EB-2024-0126 : 1 : Avi Lipsitz

COST CLAIM NUMBER	SUBMISSION DEADLINE DATE	CLAIM STATUS
2722	May 29, 2025	Submitted
EB#	**OTHER EB#S**	**PHASE #***
EB-2024-0126: Initiatives: Regulatory Direction and Oversight: Ontario Energy Board		1
INTERVENOR	**INTERVENOR COMPANY***	**INTERVENOR TYPE**
Lipsitz, Avi; +1 (416) 294-3117 alipsitz@poweradvisoryllc.com	Power Advisory LLC, Toronto: Corporation	Full Registrant
HST RATE ONTARIO	**EXCHANGE RATE**	**COUNTRY**
13.00		
HST NUMBER	**LATE SUBMISSION ALLOWED**	**EXTENSION DEADLINE DATE**
813388691RT0001	No	

PARTICIPANTS

New	Non-Filing Participant First, Last Name	Filing Participant	Total ($)	Total Hours	Participant Claim Status
No	,	Hrab, Roy; +1 (416) 303-8667 rhrab@poweradvisoryllc.com	6,648.81	17.83	Submitted
Yes	Travis , Lusney		1,802.35	5.50	Submitted

TOTAL LEGAL/CONSULTANT/OTHER FEES	TOTAL DISBURSEMENTS	TOTAL HST
7,478.90	0.00	972.26
TOTAL CLAIM	**TOTAL AMOUNT AWARDED**	
8,451.16		
TOTAL HOURS CLAIMED	**TOTAL HOURS DISALLOWED**	
23.33		
REASON FOR DISALLOWANCE	**REASON FOR DISALLOWANCE - 2**	**REASON FOR DISALLOWANCE - 3**

MAKE CHEQUE PAYABLE TO
Power Advisory LLC

SEND PAYMENT TO ADDRESS
700-55 University Ave.
P.O. Box 32
Toronto, ON
M5J 2H7

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	DATE SUBMITTED
Avi Lipsitz	May 28, 2025

Roy Hrab

May 28, 2025

CASE
EB-2024-0126: Initiatives: Regulatory Direction and Oversight: Ontario Energy Board

COST CLAIM
EB-2024-0126 : 1 : Avi Lipsitz

INTERVENOR NAME
Lipsitz, Avi; +1 (416) 294-3117
alipsitz@poweradvisoryllc.com

PARTICIPANT CLAIM STATUS
Submitted

FILING PARTICIPANT
Hrab, Roy; +1 (416) 303-8667
rhrab@poweradvisoryllc.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*
22

HOURLY RATE
330

HST RATE CHARGED*
13.00

CV STATUS (FOR CONSULTANT/ANALYST)
CV Attached

LAST CV DATE
May 28, 2025

OVERRIDE HOURLY RATE
No

HST NUMBER
813388691RT0001

HEARINGS
No

CONSULTATIONS
Yes

DISBURSEMENTS
No

CONSULTATION

Consultation Hours	Consultations Subtotal ($)	Consultations Total Tax ($)	Consultations Total ($)
17.83	5,883.90	764.91	6,648.81

	Description	Maximum Hours	Hours	Hourly Rate	Sub Total	HST Rate	HST	Total
1	Written Comments on OEB Letter - April 24, 2024	5.00	0.50	330	165.00	13.00	21.45	186.45
2	Tranmission Connections Review Meeting #1 - August 26, 2024	3.75	2.58	330	851.40	13.00	110.68	962.08
3	Tranmission Connections Review Meeting #2 - October 28, 2024	3.75	3.50	330	1,155.00	13.00	150.15	1,305.15
4	Tranmission Connections Review Meeting #3 - December 2, 2024	3.00	2.75	330	907.50	13.00	117.98	1,025.48
5	Written Comments on Notice of Proposal to Amend TSC - January 27, 2025	5.00	5.00	330	1,650.00	13.00	214.50	1,864.50
6	Tranmission Connections Review Meeting #4 - April 9, 2025	3.00	2.00	330	660.00	13.00	85.80	745.80
7	Tranmission Connections Review Meeting #5 - April 30, 2025	2.25	1.50	330	495.00	13.00	64.35	559.35
	Total Legal/Consultant Fees		**17.83**		**5,883.90**		**764.91**	**6,648.81**

Attachments

Attachment	Document Type	Import Message
CV - Roy Hrab.pdf	CV	
REASCWA TCR Invoices.pdf	Invoice	
Time log - Roy Hrab.pdf	Time Docket	

Hearings, Consultations, Disbursements Attachments

Attachment	Document Type	Claim Type	Import Message
CV - Roy Hrab.pdf	CV	Consultations	
REASCWA TCR Invoices.pdf	Invoice	Consultations	
Time log - Roy Hrab.pdf	Time Docket	Consultations	

Roy Hrab
Senior Manager, Policy Research

Power Advisory LLC
55 University Avenue
Suite 700, P.O. Box 32
Toronto, ON M5J 2H7
Tel: (416) 433-6737
rhrab@poweradvisoryllc.com

SUMMARY

Roy is an electricity sector professional with over 20 years of experience. He offers broad and unique energy sector experience over a wide range of regulatory and policy matters, having worked for the government, regulator and industry. He has extensive experience collaborating on policy development with senior executives and staff of the Government of Ontario, Ontario Energy Board (OEB), Independent Electricity System Operator (IESO), regulated electric and gas utilities, technology and service providers, and other sector stakeholders.

Roy has supported clients on a board range of electricity regulatory and policy matters, including sector evolution, energy affordability, grid modernization, business development opportunities, energy transition, distribution system operator models, and distributed energy resources.

Prior to joining Power Advisory, Roy was a Special Advisor at the Ontario Ministry of Energy, providing strategic advice to senior executives on the mandate and governance of the OEB, Ontario's energy regulator. While at the Ministry, he also provided policy advice and research support to the Electrification and Energy Transition Panel, an advisory body established to help Ontario's economy prepare for electrification and the energy transition.

Previously, Roy was the Director of Policy at the Ontario Energy Association, where he helped lead the development of policy positions, priorities and advocacy strategies as well as representing the industry's interests before the government, regulator and system operator.

Roy served at the OEB for over eleven years. While at the OEB, he worked on a variety of policy issues and adjudicative proceedings, including time-of-use pricing and smart metering, compliance and rate hearings, smart grid and distributed energy resources, generator connection policies, review of the integrated power system plan and procurement processes, as well as providing interpretation of legal and regulatory requirements to stakeholders.

In addition to his energy sector experience, Roy has held public policy research positions at the Institute for Competitiveness & Prosperity and the Panel on the Role of Government in Ontario.

He holds BA and MA degrees in Economics from the University of Toronto.

Professional History

Power Advisory LLC, Senior Manager, Policy Research (2023-present)
Ontario Ministry of Energy, Special Advisor (2022-2023)
Ontario Energy Association, Director of Policy (2016-2022)
Ontario Energy Board, Policy Advisor (2005-2016)
Institute for Competitiveness & Prosperity, Senior Researcher (2004-2005)
Panel on the Role of Government in Ontario, Research Associate (2002-2004)

Education

University of Toronto
Hon. BA, Specialist in Economics
MA, Economics

PROFESSIONAL EXPERIENCE

Regulatory Policy

- For multiple clients provided strategic advice on Ontario's electricity regulatory framework including electricity market design, legislation, regulation, system codes, and policy design. Clients include the Ontario Energy Association (OEA), Toronto Hydro, Alectra Utilities, Hydro Ottawa, Atura Power, Energy Storage Canada (ESC), The Atmospheric Fund, Rodan Energy, and Electricity Distributors Association (EDA).
- Made submissions on behalf of the Canadian Renewable Energy Association, Energy Storage Canada, and the Ontario Waterpower Association (collectively, "REASCWA") on the IESO's Request to Amend Licence EI-2013-0066 (EB-2024-0128) application to the OEB.
- Represented REASCWA at the OEB's Transmission Connections Review Working Group.
- Provided advice and developed submissions for housing developers participating in the OEB's policy review of the electricity distribution system expansion for housing development and proposed amendments to the Distribution System Code (DSC) to facilitate the connection of housing developments and residential customers
- Represented the OEA at OEB and IESO working groups and stakeholder meetings, including market renewal, CDM framework mid-term review, framework for energy innovation, innovation sandbox, and distributed energy resources connections review.
- Planned, conducted, and provided studies, in-depth analysis, research and advice to OEB executives and senior management on energy related issues, including new developments, industry trends, initiatives, policies, and practices.
- Prepared various staff discussion papers, staff reports, summaries of stakeholder submissions, and code amendments for the OEB.
- Led development of OEB's Regulated Price Plan (RPP) Roadmap, setting out a plan to redesign the RPP to respond to policy objectives, improve system efficiency, and give consumers greater control over their electricity use and bills. Oversaw supplementary research undertaken by external consultants related to qualitative consumer research using focus groups and surveys, behavioural economics, and a jurisdictional review of dynamic electricity pricing.
- Led OEB's policy review of micro-embedded generation connection issues, including the development of a staff discussion paper, review of stakeholder comments, and proposals to amend the OEB's Distribution System Code for the connection of micro-embedded generation facilities.
- Led development of OEB's Guidance for the Implementation of Smart Grid in Ontario setting out the Board Board's expectations for regulated entities in the preparation of their plans for the development and implementation of the smart grid and identify the criteria for the Board to evaluate such plans.
- Led the OEB's implementation and monitoring of mandatory time-of-use pricing implementation and smart meter installation.
- Led revisions to the Distribution System Code on the approach to assigning connection cost responsibility between an electricity distributor and a generator on the connection of renewable generation facilities to distribution systems to facilitate implementation of the Government's policy objectives regarding renewable generation.

- Led development of amendments to the Distribution System Code to require electricity distributors to install an interval meter on any installation that forecast by the distributor to have a monthly average peak demand during a calendar year of over 50 kW.
- Prepared staff discussion paper examining the issue of large customer commodity payment default risk management by electricity distributors, with a view to identifying whether risk mitigation tools that were available to distributors were adequate for the purpose of managing such risk and protecting ratepayers.
- Prepared staff discussion paper regarding the development of filing requirements for transmission infrastructure investments, proposing a potential cost/benefit analysis framework to evaluate and rank transmission investment proposals compared to alternatives.
- Supported and represented OEB staff at hearings through the preparation of interrogatories, cross-examination questions, and/or staff submissions, including the Smart Metering Entity's Smart Metering Charge, Ontario Power Authority's (OPA) revenue requirement, review of the Integrated Power System Plan as well as compliance cases and electricity distributor incentive regulation mechanisms rate applications.

Government Policy

- Assessed and evaluated the OEB's business plan and annual report to provide advice to the Minister of Energy to facilitate the minister's review and approval of the plan and report.
- Monitored corporate projects/initiatives related to Agency governance to ensure that OEB governance and program directions were consistent with government/ministry strategic directions and priorities.
- Contributed to the development of the Ministry's policy vision for the OEB, including through the development of an annual Letter of Direction.
- Provided advice to senior ministry executives on how to promote effective information sharing and collaboration with the OEB in a manner that recognized the OEB's independence from government and consistent with legislation, regulation, directives, and the Memorandum of Understanding.
- Maintained a current awareness and expertise regarding ongoing policy and program issues related to the OEB with special emphasis on issues relating to governance and administration.
- Provided support and assistance to senior ministry officials in their dealings with the OEB and related partners and stakeholders.
- Supported OEA interests at meetings with Minister's office staff, Ministry staff, IESO and the OEB on various energy policy and regulatory matters.

Energy Policy

- Supported development of a report advocating for an overarching policy and regulatory framework to enable Distributed Energy Resources (DERs) to play a larger role in meeting Ontario's electricity resource needs and supporting economic growth for the OEA and ESC. The report focussed on the importance of enabling Local Distribution Company (LDC)-led DER procurements and making the grid modernization investments necessary to integrate and manage DERs.
- Prepared report on international approaches to energy affordability and poverty for Electricity Canada.
- Conducted research and analysis for utility clients on the development and evolution of electricity distribution utilities to Distributor System Operator (DSO) models, including the required grid modernization investments, policy and regulatory frameworks, and associated strategies towards implementing DSOs within Ontario's electricity market.
- Supported research, consultation with EDA members and drafting of the report entitled Solving Grid-Lock: Our Vision for a Customer-Centric Energy Transition, which described how to make Ontario grid-ready to

achieve low-carbon economy objectives by addressing climate action policies, increasing electrification, driving for new and expanded infrastructure, and meeting evolving customer needs.

- Supported the Electrification and Energy Transition Panel by undertaking jurisdictional research, analysis, and providing policy advice on energy transition and net zero policies and plans in Canada, the United States, and Europe.
- Led the preparation of the initial draft synthesis of research and engagement session findings to formulate recommendations for the Electrification and Energy Transition Panel on its key themes of Energy Planning; Governance and Accountability; Community and Customer Perspectives, Affordability and Energy Sector Objectives; and Facilitating Economic Growth.
- Led the development of the OEA's 2022 Energy Platform to provide Ontario's political parties with recommendations on how to optimize energy policies for Ontario energy consumers. The recommendations focussed on five key areas: comprehensive and coordinated planning; optimizing the use of existing infrastructure; investing in infrastructure, technology and adaptation; investing in energy efficiency; and achieving behavioral change.

Stakeholder Engagement and Consultation

- Supported Ontario's Electrification and Energy Transition Panel stakeholder engagement process, including roundtables, with Indigenous partners and energy sector stakeholders through assisting in the development of discussion guides, presentations, post-engagement notes, as well as the questions used for the Panel's open call for written feedback.
- Led the Ontario Energy Association's (OEA) Regulatory Committee and Climate Change & Energy Efficiency Committee, comprised of senior leaders from broad spectrum of energy sector companies, in the development of positions, submissions, and advocacy plans related to many provincial energy policies and regulatory proposals, such as energy transition, net zero, load serving entities, geologic carbon storage, hydrogen strategy, long-term energy planning, CDM/DSM, innovation, regulatory reform, net metering, regulatory burden, electricity bill design, minimizing system costs, and pre-budget submissions.
- Supported report drafting, agenda preparation, meeting notes and facilitation of the OEA's Interconnection Working Group (IWG), composed of local distribution companies and storage project developers, which was created to investigate and identify improvements to the connection process for behind-the-meter non-injecting energy storage facilities in Ontario. The IWG reached consensus on areas for improvement and submitted the report as an input into the OEB's Distributed Energy Resources Connections Review.
- Led the Ontario Energy Board's (OEB) Smart Grid Advisory Committee to provide the OEB with ongoing assistance on emerging smart grid issues as the OEB facilitated the development and implementation of smart grid in Ontario. This process provided consumers, distributors, generators, transmitters and others with an interest in the development of smart grid with an opportunity to provide advice and recommendations for consideration by the OEB with a focus on issues related to data access for low volume customers, energy storage, and cybersecurity.

Selected Speaking Engagements

- "International Approaches to Energy Affordability," Presentation to Electricity Canada Customer Council, Toronto, November 26, 2024.
- "Electricity Pricing and Market Renewal Program," Presentation to Canadian Manufacturers & Exporters' Ontario Energy Committee, September 17, 2024.
- "Comparing Apples and Oranges: Building the Right Basket of Grid Solutions," Panelist at GridFWD 2018, Vancouver, October 10, 2018.
- "OEB Modernization Review Panel," Presentation at OEA Conversations That Matter, Toronto, May 3, 2018.
- "How to Not Cut Ourselves with the 'Swiss Army Knife'? Regulatory Perspectives on Energy Storage," Panelist at Canada Energy Storage Summit, Electric Utility Consultants Inc., Toronto, November 13, 2014.
- "Interval Metering for GS>50 Customers," Presentation at EDA (Electricity Distributors Association) Niagara Grand and Western Districts' Joint Metering Exhibition and Workshop, London, November 12, 2014.
- "Retrenchment in North American Electricity Restructuring?" Presentation at the Electricity Industry Restructuring and the Future of Continental Electricity Markets Symposium, Canadian Institute of Resources Law, Ottawa, November 3, 2003.
- "Electricity Restructuring in Ontario," (with Michael Trebilcock), Paper presented at the 2003 Meetings of the Canadian Law and Economics Association, Toronto, September 19, 2003.

Selected Publications

Refereed Articles

- "Electricity Restructuring in Ontario," (with M. Trebilcock) The Energy Journal, 26 (1), 2005, pp. 123-46.

Book Chapters

- "Climate Change and the Coal Challenge: The Case of Ontario," (with Peter Fraser) in G. Kaiser and B. Heggie (eds.) Energy Law and Policy, Carswell, 2011, pp. 445-462.
- "Ontario: The Road to Off-coal is Paved with Speed Bumps," (with P. Fraser) in F. P. Sioshansi (ed.) Electricity Generation in a Carbon Constrained World, Elsevier, 2009, pp. 347-67.
- "Electricity Restructuring in Canada," (with M. Trebilcock) in F. P. Sioshansi and W. Pfaffenberger (eds.) Electricity Market Reform: An International Perspective, Elsevier, 2006, pp. 419-49.

Commentaries and Other

- "A Tipping Point? The Minister's 2024 Letter of Direction to the OEB," Power Advisory, January 6, 2025.
- "The Right Stuff? The Role of the OEB in Ontario's Energy Transition," Power Advisory, December 19, 2024.
- "From Small To Mighty: Unlocking DERs to Meet Ontario's Electricity Needs," (with Sarah Simmons), Power Advisory, December 12, 2024.
- "Ontario Moves to Accelerate Grid Expansion and Connections," Power Advisory, October 30, 2024.
- "Ontario's Vision And Plan To Tackle The Energy Transition," Power Advisory, October 28, 2024.
- "Addressing Ontario's Supply Gap with a New Energy Efficiency Framework," (with Kausar Ashraf), Power Advisory, October 18, 2024.
- "Waiting for Grid Modernization," Power Advisory, June 18, 2024.
- "Towards Developing a Natural Gas (and Energy Transition) Policy for Ontario," (with Travis Lusney), Power Advisory, April 1, 2024.
- "Flexible Hosting Capacity Arrangements in Ontario," (with S. Simmons and T. Lusney), Power Advisory, March 1, 2024.
- "Nova Scotia's Clean Electricity Solutions Task Force," (with John Dalton and Jason Chee-Aloy), Power Advisory, February 26, 2024.
- "Ontario's Keeping Energy Costs Down Act," (with Brady Yauch), Power Advisory, February 26, 2024.
- "The Electrification and Energy Transition Panel Report," (with S. Simmons and Avi Lipsitz), Power Advisory, January 2024.
- "The Enbridge Gas Phase 1 Decision: The OEB, the Minister of Energy, the Natural Gas System and the Energy Transition," (with B. Yauch and A. Lipsitz), Power Advisory, January 3, 2024.
- "The 2023 OEB Letter of Direction: The Role of the Regulator in Economic Development, the Energy Transition, and the Future of Natural Gas," Power Advisory, December 11, 2023.
- "Ontario's Industrial Conservation Initiative and the Treatment of Clean Energy Corporate Power Purchase Agreements," (with J. Chee-Aloy), Power Advisory, November 22, 2023.
- "The Electricity Grid, the Energy Transition, and Policy Consistency: Recent Trends," Power Advisory, November 1, 2023.
- "Power Muddle," (with M. Trebilcock and Andrew Green), National Post, March 20, 2004, p. FP11.
- "Peak price metering will spur conservation," (with M. Trebilcock), National Post, December 9, 2003, p. FP11.
- "Voting for voltage: Good luck," (with M. Trebilcock), National Post, September 30, 2003, p. FP11.
- "What Will Keep the Lights on in Ontario: Responses to a Policy Short-Circuit," (with M. Trebilcock), C.D. Howe Commentary 191, 2003.
- "Power-less Ontario," (with M. Trebilcock), National Post, May 29, 2003, p. FP11.

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

Ontario Waterpower Association
380 Armour Rd., Suite 264
Peterborough, Ontario K9H 7L7

Invoice 2505069

Date	May 26, 2025
Terms	N/A
Service Thru	May 26, 2025

In Reference To: Transmission Connections Review (Labor)

Transmission Connections Review
EB-2024-0126

Date	Services	Amount
05/26/2025	EB-2024-0126 Interim invoice	$ 2,492.97

Labor	$ 2,492.97
Labor HST 81338 8691 RT001	$ 324.09
Total Labor	$ 2,817.06
Total Invoice Amount	$ 2,817.06

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

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

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

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

Invoice 2505068

Date	May 26, 2025
Terms	N/A
Service Thru	May 26, 2025

In Reference To: Transmission Connections Review (Labor)

Transmission Connections Review
EB-2024-0126

Date	Services	Amount
05/26/2025	EB-2024-0126 Interim invoice	$ 2,492.97

Labor	$ 2,492.97
Labor HST 81338 8691 RT001	$ 324.09
Total Labor	$ 2,817.06
Total Invoice Amount	$ 2,817.06

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

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

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

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

Canadian Renewable Energy Association
240 Bank Street
Suite 400
Ottawa, Ontario K2P 1X4

Invoice 2505067

Date	May 26, 2025
Terms	N/A
Service Thru	May 26, 2025

In Reference To: Transmission Connections Review (Labor)

Transmission Connections Review
EB-2024-0126

Date	By	Services	Hours	Rates	Amount
05/26/2025	JG	EB-2024-0126 Interim invoice	Flat Fee	$ 2,492.97	$ 2,492.97

Labor	$ 2,492.97
Labor HST 81338 8691 RT001	$ 324.09
Total Labor	$ 2,817.06
Total Invoice Amount	$ 2,817.06

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

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

Power Advisory LLC - Time Entry

Date Start: 6/1/2024 | Date End: 5/20/2025 | Clients: Power Advisory | Projects: Transmission Connections Review | Users: Roy Hrab | Client Type: All | Project Type: All | Location: All | Billing Method: All | Paid Status: All | Group By: User

User	Entry Date	Project Type	Activity	Description	Billable Time	Total Time	Hourly Rate	Billable Amt
Roy Hrab	06-04-2024	T - Time & Materials	Comments on OEB letter	Meeting with OEB staff on REASCWA's comments to the OEB's Transmission Connections Review (EB-2024-0126)	0.50	0.50	$330.00	$165.00
Roy Hrab	07-19-2024	T - Time & Materials	TCR Meeting #1	TSC Review discussion with Travis	0.50	0.50	$330.00	$165.00
Roy Hrab	08-26-2024	T - Time & Materials	TCR Meeting #1	Preparation of report summarizing August 26 Stream 2 Working Group meeting for REASCWA.	0.33	0.33	$330.00	$108.90
Roy Hrab	08-26-2024	T - Time & Materials	TCR Meeting #1	Participation in August 26, TSC Review Stream 2 working group meeting.	1.75	1.75	$330.00	$577.50
Roy Hrab	10-28-2024	T - Time & Materials	TCR Meeting #2	Participating in Oct. 28 Transmission Connections Review Working Group Meeting #2 [EB-2024-0126]	2.50	2.50	$330.00	$825.00
Roy Hrab	11-08-2024	T - Time & Materials	TCR Meeting #2	Preparation of client communication update on TCR initiative and working group	1.00	1.00	$330.00	$330.00
Roy Hrab	12-02-2024	T - Time & Materials	TCR Meeting #3	Participating in December 2, 2024 TCR Working Group Meeting.	2.00	2.00	$330.00	$660.00

Roy Hrab	12-13-2024	T - Time & Materials	TCR Meeting #3	Client communication summarizing December 2, Transmission Connections Review Working Group Meeting #3 [EB-2024-0126]	0.75	0.75	$330.00	$247.50
Roy Hrab	01-28-2025	T - Time & Materials	TSC Amendments	Review of proposed amendments to TSC on energy storage	1.50	1.50	$330.00	$495.00
Roy Hrab	01-31-2025	T - Time & Materials	TSC Amendments	Drafting REASCWA submission on proposed amendments to the TSC on energy storage	1.50	1.50	$330.00	$495.00
Roy Hrab	02-03-2025	T - Time & Materials	TSC Amendments	Review of proposed amendments and drafting submission on TSC re: energy storage	1.25	1.25	$330.00	$412.50
Roy Hrab	02-04-2025	T - Time & Materials	TSC Amendments	Communication with client on submission on draft submission on proposed amendments to TSC on energy storage	0.25	0.25	$330.00	$82.50
Roy Hrab	02-13-2025	T - Time & Materials	TSC Amendments	Review and finalization of REASCWA feedback on proposed TSC amendments; submission of feedback to OEB	0.50	0.50	$330.00	$165.00
Roy Hrab	04-09-2025	T - Time & Materials	TCR Meeting #4	Participation on Transmission Connections Review Working Group Meeting #4 [EB-2024-0126]	2.00	2.00	$330.00	$660.00
Roy Hrab	04-30-2025	T - Time & Materials	TCR Meeting #5	Transmission Connections Working Group Meeting #5	1.50	1.50	$330.00	$495.00

Totals For Roy Hrab		**17.83**	**17.83**	
	Grand Total	**17.83**		**$5,883.90**

Travis Lusney

CASE
EB-2024-0126: Initiatives: Regulatory Direction and Oversight: Ontario Energy Board

COST CLAIM
EB-2024-0126 : 1 : Avi Lipsitz

INTERVENOR NAME
Lipsitz, Avi; +1 (416) 294-3117 alipsitz@poweradvisoryllc.com

PARTICIPANT CLAIM STATUS
Submitted

FILING PARTICIPANT

NEW PARTICIPANT
Yes

NON-FILING PARTICIPANT F. NAME
Travis

NON-FILING PARTICIPANT L. NAME
Lusney

SERVICE PROVIDER TYPE*
Consultant

YEAR CALLED TO BAR*

COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE*
19

HOURLY RATE
290

HST RATE CHARGED*
13.00

CV STATUS (FOR CONSULTANT/ANALYST)
CV Attached

LAST CV DATE
May 22, 2025

OVERRIDE HOURLY RATE
No

HST NUMBER
813388691RT0001

HEARINGS
No

CONSULTATIONS
Yes

DISBURSEMENTS
Yes

CONSULTATION

Consultation Hours	Consultations Subtotal ($)	Consultations Total Tax ($)	Consultations Total ($)
5.50	1,595.00	207.35	1,802.35

	Description	Maximum Hours	Hours	Hourly Rate	Sub Total	HST Rate	HST	Total
1	Written Comments on OEB Letter - April 24, 2024	5.00	0.50	290	145.00	13.00	18.85	163.85
2	Tranmission Connections Review Meeting #1 - August 26, 2024	3.75	2.50	290	725.00	13.00	94.25	819.25
3	Tranmission Connections Review Meeting #2 - October 28, 2024	3.75	0.50	290	145.00	13.00	18.85	163.85
4	Tranmission Connections Review Meeting #3 - December 2, 2024	3.00	0.00	290		13.00		
5	Written Comments on Notice of Proposal to Amend TSC - January 27, 2025	5.00	0.00	290		13.00		
6	Tranmission Connections Review Meeting #4 - April 9, 2025	3.00	0.00	290		13.00		
7	Tranmission Connections Review Meeting #5 - April 30, 2025	2.25	2.00	290	580.00	13.00	75.40	655.40
	Total Legal/Consultant Fees		**5.50**		**1,595.00**		**207.35**	**1,802.35**

Attachments

Attachment	Document Type	Import Message
CV - Travis Lusney - 2024-04.pdf	CV	
REASCWA TCR Invoices.pdf	Invoice	
Time log - Travis Lusney.pdf	Time Docket	

DISBURSEMENTS

Disbursement Subtotal($)	Disbursement Total Tax($)	Other Taxes/Tips Total($)	Disbursement Total($)
0.00	0.00	0.00	0.00

Name	ATT. REQ'D	ATT. PROV	Qty	$/ Unit	Net Cost	HST Rate	HST	Other Taxes/Tip	Total	Rationale/ Comment
Scanning/Photocopy (Internal)						13.00				
Scanning/Photocopy (External)						13.00				
Printing (Internal)						13.00				
Printing (External)						13.00				
Courier						13.00				
Teleconference						13.00				
Travel: Air						13.00				
Travel: Car Rental						13.00				
Travel: Gas						13.00				
Travel: Car Mileage – Southern Ontario				0.40						
Travel: Car Mileage – Northern Ontario				0.41						
Travel: Rail						13.00				
Travel (Other)						13.00				
Parking						13.00				
Taxi						13.00				
Accommodation						13.00				
Other						13.00				

Hearings, Consultations, Disbursements Attachments

Attachment	Document Type	Claim Type	Import Message
CV - Travis Lusney - 2024-04.pdf	CV	Consultations	
REASCWA TCR Invoices.pdf	Invoice	Consultations	
Time log - Travis Lusney.pdf	Time Docket	Consultations	

Travis Lusney
Director Power System

SUMMARY

Travis Lusney is a Professional Engineer with over 15 years of experience in the regulated and commercial electricity sectors. He offers deep experience in transmission and distribution power system planning, generation procurement strategy, policy development and power purchase agreement negotiations. Travis provides clients with unique expertise in the integration between generation development and transmission/distribution planning by providing advice on project risk assessment and strategic investment.

Travis is an expert in energy storage resources and their applicability to customers, grid operators and wholesale markets. Travis has performed extensive analysis for a wide range of customers on the opportunities, risks and impacts of energy storage resources on power systems. Travis has deep expertise in competitive energy procurement having worked on various procurement initiatives as the independent administrator including Nova Scotia wind RFP in 2012 and Emera's Atlantic Link Notice of Solicitation for renewables in 2017. Travis offers clients participating in competitive energy procurements through competition strategy, competitor analysis along with offering detailed knowledge of generation curtailment risk, regional transmission constraints and power system operational restrictions for all electricity market participants. Travis has been an active member in the Ontario Energy Board's Regional Planning Process Advisory Group (RPPAG) and the IESO's Transmission-Distribution Working Group (TDWG), both as the technical representative for the Non-Wires Solution Working Group.

Prior to Power Advisory, Travis worked as a Senior Business Analyst as the lead on the ongoing evolution of the Feed-In Tariff program for the OPA (Ontario Power Authority). Travis worked as a Transmission Planner at the OPA where he was a lead for connection assessment development as part of the Feed-In Tariff program, reviewing both transmission and distribution impacts. He was also involved in developing regional integrated system plans with ten-to-twenty-year planning horizons along with assessing bulk system requirements. He was the lead on a study on Distributed Generation impacts in urban centers to understand the barriers and benefits of large-scale integration. Previous tohis work at the OPA, Travis was a Distribution Engineer at Hydro Ottawa where he was responsible for capital planning, asset management, reliability analysis, regulatory filing support and project management.

Travis has served on the board of the Queen's University Engineering Society Services Inc. (QUESSI – the Campus Bookstore) and was a University Councillor for Queen's University. Travis has an MSc in Electrical Engineering and a BSc in Electrical Engineering, both from Queen's University.

Professional History

Power Advisory LLC (2011-Current)
Ontario Power Authority (2008-2011)
Hydro Ottawa Limited (2006-2008)

Education

Queen's University
MSc Electrical Engineering, 2007
BSc Electrical Engineering, 2004

PROFESSIONAL EXPERIENCE

Power System Planning

- For multiple clients, analyzed power system plans to determine investment need, prudency of capital deployment, and reasonableness of operating and maintenance expectations. Power system plans included integrated resource plans, bulk & regional transmission plans, distribution system plans and specific system investment plans. Analysis required understanding of power system planning criteria and reliability standards. The analysis included identifying potential investment opportunities as well as preparing criticisms of power system plans. Have presented analysis findings to company executives and senior management in support of corporate planning objectives. Have also prepared clients notes and presented publicly on power system planning analysis.
- Support for Independent Power Producers in Arbitration against BC Hydro and Power Authority (2021). Power Advisory was retained by Independent Power Producers (IPPs) to provide an expert opinion in relation to three arbitration proceedings in which British Columbia Hydro and Power Authority (BC Hydro) is the respondent. The evidence related to Force Majeure claims by BC Hydro for COVID-19 related demand reductions in the province that BC Hydro claimed rendered their inability to perform its obligations to accept and purchase energy from the projects in BC. The expert report provided a detailed description of the BC Hydro electricity system, generation and load balance, and export/import functionality. The report analyzed a specific time period where an imbalance was claimed to restrict the ability to accept and purchase energy output and provided insight into potential flexibility and operability options that BC Hydro could have pursued that would have allowed them to maintain their contractual obligations to the IPPs.
- Led the analysis of net-zero scenarios for the Ontario electricity system in 2035 for The Atmospheric Fund (TAF). The analysis was based on Ontario meeting the federal governments 2035 net-zero electricity supply mix objective. The report described the results of three different scenarios based on a mixture of conservation efforts, nuclear expansion/refurbishment, firm imports, renewable generation development and energy storage resources. The analysis required a forecast of future demand in 2035 including an hourly consumption profile to determine appropriate supply requirements. Key take-aways and recommendations were provided and published publicly.
- Led the publication of a report on the potential for energy storage under net-zero Canadian electricity systems. The analysis supporting the report included forecasting future demand in 2035 and identifying the amount of carbon-intensive generation in each Canadian jurisdiction. The report estimated the capacity of energy storage for various durations that could be developed under a base and high scenario. The report required analysis of each Canadian jurisdiction power system plans and identifying potential for energy storage to meet system peaking requirements and regional power system needs.
- Oversaw a report for the IESO evaluating the effects of climate change on the electricity system in Ontario, specifically exploring the impact on electricity system operation, resource adequacy and power system planning. The report summarized how, what and when climate change events will impact the electricity system and provided insight and analysis on how changing supply mix, weather and environment can constrain the power system in new ways. The report highlighted ways existing assessments can evolve to address the quickly changing weather patterns caused by climate change.
- Led a jurisdictional survey on behalf of the Independent Electricity System Operator (IESO) on five core initiatives: bulk system planning process, regional planning and non-wires alternatives, customer reliability, end-of-life assets, and competitive transmission procurement. Jurisdictional survey included developing a detailed survey tool and performing over 50 interviews with represents from the around the world including all US Northeastern ISOs, CAISO, system operator and regulator in the UK, system operator, regulator and market operator in Australia, as well as multiple distribution and transmission facility operators. The lessons learned from the analysis were used as an input into a comprehensive overhaul of the IESO's planning methods.

- Completed multiple priority siting studies across various jurisdictions in Canada and the US for new resources including renewable generation, energy storage resources and conventional generation. Analysis included review and assessment of power system plans, connection capability, demand outlook and additional risks & opportunities for new resources. The analysis was used by clients to determine project development priorities and investment objectives.
- Representative for Non-Wires Solutions clients on the Regional Planning Process Advisory Group (RPPAG) at the Ontario Energy Board (OEB). The RPPAG is to review and provide recommendations for implementation of regional planning process changes identified by the IESO's regional planning process review report. In addition to RPPAG responsibilities, represented Non-Wires Solutions at various stakeholder engagement sessions on regional planning and bulk system planning in Ontario and Alberta.
- Representative for Non-Wires Solutions Working Group (i.e., Energy Storage Canada, Advanced Energy Management Alliance, and Canadian Renewable Energy Association) in the IESO's Transmission-Distribution Working Group (TDWG). The objective of the TDWG is to determine an appropriate framework for processes and procedures for Distributed Energy Resources (DERs) participation in IESO-Administered Markets and the coordination required for distribution system constraints, among other issues.
- Prepared multiple power system outlook to determine future resource needs and potential investment opportunities for supply resources. Analysis included reviewed and commentary on resource adequacy, operability needs, transmission integration, customer reliability and broad regulatory framework. The power system outlook considered key areas of risk assessment, supply development scenarios, investment opportunities based on connection capability and project economics by supply type.
- Expert witness in the definition of electricity and the complexities of the electricity network on behalf of the Canadian Department of Justice in the Tax Court of Canada. Jointly prepared expert evidence and rebuttal report as part of the procedure that detailed the main components of electricity, the criteria driving power system planning and development, and the relationship to the financial & regulatory construct that overlays the physical electricity network for operation, pricing, and settlement in the Ontario electricity system.
- Expert witness in power system planning and solar generation development for litigation between international investment bank and large Canadian law firm. Reviewed evidence filed with respect to solar generation installed costs and development process. Prepared expert evidence in response to findings related to Feed-In Tariff (FIT) program, solar development costs, master service agreements, prudency of development timelines and connection capability constraints. Provided testimony to superior court of Ontario as expert witness.
- Provided strategic advice and power system analysis to generation development and energy storage resource clients on connection capability of proposed generation projects. Assisted clients in determining optimal project location and estimation of connection cost for different interconnection options. Review of Impact Assessments for multiple clients to assess project operations risks and potential future power system constraints. Estimated reliability of supply for load customers or deliverability for supply resources. Worked with clients to amend or adjust impact assessments to resolve or mitigate project risks.
- Developed ancillary service price forecast and transmission congestion analysis for clients in Alberta and Ontario. The analysis considered unique transmission system constraints, future supply mix assumptions and real-time energy market operation. The output determined the potential value of both renewable generation and energy storage assets in both markets.
- Consulting resource for a First Nation community to review and comment on a System Impact Assessment for a mining development nearby. Analysis focused on the impact to the community's reliability and determine potential options to resolve service quality concerns. Reviewed evidence filed by the mining developer and transmitter (i.e., Hydro One) to determine system constraints and potential options for removing or mitigating the constraint.

- Assessed connection costs for interconnection queues in multiple jurisdictions to support competition analysis for clients. Assessment included identifying primary and secondary connection locations, estimating connection costs and determining critical failures that could limit a projects connection capability.
- Reviewed and prepared commentary for the 2020 New Brunswick Power Integrated Resource Plan (IRP). The review included preparing analysis for supply resource decisions, assessing the impact of a potential federal ghg equivalency agreement for continued operation of the Belledune coal-fired generation facility and other power system component analysis.
- Provided an outlook for future hydroelectric development in Northern Ontario. The outlook considered future demand growth and the impact on the existing power system. Next, provided analysis of potential transmission expansion projects and the potential to unlock capacity for new or expanded hydroelectric generation capacity. Finally, provided strategic advice on a development progress plan including potential contract arrangements and bilateral opportunities.
- Assisted in leading engagement with distributors, transmitters and system operators for variety of clients. Engagement included determining interconnection options, assessing connection risks and establishing timelines and milestones to support overall project development.
- Supported analysis for the Integrated Power System Plan (IPSP) dealing with bulk and regional system considerations, including reliability assessment. Developed regional integrated plans for constrained areas. Lead stakeholder consultation with local distribution companies, regulatory agencies, transmitters and local government officials to develop 10 to 20-year plans and activity coordination.
- Represented through expert evidence and testimony the Utility Consumer Advocate Alberta during Transmission Rate Tariff hearing in front of the Alberta Utility Commission as an expert witness on transmission planning and cost allocation.
- Advised and supported a major gas generation procurement for the Province of Ontario. Work included analysis of regional power system needs and constraints. Assisted in the development of evaluated criteria considerations.
- Developed procedures and policy for system connection assessment under the Feed-In Tariff program, in particular lead the development of the Transmission Availability Test (TAT) and Distribution Assessment Test (DAT) used to assess connection capability. Oversaw development of custom database to support the connection assessment process and coordination with over 80 local distribution companies. Managed staff for regional system analysis as part of the Feed-In Tariff program to determine connection capability for contract awards.
- Lead a study on Distributed Generation impacts and opportunities in the major urban centers as part of a long-term energy plan. Lead analysis on behalf of the Ontario Power Authority to determine the distribution generation potential in Central and Downtown Toronto along with the associated cost to develop the distributed generation resources. Worked closely with the local distribution companies, city officials and key stakeholders in understanding specific and general barriers and benefits.
- Developed capital work planning process for Asset Management department to ensure accountability and situation and issue identification. Lead the development of the capital budget and work plan for all distribution projects including a 25-year capacity plan for Distribution rate filing. Oversaw capital project tracking and reporting metrics to ensure accountability and transparency for senior management requirements.
- Managed reliability statistical reporting as part of regulatory requirements and senior executive requests. Involved in evolution of information gathering methods and worst feeder identification. Lead reliability engineer working closely with planning, design and construction personnel in identifying issues and resolution members. Chair of the asset management committee which oversaw the expectations of future capital sustainment work and associated risk levels.
- Involved in the development of the distribution and station asset management plan as key support for distribution Rate filing. Involvement included preparing financial analysis, reviewing rate-filing materials, presenting to senior executive teams and coordinating internal team analysis and responses.

Strategic Investment and Risk Assessment

- Lead the development of Ontario wholesale electricity price forecast for multiple clients. Clients were provided with a description of wholesale price formation in Ontario. The forecasts include a description of assumptions and methodology based on assessments of power system fundamentals, government policy and Ontario's regulatory framework. Performed sensitivity analysis and scenario assessment to support a wide variety of investment and risk assessments.
- Supported the development of an Alberta pool price forecast for multiple clients. Clients were provided with a description of wholesale price formation in Alberta and energy-only market dynamics. The forecasts include a description of assumptions and methodology based on assessments of power system fundamentals, government policy and Alberta's regulatory framework. Performed sensitivity analysis and scenario assessment to support a wide variety of investment and risk assessments.
- Co-lead working group of successful energy storage proponents in Ontario with the objective of identifying challenges and gaps in the connection assessment, facility registration, testing and commissioning of storage resources to meet aggressive development timelines. Coordinated with senior executives within the system operator to ensure all parties understand the issues and worked through solutions. Transitioned to addressing operability and market design challenges for energy storage resources.
- Provided detailed analysis and strategic guidance to participants in the IESO's Expediated Long-Term RFP (E-LT-RFP) and for Long-Term 1 (LT1) for both energy storage resources and gas-fired generation. Provide review and commentary on procurement documents including guidance on maintaining quality assurance. Provide detailed financial modelling of contract settlement logic and revenue streams for project. Provided overview of energy storage market operation in Ontario under current and future market rule designs. Offered insight and analysis on the integration of contract revenue and market revenue including identifying key risks and offering mitigation strategy.
- Provided detailed competition analysis for participants in multiple procurements across different jurisdictions. Competition analysis identified proponents, financial sourcing, relative cost of capital, project sites, community acceptance, first nations and indigenous partners, connection capability, resource potential among other specific information. Provided analysis and assessment of leading entities in a procurement given procurement evaluation criteria and project cost modeling.
- Financial and technical due diligence for generation, wires, and energy storage resource acquisition/sales. Due diligence includes detailed electricity market assessment, multiple scenarios of electricity price forecasts, analysis of input costs and risk factors for project economics. Provided summary and commentary on recent regulatory and policy activities that could impact project economics. Prepared financial models for different project arrangements and capital structures, performed sensitivity analysis and stress-testing results for clients. Hosted meetings with clients to respond to feedback and questions and ensure client understands risks and opportunities.
- For multiple clients prepared and facilitated regular market monitoring meetings for jurisdictions across Canada and throughout the US. Responsible for preparing agenda and analysis, presenting updates, responding to questions and leading discussion. Reasonable action items were addressed between meetings. Clients included resource generation developers, engineering, procurement & construction firms, private equity, technology investors, government agencies, and industry associations.
- Provide financial and operational analysis of district energy system in southern Ontario. The district energy system focused on using multiple greenhouses and cogeneration applications to create a functioning network that could supply the load customers with electricity, thermal energy and CO2 while also being capable of exporting energy to the IESO-Administered Markets when profitable. The financial model integrated wholesale price forecast and operational expectations to determine profitability.
- Prepared analysis and opportunities for siting of new resources over multiple jurisdictions with focus on Ontario and Alberta. Analysis reviewed and assessed regional system plans and bulk system plans. Report to clients identified priority locations for developing new resources (e.g., energy storage, renewables, and gas-fired generation) based on technical, community and market price factors. Clients includes asset owners, financial entities, and technology providers.

- Strategic guidance support for the siting of large data centers. Provided an overview of market structure and regulatory framework for select Canadian jurisdictions (i.e., British Columbia, Alberta, Ontario, Quebec and Nova Scotia). Identified potential connection locations by regions for large data centers and provided an estimate of electricity costs and greenhouse gas emissions intensity for the facility.
- Provided analysis for Synergy North, a Local Distribution Company (LDC) in Northern Ontario, on the potential for non-wires solutions to address distribution system needs. In addition, provided analysis on the integration of electric vehicles and offered potential strategies for supporting the adoption of electric vehicles through prudent investments.
- Supported the development of renewable natural gas project. Included analysis of electricity consumption costs using Power Advisory's proprietary price forecast for Ontario. Provided analysis of regulatory requirements and market design for both electricity and natural gas. Provided advice on potential bilateral agreements with utilities across Canada.
- Strategic guidance for investments in energy storage solutions in Ontario. Advice included detailed summary of Ontario's electricity market and assessment of opportunities for energy storage solutions along with identification of primary risks to potential revenue streams. Calculated value stacking opportunities and discounts for providing multiple electricity services from a single energy storage resource. Provide an overview and assessment of regulatory and policy structure impacting energy storage resources. Clients for this service included project developers, technology providers, load customers, financial investors, and insurance companies. Energy storage technology types included battery-based, compressed air, pumped hydro, flywheel, novel technologies and thermal energy storage.
- Primary consulting resource for New Jersey Resources (NJR) in preparing responses and analysis for the community solar initiative in New Jersey. Lead discussion and analysis with senior leadership team including researching activities in other jurisdictions, potential marketing cost impacts and commentary on potential community solar program procedure requirements. In addition, prepared multiple energy storage use case analysis for NJR existing and future assets.
- Assessment of Demand Response (DR) auction prices and elasticity of offers in various jurisdictions for a client. Analysis consider the price inputs determine DR offers in Capacity Auctions and local DR programs. Interviewed various DR providers including aggregators and dispatchable load customers.
- For multiple clients provide market monitoring services for jurisdictions across Canada. Market monitoring includes following and analyzing electricity market developments, policy initiatives and regulatory activities. Analysis included preparation of client notes, responding to analysis requests and leading discussion with client teams.
- Led the creation of a GHG marginal emissions factor analysis and tool to estimate the potential GHG emissions reduction potential for distributed combined heat-and-power (DCHP) applications in Ontario. Analysis included detailed assessment of Ontario power system outlook and calculations of marginal emission factor based on electricity market operations and supply. Prepared a model to assess the GHG emissions saving potential for different DCHP applications.
- Led the completion of an energy storage market assessment across select US jurisdictions. The report included a summary of existing and potential regulatory and policy structures for energy storage in each jurisdiction. Prepared a financial model for each jurisdiction and compared return expectations for different energy storage applications. Provided a summary of energy storage projects in service or under development within each market.
- Prepared and hosted strategy and information session for a district energy corporation. The workshop focused on the Ontario electricity market, participation of district energy, regulatory framework and market design changes, and future outlook. Attendance was from multiple departments including finance, regulatory, business development, operations and legal. Subsequently hired to provide wholesale price forecast in support of ongoing strategy support

- Lead the assessment of connection capability of renewable generation for the City of Swift Current and their local distribution company Swift Current Light & Power (SCLP). Estimate the future cost of renewable generation for comparison to future SaskPower wholesale electricity rates. In addition, SCLP requested an outlook on the battery-based energy storage system (BESS) market and the potential for deployment of BESS to support the integration of renewable generation within their distribution system. The assessment concluded that both solar generation and wind generation were viable options for SCLP.
- Building on the feasibility assessment, assessed the capability of the SCLP distribution system to become self-sufficient using a combination of renewable generation and other resources. Self-sufficiency for the purpose of the assessment was the ability to supply all electricity consumptions needs of the SCLP system on an hourly basis. SCLP would remain connected to the SaskPower transmission system and therefore receive power quality and reliability services from SaskPower. Power Advisory assessed two self-sufficiency scenarios to determine the appropriate mix of wind and solar generation installed capacity. The No Export Scenario assumes no excess energy will be delivered to the SaskPower transmission system. The 60% Back-feed Scenario assumed a reasonable amount of excess energy could be exported in any given hour (the amount of export capability was the technical back-feed limit determined in the feasibility assessment report).
- Review, analysis and commentary on regulated and unregulated of comparable LDCs for a large Ontario distributor. Analysis included detailed modeling of capital spending patterns of multiple LDCs and assessment of differences between spending focus and system plans.
- Advising generation developers on new competitive procurement processes and determining strategy to help ensure successful participation while reduce exposure to risk. Participated in consultation and stakeholder engagement as an expert in transmission planning, procurement design, and proposal bid development.
- Provided detailed analysis of operating gas-fired generation facilities as part of potential asset sale. Analysis included modeling financial returns, assessment of operational risks. Provided a summary of technical requirements and opportunities the facilities could provide the power system currently and in the future.
- Working with renewable energy developers (mainly wind and solar PV) to plan, construct and successfully reach commercial operation for projects with long-term. Work includes assessment of project risk, investment opportunities, development strategy, solutions for connection issues and advice for securing construction approvals and permits.
- Completed due diligence on project economics, connection capability and estimated generation operating performance for wide range of generation types as part of strategic acquisitions. Services included analysis of natural gas delivery, operation restrictions and government policy drivers.
- Analyzed the Long-Term Transmission Plan (LTP) for Alberta and developed a comprehensive forecast of Capital Expenditures over the planning time period (2014-2032). The forecast includes an estimate of Development Capital Expenditures by project and region over the three time periods considered in the LTP. Estimated Capital Expenditures for General Plant and Sustainment based on the growth expectations of Alberta's transmission rate base. The analysis provides a detailed view of the long-term trend for capital investment in Alberta's transmission system and includes an alternative scenario for lower economic growth and oil sand development.
- Working with manufacturers of solar PV and wind generation components regarding strategic advice and solutions to meet Provincial content requirements and ultimately increase their market share.
- Constructed a quantitative project attrition model for projects with FIT PPAs to determine opportunities for future investment for clients. The model determined probabilistically which contracted FIT projects were at risk of failing to reach commercial operation and identify where new connection capacity would become available.

Supply Resource Procurement and Contracting

- Supported multiple clients in the participation of Independent Electricity System Operator (IESO) Expediated Long-Term RFP and Long-Term RFP. Provided support on priority siting of projects based on review of power system plans. Offered advice on revenue stream potential, RFP procurement mechanics, mandatory requirements and contract analysis.
- Retained by the City of Edmonton to assist in assessing the options to purchase green electricity (i.e., electricity from sources that do not emit carbon dioxide). Scope of work involved analyzing renewable electricity technologies and contracting options available to the City. Specifically, the City is interested in: assessing the cost of wind, solar, and biomass (biogas and landfill gas) technologies; determining the supply need and renewable generation resource potential to meet the 100% green electricity objective; and an overview of contracting models and summary of potential risks for the City
- Part of the Procurement Administrator for the Marine Renewable energy procurement to secure novel tidal resources in the Bay of Fundy. Supported engagement with perspective proponents and discussions with government agencies. Prepared request for proposal documents and power purchase agreement terms.
- Retained by Alberta Climate Change Office (ACCO) to prepare detailed design recommendations for a community generation program. The recommendations included eligibility requirements for proposed projects and evaluated price methodology to stack proposals in order of their relative value, with the ranking within the stack used to award contracts to successful applicants. Proposed contract provisions, payment structure and an outline of responsibilities for successful applicants in developing, constructing, operating and maintaining a community generation facility.
- Acted as the Independent Administrator for the Atlantic Link Solicitation. The solicitation process was initiated for energy to be bundled with transmission capacity on Emera Inc.'s proposed Atlantic Link submarine electricity transmission project for the delivery of clean energy into the ISO-New England market. As the Independent Administrator, provided assurance to proponents and the Federal Energy Regulatory Commission (FERC) as to the fairness and transparency of activities related to the Atlantic Link energy solicitation.
- Technical expert for the Alberta Infrastructure (AI) solar RFP. Provided analysis and strategic guidance on program design, commercial agreement provisions and stakeholder engagement. Assisted the evaluation team in the review and assessment of proposals submitted to the RFP including evaluation of technical requirements for participation and assisting in evaluated cost bid price assessment.
- Provide to select clients detailed competitor assessment for clean energy procurements including relative cost of capital analysis, capital cost estimates, procurement strategy, contract risk assessment, bid preparation and quality review of submissions.
- Prepared a framework for a unique demand response program for a district energy system. The program design included key qualifications for customers, methodology for calculating incentive structure, program administration requirements and presented draft terms for demand response service agreement.
- Technical expert for procurement participation for a variety of resource developers including renewables and energy storage. Provided detailed analysis and assessment of procurement process and documentation including strategy for development of proposed projects to maximize opportunities within the Request For Proposal (RFP) and Contract in the multiple procurement processes.
- Worked as the Renewable Electricity Administrator in Nova Scotia responsible for the developing and administrating a Request for Proposal (RFP) process to procure over 300 GWh of low impact renewable energy. The process included engagement with stakeholders, development of an RFP document and Power Purchase Agreement and filing the Power Purchase Agreement for regulatory approval with the Nova Scotia Utility and Review Board On August 2nd 2012, after completing the evaluation of all 19 proposals that were submitted, the process successfully concluded with the execution of 355 GWh of contracted facilities.

- Provided support to Non-Utility Generators (NUGs) in negotiations with the Ontario Power Authority for extension of existing Power Purchase Agreement. Support included economic dispatch analysis, development of net revenue requirement pro formas to determine contract value, leading negotiation and providing strategic advice.
- Modeling procurement mechanics and Ontario system characteristics for renewable energy developers to establish a strategic direction for successfully securing power purchase agreements. This work included modeling connection capability within both the distribution and transmission system and assessing attrition risk of currently contracted and under development projects. Responsible for development and ongoing management of the standard offer Feed-In Tariff program for Renewable Energy. Involved with a wide range of stakeholders including project developers, manufactures, investors, regulatory agencies and Government. Analyzed ongoing project costs and market rates to update and maintain Feed-In Tariff price assumptions. This work included analysis of supply chain evolution, equipment providers capability and assessment of project economics.
- Involved in domestic content development within the Feed-In Tariff program as chair of the Domestic Content Working Group. Advised and clarified expectations for project developers and manufactures in understanding the domestic content requirements.

Regulatory and Policy

- Co-led the development of an Electric Vehicle Connection Process (EVCP) for the Ontario Energy Board (OEB). The EVCP provides a consolidation of the procedures, timelines, workflows, and template forms issued by the OEB to facilitate the streamlined connection of non-residential Electric Vehicle Supply Equipment (EVSE). The EVCP was developed through extensive working group sessions with local distribution companies (LDCs) and EVSE suppliers (e.g., Tesla).
- Filed expert report in BC Hydro 2021 Integrated Resource Plan (IRP) on behalf of Clean Energy BC (CEBC). The report reviewed the conclusions of the BCH 2021 IRP with respect to supply and demand needs over the forecast period. Specifically analyzed the impact of electrification from electric vehicles and space heating on demand forecast. In addition, reviewed the global natural gas prices and the potential support for Liquified Natural Gas (LNG) export facilities in BC. Finally, provide an assessment and expertise with respect to Distributed Energy Resources (DERs) and new renewable generation development timelines & challenges.
- Expert witness in arbitration between energy storage developer and industrial customer in Ontario for a behind-the-meter energy storage application. Qualified as expert in Ontario power system planning, distribution system design, and resource integration including energy storage. Prepared written evidence on applicable codes and standards for connection and operation of energy storage resources in Ontario. The evidence reviewed the Ontario Energy Board's Distribution System Code (DSC), Hydro One's Condition of Service (COS), and Technical Interconnection Requirements. Testified in front of arbitration panel on written evidence.
- Expert Report on Export Transmission Service (ETS) Rate: Association of Power Producers of Ontario (APPrO) in Ontario Energy Board (OEB) Generic Rate Proceeding EB-2021-0243 (2022) – A Power Advisory team, led by Travis Lusney, provided evidence and testimony on the total rate-payer impact of changes to the ETS rate. The evidence provides a high-level review of the current evidentiary record, the background for the current ETS rate, as well as an analysis of the impact on a change to the rate may have on exports and overall costs to ratepayers in Ontario. As part of this analysis, a number of the unique features of the Ontario electricity market were analyzed and, where appropriate, compared to neighbouring jurisdictions where energy is exported from Ontario by numerous market participants. Electricity trading is highly dynamic, involves many physical and financial considerations and occurs amidst the real-time balancing of an incredibly complex physical electricity grid. The report captures that complexity to the greatest extent possible and provides an analysis on how traders and other market participants would respond to a change in the ETS rate – which, if increased or decreased, would change the transactional cost of energy trading from Ontario into neighbouring markets.

- Acted as a witness in Hydro One's transmission rate filing, an Ontario transmitter, providing an assessment on transmission loss in regulation in other jurisdictions and how transmission losses are included in power system planning decisions, including how those losses are related to conservation and demand management initiatives.
- Acted as expert witness in Leave to Construct process for reconductoring of transmission line in Eastern Ontario in front of Ontario Energy Board. Provide an assessment of the planning process and conclusions related to import capacity value and transmission losses.
- Technical consulting resource for Energy Storage Canada (ESC) across Canada. Provide bi-weekly updates to working groups in Alberta and Ontario as well as the Maritimes. Provided commentary, analysis and guidance on policy, regulatory, and market development. Prepared submissions to stakeholder engagement processes including market rule changes and regulatory evolution.
- Technical consulting resource for Ontario Sustainable Energy Association (OSEA) participation in multiple Ontario regulatory proceedings (2021 to present). Regulatory proceedings included Enbridge Integrated Resource Plan (IRP), Enbridge Multiple-Year Demand-Side Management (DSM) application, Enbridge Annual Supply Plan 2021, Hydro One Joint Rate Application Procedure (JRAP) 2023-2027, and Ontario Power Generation 2022-2026 Rate application. As technical consultant, reviewed materials, prepared analysis and questions for applicants, prepared submissions on behalf of OSEA and participated in technical conference on various subject matters.
- Expert Testimony for Energy Storage Canada (ESC) in Alberta Electricity System Operator (AESO) Bulk and Regional Rate Design Application to the Alberta Utilities Commission (AUC) for AUC Proceeding 26911 (2022). Prepared expert evidence on energy storage tariff design and made recommendations for a Storage Opportunity Service (SOS) to be established in the AESO Tariff. Evidence discussed and critiqued the AESO's proposed Modernized Demand Opportunity Service (DOS) and preferred rate design as it related to energy storage participation in the Alberta electricity market.
- Supported many clients in the participation of stakeholder engagements for potential evolution of regulatory framework in multiple jurisdictions. Support included analyzing proposed design changes for electricity markets, regulatory structures, and legislation. Assisted clients in preparing for stakeholder meetings and submissions. Acted on client's behalf in stakeholder engagements and provided strategic advice to clients on how best to position feedback and alternatives where warranted.
- Supported Energy Storage Canada (ESC) Alberta working group in the Alberta Electric System Operator (AESO) Bulk & Regional Tariff Design with focus on energy storage resources (2021). Attended stakeholder sessions, prepared commentary and submissions on behalf of working group and performed analysis of preferred and alternative rate designs.
- Involved in an energy storage valuation report for Energy Storage Canada. The report summarized and calculated the benefits energy storage resource deployment in Ontario could provide to customers both quantitatively and qualitatively. Lead the analysis of transmission & distribution system investment deferral and direct-to-customer benefits. Support analysis on wholesale market savings. Presented to leadership council, working group and general membership at Energy Storage Canada.
- Supported for a consortium of clients the analysis of substation cost allocation for potential cost sharing between distributed connected generation and load customers within a distribution network in Alberta in response to the AESO pursuit of sub-station fractioning. The AESO had proposed and received initial regulatory approval to seek cost recovery from distributed connected generation for use of existing connection assets to the Alberta transmission system. Researched cost and design differences between load customer and generation customer substation design, prepared approach with justification for cost allocation and presented to consortium and the AESO during stakeholder engagement sessions.

- Prepared a detailed submission on behalf of Energy Storage Canada (ESC) for the Alberta Utilities Commission (AUC) Distribution System Inquiry (DSI) Module One. Module One focuses on the impact of innovative and emerging technologies impact on distribution system design, operations, capital requirements and cost of providing services. In addition, Module One seeks to understand the opportunity for new market entry within the monopolistic franchise. Reviewed, researched and analyzed multiple jurisdictions and energy storage technology types to support drafting of the submission. Prepared a presentation for the Module One technical conference and participated in the technical conference on behalf of ESC.
- Drafted a discussion paper and presentation on co-location of energy storage resources with renewable generation resources. The discussion paper outlined the benefits and barriers for co-location projects, provided an overview of ongoing policy & regulatory activities, identified options to address barriers and provided near-term recommendations.
- Consulting resource for the Electricity Distributor Association (EDA) on the analysis and preparation of two best practices discussion paper for evolving the Ontario connection process for distributed energy resources. Engaged with EDA members and DER proponents to determine best practices, barriers and opportunities. Lead the drafting of the discussion paper, engagement with stakeholders for feedback and assisted in preparing presentation to board of directors.
- Supported research, consultation with Electricity Distributor Association (EDA) members and drafting of the report entitled *Power to Connect: A Roadmap to a Brighter Ontario*, which identified the challenges and barriers within the statutory framework, and proposed solutions, with respect to the transition of LDCs to "Fully Integrated Network Orchestrators". The report provided detailed analysis of Ontario's regulatory framework, market design, and organizational structure.
- For multiple clients provided strategic advice on evolution of electricity regulatory framework including electricity market design, legislation, regulation, system codes and approval processes. Clients include Canadian Solar Industrial Association, Canadian Wind Energy Association, Association of Power Producers of Ontario, Energy Storage Canada, Energy Storage Canada, Quality Urban Energy Solutions of Tomorrow (QUEST) and federal and provincial government agencies & ministries.
- Developed a discussion paper on the barriers to development of load-displacement energy storage applications in Ontario. The paper detailed the benefits of energy storage for customers and the power system as a whole. The paper described key barriers restricting the ability to adopt energy storage solutions and proposed multiple regulatory framework changes that would reduce or remove the barriers based on experience in other jurisdictions and reflecting the unique Ontario electricity market.
- Performed analysis of industrial rate design options in Ontario for Canadian Solar Industries Association (CanSIA) to determine the potential impact to net-metered solar generation and energy storage applications. Analysis modeled eight different rate design options over a ten-year forecast period. The avoided cost revenue from the industrial rates were then used in a financial model to assess the potential returns for each option.
- Review, analysis and drafting of responses on behalf of the Association of Power Producers of Ontario (APPrO) and Canadian Solar Industries Association (CanSIA) to the Ontario Energy Board (OEB) for Residential distribution rate design and Commercial & Industrial distribution rate design. The analysis included assessment of impact on customers and suppliers economics, review of rate design in other jurisdictions, and identification of appropriate rate design that benefits rate-payers and distributed energy resource suppliers.
- Primary consulting resource for CanSIA's Distributed Generation Task Force (DGTF). The DGTF objective included developing a customer-based generation model for solar generation after the conclusion of the Feed-In Tariff (FIT) program in Ontario (post-FIT solution), to identify transitional changes to the existing FIT program to support the post-FIT solution and to support solar market growth in the long-term. Responsible for jurisdictional review to identify best practices for customer based solar generation, technical and policy analysis to support the post-FIT solution and development of recommendation report and accompanying communication plan with key stakeholders.

- Co-leader of Solar Development Evolution Working Group which has participation and support from key solar PV project developers, EPC firms, asset operators and owners. The mandate of the working group was to develop policy for a long-term customer centric procurement approach for solar PV generation and identify priorities for transition of the existing FIT program.

Selected Speaking Engagements

- Ontario Energy Conference 2022: Panelist – Ontario Transmission Needs
- Association of Municipalities Ontario, Municipal Energy Symposium 2022: Speaker – Meeting Municipal Clean Energy Needs
- APPrO 2021, the Canadian Power Conference: Speaker – Ontario Planning Outlook
- Energy Storage Canada 2021: Panelist – Energy Storage – A Western Canadian Perspective
- Energy Storage Canada 2020: Panelist – View from Alberta
- Engineering Insurance Conference (AEIC 2019): Speaker -Energy Storage: Game Changer
- Canadian Wind Energy Conference 2019: Speaker -Hybrid Wind Energy Project Opportunities in Canada
- Energy Storage Canada 2019: Panelist - Markets and Regulations - Frameworks on the Move
- Alberta Utilities Commission Distribution System Inquiry Module One Technical Conference: Speaker - Energy Storage Resources
- Energy Storage Canada 2018: Speaker – Behind-the-Meter Storage for Commercial and Industrial Applications
- Energy Storage Canada 2018: Keynote Speaker -How Market Reforms are Driving Energy Storage Opportunities, April 2018 (Toronto) and June 2018 (Calgary)
- CanWEA Spring Forum 2017: Panelist - What lies ahead in Ontario and Quebec the low demand future, April 2017
- APPrO Conference 2016: Panelist - The evolving connection assessment and planning process in Ontario, November 2016
- Canadian Energy Research Institute (CERI) 2016 Electricity Conference: Ontario – A Case Study of Retail Price Impacts, October 2016
- Solar Ontario 2016: Moderator for panel on Ontario Electricity Market Renewal Implications for Solar Generation, May 2016
- Clean Energy BC - BC Generate 2015: Panelist on Overview of Canadian Renewable Energy Markets, November 2015
- CanWEA 2015: Panel Member on Wind Generation Integration in Canadian Wholesale Electricity Markets, October 2015
- Solar Ontario 2015: Panel Member on Lessons Learned for the Large Renewable Procurement, May 2015
- Green Profit 2015: Plenary Panel Member on The Future is Now: The Economic Case for Renewables, March 2015
- CanSIA's Solar Canada 2014: Panel Member on Setting Precedents for the Future of Solar Distributed Generation Utility Programs, December 2014
- CanSIA's Solar Ontario 2014: Moderator on Balancing Supply: A look inside Ontario's Electricity System during Peak Demand on July 17, 2013, May 2014
- CanSIA's Solar Ontario 2013: Presenter and Moderator on Electricity Consumer Empowerment – Enabling Distributed Solar Power Generation, May 2013

- Ontario Feed-In Tariff Forum: Panel Member on Barriers to Connection Solar Projects at the Local Level, April 2012
- EUCI's 3rd Annual Conference on: Ontario's Feed-In Tariff, June 2011
- 4th International Conference on Integration of Renewable and Distributed Resources, Albuquerque, December 2010
- OSEA Community Power Conference, November 2010

List of Expert Testimony

- British Columbia Utilities Commission (BCUC), BC Hydro 2021 Integrated Resource Plan (BCH 2021 IRP), Evidence on Behalf of Clean Energy BC (January 2023)
- Arbitration between industrial customer and energy storage service provider, expert evidence on regulatory requirements for connection and operation of behind-the-meter energy storage resources specifically related the automatic and immediate must-run requirements for support load customers electricity supply, evidence on behalf of energy storage service provider (November 2022)
- Alberta Utilities Commission, Alberta Electricity System Operator Bulk, Regional and Modernized Demand Opportunity Service Rate Design Application, Evidence on Behalf of Energy Storage Canada (October 2021 - November 2022)
- Ontario Energy Board, Generic Proceeding on Export Transmission Service Rate, Rate-payer Analysis of ETS Rate Change (July/August 2022)
- Tax court of Canada, proceeding between Department of Justice and Bell Canada, fact witness on the definition of electricity for application of sales tax and overview of electricity sector physical, financial and regulatory structures (June 2022)
- Ontario Energy Board, Hydro One Network Inc's Leave to Construct Application for Merivale to Albion Line Reconductoring, Transmission Loss Analysis and Capacity Expansions Analysis (March 2021)
- Superior court of Ontario, litigation between international investment bank and large Canadian law firm, expert witness in power system planning and solar generation development (June 2018)
- Ontario Energy Board, Hydro One Networks Inc's 2017/2018 Transmission Revenue Requirement & Rate Application (EB-2016-016), Transmission Loss Reduction Options (December 2016)
- Alberta Utilities Commission, Alberta Electric System Operator's 2014 General Tariff Application (Proceeding 2718), Proposed Approach for Designating Transmission Projects (February 2014)

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

Ontario Waterpower Association
380 Armour Rd., Suite 264
Peterborough, Ontario K9H 7L7

Invoice 2505069

Date	May 26, 2025
Terms	N/A
Service Thru	May 26, 2025

In Reference To: Transmission Connections Review (Labor)

Transmission Connections Review
EB-2024-0126

Date	Services	Amount
05/26/2025	EB-2024-0126 Interim invoice	$ 2,492.97

Labor	$ 2,492.97
Labor HST 81338 8691 RT001	$ 324.09
Total Labor	$ 2,817.06
Total Invoice Amount	$ 2,817.06

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

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

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

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

Invoice 2505068

Date	May 26, 2025
Terms	N/A
Service Thru	May 26, 2025

In Reference To: Transmission Connections Review (Labor)

Transmission Connections Review
EB-2024-0126

Date	Services	Amount
05/26/2025	EB-2024-0126 Interim invoice	$ 2,492.97

Labor	$ 2,492.97
Labor HST 81338 8691 RT001	$ 324.09
Total Labor	$ 2,817.06
Total Invoice Amount	$ 2,817.06

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

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

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

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

Canadian Renewable Energy Association
240 Bank Street
Suite 400
Ottawa, Ontario K2P 1X4

Invoice 2505067

Date	May 26, 2025
Terms	N/A
Service Thru	May 26, 2025

In Reference To: Transmission Connections Review (Labor)

Transmission Connections Review
EB-2024-0126

Date	By	Services	Hours	Rates	Amount
05/26/2025	JG	EB-2024-0126 Interim invoice	Flat Fee	$ 2,492.97	$ 2,492.97

Labor	$ 2,492.97
Labor HST 81338 8691 RT001	$ 324.09
Total Labor	$ 2,817.06
Total Invoice Amount	$ 2,817.06

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Julie Glover (jglover@poweradvisoryllc.com)

Power Advisory LLC - Time Entry

Date Start: 6/1/2024 | Date End: 5/20/2025 | Clients: Power Advisory | Projects: Transmission Connections Review | Users: Travis Lusne

User	Entry Date	Project Type	Activity	Description	Billable Time	Total Time	Hourly Rate	Billable Amt
Travis Lusney	06-04-2024	T - Time & Materials	Comments on OEB letter	Meeting with OEB staff on REASCWA's comments to the OEB's Transmission Connections Review (EB-2024-0126)	0.50	0.50	$290.00	$145.00
Travis Lusney	07-19-2024	T - Time & Materials	TCR Meeting #1	TSC Review discussion with Roy	0.50	0.50	$290.00	$145.00
Travis Lusney	09-05-2024	T - Time & Materials	TCR Meeting #1	Review BC's CEAP application to Ontario	1.00	1.00	$290.00	$290.00
Travis Lusney	09-06-2024	T - Time & Materials	TCR Meeting #1	Discussion with Tracy Garner on TSC workstream 1	1.00	1.00	$290.00	$290.00
Travis Lusney	11-11-2024	T - Time & Materials	TCR Meeting #2	Review update note for working group	0.50	0.50	$290.00	$145.00
Travis Lusney	04-09-2025	T - Time & Materials	TCR Meeting #4	Attend working group meeting	2.00	2.00	$290.00	$580.00
Totals For Travis Lusney					**5.50**	**5.50**		
			Grand Total		**5.50**			**$1,595.00**