

EB-2022-0295 : 3 : Daniel Violette

COST CLAIM NUMBER
2454

SUBMISSION DEADLINE DATE
January 10, 2025

CLAIM STATUS
Approved by Finance

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

OTHER EB#S

PHASE #*
3

INTERVENOR
Violette, Daniel; +1 (303) 903-3035
dan.violette@rollingenergyresources.com

INTERVENOR COMPANY*
Apex Analytics, LLC, Denver:
Corporation

INTERVENOR TYPE
Full Registrant

HST RATE ONTARIO
0.00

EXCHANGE RATE
1.38

COUNTRY
US

HST NUMBER

LATE SUBMISSION ALLOWED
No

EXTENSION DEADLINE DATE

PARTICIPANTS

| | | | Total (\$) | Total Hours | Participant Claim Status |
|-----|---|--|------------|-------------|--------------------------|
| New | Non-Filing Participant First, Last Name | Filing Participant | | | |
| No | , | Violette, Daniel; +1 (303) 903-3035 dan.violette@rollingenergyresources.com | 12,292.50 | 37.25 | Submitted |

ATTACHMENTS

| Attachment | Document Type | Import Message |
|---|---------------|----------------|
| Time Docket and Invoice Daniel M Violette.pdf | Time Docket | |
| CV Daniel M Violette.pdf | CV | |
| Time Docket and Invoice Daniel M Violette.pdf | Time Docket | |
| AAL EB-2022-0295 Cost Claim 010920251438.pdf | | |

TOTAL LEGAL/CONSULTANT/OTHER FEES
12,292.50

TOTAL DISBURSEMENTS
0.00

TOTAL HST
0.00

TOTAL CLAIM
12,292.50

TOTAL AMOUNT AWARDED

TOTAL HOURS CLAIMED
37.25

TOTAL HOURS DISALLOWED

REASON FOR
DISALLOWANCE

REASON FOR
DISALLOWANCE - 2

REASON FOR
DISALLOWANCE - 3

MAKE CHEQUE PAYABLE TO
Daniel M. Violette

SEND PAYMENT TO ADDRESS
Daniel M. Violette
810 S. Milwaukee ST
Denver, Colorado 80209

ATTENTION

SUBMIT SECTION

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

This cost claim does not include any costs for work done, or time spent, by a person that is an employee or officer of the Party as described in section 6.05 and 6.09 of the OEB's Practice Direction on Cost Awards.

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

SUBMITTED BY
Daniel M. Violette

DATE SUBMITTED
January 09, 2025

| | | | |
|---|--|---|--|
| CASE EB-2022-0295: Initiatives: Policy Dev, CDM: Ontario Energy Board | COST CLAIM EB-2022-0295 : 3 : Daniel Violette | INTERVENOR NAME Violette, Daniel; +1 (303) 903-3035 dan.violette@rollingenergyresources.com | PARTICIPANT CLAIM STATUS Submitted |
| FILING PARTICIPANT Violette, Daniel; +1 (303) 903-3035 dan.violette@rollingenergyresources.com | NEW PARTICIPANT No | NON-FILING PARTICIPANT F. NAME | NON-FILING PARTICIPANT L. NAME |
| SERVICE PROVIDER TYPE* Consultant | YEAR CALLED TO BAR* | COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE* 20 | HOURLY RATE 330 |
| HST RATE CHARGED* 0.00 | CV STATUS (FOR CONSULTANT/ANALYST) CV Attached | LAST CV DATE January 09, 2025 | OVERRIDE HOURLY RATE No |
| HST NUMBER | HEARINGS No | CONSULTATIONS Yes | DISBURSEMENTS No |

Attachments**Attachment**

Time Docket and Invoice Daniel M
Violette.pdf
CV Daniel M Violette.pdf

Document Type

Time Docket and Invoice

CV

Import Message

CONSULTATION

| Consultation | | Consultations | | Consultations | | Consultations | | |
|--------------|--|------------------|-------|----------------|-----------|---------------|-----|-------|
| Hours | | Subtotal (\$) | | Total Tax (\$) | | Total (\$) | | |
| 37.25 | | 12,292.50 | | 0.00 | | 12,292.50 | | |
| Description | | Maximum Hours | Hours | Hourly Rate | Sub Total | HST Rate | HST | Total |
| 1 | SAG Meeting # 22 - April 25, 2024 | 4.00 | 0.00 | 330 | | 0.00 | | |
| 2 | APS review and discussions, including key inputs and comments on draft potential results May 1, 2024 | 10.00 | 0.00 | 330 | | 0.00 | | |
| 3 | Review and comment: Preliminary SAG Report draft chapters (May 1-Jul 31) | 6.00 | 0.00 | 330 | | 0.00 | | |
| 4 | SAG Meeting #23 May 9, 2024 | 4.00 | 0.00 | 330 | | 0.00 | | |
| 5 | SAG Meeting #24 May 16, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 6 | Review and comment: APS Comment Respond Round 7 May 23, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |
| 7 | SAG Meeting #25 May 23, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 8 | SAG Meeting #26 May 28, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 9 | SAG Meeting #27 June 6, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 10 | SAG Meeting #28 June 13, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 11 | Review and Comment: Final Draft APS Results June 14, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |
| 12 | Review and Comment: Final Measure Characterization Results June 18, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |
| 13 | SAG Meeting #29 June 20, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 14 | Review and Comment: SAG Feedback for June Stakeholder Session June 20, 2024 | 0.50 | 0.00 | 330 | | 0.00 | | |
| 15 | 2026-2030 EGI DSM Pre-Application Meeting June 27, 2024 | 6.50 | 0.00 | 330 | | 0.00 | | |
| 16 | SAG Meeting #30 July 11, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 17 | SAG Meeting #31 July 16, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 18 | Review and Comment: Custom C&I Proxy NTG Value - Expert Panel July 16, 2024 | 1.50 | 0.00 | 330 | | 0.00 | | |
| 19 | SAG Meeting #32 July 30, 2024 | 3.50 | 0.00 | 330 | | 0.00 | | |
| 20 | SAG Meeting #33 - Joint with EAC August 1, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |
| 21 | Review and Comment: Final SAG Report chapters (Aug 1 to Oct 31) | 12.00 | 0.00 | 330 | | 0.00 | | |
| 22 | SAG Meeting #34 - Joint with EAC August 14, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |
| 23 | DSM Engagement Session - Commercial and Industrial DSM program planning Aug 15, 2024 | 7.00 | 0.00 | 330 | | 0.00 | | |
| 24 | DSM Engagement Session - Residential and Income Qualified DSM program planning Aug 22, 2024 | 7.00 | 0.00 | 330 | | 0.00 | | |
| 25 | SAG Meeting #35 - Joint with EAC August 28, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |
| 26 | SAG Meeting #36 - Joint with EAC September 19, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 27 | Review and Comment: Draft APS Report September 26, 2024 | 12.00 | 0.00 | 330 | | 0.00 | | |
| 28 | SAG Meeting #37 Joint with EAC September 26, 2024 | 3.75 | 0.00 | 330 | | 0.00 | | |
| 29 | SAG Meeting #38 Joint with EAC October 3, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |

| | <u>Description</u> | <u>Maximum Hours</u> | <u>Hours</u> | <u>Hourly Rate</u> | <u>Sub Total</u> | <u>HST Rate</u> | <u>HST</u> | <u>Total</u> |
|----|---|--------------------------|--------------|------------------------|------------------|-----------------|------------|--------------|
| 30 | DSM Engagement Session - Portfolio Summary View October 3, 2024 | 2.00 | 0.00 | 330 | | 0.00 | | |
| 31 | Review and Comment: APS Report Comment Follow-up October 17, 2024 | 1.50 | 0.00 | 330 | | 0.00 | | |
| 32 | EAC Review and Comment: CPSV Batch 3 May 10, 2024 | 1.00 | 0.00 | 330 | | 0.00 | | |
| 33 | EAC Review and Comment: CPSV Batch 4 May 13, 2024 | 0.50 | 0.00 | 330 | | 0.00 | | |
| 34 | EAC Meeting #16 May 15, 2024 | 1.50 | 1.50 | 330 | 495.00 | 0.00 | | 495.00 |
| 35 | EAC Review and Comment: Draft Scope of Work-2023 Annual Verification May 20, 2024 | 1.50 | 1.50 | 330 | 495.00 | 0.00 | | 495.00 |
| 36 | EAC Meeting #17 May 21, 2024 | 2.00 | 2.00 | 330 | 660.00 | 0.00 | | 660.00 |
| 37 | EAC Review and Comment: 2023 Ag Spillover Survey Guide May 23, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 38 | EAC Meeting #18 May 28, 2024 | 2.00 | 2.00 | 330 | 660.00 | 0.00 | | 660.00 |
| 39 | EAC Review and Comment: Draft TRM Work Plan July 4, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 40 | EAC Review and Comment: Free Ridership Approach for future studies July 15, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 41 | EAC Review and Comment: Free Ridership Participant Vendor Survey July 3, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 42 | EAC Review and Comment: CPSV Batch 5 July 8, 2024 | 1.00 | 0.00 | 330 | | 0.00 | | |
| 43 | EAC Review and Comment: Free Ridership Participant Vendor Survey pt 2 July 15, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 44 | EAC Review and Comment: Custom C&I Proxy NTG Value - Expert Panel July 16, 2024 | 1.50 | 1.50 | 330 | 495.00 | 0.00 | | 495.00 |
| 45 | EAC Review/Comment: CPSV Batch 6 July 22, 2024 | 1.00 | 0.00 | 330 | | 0.00 | | |
| 46 | EAC Meeting #19 July 23, 2024 | 2.00 | 2.00 | 330 | 660.00 | 0.00 | | 660.00 |
| 47 | SAG Meeting #33 - Joint with EAC August 1, 2024 | 2.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 48 | EAC Meeting #20 August 6, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 49 | EAC Review and Comment: CPSV Batch 7 August 8, 2024 | 1.00 | 0.00 | 330 | | 0.00 | | |
| 50 | SAG Meeting #34 - Joint with EAC August 14, 2024 | 2.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 51 | EAC Review and Comment: CPSV Batch 8 August 19, 2024 | 1.00 | 0.00 | 330 | | 0.00 | | |
| 52 | EAC Meeting #21 August 20, 2024 | 0.50 | 0.50 | 330 | 165.00 | 0.00 | | 165.00 |
| 53 | SAG Meeting #35 - Joint with EAC August 28, 2024 | 2.00 | 2.00 | 330 | 660.00 | 0.00 | | 660.00 |
| 54 | EAC Review and Comment: Draft 2023 Free Ridership Evaluation Report August 30, 2024 | 2.00 | 2.00 | 330 | 660.00 | 0.00 | | 660.00 |
| 55 | EAC Review and Comment: CPSV Batch 9 September 4, 2024 | 0.50 | 0.00 | 330 | | 0.00 | | |
| 56 | EAC Meeting #22 September 5, 2024 | 1.25 | 1.25 | 330 | 412.50 | 0.00 | | 412.50 |
| 57 | EAC Review and Comment: CPSV Batch 9 pt 2, September 10, 2024 | 0.50 | 0.00 | 330 | | 0.00 | | |
| 58 | EAC Meeting #23 September 17, 2024 | 2.00 | 2.00 | 330 | 660.00 | 0.00 | | 660.00 |
| 59 | SAG Meeting #36 - Joint with EAC September 19, 2024 | 3.75 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 60 | SAG Meeting #37 - Joint with EAC September 26, 2024 | 3.75 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |

| | <u>Description</u> | <u>Maximum Hours</u> | <u>Hours</u> | <u>Hourly Rate</u> | <u>Sub Total</u> | <u>HST Rate</u> | <u>HST</u> | <u>Total</u> |
|------------------------------------|--|--------------------------|--------------|------------------------|------------------|-----------------|-------------|------------------|
| 51 | SAG Meeting #38 - Joint with EAC October 3, 2024 | 2.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 52 | EAC Review and Comment: Free Ridership Approach for future studies October 9, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| 53 | EAC Review and Comment: Draft Ag Spillover Report October 18, 2024 | 2.50 | 2.50 | 330 | 825.00 | 0.00 | | 825.00 |
| 54 | EAC Review and Comment: Draft 2023 CPSV Report, October 28, 2024 | 2.50 | 1.50 | 330 | 495.00 | 0.00 | | 495.00 |
| 55 | EAC Meeting #24 November 1, 2024 | 2.00 | 2.00 | 330 | 660.00 | 0.00 | | 660.00 |
| 56 | EAC Meeting #25 November 19, 2024 | 1.00 | 1.00 | 330 | 330.00 | 0.00 | | 330.00 |
| Total Legal/Consultant Fees | | | 37.25 | | 12,292.50 | | 0.00 | 12,292.50 |

Attachments

| <u>Attachment</u> | <u>Document Type</u> | <u>Import Message</u> |
|--|-------------------------|-----------------------|
| Time Docket and Invoice Daniel M Violette phase 3-DESKTOP-36DBOPL.pdf | Time Docket and Invoice | Invoice |
| CV Daniel M Violette.pdf | CV | |

Hearings, Consultations, Disbursements Attachments

| <u>Attachment</u> | <u>Document Type</u> | <u>Claim Type</u> | <u>Import Message</u> |
|--|-------------------------|-------------------|-----------------------|
| Time Docket and Invoice Daniel M Violette.pdf | Time Docket and Invoice | Hearings | |
| CV Daniel M Violette.pdf | CV | Hearings | |
| Time Docket and Invoice Daniel M Violette phase 3-DESKTOP-36DBOPL.pdf | Time Docket and Invoice | Consultations | Invoice |
| CV Daniel M Violette.pdf | CV | Consultations | |

**Time Docket and Invoice Daniel M Violette
(Hours by Meeting/Activity and Billed Amount)**

| No. | Date | Activity | Maximum Hours | Actual Hours |
|------------|-------------|--|----------------------|---------------------|
| 1 | 10-May-24 | Review and Comment: CPSV Batch 3 | 1.00 | 0.00 |
| 2 | 13-May-24 | Review and Comment: CPSV Batch 4 | 0.50 | 0.00 |
| 3 | 15-May-24 | EAC Meeting #16 | 1.50 | 1.50 |
| 4 | 20-May-24 | Review and Comment: Draft Scope of Work - 2023 Annual Verification | 1.50 | 1.50 |
| 5 | 21-May-24 | EAC Meeting #17 | 2.00 | 2.00 |
| 6 | 23-May-24 | Review and Comment: 2023 Ag Spillover Survey Guide | 1.00 | 1.00 |
| 7 | 28-May-24 | EAC Meeting #18 | 2.00 | 2.00 |
| 8 | 4-Jun-24 | Review and Comment: Draft TRM Work Plan | 1.00 | 1.00 |
| 9 | 15-Jul-24 | Review and Comment: Free Ridership Approach for future studies | 1.00 | 1.00 |
| 10 | 3-Jul-24 | Review and Comment: Free Ridership Participant Vendor Survey | 1.00 | 1.00 |
| 11 | 8-Jul-24 | Review and Comment: CPSV Batch 5 | 1.00 | 0.00 |
| 12 | 15-Jul-24 | Review and Comment: Free Ridership Participant Vendor Survey pt 2 | 1.00 | 1.00 |
| 13 | 16-Jul-24 | Review and Comment: Custom C&I Proxy NTG Value - Expert Panel | 1.50 | 1.50 |
| 14 | 22-Jul-24 | Review and Comment: CPSV Batch 6 | 1.00 | 0.00 |
| 15 | 23-Jul-24 | EAC Meeting #19 | 2.00 | 2.00 |
| 16 | 1-Aug-24 | SAG Meeting #33 - Joint with EAC | 2.00 | 1.00 |
| 17 | 6-Aug-24 | EAC Meeting #20 | 1.00 | 1.00 |
| 18 | 8-Aug-24 | Review and Comment: CPSV Batch 7 | 1.00 | 0.00 |
| 19 | 14-Aug-24 | SAG Meeting #34 - Joint with EAC | 2.00 | 1.00 |
| 20 | 19-Aug-24 | Review and Comment: CPSV Batch 8 | 1.00 | 0.00 |
| 21 | 20-Aug-24 | EAC Meeting #21 | 0.50 | 0.50 |
| 22 | 28-Aug-24 | SAG Meeting #35 - Joint with EAC | 2.00 | 2.00 |
| 23 | 30-Aug-24 | Review and Comment: Draft 2023 Free Ridership Evaluation Report | 2.00 | 2.00 |
| 24 | 4-Sep-24 | Review and Comment: CPSV Batch 9 | 0.50 | 0.00 |

| | | | | |
|--|-----------|--|------------------|-------|
| 25 | 5-Sep-24 | EAC Meeting #22 | 1.25 | 1.25 |
| 26 | 10-Sep-24 | Review and Comment: CPSV Batch 9 pt 2 | 0.50 | 0.00 |
| 27 | 17-Sep-24 | EAC Meeting #23 | 2.00 | 2.00 |
| 28 | 19-Sep-24 | SAG Meeting #36 - Joint with EAC | 3.75 | 1.00 |
| 29 | 26-Sep-24 | SAG Meeting #37 - Joint with EAC | 3.75 | 1.00 |
| 30 | 3-Oct-24 | SAG Meeting #38 - Joint with EAC | 2.00 | 1.00 |
| 31 | 9-Oct-24 | Review and Comment: Free Ridership Approach for future studies | 1.00 | 1.00 |
| 32 | 18-Oct-24 | Review and Comment: Draft Ag Spillover Report | 2.50 | 2.50 |
| 33 | 28-Oct-24 | Review and Comment: Draft 2023 CPSV Report | 2.50 | 1.50 |
| 34 | 1-Nov-24 | EAC Meeting #24 | 2.00 | 2.00 |
| 35 | 19-Nov-24 | EAC Meeting #25 | 1.00 | 1.00 |
| Total Hours | | | 53.25 | 37.25 |
| Invoice Amount @ \$330 per hour | | | 12,292.50 | |

Dan Violette, Ph.D.

Director

Dan.M.Violette@gmail.com
Boulder, CO
Direct: 303.728.2503

Professional Summary

Daniel M. Violette, Ph.D., has 20 years of consulting experience, Dr. Violette has conducted assignments for clients across North America and internationally with an emphasis on the application of quantitative methods to utility planning, rates and pricing. Included in this work are over 100 evaluations of demand-side management (DSM) program portfolios, innovative pricing programs, demand response initiatives and distributed energy resource scenarios. He has authored guidebooks on planning and evaluation for EPRI, Oak Ridge National Laboratories, the International Energy Agency, and he coauthored three reports on quality assurance, econometric and engineering methods, and evaluation approaches for CALMAC/CADMAC (California Demand-side Management Advisory Committee).

He served three elected terms as President of the Association of Energy Services Professionals (AESP) executive board and served two terms as Vice Chair of the Peak Load Management Association. He has published over 25 papers in journals and books, made over 60 contributions to published conference proceedings, and contributed to reports to the US Congress prepared by the Department of Energy, the National Acid Precipitation Assessment Panel (NAPAP), and the National Commission on Air Quality (NCAQ).

His consulting engagements have ranged from focused quick-hit white paper studies to managing multi-year, multi-million dollar assignments. For electric and gas utilities, he has conducted assignments in the areas of resource planning, DSM planning/operations and evaluation, risk assessment, rate design, new energy services analyses, and organizational studies. He has provided support to utilities and financial entities regarding merger and acquisition analyses, rate cases, and regulatory hearings, as well as in securities and environmental litigation. He has testified on these topics in over 20 jurisdictions.

He has conducted onsite workshops at nearly a dozen client sites and numerous workshops on planning, DSM and evaluation for EPRI, as well as training courses for the Association of Energy Services Professionals and the Peak Load Management Alliance. He was selected to teach the workshop on Necessary Statistics and Data Analysis for the evaluation of energy programs (DSM and pricing) at the International Energy Program Evaluation Conference (IEPEC).

Professional Experience

- Conducted a survey of utility demand-response organizations to determine their product and service needs as part of the market due diligence for the acquisition of a competitive DR services company by a private equity investment firm.
- Leading the development of a set of principles and framework for making regulatory decisions on the use of gross savings (prospectively and retrospectively) and net savings (prospectively and retrospectively) along with decisions regarding definition and methods of estimation. For the New England (NEEP) EM&V Forum.
- Directed the evaluation of all EE and DR programs at Kansas City Power & Light with submissions to regulators and stakeholder groups.

Dan Violette, Ph.D.

Director

- Worked with a stakeholders group to assess how to treat gross savings and net savings in an overall EE policy framework. This project included work across the entire subject from definitions to the development of a value-of-information framework based on the assessment of R&D research that resulted in a set of research initiatives to be undertaken by the utilities in Iowa.
- Worked with the US Department of Energy as part of their Uniform Methods Protocols including serving as the lead author on the persistence of demand-side measures effectiveness, and on methods to estimate net savings attributable to demand-side actions.
- Currently working on the design and evaluation of NSTAR's Smart Grid Pilot Program with DR and pricing in response to the legislation passed by the Massachusetts State Legislature.
- Currently involved in developing estimates of load reductions for bidding into the PJM capacity auction on behalf of two Mid-Atlantic (BG&E and PEPCO) utilities including the EM&V plans and meeting the verification requirements.
- Currently leading the evaluation of Maryland's Empower DSM programs for five investor-owned utilities in the State as well as supplying PJM Interconnect with verified permanent load reductions.
- Served as an outside expert reviewer for BC Hydro's peak pricing and conservation pricing programs with written reviews of analytic estimation methods and work with the pricing stakeholder group. Pricing across C&I and residential customers were addressed by the stakeholder group.
- Led the impact evaluation and overseeing the process and operational assessment of Public Service Electric & Gas (PSE&G) company's myPOWER innovative pricing pilot program spanning three years and addressing TOU, CPP and day-ahead RTP rate designs.
- Completing a review of BC Hydro's 2008 DSM Plan on behalf of the Electricity Conservation and Efficiency Advisory Committee in British Columbia.
- Served as an expert to the California Public Utilities Commission on evaluation methods for demand response (DR) programs and approaches for assessing the cost-effectiveness of DR programs.
- Evaluated Hydro One's Double Returns Peak Load Reduction program for the C&I sector.
- Led a DSM technical potential study for Con Ed focused on peak reduction and dispatchable reduction technologies.
- Served as expert staff to the California Public Utilities Commission on evaluation methods for demand response (DR) programs and approaches for assessing the cost-effectiveness of DR programs.
- Lead the implementation of the evaluation of New York State Energy Research and Development Authority's (NYSERDA) utility-SBC funded DSM and DR programs spanning all sectors, including the evaluation of the NYSERDA's new DSM technology development program.

Selected Conference Presentations and Papers

- "Building Confidence in Meeting Energy Efficiency Targets—Addressing Free Riders and Additionality" International Energy Policies and Programmes Evaluation Conference, Berlin, Germany, September 2014.

Dan Violette, Ph.D.

Director

- “Estimating Net Savings: Common Practices” Chapter 21, Uniform Methods Project, US Department of Energy, September 2018.
- “Estimating Net Savings – Methods and Implicit Policies”, NEEP EM&V Forum’s Annual Public Meeting, Portsmouth, NH, December 2013
- “Bottom-Up and Top-Down Approaches for Assessing DSM Program Impacts” Proceedings of the International Energy Program Evaluation Conference (IEPEC), Rome, Italy, June 2012.
- “The Smart Grid and DSM – Working on Integration” Presented at: AESP Fall Technology, Smart Grid, Demand Response & Energy Efficiency Conference, Milwaukee, October 5, 2009
- “Review of BC Hydro’s 2008 DSM Plan as Part of the IRP.” Prepared for: BC Hydro’s Electricity Conservation and Efficiency Advisory Committee, January 22, 2009
- (Over 50 papers since 2000)

Testimony

- Prepared testimony on behalf of Nova Scotia Power Inc. in the matter of An Application to Approve Demand Side Management Plan, pursuant to the Public Utilities Act, 1989 as amended, January, 2008.
- Prepared testimony on behalf of the Piedmont Environmental Council on “Availability of DSM Resources,” related to the need for new transmission lines, Docket PUE-2007-00031, State Corporation Commission of Virginia, 2007.
- Prepared testimony on behalf of the Piedmont Environmental Council on “Availability of DSM Resources including Demand Response,” related to the need for new transmission lines, Docket PUE-2007-00033, State Corporation Commission of Virginia, 2007.
- Testimony related to the Generic DSM Hearings on Behalf of Enbridge in case EB-2006-0021 before the Ontario Energy Board in the matter of a generic proceeding initiated by the Ontario Energy Board to address a number of current and common issues related to demand side management activities including financial incentives for natural gas utilities, July 2006. (Panel of Experts)
- Prepared Testimony on Appropriate DSM Incentives and Alignment with Policy Objectives, written rate case testimony submitted to the Hawaii Public Utilities Commission on behalf of Hawaiian Electric Company, HECO T-12, Docket No. 04-0113, August 2006.
- Expert Report prepared for Constellation NewEnergy, Inc., United States District Court Eastern District of Pennsylvania, Civil Action No. 02-CV-2733, related to demand response / load management programs and technologies, May 2004.

Between 1983 and 1998, testified in 25 regulatory proceedings covering a wide-range of topics related to utility rates and planning.

In addition, Dr. Violette has facilitated stakeholder processes as part of regulatory proceedings and processes, presented at Federal Energy Regulatory Commission expert panels, and prepared expert reports on energy and environmental policies for parties participating in US District Court proceedings, civil cases related to risk assessment and analysis, and EPA rulemaking proceedings.

Dan Violette, Ph.D.

Director

Work History

- Current - Board Member, Lumina Decision Systems and Apex Analytics, Inc.
- Current – Director, Ev.energy
- Managing Director, Navigant Consulting (now Guidehouse)
- Principal and Founder, Summit Blue Consulting
- Sr. VP, Economics and Analytics, Hagler Bailly Consulting, Inc.
- Sr. VP, EDS Management Consultants
- Sr. VP, XENERGY Inc. (now KEMA)

Professional Associations

- Association of Energy Services Professionals (AESP)
- American Evaluation Association (AEA)
- International Association of Energy Economists (IAEE)
- Association of Demand Response and Smart Grid (ADS) – Board Member (now merged with SEPA – Smart Electric Power Alliance)

Education

- Ph.D. Economics, University of Colorado (Highest Honors in both Ph.D. Fields: Econometrics and Industrial Organization).
- MS, Economics, University of Colorado.
- BS, Economics, Arizona State University, (Honors: Scholar of the Year by the ASU Alumni Association, Summa Cum Laude, Outstanding Scholar Economics, Athlete-Scholar Western Athletic Conference).

Time Docket and Invoice Daniel M Violette (Phase 3)
(Hours by Meeting/Activity and Billed Amount)

| No. | Date | Activity | Maximum Hours | Actual Hours |
|------------|-------------|--|----------------------|---------------------|
| 32 | 10-May-24 | Review and Comment: CPSV Batch 3 | 1.00 | 0.00 |
| 33 | 13-May-24 | Review and Comment: CPSV Batch 4 | 0.50 | 0.00 |
| 34 | 15-May-24 | EAC Meeting #16 | 1.50 | 1.50 |
| 35 | 20-May-24 | Review and Comment: Draft Scope of Work - 2023 Annual Verification | 1.50 | 1.50 |
| 36 | 21-May-24 | EAC Meeting #17 | 2.00 | 2.00 |
| 37 | 23-May-24 | Review and Comment: 2023 Ag Spillover Survey Guide | 1.00 | 1.00 |
| 38 | 28-May-24 | EAC Meeting #18 | 2.00 | 2.00 |
| 39 | 4-Jun-24 | Review and Comment: Draft TRM Work Plan | 1.00 | 1.00 |
| 40 | 15-Jul-24 | Review and Comment: Free Ridership Approach for future studies | 1.00 | 1.00 |
| 41 | 3-Jul-24 | Review and Comment: Free Ridership Participant Vendor Survey | 1.00 | 1.00 |
| 42 | 8-Jul-24 | Review and Comment: CPSV Batch 5 | 1.00 | 0.00 |
| 43 | 15-Jul-24 | Review and Comment: Free Ridership Participant Vendor Survey pt 2 | 1.00 | 1.00 |
| 44 | 16-Jul-24 | Review and Comment: Custom C&I Proxy NTG Value - Expert Panel | 1.50 | 1.50 |
| 45 | 22-Jul-24 | Review and Comment: CPSV Batch 6 | 1.00 | 0.00 |
| 46 | 23-Jul-24 | EAC Meeting #19 | 2.00 | 2.00 |
| 47 | 1-Aug-24 | SAG Meeting #33 - Joint with EAC | 2.00 | 1.00 |
| 48 | 6-Aug-24 | EAC Meeting #20 | 1.00 | 1.00 |
| 49 | 8-Aug-24 | Review and Comment: CPSV Batch 7 | 1.00 | 0.00 |
| 50 | 14-Aug-24 | SAG Meeting #34 - Joint with EAC | 2.00 | 1.00 |
| 51 | 19-Aug-24 | Review and Comment: CPSV Batch 8 | 1.00 | 0.00 |
| 52 | 20-Aug-24 | EAC Meeting #21 | 0.50 | 0.50 |
| 53 | 28-Aug-24 | SAG Meeting #35 - Joint with EAC | 2.00 | 2.00 |
| 54 | 30-Aug-24 | Review and Comment: Draft 2023 Free Ridership Evaluation Report | 2.00 | 2.00 |
| 55 | 4-Sep-24 | Review and Comment: CPSV Batch 9 | 0.50 | 0.00 |

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|---------------------------------|-----------|--|-----------|-------|
| 56 | 5-Sep-24 | EAC Meeting #22 | 1.25 | 1.25 |
| 57 | 10-Sep-24 | Review and Comment: CPSV Batch 9 pt 2 | 0.50 | 0.00 |
| 58 | 17-Sep-24 | EAC Meeting #23 | 2.00 | 2.00 |
| 59 | 19-Sep-24 | SAG Meeting #36 - Joint with EAC | 3.75 | 1.00 |
| 60 | 26-Sep-24 | SAG Meeting #37 - Joint with EAC | 3.75 | 1.00 |
| 61 | 3-Oct-24 | SAG Meeting #38 - Joint with EAC | 2.00 | 1.00 |
| 62 | 9-Oct-24 | Review and Comment: Free Ridership Approach for future studies | 1.00 | 1.00 |
| 63 | 18-Oct-24 | Review and Comment: Draft Ag Spillover Report | 2.50 | 2.50 |
| 64 | 28-Oct-24 | Review and Comment: Draft 2023 CPSV Report | 2.50 | 1.50 |
| 65 | 1-Nov-24 | EAC Meeting #24 | 2.00 | 2.00 |
| 66 | 19-Nov-24 | EAC Meeting #25 | 1.00 | 1.00 |
| Total Hours | | | 53.25 | 37.25 |
| Invoice Amount @ \$330 per hour | | | 12,292.50 | |

Dan Violette, Ph.D.

Director

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Professional Summary

Daniel M. Violette, Ph.D., has 20 years of consulting experience, Dr. Violette has conducted assignments for clients across North America and internationally with an emphasis on the application of quantitative methods to utility planning, rates and pricing. Included in this work are over 100 evaluations of demand-side management (DSM) program portfolios, innovative pricing programs, demand response initiatives and distributed energy resource scenarios. He has authored guidebooks on planning and evaluation for EPRI, Oak Ridge National Laboratories, the International Energy Agency, and he coauthored three reports on quality assurance, econometric and engineering methods, and evaluation approaches for CALMAC/CADMAC (California Demand-side Management Advisory Committee).

He served three elected terms as President of the Association of Energy Services Professionals (AESP) executive board and served two terms as Vice Chair of the Peak Load Management Association. He has published over 25 papers in journals and books, made over 60 contributions to published conference proceedings, and contributed to reports to the US Congress prepared by the Department of Energy, the National Acid Precipitation Assessment Panel (NAPAP), and the National Commission on Air Quality (NCAQ).

His consulting engagements have ranged from focused quick-hit white paper studies to managing multi-year, multi-million dollar assignments. For electric and gas utilities, he has conducted assignments in the areas of resource planning, DSM planning/operations and evaluation, risk assessment, rate design, new energy services analyses, and organizational studies. He has provided support to utilities and financial entities regarding merger and acquisition analyses, rate cases, and regulatory hearings, as well as in securities and environmental litigation. He has testified on these topics in over 20 jurisdictions.

He has conducted onsite workshops at nearly a dozen client sites and numerous workshops on planning, DSM and evaluation for EPRI, as well as training courses for the Association of Energy Services Professionals and the Peak Load Management Alliance. He was selected to teach the workshop on Necessary Statistics and Data Analysis for the evaluation of energy programs (DSM and pricing) at the International Energy Program Evaluation Conference (IEPEC).

Professional Experience

- Conducted a survey of utility demand-response organizations to determine their product and service needs as part of the market due diligence for the acquisition of a competitive DR services company by a private equity investment firm.
- Leading the development of a set of principles and framework for making regulatory decisions on the use of gross savings (prospectively and retrospectively) and net savings (prospectively and retrospectively) along with decisions regarding definition and methods of estimation. For the New England (NEEP) EM&V Forum.
- Directed the evaluation of all EE and DR programs at Kansas City Power & Light with submissions to regulators and stakeholder groups.

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- Worked with a stakeholders group to assess how to treat gross savings and net savings in an overall EE policy framework. This project included work across the entire subject from definitions to the development of a value-of-information framework based on the assessment of R&D research that resulted in a set of research initiatives to be undertaken by the utilities in Iowa.
- Worked with the US Department of Energy as part of their Uniform Methods Protocols including serving as the lead author on the persistence of demand-side measures effectiveness, and on methods to estimate net savings attributable to demand-side actions.
- Currently working on the design and evaluation of NSTAR's Smart Grid Pilot Program with DR and pricing in response to the legislation passed by the Massachusetts State Legislature.
- Currently involved in developing estimates of load reductions for bidding into the PJM capacity auction on behalf of two Mid-Atlantic (BG&E and PEPCO) utilities including the EM&V plans and meeting the verification requirements.
- Currently leading the evaluation of Maryland's Empower DSM programs for five investor-owned utilities in the State as well as supplying PJM Interconnect with verified permanent load reductions.
- Served as an outside expert reviewer for BC Hydro's peak pricing and conservation pricing programs with written reviews of analytic estimation methods and work with the pricing stakeholder group. Pricing across C&I and residential customers were addressed by the stakeholder group.
- Led the impact evaluation and overseeing the process and operational assessment of Public Service Electric & Gas (PSE&G) company's myPOWER innovative pricing pilot program spanning three years and addressing TOU, CPP and day-ahead RTP rate designs.
- Completing a review of BC Hydro's 2008 DSM Plan on behalf of the Electricity Conservation and Efficiency Advisory Committee in British Columbia.
- Served as an expert to the California Public Utilities Commission on evaluation methods for demand response (DR) programs and approaches for assessing the cost-effectiveness of DR programs.
- Evaluated Hydro One's Double Returns Peak Load Reduction program for the C&I sector.
- Led a DSM technical potential study for Con Ed focused on peak reduction and dispatchable reduction technologies.
- Served as expert staff to the California Public Utilities Commission on evaluation methods for demand response (DR) programs and approaches for assessing the cost-effectiveness of DR programs.
- Lead the implementation of the evaluation of New York State Energy Research and Development Authority's (NYSERDA) utility-SBC funded DSM and DR programs spanning all sectors, including the evaluation of the NYSERDA's new DSM technology development program.

Selected Conference Presentations and Papers

- "Building Confidence in Meeting Energy Efficiency Targets—Addressing Free Riders and Additionality" International Energy Policies and Programmes Evaluation Conference, Berlin, Germany, September 2014.

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- “Estimating Net Savings: Common Practices” Chapter 21, Uniform Methods Project, US Department of Energy, September 2018.
- “Estimating Net Savings – Methods and Implicit Policies”, NEEP EM&V Forum’s Annual Public Meeting, Portsmouth, NH, December 2013
- “Bottom-Up and Top-Down Approaches for Assessing DSM Program Impacts” Proceedings of the International Energy Program Evaluation Conference (IEPEC), Rome, Italy, June 2012.
- “The Smart Grid and DSM – Working on Integration” Presented at: AESP Fall Technology, Smart Grid, Demand Response & Energy Efficiency Conference, Milwaukee, October 5, 2009
- “Review of BC Hydro’s 2008 DSM Plan as Part of the IRP.” Prepared for: BC Hydro’s Electricity Conservation and Efficiency Advisory Committee, January 22, 2009
- (Over 50 papers since 2000)

Testimony

- Prepared testimony on behalf of Nova Scotia Power Inc. in the matter of An Application to Approve Demand Side Management Plan, pursuant to the Public Utilities Act, 1989 as amended, January, 2008.
- Prepared testimony on behalf of the Piedmont Environmental Council on “Availability of DSM Resources,” related to the need for new transmission lines, Docket PUE-2007-00031, State Corporation Commission of Virginia, 2007.
- Prepared testimony on behalf of the Piedmont Environmental Council on “Availability of DSM Resources including Demand Response,” related to the need for new transmission lines, Docket PUE-2007-00033, State Corporation Commission of Virginia, 2007.
- Testimony related to the Generic DSM Hearings on Behalf of Enbridge in case EB-2006-0021 before the Ontario Energy Board in the matter of a generic proceeding initiated by the Ontario Energy Board to address a number of current and common issues related to demand side management activities including financial incentives for natural gas utilities, July 2006. (Panel of Experts)
- Prepared Testimony on Appropriate DSM Incentives and Alignment with Policy Objectives, written rate case testimony submitted to the Hawaii Public Utilities Commission on behalf of Hawaiian Electric Company, HECO T-12, Docket No. 04-0113, August 2006.
- Expert Report prepared for Constellation NewEnergy, Inc., United States District Court Eastern District of Pennsylvania, Civil Action No. 02-CV-2733, related to demand response / load management programs and technologies, May 2004.

Between 1983 and 1998, testified in 25 regulatory proceedings covering a wide-range of topics related to utility rates and planning.

In addition, Dr. Violette has facilitated stakeholder processes as part of regulatory proceedings and processes, presented at Federal Energy Regulatory Commission expert panels, and prepared expert reports on energy and environmental policies for parties participating in US District Court proceedings, civil cases related to risk assessment and analysis, and EPA rulemaking proceedings.

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Work History

- Current - Board Member, Lumina Decision Systems and Apex Analytics, Inc.
- Current – Director, Ev.energy
- Managing Director, Navigant Consulting (now Guidehouse)
- Principal and Founder, Summit Blue Consulting
- Sr. VP, Economics and Analytics, Hagler Bailly Consulting, Inc.
- Sr. VP, EDS Management Consultants
- Sr. VP, XENERGY Inc. (now KEMA)

Professional Associations

- Association of Energy Services Professionals (AESP)
- American Evaluation Association (AEA)
- International Association of Energy Economists (IAEE)
- Association of Demand Response and Smart Grid (ADS) – Board Member (now merged with SEPA – Smart Electric Power Alliance)

Education

- Ph.D. Economics, University of Colorado (Highest Honors in both Ph.D. Fields: Econometrics and Industrial Organization).
- MS, Economics, University of Colorado.
- BS, Economics, Arizona State University, (Honors: Scholar of the Year by the ASU Alumni Association, Suma Cum Laude, Outstanding Scholar Economics, Athlete-Scholar Western Athletic Conference).