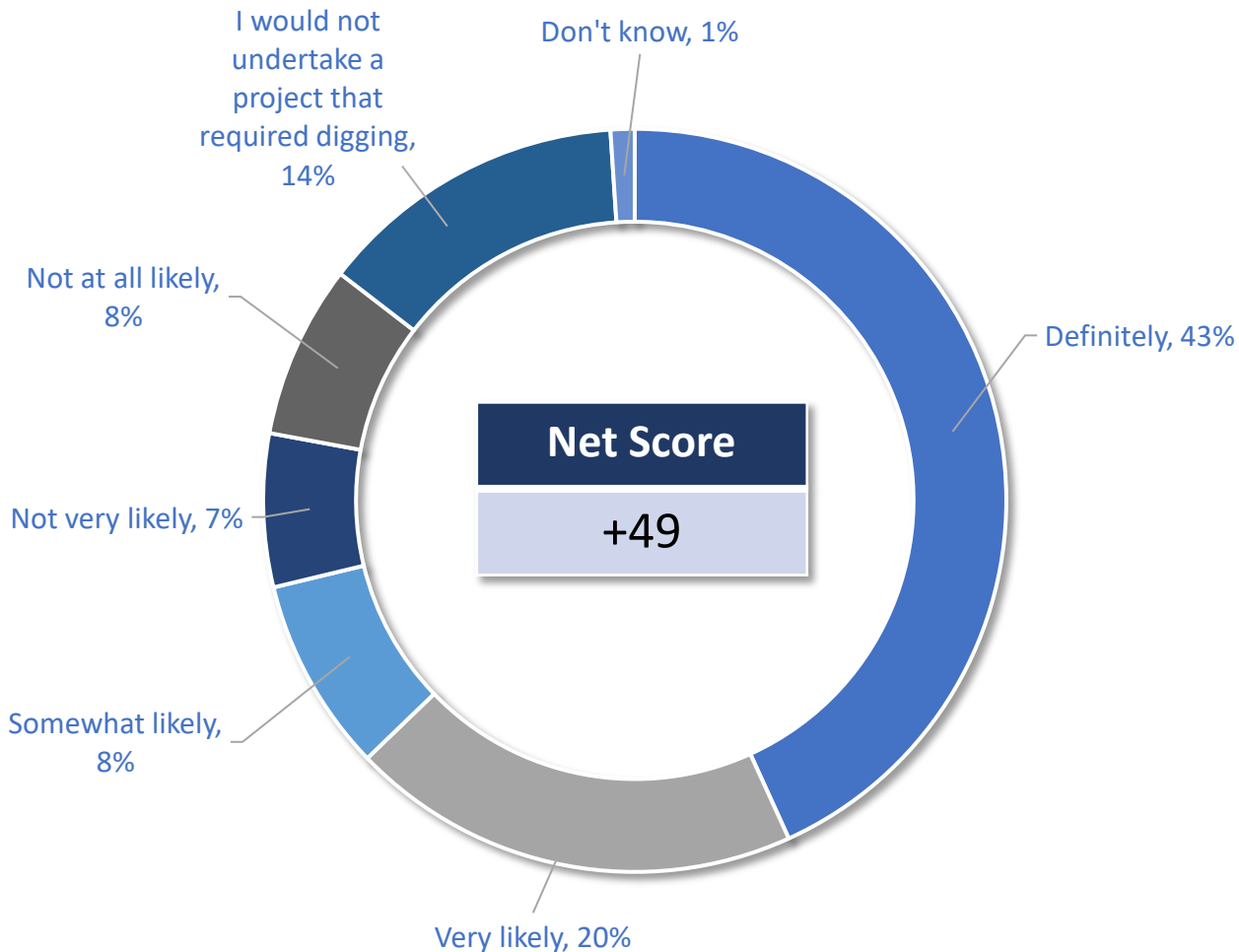
	Total
Base: Total Answering	400
Definitely	43%
Very likely	20%
Somewhat likely	8%
Not very likely	7%
Not at all likely	8%
I would not undertake a project that required digging	14%
Don't know	1%

*Note: Charts and tables may not add up to 100% due to rounding

B6: How dangerous do you believe it is to touch – with your body or any object – an overhead power line?

Somewhat dangerous, 2%

Not very dangerous, 1%

Not at all dangerous, 1%

Net Score

+95
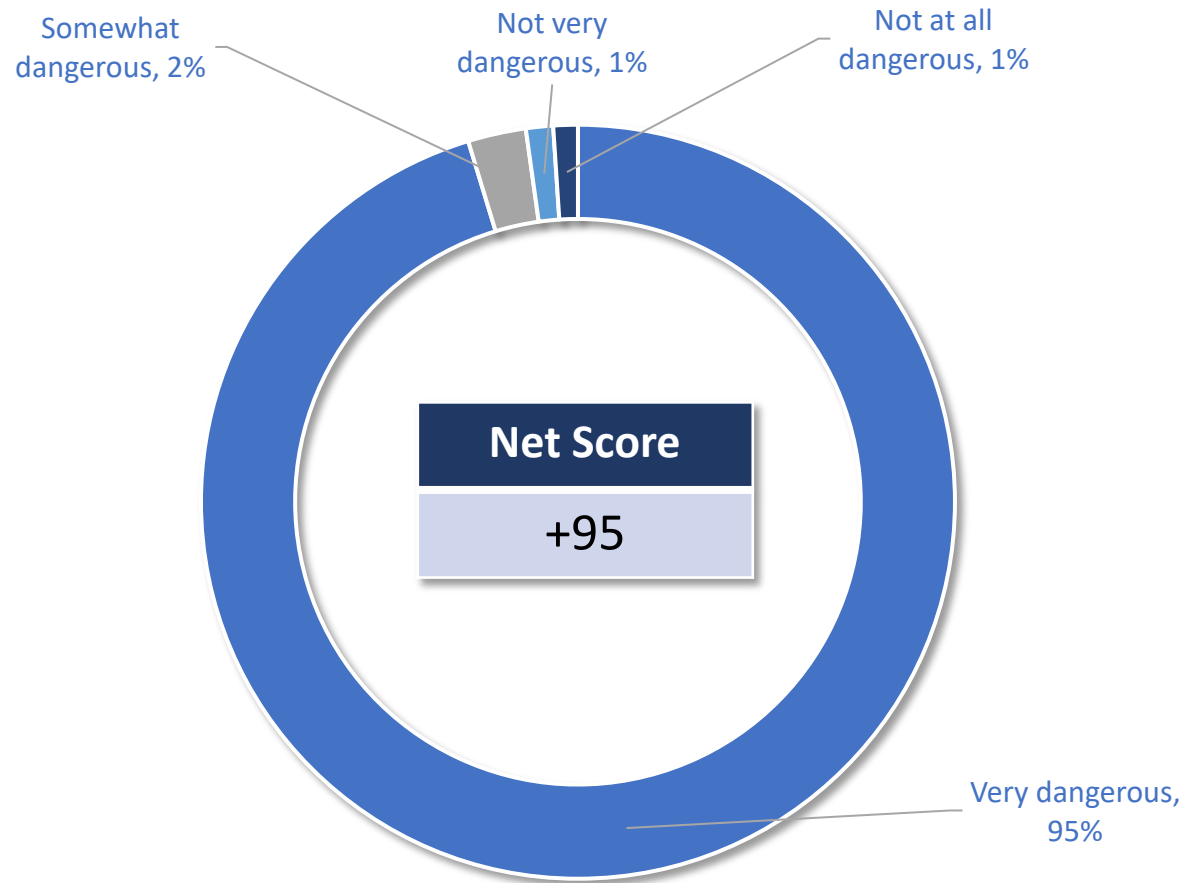
Very dangerous, 95%

	Total
Base: Total Answering	400
Very dangerous	95%
Somewhat dangerous	2%
Not very dangerous	1%
Not at all dangerous	1%
Don't know	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 6-March 10, 2020, n=400, accurate 4.9 percentage points plus or minus, 19 times out of 20.

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10

Don't know, 7%

Less than 1 metre, 6%

1 to less than 3 metres, 17%

2020 ESA Survey

You should maintain a distance of > 6 metres, 43%

3 metres to less than 6 metres, 27%
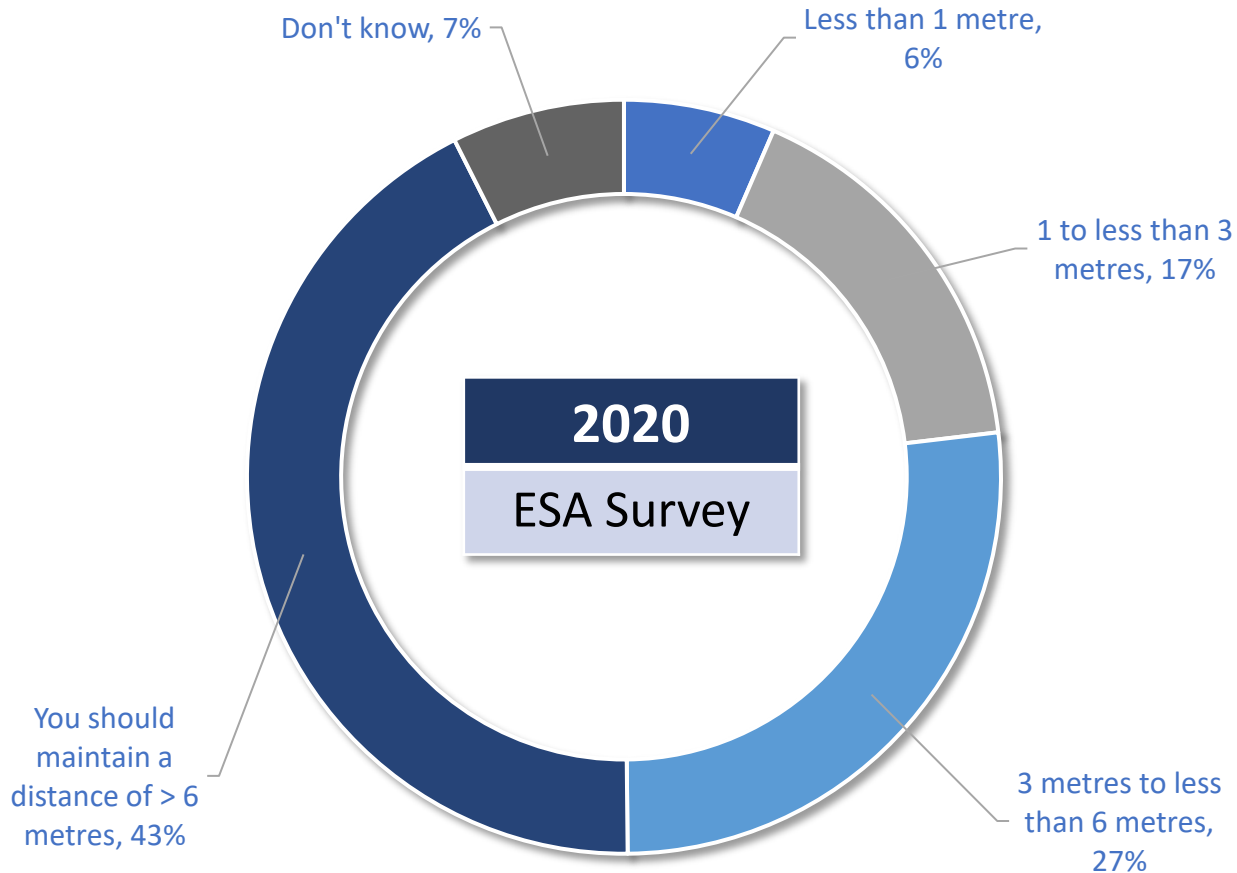
	Total
Base: Total Answering	400
You can safely touch an overhead power line	0%
Less than 1 metre	6%
1 to less than 3 metres	17%
3 metres to less than 6 metres	27%
You should maintain a distance of > 6 metres	43%
Don't know	7%

*Note: Charts and tables may not add up to 100% due to rounding

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Somewhat dangerous, 5%

Don't know, 1%

Net Score

+97
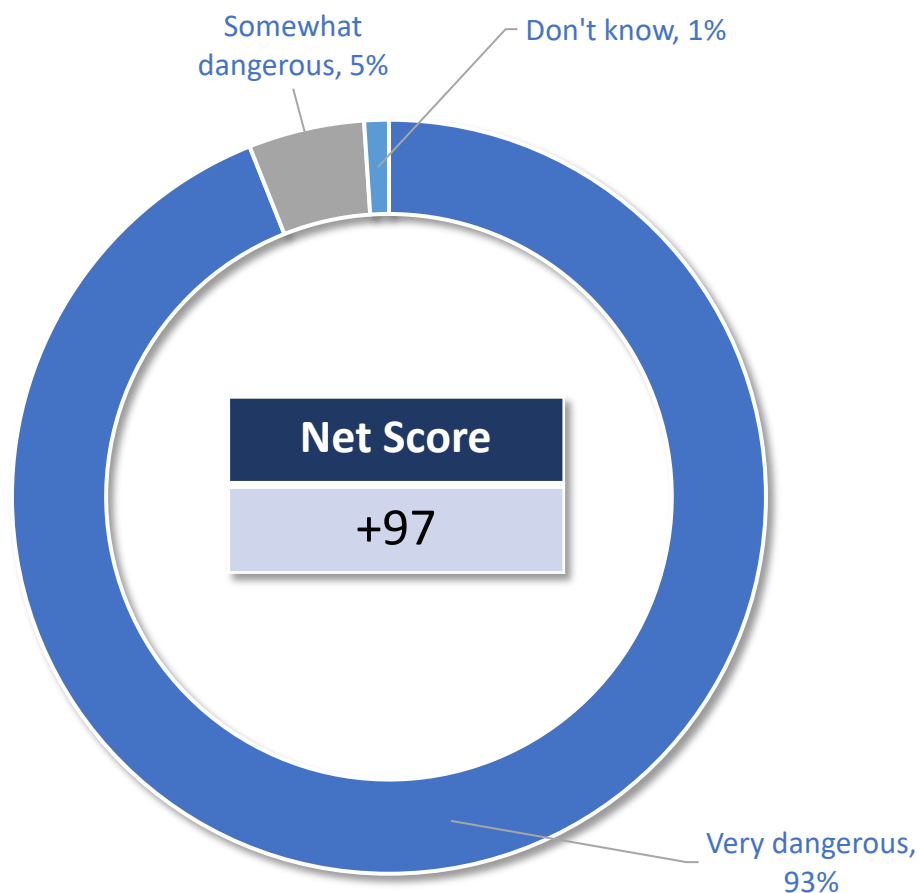
Very dangerous, 93%

	Total
Base: Total Answering	400
Very dangerous	93%
Somewhat dangerous	5%
Not very dangerous	0%
Not dangerous at all	0%
Don't know	1%

*Note: Charts and tables may not add up to 100% due to rounding

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B10: If you were in a vehicle, such as a car, bus or truck and an overhead power line came down on top of it, which of the following options do you believe is generally safer?

Don't know, 2%

Get out quickly and seek help, 4%

2020

ESA Survey

Stay in the vehicle until power has been disconnected from the line, 94%
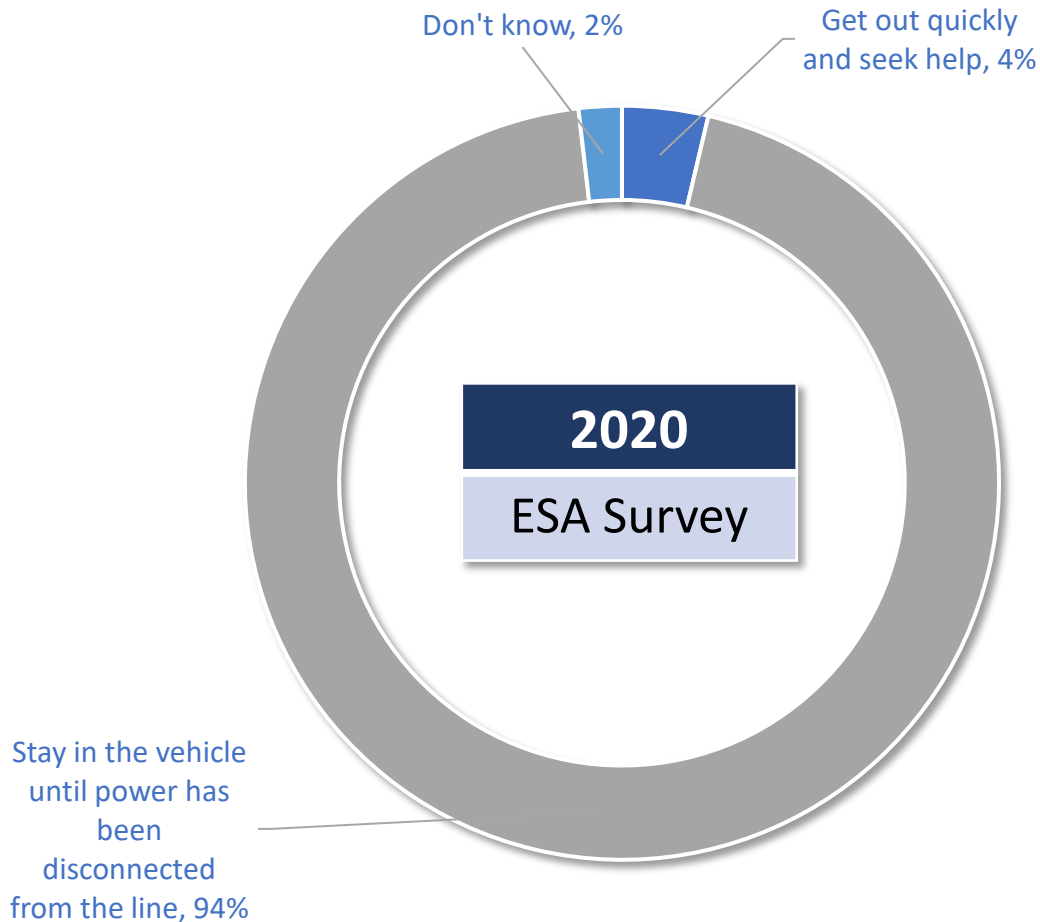
	Total
Base: Total Answering	400
Get out quickly and seek help	4%
Stay in the vehicle until power has been disconnected from the line	94%
Don't know	2%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 6-March 10, 2020, n=400, accurate 4.9 percentage points plus or minus, 19 times out of 20.

14

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B11: Does your job regularly cause you to come close to energized power lines?

Don't know, 1%

Yes, 12%

2020

ESA Survey
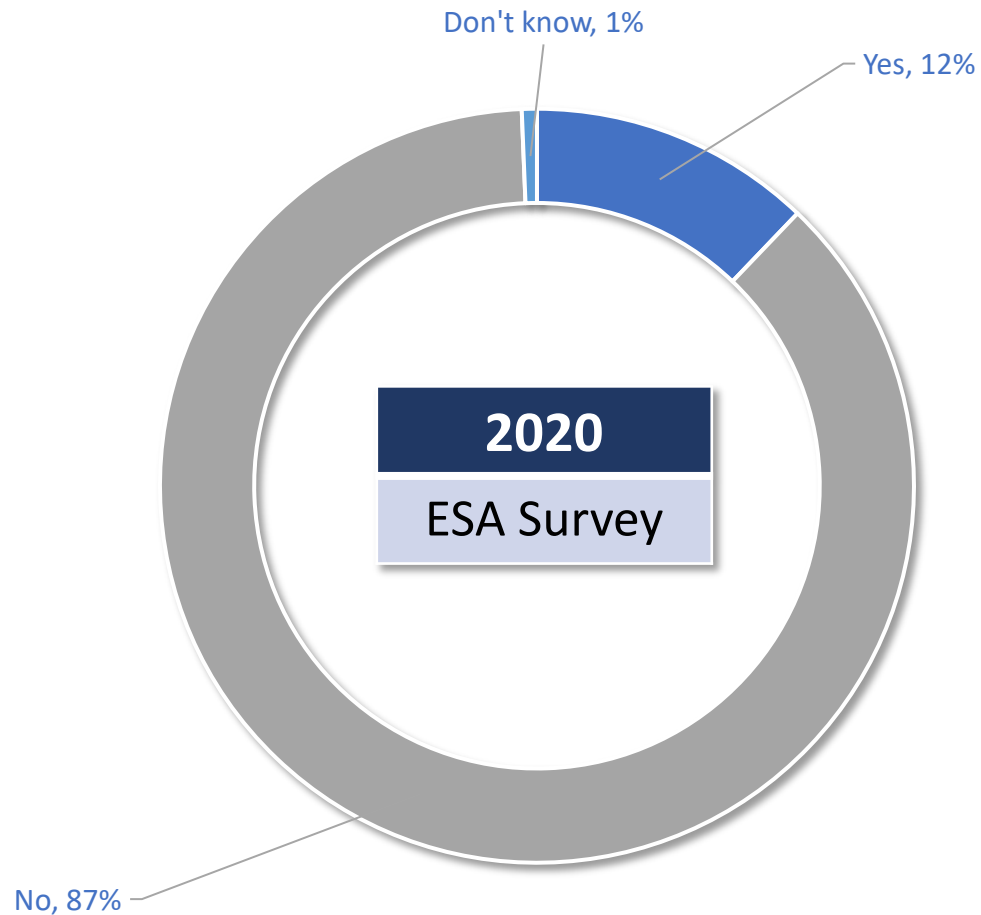
No, 87%

	Total
Base: Total Answering	400
Yes	12%
No	87%
Don't know	1%

*Note: Charts and tables may not add up to 100% due to rounding

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B12: Do you work in any of the following fields?

2020 ESA Survey

Construction or outdoor trades, 54%

Transportation, 16%

Electrician, 9%

General labour, 2%

Other, 16%

Don't know/Prefer not to say, 3%
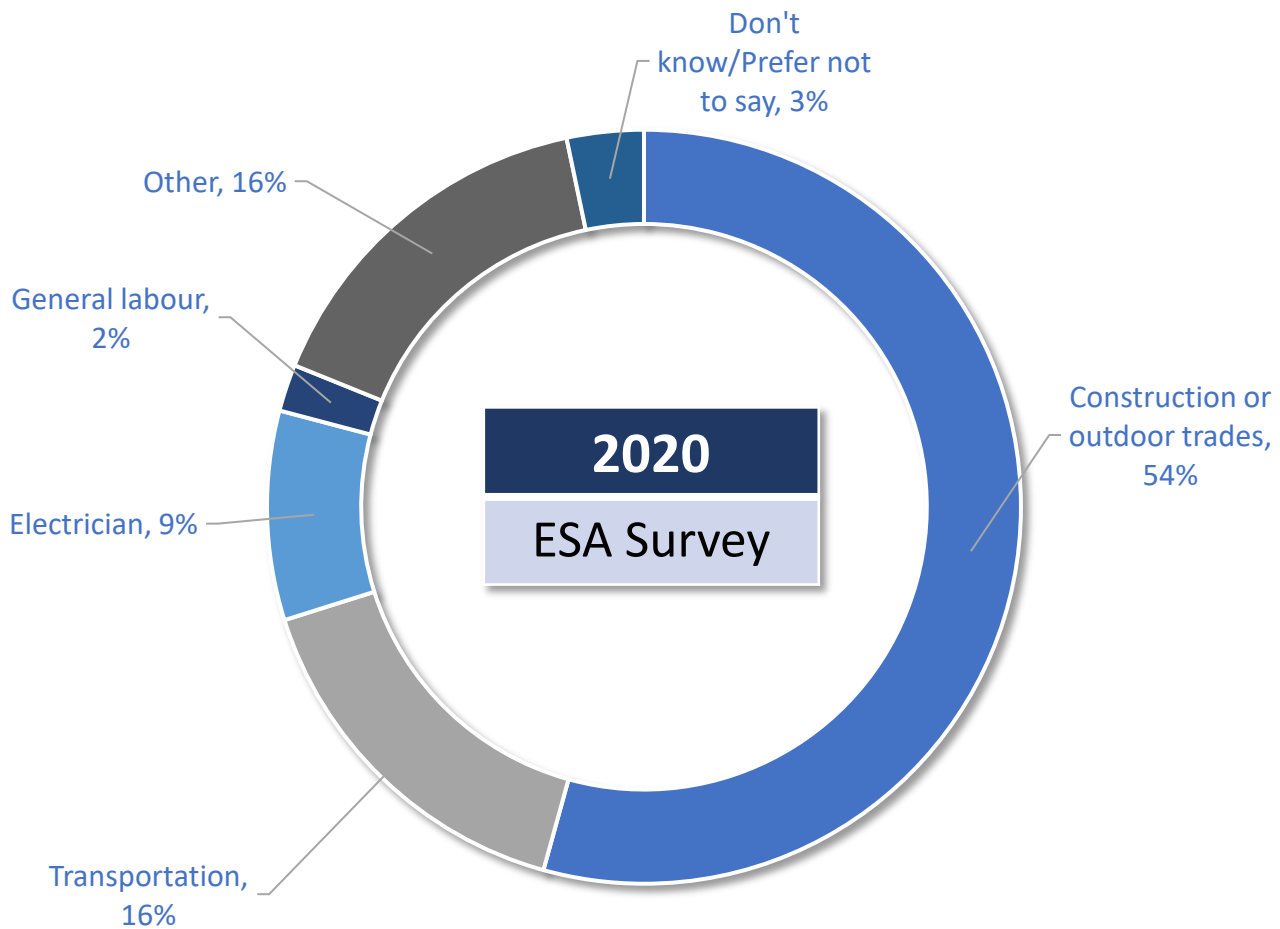
	Total
Base: Job requires regular proximity to power lines	37
Construction or outdoor trades	54%
Transportation	16%
Electrician	9%
General labour	2%
Other	16%
Don't know/Prefer not to say	3%

*Note: Charts and tables may not add up to 100% due to rounding

REDHEAD INC
MEDIA SOLUTIONS

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B13: How would you describe your primary residence?

A semi-detached home, 2%

Other, 3%

A townhome or row house, 3%

A farm, 5%

An apartment or condo building less than 5 storeys, 10%

2020
ESA Survey

A fully-detached home, 77%
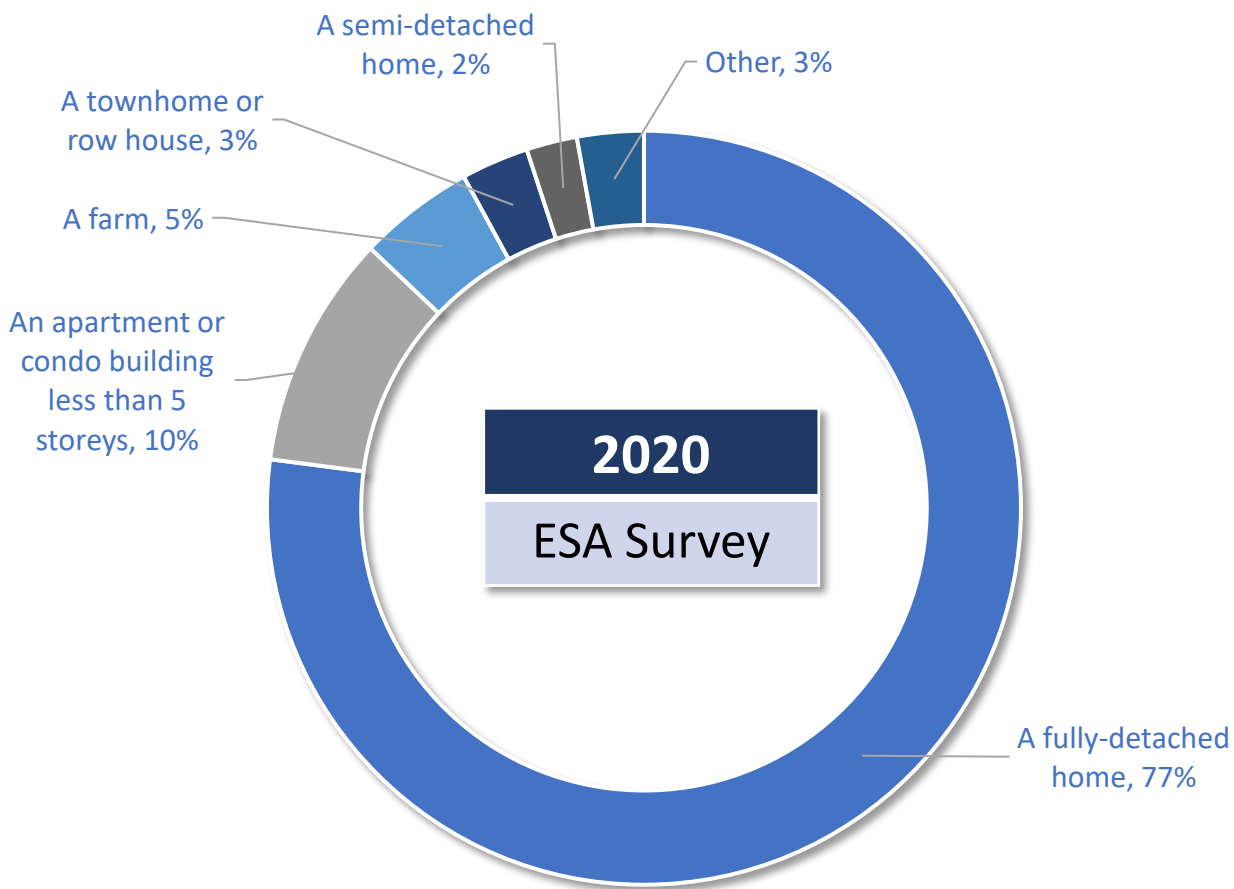
	Total
Base: Total Answering	400
A fully-detached home	77%
An apartment or condo building less than 5 storeys	10%
A farm	5%
A townhome or row house	3%
A semi-detached home	2%
An apartment or condo building 5 storeys or higher	0%
Other	3%

*Note: Charts and tables may not add up to 100% due to rounding

REDHEAD INC
MEDIA SOLUTIONS

B14: Does your primary residence receive electricity through overhead wires or underground cables?

Don't know, 4%

2020

ESA Survey

Underground cables, 44%

Overhead wires, 53%

	Total
Base: Total Answering	400
Overhead wires	53%
Underground cables	44%
Don't know	4%

*Note: Charts and tables may not add up to 100% due to rounding

REDHEAD INC
MEDIA SOLUTIONS

18

RESULTS

2020 Public Safety Awareness Index Score
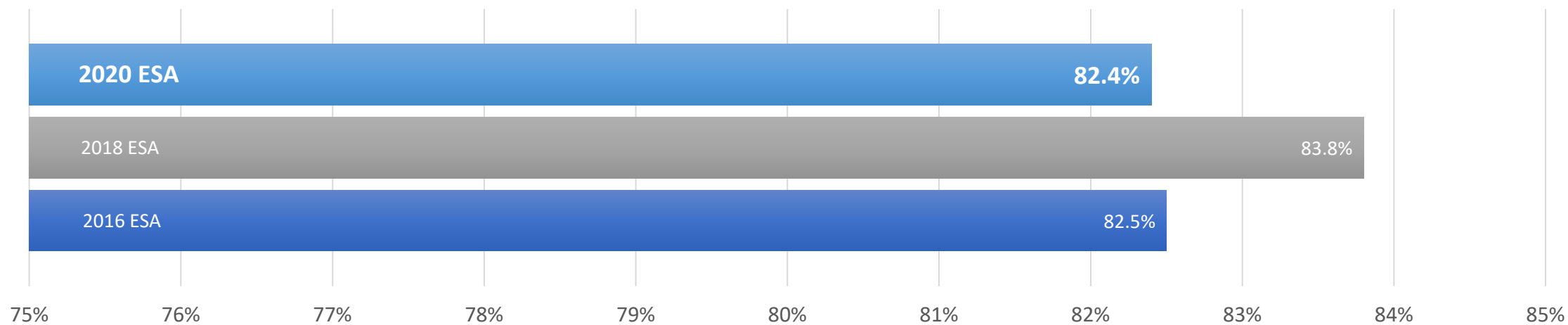
	2016	2018	2020
Base: Total Answering	401	400	400
Public Safety Awareness Index Score	82.5%	83.8%	82.4%

*Note: Charts and tables may not add up to 100% due to rounding

REDHEAD MEDIA SOLUTIONS INC

2020 Public Safety Awareness Index Score External Comparison
Upper and Lower Bound
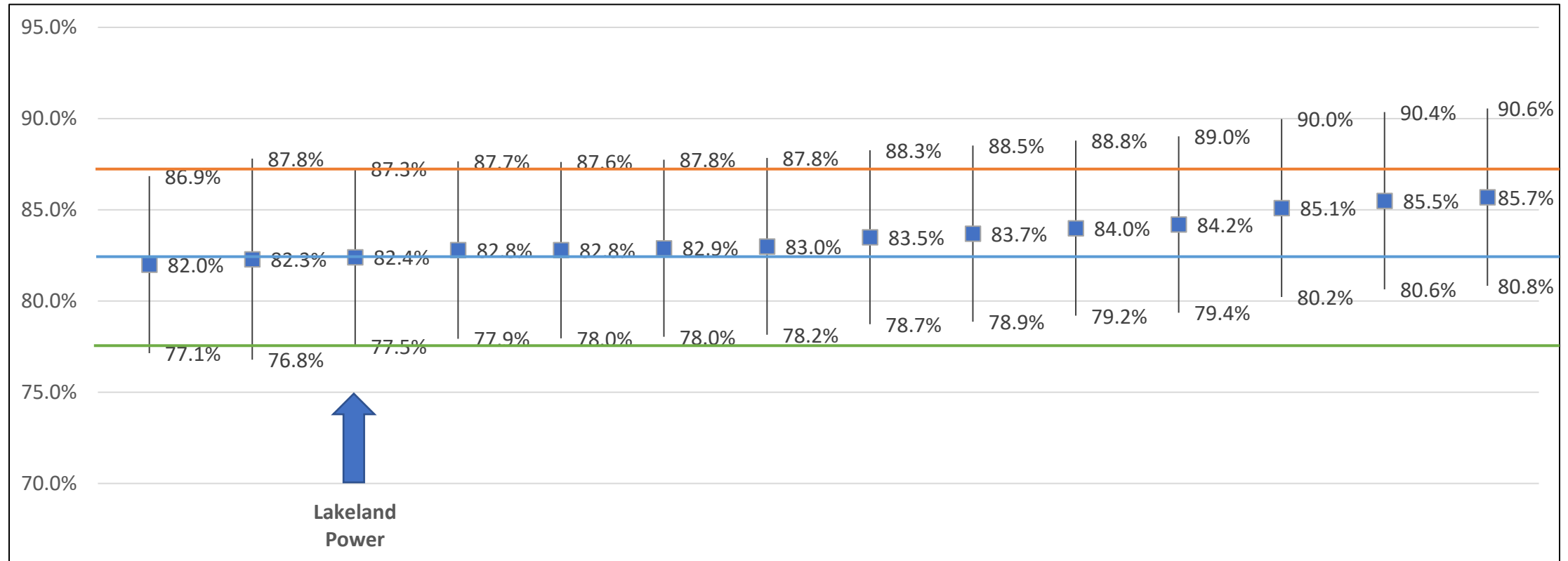
- The lines denote Lakeland Power's upper bound (orange), lower bound (green) and 2020 PSA Index score (blue). This is calculated by adding (upper) and subtracting (lower) the margin of error from the 2020 ESA Score.
- Lakeland Power overlaps with all survey LDCs, which indicates a statistical similarity, as also occurred in the 2018 ESA Survey.

REDHEAD INC
MEDIA SOLUTIONS

METHODOLOGY

Methodology Summary

Commissioned by	Lakeland Power
Sample size	400 randomly selected customers
Margin of error	±4.9 percentage points, 19 times out of 20
Survey mode	Random telephone survey of customer base, CATI data collection
Survey sample	Residents 18 years of age + who reside in the service territory of Lakeland Power
Time of calling	4PM-9PM ET Weekdays, callbacks scheduled 9AM-9PM ET
In-field dates	January 6-March 10, 2020
Language	English only
Survey author	Innovative Research/Electrical Safety Authority
Question Order	Report shown in order
Question Wording	Questions shown in report as asked
Survey Company	Redhead Media Solutions Inc/Advanis

REDHEAD INC
MEDIA SOLUTIONS

Methodology Details

Target Respondents

The respondents of the survey were Ontario residents 18 years of age or older who reside within Lakeland Power's service territory. Target areas were determined based on a list of postal codes provided by Lakeland Power.

Sample Size and Statistical Reliability

All margins of error (MoE) are shown at a 95% confidence level.

➢ E.g., the margin of error associated with a sample size of 400 for a large (infinite) population is ±4.9 percentage points, 19 times out of 20.
➢ Because Lakeland Power's service area has a smaller adult (18+) population, and MoE is a function of the relationship between sample size and population, it is appropriate to apply a finite population correction factor when calculating MoE. When sample size is a higher percentage of the population, the MoE may narrow.

Sample sizes were set according to the *Public Awareness of Electrical Safety: Methodology & Survey Implementation Guide*, prepared for the Electrical Safety Authority by Innovative Research (November 2015):

➢ Where possible, sample size of n=400.
➢ For LDCs with a service territory population of less than 5,000, a minimum sample size of n=300 is appropriate.
➢ For LDCs with a service territory population of less than 3,000, a minimum sample size of n=200 is appropriate.

Sampling Methodology

Redhead was provided service territory postal codes from Lakeland Power. Both landline and wireless sample were used. The landline sample used listed numbers only, the wireless sample was drawn randomly from the most recent working cell phone lists in rate centers in or around the specified area(s). We then sampled from these lists randomly using Advanis' proprietary sample server.

To minimize low response:

➢ Sample was loaded in batches to ensure the sample was fully utilized before moving onto fresh sample records;
➢ Calls were made between the hours of 4pm and 9pm ET on weekdays; and
➢ Call backs were scheduled and honored between the hours of 9am and 9pm ET.

Questionnaire

The survey instrument was provided by the Electrical Safety Authority (ESA) developed in conjunction with Innovative Research. The survey consisted of an introduction, electrical safety core questions and demographic information.

Data Collection

Computer aided telephone interviews (CATI) were conducted from January 6-March 10, 2020.

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Methodology Details

Quality Control

The accuracy and integrity of results is of the highest importance for Redhead/Advanis. As such, several controls are implemented to ensure the highest quality output is achieved:

➢ Advanis, on behalf of Redhead, trained the interviewers to understand the study's objectives;
➢ Detailed call records are kept by the automated CATI system, and are supplemented by output files to SPSS for productivity analysis (i.e., not subject to human error);
➢ The survey was soft launched in select markets. The data was then checked before calling began in full for Lakeland Power;
➢ 100% of all surveys are digitally recorded for potential review;
➢ Advanis' Quality Assurance team listened to the actual recordings of five percent of completed surveys and compared the responses to those entered by the interviewer to ensure that responses from respondents are properly recorded;
➢ Team Supervisors conduct regular more formal evaluations with each interviewer, in addition to nightly monitoring of each interviewer on their team;
➢ Project Managers closely monitored the progress of data collection, including call record dispositions;
➢ All SPSS code is reviewed by a more senior researcher;
➢ All Report Builder output is reviewed by a more senior researcher; and
➢ All values in the report are reviewed by another team member to ensure accuracy.

Analysis of Findings & Data Weighting

Within each LDC, results were weighted to match corresponding population proportions from the most recent Statistics Canada census data for these six combinations of gender and age:

- ➢ Males 18-34
- ➢ Females 18-34
- ➢ Males 35-54
- ➢ Females 35-54
- ➢ Males 55 and older
- ➢ Females 55 and older

As noted above, the service territory was specified by postal code. Since census data is not available by postal code, RMS provided Advanis with the municipalities covered by the LDC, and the population numbers for the Census Subdivisions that most closely matched those municipalities were totaled to arrive at the LDC population proportions for each of the six gender/age combinations.

The Public Safety Awareness index scores have been highlighted and were calculated as described below, based on instructions from the Electrical Safety Authority (ESA). The "provided response values" referenced in the description below were also determined and provided by the ESA. Data analysis and cross-tabulation have been conducted using SPSS and Report Builder software.

This **index score** is calculated using the following formulas:

Step 1: Add each individual respondent's key measurement questions using the provided response values.

$$
\begin{aligned}
& B5 \\
+\ & B6 \\
+\ & B7 \\
+\ & B8 \\
+\ & B9 \\
+\ & B10 \\
=\ & \text{Individual respondent's cumulative score}
\end{aligned}
$$

Step 2:
Individual respondent's cumulative score / # of sections
= Respondent Standardized Score

Step 3:
Summation of all "Respondent Standardized Scores" / n-size (i.e. total sample size)
= Raw Index Score

Step 4:
Raw Index Score × 100 = Index Score (bound between 0-100%)

Methodology Tables

Margin of error

LDC	Completed Surveys	Sample Size as % of population	Assuming Large Population	Using Actual 18+ Population
Lakeland Power	400	1.1%	+/- 4.9%	+/- 4.9%

Service Territory Defined by Postal Code

LDC	Total Postal Codes in Service Territory	Forward Sortation Areas (FSA) Covered	Number of Local Delivery Units in Each FSA
Lakeland Power	741	P0A	3
		P1H	110
		P1L	253
		P2A	375

Thank You

We greatly appreciate working on this important project for Lakeland Power and hope we have met or exceeded your expectations.

We are happy to present this data to your staff or Board members upon request. If you wish to do so, please contact us for an appointment.

We look forward to working with you on future projects. Please note if you have any other projects that we may be able to help you with, don't hesitate to be in touch.

Graydon Smith - President
Redhead Media Solution Inc.
505 Hwy 118 W.
Suite 416
Bracebridge, ON
P1L 2G7

LakelandPower

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Appendix I	**DSP Customer Engagement Survey on Website 2024**

1

2

Application Specific Customer Engagement Survey

Survey was posted on our website and promoted in social media and on our bills.

Please select your municipality.

- Bracebridge
- Huntsville
- Burk's Falls
- Sundridge
- Magnetawan
- Parry Sound

Please select the type of electric account you have with Lakeland Power.

- Residential
- Small Business
- Large commercial

Please review the options below and select 5 options that are most important to you.

- Maintaining and upgrading equipment to ensure a safe and reliable electricity supply
- Increased community involvement
- Enhanced digital solutions to improve customer service (website, online forms, outage Chat, etc.)
- Affordable cost of electricity
- Improved outage communication (outage map, social media, etc.)
- Improved outage restoration time
- Increased vegetation management efforts (tree trimming for increased safety and reliability)
- Improved customer education (electrical safety, financial assistance, energy conservation, etc.)
- Cybersecurity to prevent data breaches and system disruptions
- Storm hardening (physical infrastructure improvements increasing resistance to weather)
- New technology for improved infrastructure communication and outage management
- New technology to support renewable energy generation, electric vehicles, etc.
- Attracting and retaining highly skilled employees to deliver the best service

Additional comments

(Free form box)

Please enter your account number or address for your chance to win.

(Free form box)

Application Specific Customer Engagement Survey Results

There were 462 responses

Options	
Please review the options below and select 5 options that are most important to you.	# of times selected
• Affordable cost of electricity	328
• Maintaining and upgrading equipment to ensure a safe and reliable electricity supply	325
• Storm hardening (physical infrastructure improvements increasing resistance to weather)	244
• New technology to support renewable energy generation, electric vehicles, etc.	149
• Improved outage communication (outage map, social media, etc.)	139
• New technology for improved infrastructure communication and outage management	134
• Attracting and retaining highly skilled employees to deliver the best service	129
• Increased vegetation management efforts (tree trimming for increased safety and reliability)	124
• Cybersecurity to prevent data breaches and system disruptions	119
• Improved outage restoration time	115
• Improved customer education (electrical safety, financial assistance, energy conservation, etc.)	109
• Enhanced digital solutions to improve customer service (website, online forms, outage Chat, etc.)	105
• Increased community involvement	29

| Appendix J | **Community Involvement – Pay it Forward** |
| | **2019** |

1

2

Home > News > Lakeland Holdings pays it forward

News

Lakeland Holdings pays it forward

By **James Wood** Wednesday, Sep. 25th, 2019

| f Facebook | X Twitter | Reddit | WhatsApp | ✉ Email |

Image of Lakeland Holdings employees submitted by Lakeland Holdings.

- Advertisement -

BRACEBRIDGE, ON- More than $4000 was given out in Muskoka on Monday afternoon.

The giving was orchestrated by local power conglomerate Lakeland Holdings, which includes Lakeland Power, Bracebridge Generation, and Lakeland Networks. The company had their team building day on Monday, with a total of 70 staff and 14 teams taking part.

Each team was given $250 to "pay it forward" in the area, heading out to give to individuals and organizations throughout the region.

According to Chris Litschko, Lakeland Holding's CEO, the impact was widely felt.

"There were many hugs and kisses, and a few tears of appreciation throughout Muskoka, especially Bracebridge and Huntsville, and some (recipients) were surprised," said Litschko, speaking to *99.5 The Moose* on Monday.

"A lot of times, they're overlooked for donations, so we got to some really key organizations. At least one recipient said they would pay it forward with their whole donation, and forward it to another organization they thought was more worthy."

Litschko indicated that teams used their funds in a variety of ways, with some handing out cookies to passersby on the street, and some members giving some of their own money during the effort.

Eventually, they all came back together and voted on who had used their funds in the best way possible.

"The team that won had actually donated all the $250, and with an hour and a half left they went to a local retirement home and sat with some seniors," said Litschko.

"In the beginning, there were six seniors they were sitting with, and by the end the whole room was full of seniors. They were asking the seniors how they paid it forward, in their earlier life."

Litschko mentioned that the employees learned about the need for games and books in seniors homes.

Overall, he thanked them for their empathy and generosity.

"Paying it forward is not about money, but is about the act of giving, generosity, and kindness," said Litschko.

"We live in a world of materialism, and people not interacting. For instance, we're always looking down at our devices. An act of kindness should not be a surprise in today's world, but it should be the norm."

Appendix K   **OEB COS Checklist**

1

2025 Cost of Service Checklist
Lakeland Power Distribution Ltd.
EB-2024-0039

Date: October 31, 2024

Filing Requirement Page # Reference		Evidence Reference, Notes (Note: if requirement is not applicable, please provide reasons)
GENERAL REQUIREMENTS		
Ch1, p4	Confidential Information - Practice Direction has been followed	Practice Direction Followed
Ch1, p5	Certification by a senior officer that the application and any evidence filed in support of the application does not include any personal information unless it is filed in accordance with Rule 9A of the OEB's Rules (and the Practice Direction, as applicable).	Ex 1 - 1.2.13
Ch1, p5	Certification by a senior officer that the evidence filed (including the models and appendices) is accurate, consistent and complete to the best of their knowledge	Ex 1 - 1.2.13
Ch1, p5	Certification by the Chief Executive Officer, or Chief Financial Officer, or equivalent, that the distributor has the appropriate processes and internal controls for the preparation, review, verification and oversight of all deferral and variance accounts, regardless of whether the accounts are proposed for disposition	Ex 1 - 1.2.13
Ch2, p2	COS checklist filed and statement identifying all deviations from Filing Requirements	Excel model submitted; Ex1 - 1.1.1 and Appendix K
2 & 3	Chapter 2 appendices in live Excel format; PDF and Excel copy of current tariff sheet	Excel models submitted; Ex1 - 1.1.1 and Ex 8 - Appendix B
3	If distributor updates/amends an OEB model, reference made in corresponding exhibit re: what was amended	Ex 6 - 6.3.2
3	Regulated entity shown seperately from parent company or any other affiliates	Ex 1 - 1.2.11
3 & 4	If applicable, if cost of service filed earlier than scheduled, justify why an early rebasing is required by demonstrating why and how distributor cannot adequately manage resources and financial needs during IRM period	N/A - last COS filed 2019
4	If applicable, late applications filed after the commencement of the rate year for which the application is intended to set rates is converted to the following rate year	N/A - COS filed Oct/24 for May/25 rates
4 & 5	All of the following exhibits filed: Application Overview and Administrative Documents, Rate Base and Capital (including DSP), Customer and Load Forecast, Operating Expenses, Cost of Capital and Capital Structure, Revenue Requirement and Revenue Deficiency/Sufficiency, Cost Allocation, Rate Design, Deferral and Variance Accounts	Submitted; Ex 1 - 1.1.1
5	General requirements applicable throughout application: -written evidence included before data schedules -avg. of opening and closing fiscal year balances used for items in rate base (unless alternative method justified) -debt + equity = total rate base -data for test year, bridge year, three most recent historicals (or as many needed to provide actuals back to last OEB-approved), most recent OEB-approved test	Completed
5	Documents must include page numbers and be provided in text searchable and bookmarked PDF format	Completed
6	Links within Excel models are broken and models named so that they can be identified (e.g. RRWF instead of Attachment A)	Completed and Submitted
7	Materiality threshold: Explanation/justification and/or supporting evidence for material amounts pertaining to CAPEX, capital variances, rate base variances, OM&A, and DVAs; additional details below the threshold if necessary	Ex 1 - 1.2.5
EXHIBIT 1 - APPLICATION OVERVIEW AND ADMINISTRATIVE DOCUMENTS		
Table of Contents		
7	Table of Contents listing major sections and subsections of the application	Ex 1 - 1.1.1
Application Summary and Business Plan		
7	**Distributor with less than 30k customers: Business and/or Strategic Plan. If no Business or Strategic plan: key planning assumptions, description of material factors (internal and external) that may affect the operation of the utility and major goals of the distributor in the test year and remaining years of the five-year term.** Distributor with 30k or more customers: Business Plan underpinning application - can be augmented by plain language summary of distributor's goals that informed the application if this is not otherwise in the Business Plan. Also provide Strategic Plan, if available.	Ex 1 - 1.1.2 and Appendix A
8 & 9	Brief, plain language summary of the application which includes the main requests with section references and rationale behind each request. Must include: -Revenue requirement (service revenue requirement requested for test year, increase/decrease ($ and %) from most recent approved, main drivers of revenue requirement changes -Load forecast summary (load and customer growth (% change in kWh, kW and change in customer #s from last OEB-approved)) -Rate base and DSP (major drivers of DSP and cost trends, rate base requested, change in rate base from last OEB-approved ($ and %), CAPEX for test year, change in CAPEX from last OEB-approved ($ and %) -OM&A (OM&A requested for test and change from last OEB-approved ($ and %), drivers and cost trends) -Cost of capital (table showing proposed capital structure and parameters resulting in WACC, statement confirming use of OEB's cost of capital parameters, summary of deviations from OEB methodology) -Cost allocation and rate design (proposed new customer classes and/or customer definition changes, new proposed charges, significant changes proposed to rev. cost ratios and fixed/variable split, mitigation plans) -DVAs (total disposition ($) including split between customer classes and between RPP and non-RPP (if applicable), disposition period(s), new DVAs and requested discontinuation of DVAs) -Bill Impacts ($ and %) for residential customer at 750kWh, and typical customers for all other classes (based on commodity rates on TOU with regulatory charges held constant; bill impacts to be used for Notice (Sub-total A) for residential customer at 750kWh and GS<50 at 2000kWh as well as a typical consumer for a distributor's service area for all customer classes, and bill impacts based on alternative consumption profiles and customer groups as appropriate	Ex 1 - 1.1.3
Administration		
9	Primary contact information (name, address, phone, email)	Ex 1 - 1.2.1
9	Identification of legal (or other) representation	Ex 1 - 1.2.2
9	Applicant's internet address for viewing of application and any social media accounts, with addresses, used by the applicant to communicate with customers	Ex 1 - 1.2.3
9	Statement identifying where notice should be published and why	Ex 1 - 1.2.4
9	Form of hearing requested and why	Ex 1 - 1.2.6
9	Requested effective date	Ex 1 - 1.2.7
10	Statement identifying and describing any changes to methodologies used vs previous applications	Ex 1 - 1.2.8
10	Identification of OEB directions from any previous OEB Decisions and/or Orders, including commitments made as part of approved settlements. Indication of how these are being addressed in the current application	Ex 1 - 1.2.9
10	Reference to Conditions of Service - provide reference to website and confirm version is current; identify if there are changes to Conditions of Service (a) since last CoS application and/or (b) as a result of the current application. Confirmation that there are no rates and charges linked in the Conditions of Service that are not in the distributor's Tariff of Rates and Charges must be provided	Ex 1 - 1.2.10

2025 Cost of Service Checklist
Lakeland Power Distribution Ltd.
EB-2024-0039

	Date: October 31, 2024

Filing Requirement Page # Reference		Evidence Reference, Notes (Note: if requirement is not applicable, please provide reasons)
10	Description of the corporate and utility organizational structure showing the main units and executive and senior management positions within the distributor; corporate entities relationship chart, showing the extent to which the parent company is represented on the distributor company's Board of Directors; description of the reporting relationships between distributor and parent company management. Also include any planned changes in corporate or operational structure, including any changes in legal organization and control	Ex 1 - 1.2.11
10	List of approvals requested (and relevant section of legislation). All approvals including accounting orders, new rate classes, revised specific service charges or retail service charges which the distributor is seeking, must be documented - Appendix 2-A provided, but not required to be used by LDC	Ex 1 - 1.2.12
Distribution System Overview		
10	Description of Service Area - general description and map showing where distributor operates and communities served	Ex 1 - 1.3.1
Customer Engagement		Ex 1 - 1.4
11	Provide information regarding its customer engagement activities, activities that occur on an on-going basis, and specific activities pertaining to application. **May** use Appendix 2-AC to assist in listing customer engagement activities	Ex 1 - 1.4.1 and Appendix F (2-AC)
11	Ongoing Customer Engagement - Describe methods used to communicate and engage with each customer class regularly, summarize pertinent feedback received through regular customer communications, and explain how feedback informs operations and rate application, where applicable	Ex 1 - 1.4.2
11 & 12	Application-Specific Customer Engagement - Explain customer engagement process specific to application (tailor customer engagement activities to distributor's circumstances and the proposals in application). Demonstrate how customer needs and priorities were factored into the decision-making process	Ex 1 - 1.4.3
12	Customer engagement with customers who would be affected by proposals related to new rate classes, changes in to existing rate classes and change in charges such as RSCs, Specific Service Charges, standby rates, and unmetered-load customers	Ex 1 - 1.4.1
12	All responses to matters raised in letters of comment filed on public record	Ex 1 - 1.4.5 - none at the time of filing
Performance Measurement		
12	Link to most recent scorecard	Ex 1 - 1.5.1
12	Identification of performance improvement targets	Ex 1 - 1.5.1 and 1.1.2
12	PEG Model for the test year showing efficiency assessment, discussion on how the results obtained from the PEG model has informed the distributor's business plan and application	Ex 1 - 1.5.2
12 & 13	Distributors **may** wish to provide table showing respective OEB-approved IRM increases for each of the last historical years from last rebasing, and assigned cohort as per PEG model	Ex 1 - 1.5.2
13	Activity and Performance-based Benchmarking (APB) results - at least provide the following unit cost variance analysis: - Year-over-year Historical Actuals (for most recent APB results) - Forecast Bridge Year vs Historical Actuals, to extent possible - Test Year vs Historical Actuals, to extent possible	Ex 1 - 1.5.3
13	Explain variances in cost performance, whether changes in unit costs are within distributor's control, and discuss relevant actions planned or underway. Discuss econometric results to extent possible	Ex 1 - 1.5.3
Facilitating Innovation		
13 & 14	Distributors are encouraged to include a description of the ways their approach to innovation has shaped the application. Could include explanations of approach to innovation or keeping up with innovation in their business more generally; of specific projects or technologies for enhancing the provision of distribution services; and of enabling characteristics or constraints in their ability to undertake innovative solutions. Explain how innovative alternatives have been considered in place of traditional investments	Ex 1 - 1.6
14	Explain how innovative alternatives have been considered in place of traditional investments. Include information about the costs, expected benefits and associated risks of innovative alternatives	Ex 1 - 1.6; Ex 2 - Appendix A (DSP)
Financial Information		
14	Audited Financial Statements (excluding operations of affiliated companies that are not rate regulated) for two most recent historical years (i.e. one year's statements must be filed, covering two years of historical actuals); if most recent finals n/a, draft financial statements filed and finals, along with summary of main changes if there are any, provided as soon as they are available. Alternatively, if distributor publishes financial statement on its website, a link may be provided	Ex 1 - 1.7.2 and Appendix C and D
15	Annual Report and MD&A for most recent year of distributor and parent company, as available and applicable. If an Annual Information Form is filed publicly, a link should be provided	Ex 1 - 1.7.1 and 1.7.4 (Annual Report N/A)
15	Rating Agency Reports, if available; Prospectuses, information circulars etc. for recent and planned public debt and/or equity offerings	Ex 1 - 1.7.5 (N/A)
15	Any change in tax status	Ex 1 - 1.7.6
15	Description of existing accounting orders and departures from these orders, as well as any departures from the USoA	Ex 1 - 1.7.7
15	Accounting Standards used for financial statements and when adopted	Ex 1 - 1.7.3
15	If distributor conducting non-distribution businesses, confirmation that accounting treatment used has segregated these activities from rate regulated activities	Ex 1 - 1.7.8
Distributor Consolidation		
15	Information filed on the extent to which the distributor has investigated opportunities for consolidation or collaboration/partnerships with other distributors (contained within a dedicated section of the application); conclusions from investigations, including future plans	Ex 1 - 1.8
15	If distributor has become party to a proposed or approved MAADs transaction since last rebasing, disclosure of this information in current application	N/A - no MAADs
A distributor filing an application to rebase following a consolidation must:		
15	Identify any incentives that formed part of the acquisition or amalgamation transaction if the incentive represents costs that are being proposed to remain or enter rate base and/or revenue requirement - list the exhibits in which incentives are discussed	N/A
16	Specify whether and which commitments made to shareholders are to be funded through rates	N/A
16	Detail of realized and projected savings as a result of consolidation compared to what was in the approved consolidation application and explanation of the nature of these savings (e.g. one-time, ongoing etc.)	N/A
16	Detail of efficacy of any rate plan confirmed as part of MAADs	N/A
16	Identify approved ACM or ICM from a previous Price Cap IR application it proposes be incorporated into rate base	N/A
Impacts of COVID-19 Pandemic		
16	Distributors generally expected to reflect the impacts of the COVID-19 pandemic in their applications, including applicable forecast information. This includes, but is not limited to, the distributor's load forecast, capital forecast, and OM&A forecast in the applicable sections of the application	Ex 1 - 1.9

2025 Cost of Service Checklist
Lakeland Power Distribution Ltd.
EB-2024-0039

Date: October 31, 2024

Filing Requirement Page # Reference		Evidence Reference, Notes (Note: if requirement is not applicable, please provide reasons)
EXHIBIT 2 - RATE BASE AND CAPITAL		
Rate Base		
16	Indication of whether capital expenditures are equivalent to in-service additions, and if so, variance explanations only required once. If not, specify whether variance explanations are on CAPEX or in-service additions basis	Ex 2 - 2.1.1
16	For rate base, opening and closing balances for each year, and the average of the opening and closing balances for gross assets and accumulated depreciation (discussion of methodology if applicant uses an alternative method); working capital allowance	Ex 2 - 2.1.1
16	Table showing components of the last OEB-approved rate base, the proposed test year rate base and the variances	Ex 2 - 2.1.1 and Table 1
Fixed Asset Continuity Schedule		
17	Completed Appendix 2-BA for each year - in Excel format	Excel model completed; Ex 2 - 2.2

17	Continuity statements and year-over-year variance analysis must be provided (year end balance, including capitalized interest during construction and overhead costs). Explanations provided where there is a year-over-year variance greater than the applicable materiality threshold
	If applicable, explanation for any restatement (e.g. due to change in accounting standards) and reconciliation to original statements
	Year over year variance analysis; explanation where variance greater than materiality threshold. The following comparisons must be provided:
	  Hist. OEB-Approved vs Hist. Actual (for the most recent historical OEB-approved year)
	  Hist. Act. vs. preceding Hist. Act. (for the relevant number of years)
	  Hist. Act. vs. Bridge
	  Bridge vs. Test
		Ex 2 - 2.2 and 2.3.3

17	Opening and closing balances of gross assets and accumulated depreciation correspond to fixed asset continuity statements. If not, an explanation and reconciliation must be provided (e.g. CWIP, ARO). Reconciliation must be between net book value balances reported on Appendix 2-BA and balances included in rate base calculation	Ex 2 - 2.2
17 & 18	Distributor may include in-service balances previously recorded in DVAs, such as renewable generation/smart grid related accounts, in its opening test year property, plant and equipment balances, if these costs have not been previously reviewed and approved for disposition, and if disposition is being requested in this application. In this situation, the distributor must clearly show in its evidence (e.g. Appendix 2-BA) that the addition was included in the opening test year balances and must reconcile the closing bridge year and opening test year figures. Distributors must provide the same reconciliation for accumulated depreciation	Ex 2 - 2.1.1
18	Summary of approved and actual costs for any ICM(s) and/ or ACM approved in previous IRM applications	Ex 2 - 2.8 (N/A)
18	Continuity statements must reconcile to calculated depreciation expenses and presented by asset account	Ex 2 - 2.2 and 2.3.1
18	All asset disposals clearly identified in Chapter 2 Appendices for all historical, bridge and test years	Ex 2 - 2.2
Depreciation, Amortization and Depletion		
18	Explanations for any useful lives of an asset that are proposed that are not within the ranges contained in the Kinectrics Report	Ex 2 - 2.4.1
18	Depreciation, amortization and depletion details by asset group for historical, bridge and test years. Include asset amount and rate of depreciation/amortization. Must complete Appendix 2-C which must agree to accumulated depreciation in Appendix 2-BA under rate base	Ex 2 - 2.4.1
18	Identification of any Asset Retirement Obligations and associated depreciation or accretion expense - includes the basis for and calculation of these amounts	Ex 2 - 2.4.3
19	Identification of historical depreciation practice and proposal for test year. Variances from half year rule must be documented and supporting rationale provided	Ex 2 - 2.4.4
19	Copy of depreciation/amortization policy if available. If not, equivalent written description; summary of changes to depreciation/amortization policy since last CoS	Ex 2 - 2.4.2
19	If filing under MIFRS, explanation of any deviations from the practice of depreciating significant parts or components of PP&E separately	Ex 2 - 2.2 and 2.9.1
19	If no changes have been made to depreciation policy or service lives since last rebasing, a statement confirming that this is the case is required. For any depreciation expense policy or asset service lives changes since its last rebasing application: - identification of the changes and detailed explanation for the causes of the changes -use of Kinectrics study or another study to justify changes in useful life - list detailing all asset service lives tied to USoA and reconcile this list to the USoA, detail differences in asset service lives and the TULs from Kinectrics and explain differences outside of minimum and maximum TUL range from Kinectrics; Appendix 2-BB if there have been changes in asset service lives since last rebasing	Ex 2 - 2.4.1 and 2.4.2
Allowance for Working Capital		
19 & 20	Working Capital - 7.5% allowance or Lead/Lag Study. If previously ordered by OEB as part of last rate application to file Lead/Lag Study, must comply.	Ex 2 - 2.5.1
20	If Lead/Lag Study conducted - leads and lags measured in days, dollar-weighted and reflects the distributor's actual billing and settlement processing timelines and considers relevant changes to operating environment	Ex 2 - 2.5.1 (N/A)
20	Cost of Power must be determined by split between RPP and non-RPP Class A and Class B customers based on actual data, use most current RPP (TOU) price. Calculation must include the impact of the most up to date Ontario Electricity Rebate. Distributors must complete Appendix 2-Z - Commodity Expense.	Ex 2 - 2.5.2
20	Use most recent approved UTRs, Smart Metering Entity Charge and regulatory charges	Ex 2 - 2.5.2
Distribution System Plan		
20	DSP filed as a stand-alone, self-sufficient element within Exhibit 2	Ex 2 - 2.6.1 and Appendix A
Policy Options for the Funding of Capital		
21	Distributor may propose ACM capital project coming into service during Price Cap IR (a discrete project documented in DSP) - provide information on need and prudence	Ex 2 - 2.7
21	Identification that distributor is proposing ACM treatment for these future projects and provide the preliminary cost information, and ACM/ICM materiality threshold calculations - ACM Report provides further details on information required	Ex 2 - 2.7 (N/A)
21	Complete Capital Module Applicable to ACM and ICM	N/A - no ACM or ICM being filed
Addition of Previously Approved ACM and ICM Project Assets to Rate Base		
22	Distributor with previously approved ACM(s) and/or ICM(s) - schedule of ACM/ICM amounts proposed to be incorporated into rate base (i.e. PP&E and associated depreciation). Comparison of actual capital spending with OEB-approved amount and explanation for variances	Ex 2 - 2.8 (N/A)
22	Balances in Account 1508 sub-accounts; rate of interest prescribed by the OEB for DVAs for the respective quarterly period as published on the OEB's website	Ex 2 - 2.8 (N/A)
22	True-up calculation if material, comparing the recalculated revenue requirement based on actual capital spending relating to the OEB-approved ACM/ICM project(s) to the rate rider revenues collected in the same period; assumptions used in the calculation noted (e.g., half-year rule).	Ex 2 - 2.8 (N/A)
23	Accelerated capital cost allowance (CCA) should not be reflected in the ACM/ICM revenue requirement associated with these projects. Distributors should include the impact of the CCA rule change associated with the ACM/ICM project(s) in Account 1592 - PILs and Tax Variances – CCA Changes sub-account for CCA changes	Ex 2 - 2.8 (N/A)
Capitalization		
24	Capitalization Policy: provide policy including changes since last rebasing application. Confirm if no changes made to capitalization policy since last rebasing application.	Ex 2 - 2.9.1
24	Overhead Costs: complete Appendix 2-D	Ex 2 - 2.9.2 (N/A)
24	Burden Rates: identification of burden rates; if burden rates were changed since last rebasing, identification of the burden rates prior to the change	Ex 2 - 2.9.3

2025 Cost of Service Checklist
Lakeland Power Distribution Ltd.
EB-2024-0039

Filing Requirement Page # Reference		Date: October 31, 2024 Evidence Reference, Notes (Note: if requirement is not applicable, please provide reasons)
Costs of Eligible Investments for the Connection of Qualifying Generation Facilities		
24	See Appendix A	Ex 2 - 2.10 (N/A)
General & Administrative Matters		
Ch5, p2	Use of terminology and formats set out in Ch. 5	Yes
Investment Categories		
Ch5, pp 2, 3 & 4	Investment projects and programs grouped into one of four investment categories (i.e. system access, system renewal, system service, general plant)	Section 5.2.1.2
Distribution System Plan		
Ch5, p4	If a distributor's application uses alternative section headings and/or arranges the information in a different order, table provided that cross-references the headings/subheadings used in the application to the section headings/subheadings indicated in Ch. 5	N/A
Ch5, p5	DSP duration minimum of 10 years, comprising of a historical and forecast period. The historical period is the first five years of the DSP duration, consisting of five historical years, ending with the bridge year. For distributors that have not filed a DSP within the past five years, the historical period is from the test year of a distributor's last cost or service application to the bridge year. The forecast period is the last five years of the DSP duration, consisting of five forecast years, beginning with the test year of the current cost of service application..	5.2.1
Distribution System Plan Overview		5.2.
Ch5, p5	High-level overview of information filed in DSP which includes capital investment highlights and changes since last DSP; objectives distributor plans to achieve through DSP, which will be used as a baseline comparison in the performance measurement section below.	5.2.1
Coordinated Planning with Third Parties		5.2.2
Ch5, p5	The distributor must demonstrate that it has coordinated planning with third parties where appropriate. Explanation of whether consultations affected distributor's DSP, and if so, how; for consultations that affected DSP - overview of consultation and relevant material supporting the effects the consultation had on the DSP.	5.2.2 for each third party class
Ch5, p5	Overview of consultation should include: purpose, outcome, whether the distributor initiated the consultation or was invited to participate in it, and the other participants in the consultation process	5.2.2.1.4
Ch5, p5	A distributor should file the most recent regional plan. In the absence of a regional plan, the distributor should file a Regional Planning Status Letter from the transmitter.	5.2.2.6
Ch5, p5 & 6	Identification of any inconsistencies between DSP and any current Regional Plan. If there are any inconsistencies, explanation of the reasons why, particularly where a proposed investment in their DSP is different from the recommended optimal investment identified in the Regional Plan	5.2.2.6
Ch5, p6 & OEB Letter, Jan. 11, 2022	Telecommunications Entities: See January 11, 2022 letter for further guidance to the regulation that requires distributors to consult with any telecommunications entity that operates within its service area when preparing a capital plan for submission to the OEB, for the purpose of facilitating the provision of telecommunications services, and include the following information in its capital plan: -number of consultations conducted and a summary of the manner in which the distributor determined with whom to consult; a summary of the results of the consultation; and a statement as to whether the results of the consultations are reflected in the capital plan and, if so, a summary as to how.	5.2.2.7
Ch5, p6	REG: -confirmation if there are REG investments in region -if there REG investments proposed in DSP, demonstration of coordination with IESO, other distributors/transmitters (as applicable), and that investments proposed are consistent with Regional Infrastructure Plan - IESO letter in relation to REG investments	5.2.2.9
Performance Measurement for Continuous Improvement		5.2.3
Ch5, p6 & 7	Distribution System Plan: Summary of objectives for continuous improvement set out in last DSP and discussion on whether these objectives achieved. For objectives not achieved, explanation of how this affects current DSP and if applicable, improvements implemented to achieve the objectives in Section 5.2.1.	5.2.3.1
Ch5, p7	Service Quality and Reliability: -5 historical years of SQRs; explanations for material changes in service quality and reliability and whether and how DSP addresses these issues -for reliability, any declining 5 year SAIDI/SAIFI trends explained -if reliability targets established in last DSP, any under-performance explained	5.2.3.2
Ch5, p7	Completed Appendix 2-G; confirmation that the data is consistent with scorecard, or explanation of any inconsistencies	5.2.3.2.2
Ch5, p7	Summary of performance for historical period using methods and measures (metrics/targets) identified and how performance has trended over the period. Summary must include historical period data on: -all interruptions -all interruptions excluding loss of supply -all interruptions excluding major events and loss of supply for: SAIFI, SAIDI	5.2.3.2.2
Ch5, p7	Summary of major events that occurred since last cost of service	5.2.3.2.3
Ch5, p7 & 8	For each cause of interruption for last five historical years: number of interruptions that occurred as a result of the cause of interruption, number of customer interruptions that occurred as a result of interruption, number of customer-hours of interruptions that occurred as a result of the cause of interruption	5.2.3.2.3.2, 5.2.3.2.3.3
Ch5, p8	Distributor Specific Reliability Targets: -if establishing performance expectations based on something other than historical performance, evidence provided of capital and operational plan and other factors that justify the reliability performance the distributors plan to deliver -summary of any feedback from customers regarding reliability on distributors' system -distributors that use SAIDI and SAIFI performance benchmarks that are different than the historical average - evidence provided to support reasonableness of benchmarks	5.2.3.3
Planning Process		5.3
Ch5, p8	Overview of planning process that has informed five-year capital expenditure plan; flowchart accompanied by explanatory text **may** be helpful	5.3.1
Ch5, p8	Summary of important changes in distributor's AM process since last DSP	5.3.1.2

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Ch5, p9	Process: -provide processes used to identify, select, prioritize (including reprioritization over 5 year term), optimize, and pace execution of investments -demonstration that distributor has considered correlation between plan and customer's feedback and needs -demonstration that distributor has considered potential risks of proceeding/not proceeding with individual capital expenditures -demonstrate how it does grid optimization using an approach that considers the distributor's whole system -consideration, where applicable, of assessing the use of non-wires alternatives, distributed energy resources, cost-effective implementation of distribution improvements affecting reliability, and meeting customer needs as acceptable costs to customers, other innovative technologies, and consideration of dx funded CDM activities	5.3.1.3
Ch5, p9	Data -identification, description and summary of data used in processes above to identify, select, prioritize, optimize and pace investments over DSP	5.3.1.4
Overview of Assets Managed		5.3.2
Ch5, p10	Overview of service area (e.g. system configuration, urban/rural etc.) to support capital expenditures over forecast period; asset information (e.g. capacity, utilization, condition, failures/performance, asset risks, demographics) by major asset type that may help explain the specific need for the capital expenditure and demonstration of consideration of economic alternatives	5.3.2
Ch5, p10	Statement as to whether distributor has had any transmission or high voltage assets deemed previously by the OEB as distribution assets, and whether there are any such assets that the distributor is asking the OEB to deem as distribution assets in the current application	5.3.2.3
Ch5, p10	Description of whether distributor is a host and/or embedded distributor; identification of any embedded and/or host distributors; partially embedded status identified (including % of total load supplied through host); if host distributor, identification of whether there is a separate embedded class or if any embedded distributors are included in other classes	5.3.2.4
Asset Lifestyle Optimization Policies and Practices		5.3.3
Ch5, p11	Demonstration that distributor has carried out cost-effective system O&M activities to sustain as asset to the end of its service life (and can include references to the Distribution System Code)	5.3.3.1
Ch5, p11	Explanation of processes and tools used to forecast, prioritize and optimize system renewal spending and how distributor intends to operate within budget envelopes	5.3.3.3.1
Ch5, p11	Demonstration of consideration of potential risks of proceeding/not proceeding with individual capital expenditures	5.3.3.3.4
Ch5, p11	Demonstration that the distributor has considered the future capacity requirements of the asset such that it does not need to be replaced prematurely due to capacity constraints	5.3.3.3.5
Ch5, p11	Summary of important changes to the distributor's asset life optimization policies, processes, and tools since last DSP	5.3.3.4
System Capability Assessment for REG and DER		5.3.4
Ch5, p11	Provide list of restricted feeders by name, the feeder designation, the reason for the restriction, number of connected customers, and explain if there are plans to improve the distribution system's ability to connect distributed energy resources	5.3.4
Ch5, p11	If a distributor has incurred or expects to incur costs to accommodate and connect renewable generation facilities that will be the responsibility of the distributor under the DSC, refer to Appendix A	N/A
CDM Activities to Address System Needs		5.3.5
Ch5, p12	Description of how distributor has taken CDM into consideration in its planning process	5.3.5
Ch5, p12	Any application for CDM funding to address system needs must include a consideration of the projected effects on the distribution system on a long-term basis and the forecast expenditures.	N/A
Ch5, p12	Explanation of proposed activity in the context of the DSP, including providing details on the system need that is being addressed, infrastructure investments that are being avoided or deferred as a result of CDM activity, and the prioritization of proposed CDM activity relative to other system investments in the DSP	N/A
Ch5, p12	Description of the approach to assessing the benefits and costs of CDM activity	5.3.5
Capital Expenditure Summary		5.4
Ch5, p13	Provide capital expenditure plan that sets out proposed expenditures on distribution system and general plant over a five-year planning period, including investment and asset-related operating and maintenance expenditures	5.4.1
Ch5, p13	Provide a snapshot of a distributor's capital expenditures over a 10-year period, including five historical years and five forecast years	5.4.1
Ch5, p13	The entire cost of individual projects or programs allocated to one of the four investment categories based on the primary driver of the investment	5.4.1 Table 5.4-35
Ch5, p13	Completed Appendices 2-AA and 2-AB	5.4.1.2
Ch5, p13	Analysis of distributor's capital expenditure performance for the DSPs historical period - should include explanation of variances by investment or category, including actuals v. OEB-approved/planned amounts for the applicant's last OEB-approved CoS or Custom IR application and DSP - explanation of variances between planned and actual volume of work completed and explanation of variances in a given year that are much higher or lower than the historical trend	5.4.1.1
Ch5, p13	Analysis of distributor's capital expenditure performance for the DSPs forecast period; for investments that have a lifecycle >1yr, the proposed accounting treatment, including the treatment of the cost of funds for CWIP	5.4.1.2
Ch5, p14	Analysis of capital expenditures in DSP forecast period v. historical	5.4.1.3
Ch5, p14	Summary of any important modifications to typical capital programs since the last DSP	5.4.1.4
Ch5, p14	Description of the impacts of capital expenditures on O&M for each year or statement that the capital plans did not impact O&M costs	5.4.1.5
Ch5, p14	Statement that there are no expenditures for non-distribution activities in the applicant's budget	5.4.1.6
Justifying Capital Expenditures		5.4.2
Ch5, p14	Context on how overall capital expenditures over 5 years will achieve distributor's objectives; comment on lumpy investment years and rate impacts of capital investments in long term	5.4.2
Material Investments		5.4.2.5
For each project that meets materiality threshold set in Ch 2A or deemed by applicant to be distinct for any other reason, guidelines are:		5.4.2.5
Ch5, p15	General information on the project/program - Need, scope, volume of work expected to be completed, key project timings (incl. key factors that affect timing), total expenditures (inc. contributions and economic evaluation as per DSC, as applicable), comparative historical expenditures, priority, alternatives considered, cost/benefit of recommended alternative, description of the innovative nature of investment if applicable. -Where an investment within the five year forecast period involves a Leave to Construct approval, provide summary of the evidence (as available), for that investment consistent with Chapter 4 of the filing requirements	5.4.2.5

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Ch5, p15	Evaluation criteria and information requirements for each project/program - Demonstration of need, and may include the need to address safety, cyber security, grid innovation, environmental, statutory/regulatory obligations - Where investment substantially exceeds materiality - business case justifying expenditure, alternatives (including CDM activities if applicable), benefits for customers, impact on distributor costs -If a distributor is requesting funding for a CDM activity, additional guidance on evidentiary requirements is provided in the CDM Guidelines	5.4.2.5
Ch5, p16	Explanation of how innovative project is expected to benefit customers, such as improved reliability, enhanced customer services, CDM, efficient use of electricity, load management, greater efficiency through grid optimization, lower rates (long-term or short-term), enhanced customer choice, or any other benefit consistent with the OEB's mandate	5.4.2.5
Appendix A (if applicable)		
Ch5, Appendix A	Information on the capability of distribution system to accommodate REG investments, including a summary of the distributor's load and renewable energy generation connection forecast by feeder/substation (where applicable); information identifying specific network locations where constraints are expected to emerge due to forecast changes in load and/or connected renewable generation capacity	N/A
Ch5, Appendix A	In relation to renewable or other distributed energy generation connections, the information that must be considered by a distributor and documented in an application (where applicable), includes: applications from renewable generators > 10 kW, number and MW of REG connections for forecast period, information from IESO and any other information about the potential for renewable generation in distributor's service area, capacity of Dx to connect REG, connection constraints	N/A
EXHIBIT 3 - CUSTOMER AND LOAD FORECAST		
Load Forecasts		
24	Weather normal load forecast provided	Ex 3 - 3.2.1 and Table 17
24	Table outlining any factors that influence the load forecast in distributor's service territory (e.g. demographics, customer composition etc.)	Ex 3 - 3.2.1 and 3.2.3
24	Explanation of the causes, assumptions and adjustments for the volume forecast, including all economic assumptions and data sources used (e.g. housing outlook & forecasts, other variables used in forecasting volumes)	Ex 3 - 3.2.2 and 3.2.3
25	Explanation of weather normalization methodology	Ex 3 - 3.2.2 - 3.2.6
25	Completed Appendix 2-IB; the customer and load forecast for the test year entered on RRWF, Tab 10	Ex 3 - Appendix B
25 & 26	Multivariate Regression Model -rationale to support change if the proposed model's methodology differs from the methodology used in the most recent load forecast; discussion of modelling approaches considered and alternative models tested -statistics should include, but not limited to, the regression equations coefficients and intercepts (e.g. t-stats, model statistics including R2, adjusted R2, F-stat, root-mean-squared-error and Durbin-Watson statistic), including explanation for any resulting non-intuitive relationships -explanation of weather normalization methodology (including if monthly HDD and/or CDD are used they are based on either: 10 year avg. or proposed alternative approach with supporting evidence -definitions of HDD and CDD including: climatological measurement points and why appropriate as well as identification of base degrees -sources of data for endogenous and exogenous variables. Where a variable has been constructed, explanation of the variable data used and source. Where a distributor has constructed the demand variable to model billed consumption on a class-specific basis, a full explanation of the approach used to pro-rate or interpolate non-interval data (i.e. if billing data are not based on calendar monthly readings as obtained from interval or smart meters) must be provided, including an explanation of why the constructed demand series is suitable for modelling -any binary variables used must be explained and justified - the use of binary variables should be limited and overlap with other variables should be avoided -explanation of any specific adjustments made (e.g. to adjust for loss or gain of major customers or load, significant re-classifications of customers, etc.). Note locally purchased generation should be included in the total for purchased power -description of how CDM impacts and other exogenous factors have been accounted for in the historical period, and how CDM impacts, including any CDM targets or forecasts in the bridge and test years, are factored into the test year load forecast -data and regression model and statistics used in customer and load forecast in Excel format	Ex 3 - 3.2.2 - 3.2.6 and Appendix A
26	NAC Model -rationale to support NAC methodology if the model use differs from the method used in the most recent load forecast -data supporting calculation of NAC values for each rate class -description of how CDM impacts and other exogenous factors have been accounted for in historical period and how CDM impacts, including any CDM targets or forecasts in the bridge and test years, are factored into test year forecast -discussion of weather normalization assumptions used	N/A - Multivariate Regression Model used
Incorporating CDM Impacts in the Load Forecast for Distributors		
27	Distributor may request approval for the use of the LRAMVA for a new CDM activity (a distribution-rate funded CDM activity or the Local Initiatives Program (LIP)), which would require establishing an LRAMVA threshold. If a distributor does request to establish an LRAMVA threshold, documentation of the CDM savings to be used as the basis for the 2023 LRAMVA threshold, and description of how these savings are aligned with the 2023 load forecast	Ex 3 - 3.2.3 (N/A - no CDM or LRAMVA being implemented or claimed)
28	If a distributor proposes a different savings values for a CDM activity in the load forecast and LRAMVA threshold, description of rationale for these differences (e.g., timing of CDM activity, line loss factor, net-to-gross conversion factor)	Ex 3 - 3.2.3 (N/A)
Accuracy of Load Forecast and Variance Analyses		
28	Completed Appendix 2-IB (2-IA provides further instructions for filling out 2-IB)	Ex 3 - Appendix B
28	For customer/connection counts: -identification as to whether customer/connection count is shown in year end or average format -year-over-year variances in changes of customer/connection counts with explanation for changes in the definition of, or major changes made in the composition of each customer class -explanations of bridge and test year forecasts by rate class -for last rebasing, variance analysis between last OEB-approved and actuals with explanations for material differences	Ex 3 - 3.2.5 and 3.3

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28	For consumption and demand: -explanation and details to support how kWh are converted to kW for applicable demand-billed classes -year-over-year variances in consumption (kWh) and demand (kW or kVA - the latter for demand billed rate classes) by rate class and for system consumption overall (kWh) with explanations for material changes in the definition of or major changes over time (comparison done for both historical actuals against each other and historical weather-normalized actuals over time) -explanations of the bridge and test year forecasts by rate class (and how these vary from or are trending from both historical actuals and from weather-normalized actuals) -for last rebasing variance analysis between the last OEB-approved and the actual results with explanations for material differences	Ex 3 - 3.2.6 and 3.3
29	All data and equations used to determine customers/connections, demand and load forecasts provided in Excel format	Submitted - LPDL_2025_CoS_Load Forecast Model_20241031
EXHIBIT 4 - OPERATING EXPENSES		
Overview		
29	Brief explanation (quantitative and qualitative) of test year OM&A levels, how the distributor develops and receives approval of their OM&A budget, cost drivers and significant changes relative to historical and bridge years, trends in costs and relevant metrics including OM&A per customer (and its components) for the historical, bridge and test years, inflation rate assumed (if proposing different rate than IPI - provide explanation supporting proposal), business environment changes	Ex 4 - 4.1.1 - 4.1.5
OM&A Summary and Cost Driver Tables		
	Inclusion of the following tables in evidence and all OM&A appendices filed:	
29	Summary of recoverable OM&A expenses; Appendix 2-JA	Ex 4 - 4.2 and Table 3
29	Recoverable OM&A cost drivers; Appendix 2-JB	Ex 4 - 4.2 and Table 4
29	OM&A programs table - Appendix 2-JC **or** OM&A by USoA Table - Appendix 2-JD	Ex 4 - 4.3 and Table 7
29	Recoverable OM&A Cost per customer and per FTE; Appendix 2-L	Ex 4 - 4.2 and Table 5
29 & 30	Distributors with 30k or more customers: present OM&A by program; Appendix 2-JC filed to provide OM&A details and variance analysis on a program basis. For each program, provide a definition of the USoA accounts included	N/A - < 30,000 customers
30	Only distributors with less than 30k customers: option to file OM&A by program or USoA. If USoA chosen, 2-JD filed instead of 2-JC	Ex 4 - 4.3 and Table 7
30	For all distributors, the table provided (2-JC or 2-JD) must reflect the entire OM&A amount proposed to be recovered through rates. Information provided for bridge and test years.	Ex 4 - 4.3 and Table 7
30	Appendix 2-JB populated to provide information on the cost drivers of OM&A expenses; 2-JA broken down into major categories	Ex 4 - 4.2 and Table 4
30	Identification of change in OM&A in test year in relation to change in capitalized overhead	Ex 4 - 4.2
OM&A Variance Analysis		
30	Re: 2-JC or 2-JD - variance analysis between: -test year vs last OEB approved -historical OEB-approved vs historical actuals (for the most recent historical OEB-approved year) -test year vs bridge year	Ex 4 - 4.3
30	If OM&A expense detailed on USoA basis, variance analysis and explanation broken down by the five major OM&A categories as per 2-JA	Ex 4 - 4.3
30	For all distributors, the variance analysis includes explanation of whether the change was within the distributor's control or not - distributors encouraged to provide explanations for costs above the threshold which have impacted historical trend	Ex 4 - 4.3
Workforce Planning and Employee Compensation		
31	Completed Appendix 2-K; information on labour and compensation includes total amount, whether expensed or capitalized	Excel model completed; Ex 4 - 4.4.4 and Table 16
31	If there are three or fewer employees in any category, aggregate with the category to which it is most closely related. This higher level of aggregation must be continued, if required, to ensure that no category contains three or fewer employees.	Ex 4 - 4.4.4
31	Description of proposed workforce plans, including compensation strategy and any changes from previous plan	Ex 4 - 4.4.2 and 4.4.3
31	Discussion of the outcomes of previous plans and how those outcomes have impacted their proposed plans including an explanation of the reasons for all material changes to FTEs and compensation. Explanation for all years includes: - Variances with an explanation of contributing factors, inflation rates used for forecasts, and the plan for any new employees - basis for performance pay, eligible employee groups, goals, measures, and review process for pay-for-performance plans - relevant studies (e.g. compensation benchmarking)	Ex 4 - 4.4.4 and 4.4.5
31	Details of employee benefit programs including pensions, OPEBs, and other costs charged to OM&A. A breakdown of the pension and OPEBs amounts included in OM&A and capital provided for the last OEB-approved rebasing application, and for historical, bridge and test years	Ex 4 - 4.4.7 and 4.4.8
31	Most recent actuarial report; tax section of evidence agrees with this analysis	Ex 4 - Appendix B
31	For virtual distributors - Appendix K completed in relation to the employees of the affiliates who are doing the work of the regulated distributor. Provide the status of pension funding and all assumptions used in the analysis	Ex 4 - 4.5.1 (N/A)
32	Indication if pension and OPEBs to be recovered using cash or accrual method. If cash method, sufficient supporting rationale and evidence for adopting cash method. If proposing to change the basis in which pension and OPEB costs are included in OM&A from last rebasing, quantification of impact of transition provided	Ex 4 - 4.4.8
Shared Services and Corporate Cost Allocation		
32	Identification of all shared services among affiliates; identification of the extent to which the applicant is a "virtual utility" and justification of proposed shared services and cost allocation	Ex 4 - 4.5.1
32	For shared services among affiliated entities: type of service provided or received, pricing methodology	Ex 4 - 4.5.1 and Table 23
32	Allocation methodology for corporate services, list of shared services, list of costs and allocators and how the allocator was derived, any third party review of cost allocation methodology	Ex 4 - 4.5.2 and 4.5.3
32	Completed Appendix 2-N for service provided or received for historical actuals, bridge and test; including reconciliation with revenue included in Other Revenue	Excel model completed; Ex 4 - 4.5.1 and Table 23
32 & 33	Shared Service and Corporate Cost Variance analysis - test year vs last OEB approved and test year vs most recent actual	Ex 4 - 4.5.2 and 4.5.3
33	Identification of any Board of Director costs for affiliates included in LDC costs	Ex 4 - 4.5.3
Non-Affiliate Services, One-Time Costs, Regulatory Costs		
33	Purchases of Non-Affiliated Services - copy of procurement policy (including information on signing authority, tendering process, non-affiliate service purchase compliance)	Ex 4 - 4.6 and Appendix D
33	For material transactions not in compliance with procurement policy, or that were undertaken pursuant to exceptions contemplated within the policy, an explanation as to why as well as a summary of the nature and cost of the product, and a description of the specific methodology used for selecting the vendor	Ex 4 - 4.6 (N/A)
33	Identification of one-time costs in historical, bridge, test; explanation of cost recovery in test year. If no recovery of one-time costs is being proposed in the test year and subsequent IRM term, an explanation must be provided	Ex 4 - 4.7.1

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33 & 34	Regulatory costs - breakdown of actual and anticipated regulatory costs including OEB cost assessments and expenses related to the CoS application (e.g. legal fees, consultant fees), information supporting incremental level of costs for preparation and review of current application, proposed recovery (i.e. amortized?), explanation if different than 5 years, completed Appendix 2-M	Excel model completed; Ex 4 - 4.7.2 and Table 28
LEAP, Charitable and Political Donations		
34	LEAP - the greater of 0.12% of forecasted service revenue requirement or $2,000 should be included in OM&A and recovered from all rate classes. If proposing LEAP funding higher than 0.12%, details of demographics provided	Ex 4 - 4.8.1
34	For any charitable contributions claimed for recovery, detailed information provided	Ex 4 - 4.8.2
34	Confirmation that no political contributions have been included for recovery	Ex 4 - 4.8.2 (N/A)
Conservation and Demand Management		
35	Statement confirming that no costs for dedicated CDM staff to support IESO programs funded under the 2021-2024 CDM Framework are included in the revenue requirement	Ex 4 - 4.9
35	Distributor should generally not include any forecast costs associated with partnership in the IESO's LIP within its revenue requirement; distributor can seek to recover partnership costs at a future date through the LIP deferral account. If distributor plans to partner with the IESO for the LIP at the time of its cost of service application, description of proposed approach to partnership, including a forecast of LIP costs	N/A - no LIP
Funding Options for Future Conservation and Demand Management Activities		
35	If CDM activities included in COS where CDM activities expected to come into service during Price Cap IR term, identification of if costs of such CDM activities included in the revenue requirement, or if the distributor intends to propose treatment similar to an ACM for these future CDM activities	N/A - no CDM
35	If the latter as noted above, supporting rationale provided (e.g., the preliminary cost information and ACM/ICM materiality threshold calculations to show that a similar capital project would qualify for ACM treatment based on the forecasted information at the time of the DSP and cost of service application)	N/A - no CDM
EXHIBIT 5 - COST OF CAPITAL AND CAPITAL STRUCTURE		
Capital Structure		
36	Use of most recent parameters issued by the OEB, subject to update if new parameters available prior to OEB decision. Alternatively - distributor specific cost of capital with supporting evidence and justification	Ex 5 - 5.1.1
36	Completed Appendix 2-OA for last OEB approved and test years	Excel model completed; Ex 5 - 5.2 and Table 2
36	Completed Appendix 2-OB for historical, bridge and test years with respect to long-term debt, short-term debt, preference shares, and common equity	Excel model completed; Ex 5 - 5.3 and Table 3
36	Explanation for any material changes in capital structure or material differences between actual and deemed capital structure including: retirement of debt or preference shares and buy-back of common shares; short-term debt, long-term debt, preference shares and common share offerings	Ex 5 - 5.1.1 and 5.1.2
Cost of Capital (Return on Equity and Cost of Debt) The following provided for each year:		
37	Calculation of cost for each capital component	Ex 5 - 5.4
37	Profit or loss on redemption of debt, if applicable	Ex 5 - 5.1.2 (N/A)
37	Copies of current promissory notes or other debt arrangements with affiliates	Ex 5 - 5.4.3 (N/A)
37	Explanation of debt rate for each existing debt instrument including an explanation on how the debt rate was determined and is in compliance with the policies documented in the 2009 Report or applicant's proposed approach	Ex 5 - 5.4.3
37	Forecast of new debt in bridge and test year - details including estimate of rate and other pertinent information (e.g. affiliated debt or third party?)	Ex 5 - 5.4.3
37	If proposing any rate that is different from the OEB guidelines, a justification of the proposed rate(s), including key assumptions	Ex 5 - 5.4.4
37	Historical return on equity achieved	Ex 5 - 5.4.1
Not-for-Profit Corporations		
37	Requested capital structure and cost of capital (including the proposed cost of long-term and short-term debt and proposed return on equity)	Ex 5 - 5.5 (N/A)
38	Statement as to whether the revenues derived from the return on equity component of the cost of capital is to be used to fund reserves or will be used for other purposes	N/A - for profit utility
38	If the revenues derived from the return on equity component will be used to fund reserves, specifications for each proposed reserve fund and a description of the governance (policies, procedures, sign-off authority, etc.) that will be applied	N/A - for profit utility
38	If the revenues derived from the return on equity component will be used for other purposes, statement as to whether these revenues will be used for non-distribution activities (in the situation where the excess revenues are greater than the amounts needed to fund distribution activities); rationale provided supporting the use of the revenues in this manner. Also, governance (policies, procedures, sign-off authority, etc.) that will be applied to the funding of non-distribution activities provided	N/A - for profit utility
38	If there are approved reserves from previous OEB decisions provide the following: -the limits of any capital and/or operating reserves as approved by the OEB, and identifying the decisions establishing these reserve accounts and their limits -the current balances of any established capital and/or operating reserves	N/A - for profit utility
EXHIBIT 6 - REVENUE REQUIREMENT AND REVENUE DEFICIENCY OR SUFFICIENCY		
38	The following information must be provided in this exhibit (with cross references to where in the application further details can be found for each) excluding energy costs and revenues and unregulated costs and revenues: -determination of net income, statement of rate base, actual return on rate base, indicated rate of return, requested rate of return, deficiency or sufficiency in revenue, gross deficiency or sufficiency in revenue	Ex 6 - 6.2
38 & 39	Revenue deficiency or sufficiency calculations net of electricity price differentials captured in the Retail Settlement Variance Accounts (RSVAs) and also net of any cost associated with low voltage (LV) charges or DVA balances of distribution expenditures/revenues being tracked through approved deferral and variance accounts for certain distribution assets (e.g. ICM and ACM capital projects) and for which disposition is not being sought in the application.	Ex 6 - 6.2.7 and 6.1.1
39	Summary of drivers for test year deficiency/sufficiency, how much each driver contributes; references in application evidence mapped to drivers	Ex 6 - 6.3.1
39	Impacts of any changes in methodologies on deficiency/sufficiency and on individual cost drivers contributing to it	Ex 6 - 6.3.1
Revenue Requirement Work Form		
39	Completed RRWF. Revenue requirement, def/sufficiency, data entered in RRWF must correspond with other exhibits	Excel model submitted; Ex 6 - 6.2.8 and Appendix A
39	If the enhanced RRWF cannot reflect a distributor's proposed rates accurately, the distributor must file its rate generator model	N/A - Confirmed that the RRWF reflects LPDL's proposed rates accurately. No rate generator model has been filed.
40	For revenues - calculation of bridge year forecast of revenues at existing rates; calculation of test year forecasted revenues at each of existing rates and proposed rates	Ex 6 - 6.2.7 and 6.3.1
Income Tax or PILs		
40	Must provide detailed calculations of income tax or PILS. Must include a completed Excel version of the PILs model available on the OEB's website, including derivation of adjustments for historical, bridge and test years. Regulatory assets and liabilities must excluded from PILs calculations when they were created and when they were disposed, regardless of the actual tax treatment accorded those amounts.	Excel model submitted; Ex 6 - 6.3.2 and Appendix D

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40	Supporting schedules and calculations identifying reconciling items	Ex 6 - 6.3.2
40	Most recent federal and provincial tax returns	Ex 6 - 6.3.2 and Appendix C
40	Financial Statements included with tax returns if different from those filed with application	Ex 1 - Appendix C and D
40	Calculation of tax credits; redact where required (filing of unredacted versions is not required)	Ex 6 - 6.3.2 Table 13
41	Supporting schedules, calculations and explanations for other additions and deductions	Ex 6 - 6.3.2
41	Completion of the integrity checks in the PILs Model	LPDL_2025_Test_year_Income_Tax_PILs_1.0_20241031
41	Accelerated CCA - full revenue requirement impact recorded in Account 1592 and the balance sought for review and disposition, method used in calculating the revenue requirement impact recorded in Account 1592, detailed calculations by year for the full revenue requirement impact recorded in Account 1592	Ex 6 - 6.3.2 Table 14
41 & 42	May propose a mechanism to smooth the tax impacts over the five-year IRM term.	Ex 6 - 6.3.2
Other Taxes		
42	Account 6105 is not an OM&A account and should be excluded from all OM&A totals. Applicant should provide an explanation of how these tax amounts are derived.	Ex 6 - 6.3.3
Non-recoverable and Disallowed Expenses		
42	Exclude from regulatory tax calculation any non-recoverable or disallowed expenses	Ex 6 - 6.3.4
Other Revenue		
42	Completed Appendix 2-H, including the breakdown of each account showing the components of each	Excel model submitted; Ex 6 - 6.4.1 and Appendix B
42 & 43	For each other distribution revenue account: -comparison of actual revenues for historical years to forecast revenue for bridge and test year, including explanations for significant variances year-over-year -revenue from any new proposed specific service charges, changes to rates, or new rules for applying existing specific service charges (incl. any credits to customers) -revenue from affiliate transactions, shared services, or corporate cost allocation. For each affiliate transaction identification of service, the nature of service provided, accounts used to record revenue, and costs to provide service -revenue from affiliate transactions recorded in Account 4375 -expenses from affiliate transactions recorded in Account 4380	Ex 6 - 6.4.1, 6.4.2 and 6.4.3
43	Balances recorded in Account 4375 and Account 4380 reconcile to the balances recorded in Appendix 2-N – Shared Services and Corporate Allocation for the three historical years, the bridge year and the test year. Any differences must be reconciled	Ex 6 - 6.4.1 and 6.4.3
43	Revenue related to microFIT recorded as revenue offset in Account 4235 and not included as part of base revenue requirement	Ex 6 - 6.4.1
43	Transfer pricing and allocation of cost methods do not result in cross-subsidization between regulated and non-regulated lines of business and compliance with article 340 of APH; explanations for any deviations	Ex 6 - 6.4.1
43	Identification of any discrete customer groups that may be materially impacted by changes to other rates and charges.	Ex 6 - 6.4.1
EXHIBIT 7 - COST ALLOCATION		
Cost Allocation Study Requirements		
44	Completed cost allocation study using the OEB-approved methodology or the distributor's study and model reflecting forecasted test year loads and costs and supported by appropriate explanations and live Excel spreadsheets; sheets 11 and 13 of the RRWF complete	Ex 7 - 7.1.1
44	Description of weighting factors, rationale for use of default values (if applicable)	Ex 7 - 7.1.3
44	If distributor is choosing to use the same weightings as its previous rebasing application, a reference to the previous application provided	Ex 7 - 7.1.3 (N/A)
45	Complete live Excel cost allocation model, whether using the OEB-issued one or a different model. If using the OEB-issued model, Input sheet I.2, cells c15 and c17 must be used to identify the final run of the model on each sheet. If using another model, the distributor must file equivalent information.	LPDL_2025_Cost_Allocation_Model_1.0_20241031
Load Profiles and Demand Allocators		
45	Update all classes' load profiles and update demand allocators, if class load profiles are unavailable, provide an explanation and commit to putting plans in place to remedy this for next time a cost allocation model is filed	Ex 7 - 7.1.2
45	Discussion of how load profiles have been normalized for weather and any notable events impacting usage patterns	Ex 7 - 7.1.2
45	If multivariate regression used, the following provided: -statistics and statistical tests related to regression equation(s) coefficients and intercept -explanation of the weather-normalization methodology including: relationship between demand and Heating and/or Cooling requirements, determination of normal weather: the hourly for daily Heating and/or Cooling required -sources of data used for both endogenous and exogenous variables. Where a variable has been constructed, explanation of the variable, data used and the sorce of the data provided -explanation of any specific adjustments made (e.g. to address gaps in historical meter data)	Ex 7 - 7.1.2 (N/A)
46	Data and regression model and statistics used in the weather normalization of load profiles provided in Excel format (includes showing the derivation of any constructed variables)	Ex 7 - 7.1.2 (N/A)
46	Demand Allocators: spreadsheet and a description with calculations to show how demand allocators are derived from the historical weather normal or weather actual load profiles	Ex 7 - 7.1.2 and LPDL_2025_CoS_Load_Profiles_20241031
46	Historical Average: Where the annual demand allocators are based on weather actual load profiles, at least three, and ideally five years of historical data should be used to perform weather normalization. Where the annual demand allocators are based on weather normalized load profiles, fewer years may be used	Ex 7 - 7.1.2 and LPDL_2025_CoS_Load_Profiles_20241031
46 & 47	Host Distributor only - evidence of consultation with embedded Dx - statement regarding embedded Dx support for approach to allocation of costs - if embedded Dx is separate class - class in cost allocation study and RRWF - if new embedded Dx class - rationale and supporting evidence (cost of serving, load served, asset ownership information, distribution charges levied); include in cost allocation study and RRWF - if embedded Dx billed as GS customer - include with the GS class in cost allocation model and the RRWF. Provide cost of serving, load served, asset ownership information, distribution charges levied, appropriateness of rates for the GS class recovering costs of providing low voltage dx services to embedded distributor(s). Completed Appendix 2-Q - Cost of Serving Embedded Distributors	Ex 7 - 7.1.4 (N/A)
47	microFIT - if the applicant believes that it has unique circumstances which would justify a different rate than the generic rate, documentation to support rate must be provided	Ex 7 - 7.1.4

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48	Standby Rates - distributors should request approval for its standby rates to be made final and provide evidence confirming that they have advised all affected customers of the proposal. A distributor that seeks changes to its standby charges, including a change in the methodology on which these rates are based, must provide full documentation supporting its proposal, and confirm that all affected customers have been notified of the proposed change(s).	Ex 7 - 7.1.4 (N/A)
48	If new customer class or changing definition of existing classes, rationale and restatement of revenue requirement from previous cost of service	Ex 7 - 7.1.4 (N/A)
48	If eliminating or combining customer classes, rationale and restatement of revenue requirement from previous cost of service	Ex 7 - 7.1.4 (N/A)
Class Revenue Requirements		
49	To support a proposal to rebalance rates, information on the revenue by class that would apply if all rates were changed by a uniform percentage provided. Ratios compared with the ratios that will result from the rates being proposed by the distributor.	Ex 7 - 7.2.1 and 7.2.2
Revenue to Cost Ratios		
49 & 50	If R:C ratios outside dead band - cost allocation proposal to bring them within the OEB-approved ranges provided. In making any such adjustments, potential mitigation measures addressed if the impact of the adjustments on the rates of any particular class or classes is significant.	Ex 7 - 7.3.1
50	If distributor proposes to continue rebalancing rates after the cost of service test year, the ratios proposed for subsequent year(s) must be provided	Ex 7 - 7.3.1 (N/A)
50	If Cost Allocation Model other than OEB model used - exclude LV, exclude DVA such as smart meters	Ex 7 - 7.1.1 (N/A)
EXHIBIT 8 - RATE DESIGN		
50	Monthly fixed charges - 2 decimal places; variable charges - 4 decimal places; if departing from this approach, explanation provided as to why necessary and appropriate	Ex 8 - 8.1.1 and 8.1.2
Fixed Variable Proportion		
50 & 51	The following is to be provided in relation to the fixed/variable proportion of proposed rates: -Current F/V for each rate class with supporting info -Proposed F/V for each rate class with explanation for any changes from current proportions -Table comparing current and proposed monthly fixed charges with the floor and ceiling as in cost allocation study Analysis must be net of rate adders, funding adders, and rate riders	Ex 8 - 8.1.2 and Table 5
RTSRs		
51	Completed RTSR Model in Excel	Ex 8 - 8.1.5 and LPDL_2025_RTSR_Workform_1.0_20241031
51	RTSR information consistent with working capital allowance calculation; explanation for any differences	Ex 8 - 8.1.5
Retail Service Charges		
51	Distributors should note that the current retail service rates and charges were established on a generic basis and should refer to the most recent rate order for the current approved rates.	Ex 8 - 8.1.6
Regulatory Charges		
52	If applying for a rate other than the generic rate set by the OEB, distributors must provide justification as to why their specific circumstances would warrant a different rate, in addition to a detailed derivation of their proposed rate	Ex 8 - 8.1.7 - 8.1.9
Specific Service Charges		
52	If requesting new specific service charge or a change to the level of an existing charge, description of the purpose of charge, or reason for change to an existing charge; calculations to support charges	Ex 8 - 8.1.11 (N/A)
52	Identification in the Application Summary all proposed changes that will have an impact on customers, including changes to other rates and charges that may affect a discrete group; identification of specific customers or customer groups impacted by each proposal	Ex 8 - 8.1.11 and 6.4.1
52	Calculation of charge includes: direct labour, labour rate, burden rate, incidental, other	n/a
53	Identification of any rates and charges in Conditions of Service that do not appear on tariff sheet. Explain nature of costs, provide schedule outlining revenues or capital contributions recovered from these rates from last OEB-approved year to most recent actuals and the revenue or capital contributions forecasted for the bridge and test years. A proposal and explanation as to whether these charges should be included on tariff sheet	Ex 8 - 8.1.11 and 8.1.14
53	Revenue from SSCs corresponds with Operating Revenue evidence	Ex 8 - 8.1.11
Wireline Pole Attachment Charge		
53	Under the new regulation (Part VI.1: O. Reg. 842/21, (Electricity Infrastructure (Part VI.1 of the Act)), OEB is to establish a generic, province-wide pole attachement charge for 2022. The Regulation further requires the OEB to set the charge for 2023 and subsequent years by adjusting the prior's charge for inflation. The Regulation provides that the annual charge will be established by order without a hearing.	Ex 8 - 8.1.11 and Table 17
Low Voltage Service Rates		
If the distributor is fully or partially embedded, information on the following must be provided:		
54	Forecast LV Cost	Ex 8 - 8.1.12
54	Actual LV Cost for the last three historical years along with bridge and test year forecasts; year-over-year variances and explanations for substantive changes in costs over time up to and including test year forecast	Ex 8 - 8.1.12
54	Support for forecast LV, e.g. Hydro One Sub-Transmission charges	Ex 8 - 8.1.12
54	Allocation of forecasted LV cost to customer classes (typically proportional to Tx connection revenue)	Ex 8 - 8.1.12
54	Proposed LV rates by customer class	Ex 8 - 8.1.12
Smart Meter Entity Charge		
55	Current OEB-approved SMC charged until the OEB approved any updated SMC	Ex 8 - 8.1.10
Loss Factors		
55	Proposed SFLF and Total Loss Factor for test year	Ex 8 - 8.1.13
55	Statement as to whether LDC is embedded including whether fully or partially	Ex 8 - 8.1.13
55	Study of losses if required by previous decision	Ex 8 - 8.1.13 (N/A)
55	3-5 years of historical loss factor data - Completed Appendix 2-R	Ex 8 - 8.1.13 and Table 21
55	If proposed distribution loss factor >5% or is showing an increasing trend, explanation for level of losses, details of actions taken to reduce losses in the previous five years, and actions planned to reduce losses going forward	Ex 8 - 8.1.13
55	Explanation of SFLF if not standard	N/A - standard
55	Reconciliation between the application and RRR filing	Ex 8 - 8.1.13 Table 23
Tariff of Rates and Charges		

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55	Current and proposed Tariff of Rates and Charges - **must be filed in Excel format and PDF format** Explanation and support of each change in the appropriate section of the application	Ex 8 - Apprendix A and B; LPDL_2025_Tariff_Schedule_and_Bill_Impact_Model_20241031
55	Completed Bill Impacts Model	Ex 8 - Apprendix C; LPDL_2025_Tariff_Schedule_and_Bill_Impact_Model_20241031
56	Explanation of changes to terms and conditions of service if changes affect application of rates and rationale behind those changes	Ex 8 - 8.1.14 (N/A)
56	Proposed tariffs must include applicable regulatory charges, and any other generic rates as ordered by the OEB	Ex 8 - Apprendix C; LPDL_2025_Tariff_Schedule_and_Bill_Impact_Model_20241031
Revenue Reconciliation		
56	Calculations of revenue per class under current and proposed rates; reconciliation of rate class revenue and other revenue to total revenue requirement (i.e. breakout volumes, rates and revenues by rate component etc.)	Ex 8 - 8.1.1 Table 1 and 8.1.4 Table 8
56	Completed RRWF - Sheet 13 (table reconciling base revenue requirement against revenues recovered through proposed rates)	Ex 8 - 8.1.4; LPDL_2025_Rev_Reqt_Workform_1.0 - 20241031
Bill Impact Information		
56	Completed Tariff Schedule and Bill Impacts Model. Bill impacts must identify existing rates, proposed changes to rates, and detailed bill impacts (including % change in distribution excluding pass through costs - Sub-Total A, % change in distribution - Sub-Total B, % change in delivery - Sub-Total C, and $ change in total bill)	Ex 8 - 8.1.15 and Appendix C; LPDL_2025_Tariff_Schedule_and_Bill_Impact_Model_20241031
56	Impact of changes resulting from the as-filed application on representative samples of end-users (i.e. volume, % rate change and revenue). Commodity and regulatory charges held constant	Ex 8 - 8.1.15
57	Bill impacts provided for typical customers and consumption levels. Must provide residential 750 kWh and GS<50 2,000 kWh. Bill impacts must be provided for a range of consumption levels relevant to the service territory for each class	Ex 8 - 8.1.15
57	If applicable, for certain classes where one or more customers have unique consumption and demand patterns, the distributor must show a typical impact and provide an explanation	Ex 8 - 8.1.15 (N/A)
Rate Mitigation		
57	Mitigation plan if total bill increase for any customer class is >10% including: specification of class and magnitude of increase, description of mitigation measures, justification for mitigation measure including reasons if no mitigation proposed, other relevant information. The Tariff Schedule and Bill Impacts Model must reflect any mitigation plan proposed.	Ex 8 - 8.1.16 (N/A)
Rate Harmonization Mitigation Issues		
58	If part of a MAADs transaction, and rate harmonization plan not yet approved by the OEB, a rate harmonization plan must be filed	Ex 8 - 8.1.17 (N/A)
58	Plan includes a detailed explanation and justification for the implementation plan, and an impact analysis	Ex 8 - 8.1.17 (N/A)
58	If impact of COS increases and harmonization effects result in total bill increases for any customer class exceeding 10%, discussionion of proposed measures to mitigate increases in its mitigation plan, or justification provided as to why mitigation is not required	Ex 8 - 8.1.17 (N/A)
58	Migration plan that includes fully harmonizing rates that is to be accomplished over more than one year must be supported by a detailed plan for accomplishing this during the subsequent Price Cap IR period	Ex 8 - 8.1.17 (N/A)
EXHIBIT 9 - DEFERRAL AND VARIANCE ACCOUNTS		
58	Summary table showing all active DVAs not disposed of yet, showing principal and interest/carrying charges, total balance for each account, whether account being proposed for disposition and whether the account is proposed to be continued or discontinued	Ex 9 - 9.1.1 and Table 1
58	In a separate section under the summary table: - For any account identified, provide an explanation as to why it is not being proposed for disposition - For any Group 2 account identified, provide an explanation as to why it is being discontinued	Ex 9 - 9.1.1 and 9.2.3 Table 19
58	If applicable, description of DVAs that were used differently than as described in the APH, relevant accounting order or other OEB document	Ex 9 - 9.1.1 (N/A)
58	Completed DVA continuity schedule for period from last disposition to present - live Excel format. Continuity schedule must show separate itemization of opening balances, annual adjustments, transactions, dispositions, interest and closing balances for all active DVAs. The opening principal amounts and interest amounts for Group 1 and 2 balances, shown in the DVA Continuity Schedule, must reconcile with the last applicable approved closing balances.	Ex 9 - Appendix A; LPDL_2025_DVA_Continuity_Schedule_CoS_1.0_20241031
59	Explanation if account balances in continuity schedule differs from trial balance reported through RRR and documented in AFS - included in tab Appendix A of DVA schedule. This includes all Account 1508 sub-accounts. A reconciliation of all the Account 1508 sub-accounts to the Account 1508 control account reported in the RRR is to be provided in the DVA continuity schedule	Ex 9 - 9.1.3 Table 3 and 9.1.4
59	Statement whether any adjustments made to DVA balances previously approved by OEB on final basis - the OEB expects that no adjustment will be made to any deferral and variance account balances previously approved by the OEB on a final basis. If any adjustments have been made, explanation for the nature and the amount of the adjustment(s), and appropriate supporting documentation, under a section titled "Adjustments to Deferral and Variance Accounts"	Ex 9 - 9.1.1 and 9.2.2
59	Confirmation of use of interest rates established by the OEB by month or by quarter for each year; most recently published rate used for future periods	Ex 9 - 9.1.6 and Table 7
Disposition of Deferral and Variance Accounts		
59	Refer to DVA Continuity Schedule Instructions for instructions on completing the DVA Continuity Schedule, annual updates and discussions on default treatments and expectations for DVAs	Ex 9 - Appendix A; LPDL_2025_DVA_Continuity_Schedule_CoS_1.0_20241031
59	Provide confirmation that a distributor is allocating DVAs using an approved allocator. If proposing to allocate a DVA which the OEB has not established an allocator, proposed allocation based on cost driver must be provided with justification; indication of proposed billing determinants, including charge type for recovery purposes and included in cont. schedule	Ex 9 - 9.3.1
60	Propose rate riders that dispose of the balances. If the distributor is proposing an alternative recovery period other than one year, explanation provided	Ex 9 - 9.3.2
60	Provide support (e.g., explanations, calculations) on how each material Group 2 balance is determined. For utility-specific Group 2 accounts that are not material, provide a brief explanation of the account balance and the relevant accounting order	Ex 9 - 9.2.4
Disposition of Accounts 1588 and 1589		
60	If a distributor has not implemented OEB's February 21, 2019 accounting guidance, indication that this is the case	Ex 9 - 9.1.1 and 9.4.1
60	Indication of the year in which Account 1588 and Account 1589 balances were last approved for disposition, and whether the balances were approved on an interim or final basis. If the balances were last disposed on an interim basis, indicate the year in which balances were last disposed on a final basis	Ex 9 - 9.4.1
60	If requesting final disposition of balances for the first time following implementation of the accounting guidance, confirmation that accounting guidance has been implemented fully effective January 1, 2019	Ex 9 - 9.4.1 (N/A)

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60 & 61	In order to request for final disposition of historical balances as part of the current application, confirmation that these balances have been considered in the context of the accounting guidance and provide a summary of the review performed. Discussion on the results of the review, any systemic issues noted, and whether any material adjustments to those balances have been recorded. Summary and description of each adjustment made to the historical balances provided	Ex 9 - 9.4.1 and 9.4.2
61	GA Analysis Workform (in live Excel format) for each year that has not previously been approved by the OEB for disposition. If the distributor is adjusting the Account 1589 GA balance that was previously approved on an interim basis, the GA Analysis Workform must be completed from the year after the distributor last received final disposition for Account 1589	Ex 9 - 9.4.2 and Appendix C; LPDL_2025_GA_Analysis_Workform_1.0_20241031
61	As described in Note 5 in the GA Analysis Workform, reconciliation of any discrepancy between the actual and expected balance by quantifying differences (e.g. true-ups between estimated and actual costs and/or revenues). Any remaining unexplained discrepancy between the actual and expected balance that is greater than +/- 1% of the total annual IESO GA charges will be considered material and warrant further investigation.	Ex 9 - 9.4.2 and Appendix C; LPDL_2025_GA_Analysis_Workform_1.0_20241031
61	Completed reasonability test for the balance in Account 1588. The reasonability test is included in the GA Analysis Workform.	Ex 9 - 9.4.2 and Appendix C; LPDL_2025_GA_Analysis_Workform_1.0_20241031
Disposition of Account 1580, Sub-account CBR Class B Variance		
61	Proposed disposition of Account 1580 sub-account CBR Class B in accordance with the CBR Accounting Guidance. Must be disposed over one year. - Account 1580 sub-account CBR Class A is not to be disposed through rates proceedings but rather follow the OEB's accounting guidance - Refer to DVA Continuity Schedule Instructions for further details on the treatment of CBR related sub-accounts	Ex 9 - 9.4.3
Disposition of Account 1595		
62	Distributors are expected to request disposition of residual balances in Account 1595 Sub-accounts for each vintage year once, on a final basis	Ex 9 - 9.2.2
62	Explanation for any material residual balances being proposed for disposition, including quantifying significant drivers of the residual balance	Ex 9 - 9.2.2
Disposition of Retail Service Charges Related Accounts		
62 & 63	If there is a balance in 1518 or 1548, distributor must: - confirm variances are incremental costs of providing retail services - state whether Article 490 of APH has been followed; explanation if not followed	Ex 9 - 9.2.5
63	If the balances in Account 1518, Account 1548, or Account 1508 Sub-account Retail Service Charges Incremental Revenue are material, the distributor must identify drivers for the balance(s) and provide schedule identifying all revenues and expenses listed by USoA that are incorporated into the variances	Ex 9 - 9.2.5 (N/A)
63	The OEB established a new variance account for electricity distributors that no longer used the RCVAs. The balance in the account, as well as in Accounts 1518 and 1548, would be disposed to ratepayers in a future rate application, and the account subsequently closed. Distributors that have not yet done so in a COS application may forecast balances up to the end of the incentive rate-setting period and the OEB may consider disposing of the forecast amounts	Ex 9 - 9.2.5 (N/A)
Disposition of Account 1592, Sub-account CCA Changes		
63 & 64	Calculations for accelerated CCA differences per year, based on actual capital additions. Calculations include: underpreciated capital cost continuity schedules for each year itemized by CCA class, calculated PILs/tax differences, grossed-up PILs/tax differences. other applicable information	Ex 9 - 9.2.4
64	Confirmation that Account 1592 amounts related to ICM/ACM have been included in the account, if applicable	N/A - no ACM or ICM
64	Reconciliation of these amounts to the amounts presented in Account 1592 sub-account CCA changes in the DVA continuity schedule	Ex 9 - 9.2.4
64	If a distributor does not have a balance in this sub-account, the distributor must explain why	Ex 9 - 9.2.4
Disposition of Account 1509 Impacts Arising from the COVID-19 Emergency		
64 & 65	If requesting disposition of any amounts related to the COVID-19 Account, the following, at a minimum is to be provided: -Discussion regarding the interactions between the COVID-19 Account and other existing generic or utility-specific accounts, including a determination that there is no double-counting between multiple ratemaking mechanisms -Calculation showing that the distributor passes the ROE-based means tests, including limitations on recoveries when various ROE thresholds are reached, and that the appropriate recovery rates for each sub-account have been applied -Supporting calculations for the annual amounts recorded in each of the sub-accounts, including the methodology used to measure incremental costs and savings, as applicable - Discussion of causation, materiality, prudence of any amounts recorded in the sub-accounts, including all identified savings and cost reductions -Discussion of whether the distributor would be able to reasonably forecast any further entries in the account, up to the effective date of the new rates, so that the account may be disposed in its entirety in the current proceeding (and whether the distributor would be amenable to such an approach) -Statement confirming proposed discontinuation of the COVID-19 Account, effective the same date as the new rates. If this is not the case, supporting rationale provided	Ex 9 - 9.2.4
Disposition of Account 1508, Sub-account Pole Attachment Revenue Variance		
65	A table showing the calculation of the account balance, the annual balance broken down customer type, if applicable and: -the number of poles used in the calculation -the pole attachment charge incorporated in rates -the updated charge May also foecast the balance to the effective date of its new rates	Ex 9 - 9.2.4
Disposition of Distributor-Specific Accounts		
66	For any material, distributor-specific accounts requested for disposition (e.g., Account 1508 sub-accounts), supporting evidence showing how the annual balance is derived and relevant accounting order should be provided. For distributor-specific accounts requested for disposition that are not material, provide a brief explanation for the account balance and the relevant accounting order.	Ex 9 - 9.2.4
Establishment of New Deferral and Variance Accounts		
66 & 67	If new DVA - evidence provided which demonstrates that the requested DVA meets the following criteria: causation, materiality, prudence; include draft accounting order with description of the mechanics of the account, provide examples of general journal entries and the proposed account duration	Ex 9 - 9.5 (N/A)
Lost Revenue Adjustment Mechanism Variance Account		
67	In preparing claims related to disposition of outstanding LRAMVA balances, distributors may seek to claim savings from Conservation First Framework (CFF) programs, and from programs they delivered through the Local Program Fund that was part of the Interim Framework. Distributors should provide sufficient supporting documentation on project savings to support their claim	Ex 9 - 9.4.4 (N/A)
Disposition of LRAMVA		
68	Disposition sought of all outstanding LRAMVA balances related to previously established LRAMVA thresholds	Ex 9 - 9.4.4 (N/A)
69	Current version of LRAMVA Work Form (Excel)	N/A - no LRAM
An application for lost revenues should include:		
69	Final Verified Annual Reports if claiming lost revenues from savings from CDM programs delivered in 2017 or earlier	N/A - no LRAM

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69	Participation and Cost reports and detailed project level savings in Excel format made available by the IESO	N/A - no LRAM
69	Other supporting evidence with an explanation and rationale should be provided to justify the eligibility any other savings from a program delivered by a distributor after April 15, 2019	N/A - no LRAM
69	Personal information and commercially sensitive information removed, or if required, filed in accordance with OEB's Rules of Practice and Procedure and Practice Direction on Confidential Filings	N/A - no LRAM
An application for lost revenues should also provide:		
70	Statement identifying the year(s) of new lost revenues and prior year savings persistence claimed in the LRAMVA disposition	N/A - no LRAM
70	Statement confirming LRAMVA based on verified savings results supported by the distributors final Verified Annual Reports and Persistence Savings Report (both filed in Excel format)	N/A - no LRAM
70	Statement indicating that the distributor has relied on the most recent input assumptions available at the time of program evaluation	N/A - no LRAM
70	Summary table with principal and carrying charges by rate class and resulting rate riders	N/A - no LRAM
70	Statement confirming recovery period; rationale provided for disposing the balance in the LRAMVA if one or more classes does not generate significant rate riders	N/A - no LRAM
70	Details related to the approved CDM forecast savings from the last rebasing application	N/A - no LRAM
70	Statement explaining how rate class allocations for actual CDM savings were determined by class and program for each year	N/A - no LRAM
70	Statement confirming whether additional documentation was provided in support of projects that were not included in distributors final Verified Annual Reports and Participation and Cost Reports (Tab 8 of LRAMVA Work Form as applicable)	N/A - no LRAM
70 & 71	If not already filed in support of a previous LRAMVA application, provide Participation and Cost Reports and detailed project level savings files made available by the IESO and/or other supporting evidence to support the clearance of energy- and/or demand-related LRAMVA balances where final verified results from the IESO are not available - filed in Exel format	N/A - no LRAM
71	For a distributor's street lighting project(s) which may have been completed in collaboration with local municipalities, the following must be provided: explanation of the methodology to calculate street lighting savings, confirmation whether the street lighting projects received funding from the IESO and the appropriate net-to-gross assumption used to calculate streetlighting savings	N/A - no LRAM
For the recovery of lost revenues related to demand savings from street light upgrades, distributors should provide the following information:		
71	Explanation of the forecast demand savings from street lights, including assumptions built into the load forecast from the last CoS application	N/A - no LRAM
71	Confirmation that the street light upgrades represent incremental savings attributable to participation in the IESO program, and that any savings not attributable to the IESO program have been removed	N/A - no LRAM
71	Confirmation that the associated energy savings from the applicable IESO program have been removed from the LRAMVA workform so as not to double count savings	N/A - no LRAM
71	Confirmation that the distributor has received reports from the participating municipality that validate the number and types of bulbs replaced or retrofitted through the IESO program	N/A - no LRAM
71	A table, in live Excel format, that shows the monthly breakdown of billed demand over the period of the street light upgrade project, and the detailed calculations of the change in billed demand due to the street light upgrade project (including data on number of bulbs, types of bulb replaced or retrofitted, average demand per bulb)	N/A - no LRAM
For the recovery of lost revenues related to demand savings from other programs that are not included in the monthly Participation and Cost Reports of the IESO (for example Combined Heat and Power projects), distributors should provide the following information:		
71	The third-party evaluation report that describes the methodology to calculate the demand savings achieved for the program year. In particular, if the proposed methodology is different than the evaluation approaches used by the IESO, an explanation must be provided explaining why the proposed approach is more appropriate	N/A - no LRAM
72	Rationale for net-to-gross assumptions used	N/A - no LRAM
72	Breakdown of billed demand and detailed level calculations in live Excel format	N/A - no LRAM
For program savings up to December 31, 2022 for projects completed after April 15, 2019, a distributor should provide the following:		
72	Related to CFF programs: explanation as to how savings have been estimated based on the available data (i.e., IESO's Participation and Cost Reports) and/or rationale to justify the eligibility of the program savings	N/A - no LRAM
72	Related to programs delivered by a distributor through the Local Program Fund under the Interim CDM Framework: explanation and rationale to justify the eligibility of the additional program savings	N/A - no LRAM
Continuing Use of the LRAMVA for New CDM Acitivities		
72	Indication of whether distributor is requesting the continued use of the LRAMVA for one or more activities related to distribution rate-funded CDM activities or LIP activities	N/A - no LRAM
72	If requesting access to, or use of, the LRAMVA for these activities, demonstration of need for the LRAMVA (or similar mechanism), the proposed LRAMVA threshold, how it intends to support the tracking of lost revenues, and the nature of the documentation that it proposes to provide at the time of LRAMVA disposition	N/A - no LRAM
72	Allocation of the CDM savings for both the LRAMVA and the load forecast provided by customer class and for both kWh and, as applicable to a customer class, kW. Document how CDM savings will be tracked and reported in order to account for differences between forecast revenue loss attributable to CDM activity embedded in rates and actual revenue loss due to the impacts of CDM programs	N/A - no LRAM
Appendix A Cost of Eligible Investments for the Connection of Qualifying Generation Facilities		
Appendix A	If applicable, proposal to divide the costs of eligible investments between the distributor's ratepayers and all Ontario ratepayers per O.Reg. 330/09	N/A - no REG per Ex 2 - 2.10
Appendix A	Appendices 2-FA through 2-FC identifying all eligible investments for recovery	N/A - no REG per Ex 2 - 2.10
Appendix A	For distributors that are already receiving rate protection as a result of a previous application the new (current) cost of service application should include an update to include the actual costs incurred for the investments as well as a depreciation adjustment to calculate a new capital amount for input into Appendices 2-FA through 2-FC. This would generate a new up-to-date rate protection amount for the test year and beyond, which will be subject to the materiality threshold	N/A - no REG per Ex 2 - 2.10