



Decision \_\_\_\_\_

**FILED**09/14/21  
12:36 PM

**BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF  
CALIFORNIA**

In the Matter of the Application of San Diego Gas & Electric Company (U902E) for Approval of its Proposals for Dynamic Pricing and Recovery of Incremental Expenditures Required for Implementation.	Application 10-07-009 (Filed July 6, 2010)
And related Matter	Application 19-03-002 (Filed March 4, 2019)  (consolidated June 24, 2019)

**INTERVENOR COMPENSATION CLAIM OF SMALL BUSINESS UTILITY  
ADVOCATES  
AND DECISION ON INTERVENOR COMPENSATION CLAIM OF SMALL  
BUSINESS UTILITY ADVOCATES**

**NOTE: After electronically filing a PDF copy of this Intervenor Compensation Claim (Request), please email the document in an MS WORD and supporting EXCEL spreadsheet to the Intervenor Compensation Program Coordinator**

<b>Intervenor:</b> Small Business Utility Advocates (SBUA)		<b>For contribution to Decision (D.) 21-07-010</b>
<b>Claimed:</b> \$ 253,178.05		<b>Awarded:</b> \$
<b>Assigned Commissioner:</b> Genevieve Shiroma		<b>Assigned ALJ:</b> Jeanne McKinney, Rafael L. Lirag, Susan Lee
I hereby certify that the information I have set forth in Parts I, II, and III of this Claim is true to my best knowledge, information and belief. I further certify that, in conformance with the Rules of Practice and Procedure, this Claim has been served this day upon all required persons (as set forth in the Certificate of Service attached as Attachment 1).		
<b>Signature:</b>		/s/ Jennifer Weberski
<b>Date:</b> September 14, 2021	<b>Printed Name:</b>	Jennifer Weberski

**PART I: PROCEDURAL ISSUES**  
**(to be completed by Intervenor except where indicated)**

<b>A. Brief description of Decision:</b>	<p>D.21-07-010 (the Decision) adopts the Settlement Agreement filed by SDG&amp;E, the Public Advocates Office at the California Public Utilities Commission, Utility Consumers' Action Network, Federal Executive Agencies, California Farm Bureau Federation, San Diego Airport Parking Company, Small Business Utility Advocates, Solar Energy Industries Association, Energy Producers and Users Coalition, California Large Energy Consumers Association, California City County Street Light Association, The Utility Reform Network, and City of San Diego. Most of the active parties to the proceeding are parties to the Settlement Agreement and none of the remaining parties directly oppose the settlement. The Decision also grants SDG&amp;E's Petition for Modification of D.12-12-004 in A.10-07-009, which makes a critical peak pricing dynamic rate offering optional for small commercial customers.</p> <p>The settlement resolves all issues amongst the settling parties except for three: (1) the proposal to adopt a new schools-only rate class; (2) the proposal to extend the load limit exemption for certain small commercial customers with electric vehicle fleets; and (3) the real-time pricing dynamic rate proposal.</p> <p>Regarding these three issues, the Decision denies the proposed schools-only rate class. The expired exemption to the small commercial rate for electric vehicle fleets is reinstated with modifications. For the real-time pricing proposal, SDG&amp;E is directed to file a separate application for a pilot; the details of the pilot and application are set forth in Section 5 of this decision. SDG&amp;E is also directed to file a sales forecast application for 2022 within 30 days of the effective date of the decision.</p>
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**B. Intervenor must satisfy intervenor compensation requirements set forth in Pub. Util. Code §§ 1801-1812<sup>1</sup>:**

	<b>Intervenor</b>	<b>CPUC Verification</b>
<b>Timely filing of notice of intent to claim compensation (NOI) (§ 1804(a)):</b>		
1. Date of Prehearing Conference:	June 12, 2019	

<sup>1</sup> All statutory references are to California Public Utilities Code unless indicated otherwise.

2. Other specified date for NOI:		
3. Date NOI filed:	July 12, 2019	
4. Was the NOI timely filed?		
<b>Showing of eligible customer status (§ 1802(b) or eligible local government entity status (§§ 1802(d), 1802.4):</b>		
5. Based on ALJ ruling issued in proceeding number:	R.20-08-020	
6. Date of ALJ ruling:	December 23, 2020	
7. Based on another CPUC determination (specify):		
8. Has the Intervenor demonstrated customer status or eligible government entity status?		
<b>Showing of “significant financial hardship” (§1802(h) or §1803.1(b)):</b>		
9. Based on ALJ ruling issued in proceeding number:	R.20-08-020	
10. Date of ALJ ruling:	December 23, 2020	
11. Based on another CPUC determination (specify):		
12. Has the Intervenor demonstrated significant financial hardship?		
<b>Timely request for compensation (§ 1804(c)):</b>		
13. Identify Final Decision:	D.21-07-010	
14. Date of issuance of Final Order or Decision:	July 16, 2021	
15. File date of compensation request:	September 14, 2021	
16. Was the request for compensation timely?		

**C. Additional Comments on Part I: (use line reference # as appropriate)**

#	Intervenor’s Comment(s)	CPUC Discussion
B.9-10	SBUA also received rulings on its customer status and showing of significant financial hardship in A.18-11-005 on June 24, 2019 and in A.16-09-001 on October 27, 2017. <i>See</i> Pub. Util. Code § 1804(b)(1).	

**PART II: SUBSTANTIAL CONTRIBUTION**  
**(to be completed by Intervenor except where indicated)**

**A. Did the Intervenor substantially contribute to the final decision (see § 1802(j), § 1803(a), 1803.1(a) and D.98-04-059): (For each contribution, support with specific reference to the record.)**

Intervenor's Claimed Contribution(s)	Specific References to Intervenor's Claimed Contribution(s)	CPUC Discussion
<p><b>1. Initial Involvement.</b></p> <p>SBUA participated in this proceeding to ensure small commercial customers are represented and actively included in the adjudication of SDG&amp;E's GRC proceeding.</p> <p>SBUA filed a Protest to the Application on April 8, 2019. In our Protest, SBUA specifically focused on the potential impact of the revenue allocation and marginal costs on small business customers.</p> <p>SBUA representatives attend both Pre-hearing Conferences to discuss the proposed issues, procedural schedule and impact of consolidation.</p> <p>Subsequently, SBUA filed a Joint Motion to Consolidate the proceedings with A. 19-07-006, which was denied.</p>	<p>"On March 4, 2019, SDG&amp;E filed Application (A.) 19-03-002 requesting authority to update its marginal costs, cost allocation, and electric rate design. Protests and responses to the application were filed from April 3, 2019 to April 8, 2019, by the following parties: ... Small Business Utility Advocates (SBUA)...." Decision, p. 4.</p> <p>"A Prehearing Conference (PHC) was held on June 12, 2019. At the PHC, the issues, schedule and other procedural matters relating to the proceedings were discussed." Decision, p. 4.</p> <p>"On August 22, 2019, a second PHC was held to identify parties and consider procedural issues following consolidation with A.10-07-009." Decision, p. 6.</p> <p>"On October 18, 2019, SDAP, SBUA and UCAN filed a Joint Motion for Consolidation of A.19-07-006 (Application of SDG&amp;E for Approval of its Electric Vehicle High Power (EV-HP) Charging Rate), A.10-07-009 (Application of SDG&amp;E for Approval of its Dynamic Pricing Proposal) and A.19-03-002. The joint motion was denied on December 4, 2019, because of concerns that consolidation could delay implementation of the proposed EV-HP rate." Decision, pp. 6-7.</p>	

<p><b>2. Impact of D.20-01-002.</b></p> <p>In January 2020, the Commission issued D.20-0-002, which changed the time frame of rate case plans for large energy utilities from 3 years to 4 years. Following the issuance of D. 20-01-002, SBUA submitted comments, at the request of the ALJ, on the impact of D. 20-01-002 on the current proceeding.</p> <p>On May 11, 2020, SBUA filed Comments regarding the transition from a 3 year to 4 year rate cycle.</p>	<p>“On January 20, 2020, the Commission issued D.20-01-002 changing the rate case plan of large energy utilities from three to four years. The decision included specific directions on how the affected utilities will transition their respective GRC cycles into the new four-year cycle. However, the decision did not include details regarding the transition of the GRC Phase 2 schedule.” Decision, p. 7.</p> <p>“On April 30, 2020, the assigned ALJ issued a ruling inviting comments on how the new rate case plan schedule should be addressed to ensure that the parties are considering the new rate case plan schedule during settlement discussions and before the evidentiary hearings. Parties [including SBUA] filed respective comments on May 11, 2020.” <i>Id.</i></p>	
<p><b>3. Testimony and Submission of Exhibits.</b></p> <p>SBUA filed Direct and Rebuttal Testimony on April 6, 2020 and May 4, 2020, respectively. SBUA’s Direct and Rebuttal Testimonies were entered into the record of the proceeding at the September 28, 2020 hearing. Exh. SBUA-1 (Direct Testimony of Paul L. Chernick on Behalf of Small Business Utility Advocates dated 4/6/20); Exh. SBUA-2 (Rebuttal Testimony of Paul L. Chernick in Behalf of Small Business Utility Advocates dated 5/4/20).</p> <p>SBUA’s Testimonies focused on the cost allocation and rate design issues, specifically</p>	<p>“An evidentiary hearing was held on September 28, 2020, where the parties [including SBUA] presented their list of exhibits to be entered into the record.” Decision, p. 8.</p> <p>“SDG&amp;E’s TOU periods were approved in D.17-08-030 and implemented on December 1, 2017. SDG&amp;E does not propose any changes to the current TOU periods. To ensure that TOU periods are regularly evaluated, the Commission requires the utility to submit certain information with its GRC Phase 2 – even if no changes are proposed... Several parties, such as SBUA and Farm Bureau, noted that the ratepayers they represent are still adapting to the changes made at the end of 2017.” Decision, p. 22.</p>	

<p>addressing demand charges, TOU periods, monthly service fees, wildfire mitigation costs, and marginal costs.</p> <p>SBUA also provided input on the consideration of “real-time” or “dynamic pricing” options for SDG&amp;E electric customers.</p>	<p>“SDAP and SBUA also argue for elimination of demand charges altogether.” Decision, p. 24.</p> <p>SDG&amp;E argues for differentiated monthly service charges between customers served at the substation level versus non-substation customers. “In contrast, SBUA argued that this differentiation unfairly rewards customers who happen to be located at a substation.” Decision, p. 31.</p> <p>“SBUA states the [day ahead market] DAM “is preferable because the vast majority of PG&amp;E’s load is settled at the DAM price” and hence was proposed by PG&amp;E as a basis for its marginal energy cost (MEC) in PG&amp;E’s GRC Phase 2 (A.19-11-019.)” Decision, pp. 51-52, fn. 111.</p> <p>“Ratepayer representatives, such as TURN, Cal Advocates, SBUA and Farm Bureau, are also encouraged to provide feedback and input to SDG&amp;E prior to filing of the application.” Decision, p. 52.</p>	
<p><b>4. Settlement Discussions and Agreement.</b></p> <p>SBUA actively participated in the lengthy and overall effective settlement discussions and subsequent Settlement Agreement. Our advocacy here is part of a broader campaign to advocate for small commercial customers with regard to rate design and other issues in Phase 2 GRCs.</p> <p>SBUA agreed to and signed the Settlement Agreement, which</p>	<p>“On June 5, 2020, the assigned ALJ issued a ruling directing the parties to meet and confer and file a joint case management statement no later than June 12, 2020, to discuss the status of settlement discussions.” Decision, p. 7.</p> <p>“On June 12, 2020, a joint case management statement was filed updating the status of settlement talks, the possibility of Alternative Dispute Resolution (ADR), joint stipulations of fact, factual issues that can be addressed through additional written testimony instead of a hearing, testimonies subject to cross-examination, and a new briefing schedule.” <i>Id.</i></p>	

<p>was jointly filed by the parties on October 8, 2020.</p> <p>In January 2021, the Commission adopted D.21-01-017 addressing SDG&amp;E's 2021 Energy Resource Recovery Account (ERRA). The adoption of D.21-01-017 necessitated an Addendum to the original Settlement Agreement which the parties discussed and submitted on February 26, 2021.</p> <p>SBUA filed comments on June 29, 2021 regarding the Proposed Decision adopting the Settlement Agreement, but did request the Commission consider the language regarding real-time pricing pilots and the impact on existing RTP pilot programs.</p> <p>In D.21-07-010, the Commission agrees with the ALJs' findings that the approved Settlement Agreement represents the input of a broad range of stakeholders, is reasonable in light of the record, and should be adopted.</p>	<p>"On August 6, 2020, another joint case management statement was filed by SDG&amp;E and the intervenors updating the commission on the status of settlement talks, joint stipulations of fact, cross-examination estimates, witness schedule, and a list of exhibits of each party" and "[o]n August 10, 2020 and September 24, 2020, telephonic status conferences were held in order to report on the progress of settlement discussions." Decision, p. 8.</p> <p>"On October 8, 2020, a Joint Motion for Approval of the GRC Phase 2 Settlement Agreement was filed by SDG&amp;E, Cal Advocates, CalSLA, City of San Diego, CLECA, EPUC, Farm Bureau, FEA, SBUA, SDAP, SEIA, TURN, and UCAN (collectively, the Settling Parties)." Decision, p. 8 and fn. 6 ("On February 26, 2021, the Settling Parties filed an Addendum to the October Settlement Agreement.").</p> <p>"The Settlement Agreement is in the public interest. As stated above, the Settling Parties include most of the active parties in the proceeding, which have vast experience about the subject matter included in the settlement, and represent the interests of a wide and diverse range of customers, interests, and concerns. We find that parties to the settlement used their collective experience to produce appropriate and well-founded recommendations." Decision, p. 46.</p> <p>"The Settlement Agreement is reasonable in light of the record, consistent with the law and in the public interest because of the process employed to reach agreement, the balancing of interests, and the protection of all customer classes from</p>	
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	<p>disproportionate impact.” Decision, p. 79 (FOF #1).</p> <p>“The Settlement Agreement is reasonable, consistent with the law and in the public interest. The thirteen parties to the Settlement Agreement represent the public and a broad range of stakeholders.” Decision, p. 85 (COL #1).</p>	
<p><b>5. Petition to Modify CPP in A.10-07-009.</b></p> <p>SBUA submitted a response on May 28, 2019 in support of SDG&amp;E’s Petition for Modification (PFM) of D.12-12-004. This PFM directly impacts small commercial customers, and the Commission in granting the PFM cites to SBUA’s support.</p>	<p>“On April 26, 2019, SDG&amp;E filed a [PFM] of D.12-12-004 requesting the Commission to modify the Dynamic Pricing Decision to establish SDG&amp;E’s TOU rate, without the CPP adder, as the standard turn-on rate, and establishing TOU/ CPP as an opt-in rate. ...SBUA also strongly supports SDG&amp;E’s PFM and urges the Commission to grant the relief requested. SBUA argued that CPP rates are problematic for small business because small businesses do not have the flexibility to adjust their usage when CPP events are called.” Decision, pp. 29 (fn. omitted).</p> <p>“Many small business customers, such as restaurants and retail establishments, are not able to adjust usage during CPP periods.” Decision, p. 81 (FOF #23).</p> <p>“Small business customers who were defaulted onto the CPP rate did not significantly reduce load during CPP events.” <i>Id.</i> (FOF #24).</p> <p>“Because many small commercial customers, such as retail establishments, are not able to reduce use during business hours, it is reasonable for CPP to be an available optional rate instead of the turn-on rate for new small commercial customers.” <i>Id.</i>, pp. 85-86 (COL #7).</p>	



**B. Duplication of Effort (§ 1801.3(f) and § 1802.5):**

	<b>Intervenor's Assertion</b>	<b>CPUC Discussion</b>
<b>a. Was the Public Advocate's Office of the Public Utilities Commission (Cal Advocates) a party to the proceeding?<sup>2</sup></b>	Yes	
<b>b. Were there other parties to the proceeding with positions similar to yours?</b>	Yes	
<b>c. If so, provide name of other parties:</b> Multiple parties provided comments and discussion during the course of Rule 12 Settlement discussions that ultimately resulted in a Joint Settlement Agreement, including Utility Consumers' Action Network, California Farm Bureau Federation, San Diego Airport Parking Company, Solar Energy Industries Association, Energy Producers and Users Coalition, California Large Energy Consumers Association, and The Utility Reform Network.		
<b>d. Intervenor's claim of non-duplication:</b>  SBUA sought to reduce overlap of efforts by presenting unique perspectives on the concerns of small commercial customers as a group as opposed to other customer classes. No other parties were representing exclusively the interests of small business customers as a class, and SBUA took all reasonable steps to coordinate its efforts with other parties. In addition, SBUA's experts presented analyses that were largely unique and differed from other parties.  In the instant case, all of the settling parties were required to compromise, change their opening positions, and offer various concessions. Although opening positions varied in aggressiveness, no party maintained stronger positions on a consistent basis throughout the negotiations in favor of small commercial customers than SBUA. By comparison, California Advocates and numerous other parties' advocated for the interests of residential customers, which, by necessity, can conflict with the interests of small commercial customers. For example, lowering revenue allocation for one customer class, such as small commercial customers, necessarily requires redistributing the revenue requirements to other classes, including residential customers (a proposition that these other groups often oppose). San Diego Airport Parking Company by comparison to SBUA is an electric vehicle operator that represents the specific interests of fleet transportation operators. Because of SBUA's unique core mission, we		

<sup>2</sup> The Office of Ratepayer Advocates was renamed the Public Advocate's Office of the Public Utilities Commission pursuant to Senate Bill No. 854, which the Governor approved on June 27, 2018.

<p>were able to sustain conflict-free and untethered advocacy in favor of small commercial customers throughout the proceeding.</p> <p>Therefore, while other parties may have had positions that were similar to SBUA in some degrees, our perspectives and goals were necessarily different, and were supplemented, not duplicated, by efforts on common issues.</p>	
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**C. Additional Comments on Part II: (use line reference # or letter as appropriate)**

#	Intervenor's Comment	CPUC Discussion

**PART III: REASONABLENESS OF REQUESTED COMPENSATION**  
**(to be completed by Intervenor except where indicated)**

**A. General Claim of Reasonableness (§ 1801 and § 1806):**

	CPUC Discussion
<p><b>a. Intervenor's claim of cost reasonableness:</b></p> <p>SBUA's main objective for the proceeding was to protect and advance the interests of small commercial customers of bundled electricity. The Commission adopted the above-discussed settlement to which SBUA was a signatory, which included numerous provisions that benefit small commercial customers. In this proceeding, SBUA actively participated in the proceeding; including filing Direct and Rebuttal Testimony, participating in numerous settlement discussions and conferences, and drafting efforts that led to the approval of the approved settlement agreements that SBUA participated in. The Settlement is beneficial because it reaches reasonable compromises among SDG&amp;E and the other interested parties.</p> <p>The Settlement Agreement has both quantitative and qualitative benefits, although precise dollar values are difficult to attribute. As a result of SBUA's work, for example: small commercial customers of bundled electricity will benefit from a cost allocation study prior to the next rate proceeding, pay lower Monthly Service Fees (MSF) than originally proposed and be represented in the construction and discussion of a real-time pricing pilot. Overall, the adoption of the SBUA-executed settlement agreements will help protect an important customer class and is in the</p>	

<p>public interest. SBUA's fee request is reasonable in comparison to the benefits, financial and otherwise, secured for small commercial customers. In sum, the Commission should conclude that SBUA's overall request is reasonable in light of the benefits achieved through SBUA's participation in the proceeding and that SBUA's participation was productive and outweighed the cost of participation. In assessing SBUA's substantial contribution, the Commission also should factor its desire to encourage participation of a broad range of customer interests and policies encouraging settlement.</p> <p>In addition, historically, small commercial customers have not been well represented in Phase 2 GRCs, and SBUA submits that its time and effort to advance the interests of this underserved customer class is well justified and valuable advocacy in the public interest.</p>	
<p><b>b. Reasonableness of hours claimed:</b></p> <p>SBUA's ability to participate and contribute to the proceeding was facilitated by the assembly and work of a team of lawyers and experts with various degrees of experience in the complex details of Phase 2 GRCs. SBUA's team applied their collective experience and expertise to submit testimony and negotiate highly complex subject matters and propositions a period of over 2 years until a final decision. In conducting and managing its participation in this proceeding, SBUA assigned specific tasks to individual members of the team based on their unique skills and experience, and as part of SBUA's internal case management processes. SBUA seeks recovery for 233.3 hours of attorney and 414.3 hours of expert time, excluding hours associated with the compensation billing hours.</p> <p>SBUA Litigation Supervisor, Jennifer Weberski, coordinated SBUA's engagement during the proceeding. She played a wide-ranging role and took the lead for SBUA in settlement discussions with SDG&amp;E and other interested parties and negotiated issues on behalf of small commercial customers. She also attended hearings and coordinated testimony with experts. Ms. Weberski has 24 years of utility regulatory experience. Based on SBUA's participation in related rate proceedings and decades of pertinent legal experience, Ms. Weberski efficiently participated in this docket and spent a reasonable amount of time the proceeding and D.21-07-010. SBUA also engaged a junior to mid-level attorney, Ivan Jimenez, early stages of the proceeding, including to work on responding to SDG&amp;E's Petition for Modification of D.12-12-004 in A.10-07-009.</p> <p>SBUA's expert Paul Chernick served as SBUA's lead consultant and utility expert. As President of Resource Insight, Inc. with 40 years of experience, SBUA expert, Mr. Chernick provided critical assistance by analyzing other parties' revenue allocation and rate design proposals and had an</p>	

<p>instrumental role in identifying and promoting small commercial customer interests in this proceeding through direct and rebuttal testimony. He also provided expert analysis and assistance during settlement discussions. SBUA's senior expert John Wilson assisted in analyzing the Application and developing SBUA positions for testimony. And two junior- to mid-level experts at Resource Insight Inc., Amy Umaretiya and James Harvey, assisted in researching, analyzing, and developing positions for testimony on rate design, cost allocation, and other issues, as well as in developing SBUA's discovery requests.</p> <p>In addition, SBUA's President and General Counsel, James Birkelund, participated in this proceeding analyzing the application and parties' testimony, developing litigation positions, providing strategic direction, managing work efforts, and overseeing and coordinating the legal team.</p> <p>Given the complexity of the issues presented in Phase 2 of a General Rate Case, SBUA's hours, including for an experienced team of attorneys and experts, are reasonable to address key issues of importance to small commercial customers in this in this proceeding. SBUA's hours represent an appropriate level of engagement and effort to participate in a rate design proceeding and reach the settled resolutions leading up to D.21-07-010. Therefore, SBUA seeks compensation for all of the hours recorded by our attorneys and experts and included in this request.</p>	
<p><b>c. Allocation of hours by issue:</b> All hours were spent on Settlement Agreement agreed to by the parties and adopted in D.21-07-010.</p> <p>SBUA has assigned the following issue codes in our timesheets:</p> <p><u>Issue 1</u>: Hearings – 29.2 hours or 4.5%</p> <p><u>Issue 2</u>: Settlement Activities – 104.65 hours or 16.2%</p> <p><u>Issue 3</u>: Demand Charges / Monthly Fees – 138.8 hours or 21.4%</p> <p><u>Issue 4</u>: Dynamic / Real-Time Pricing / TOU Periods – 184.1 hours or 28.4%</p> <p><u>Issue 5</u>: Marginal Costs / Cost Allocation – 102.2 hours or 15.8%</p> <p><u>Issue 6</u>: Discovery – 75.55 hours or 11.7%</p> <p><u>Issue 7</u>: General Participation (procedural) -13.1 hours or 2.0%</p>	

**B. Specific Claim:\***

CLAIMED						CPUC AWARD		
ATTORNEY, EXPERT, AND ADVOCATE FEES								
Item	Year	Hours	Rate \$	Basis for Rate*	Total \$	Hours	Rate \$	Total \$
Jennifer Weberski	2019	65.7	\$460	2018 rate from D.18-10-047 escalated by a 5% step increase plus 2.35% COLA per Res. ALJ-357; <i>see</i> comment 1.	\$30,222.00			
Jennifer Weberski	2020	88.5	\$470	As above, escalated by a 2.55% COLA in Res. ALJ-387.	\$41,595.00			
Jennifer Weberski	2021	11	\$625	Res. ALJ-393; <i>see</i> comment 2.	\$6,875.00			
Ivan Jimenez	2019	19	\$245	D.20-06-013	\$4,655.00			
Paul Chernick	2019	83.2	\$400	D.20-06-015	\$33,280.00			
Paul Chernick	2020	97.1	\$430	As above, increased by a 5% step increase and escalated by a 2.55% COLA in Res. ALJ-387; <i>see</i> comment 3.	\$41,753.00			
Paul Chernick	2021	10.5	\$465	Res. ALJ-393; <i>see</i> comment 4.	\$4,882.50			

John Wilson	2019	1.75	\$350	Res. ALJ-387; <i>see</i> comment 5	\$612.50			
John Wilson	2020	19.75	\$360	Res. ALJ-387; <i>see</i> comment 5.	\$7,110.00			
James Harvey	2019	3.5	\$190	Res. ALJ-387; <i>see</i> comment 6.	\$665.00			
Amy Umaretiya	2019	135.5	\$220	D.21-03-041	\$29,810.00			
Amy Umaretiya	2020	63	\$225	As above, escalated by a 2.55% COLA in Res. ALJ-387.	\$14,175.00			
James Birkelund	2019	23.1	\$495	D.20-06-013	\$11,434.50			
James Birkelund	2020	25.4	\$510	D.21-06-011	\$12,954.00			
James Birkelund	2021	0.6	\$770	Res. ALJ-393; <i>see</i> comment 7.	\$462.00			
Subtotal: \$240,485.50						Subtotal: \$		
OTHER FEES								
Describe here what OTHER HOURLY FEES you are Claiming (paralegal, travel **, etc.):								
Item	Year	Hours	Rate \$	Basis for Rate*	Total \$	Hours	Rate	Total \$
Paul Chernick	2019	16.5	\$200	50% of 2019 Rate for Travel	\$3,300.00			
Subtotal: \$ 3,300.00						Subtotal: \$		
INTERVENOR COMPENSATION CLAIM PREPARATION **								
Item	Year	Hours	Rate \$	Basis for Rate*	Total \$	Hours	Rate	Total \$
Ivan Jimenez	2019	2.3	\$122.5	50% of 2019 Rate	\$281.75			
Jennifer Weberski	2021	13	\$312.5	50% of 2021 Rate	\$4,062.50			

James Birkelund	2019	1.9	\$247.5	50% of 2019 Rate	\$470.25			
James Birkelund	2021	5.8	\$385	50% of 2021 Rate	\$2,233.00			
Subtotal: \$7,047.50						Subtotal: \$		
COSTS								
#	Item	Detail			Amount	Amount		
1.	Air Transportation	Expert / Flights to/from SFO for July 2019 and October 2019 workshops			\$1,571.70			
2.	Ground transportation	Expert / BART, Lyfts, Ubers, car rentals and gas and taxis			\$569.70			
3.	Meals	Expert / Meals while travelling			\$203.65			
Subtotal: \$2,345.05						Subtotal: \$		
TOTAL REQUEST: \$253,178.05						TOTAL AWARD: \$		
<p>*We remind all intervenors that Commission staff may audit the records and books of the intervenors to the extent necessary to verify the basis for the award (§1804(d)). Intervenors must make and retain adequate accounting and other documentation to support all claims for intervenor compensation. Intervenor’s records should identify specific issues for which it seeks compensation, the actual time spent by each employee or consultant, the applicable hourly rates, fees paid to consultants and any other costs for which compensation was claimed. The records pertaining to an award of compensation shall be retained for at least three years from the date of the final decision making the award.</p> <p>**Travel and Reasonable Claim preparation time are typically compensated at ½ of preparer’s normal hourly rate</p>								
ATTORNEY INFORMATION								
Attorney		Date Admitted to CA BAR <sup>3</sup>		Member Number		Actions Affecting Eligibility (Yes/No?) If “Yes”, attach explanation		
James M. Birkelund		March 2000		206328		No		
Jennifer L. Weberski		Admitted (Conneticut, 1997; Washington D.C., 2003)		Conn. Bar No. 414546; D.C. Bar No. 481853. While Ms. Weberski is licensed in Conneticut and D.C., not CA, the Commission has explicitly decided that attorneys admitted in other states are eligible for compensation as an attorney. Res. ALJ-393, p. 5		No		

<sup>3</sup> This information may be obtained through the State Bar of California's website.



		<p>(attorneys can be licensed in any jurisdiction within the United States); <i>see also</i> D.17-03-006, p. 16 (awarding compensation to attorney admitted in Mass.).</p> <p>Further, Ms. Weberski has been working as an attorney on matters before the Commission on behalf of intervenors (previously on behalf of Environmental Defense Fund) for almost 8 years since 2013.</p>	
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**C. Attachments Documenting Specific Claim and Comments on Part III:**  
**(Intervenor completes; attachments not attached to final Decision)**

<b>Attachment or Comment #</b>	<b>Description/Comment</b>
Attachment 1	Certificate of Service
Attachment 2	Timesheets of SBUA Attorneys and Resource Insight, Inc. Experts
Attachment 3	Resumé / Qualifications of Jennifer L. Weberski
Attachment 4	Resumé / Qualifications of Paul L. Chernick
Attachment 5	Resumé / Qualifications of James Harvey
Attachment 6	Resumé / Qualifications of James M. Birkelund
Attachment 7	Costs and Receipts
Comment 1	<p><b><u>2019 and 2020 Hourly Rates for Attorney Jennifer L. Weberski:</u></b> SBUA seeks an hourly rate for the work of attorney Jennifer Weberski of \$460 for her work in 2019 and \$470 for her work in 2020. SBUA made identical requests in A.19-08-013, A.19-09-009, and R.18-12-006. Pending a decision on any of those compensation claims, the same 2019 and 2020 hourly rates will apply here. SBUA requests that the Commission refer to and rely on the showings in these other dockets to support Ms. Weberski's 2019 and 2020 rates.</p>
Comment 2	<p><b><u>2021 Hourly Rate for Attorney Jennifer L. Weberski:</u></b> Per Resolution ALJ-393, SBUA requests an hourly rate for the work of attorney Jennifer Weberski of \$625 for 2021. SBUA made an identical request in A.19-08-013.</p> <p>Ms. Weberski received her Juris Doctor in 1997 and has been practicing law for over 20 years. Res. ALJ-393 provides that an attorney with 15+ years of experience is placed at Level V with a 2021 hourly rate range of \$486.31 to \$699.03. The requested rate for Ms. Weberski is within the third quartile of this</p>

	<p>range and is justified by her high level of experience with PUC matters and utility regulations.</p> <p>Ms. Weberski’s legal career has been single-mindedly dedicated to energy and utility matters before Public Utilities Commissions. She started practicing at Office of Consumer Counsel in Connecticut in 1997. Ms. Weberski worked for 10 years at the Office of the People’s Counsel (OPC) in Washington, D.C. (<i>i.e.</i>, the equivalent of California’s Public Advocates Office) from 2003-2013. During this time, she advanced to become OPC’s Supervisor for Litigation. Ms. Weberski spent 5 years as an attorney representing Environmental Defense Fund intervening in California PUC litigation from 2013-2018, before joining SBUA in 2019.</p> <p>A copy of Ms. Weberski’s professional qualifications is included herewith as <u>Attachment #3</u>.</p> <p>Given Ms. Weberski’s 20+ years of experience directly with PUC and utility matters, the requested rate of \$625 per hour is reasonable and falls well within the range of rates set forth by Res. ALJ-393 for attorneys with comparable credentials.</p>
Comment 3	<p><b><u>2020 Hourly Rate for Expert Paul L. Chernick:</u></b> SBUA seeks an hourly rate for expert Paul L. Chernick of \$430 for the work he performed in 2020. SBUA made identical requests in A.21-03-007, A.19-07-006, A.19-08-013, R.18-12-006, R.19-09-009, and A.21-03-007. Pending a decision on any of those compensation claims, the same 2020 hourly rate will apply here. SBUA requests that the Commission refer to and rely on the showings in these other dockets to support Mr. Chernick’s 2020 rate.</p>
Comment 4	<p><b><u>2021 Hourly Rate for Expert Paul L. Chernick:</u></b> Per Resolution ALJ-393, SBUA requests an hourly rate for the work of expert Paul Chernick of \$465 for 2021. Res. ALJ-393 provides that a public policy expert with over 15 years of experience is placed at Level V with a 2021 hourly rate range of \$491.99 (low), \$650.89 (middle), to \$868.71 (high).</p> <p>Mr. Chernick has been an expert, consultant, and analyst since 1977 – a period of over 43 years – specializing throughout that time in utility and energy matters. He is a leading expert in the field with exceptionally strong credentials. Mr. Chernick has testified or submitted reports as an expert over three hundred and fifty times on utility issues before various regulatory, legislative, and judicial bodies, including utility regulators in thirty-seven states, six Canadian provinces, and three U.S. federal agencies. He has a national and international reputation for providing expert support to companies and organizations in utility matters at Public Utility Commissions. Additionally, Mr. Chernick is the author or co-author of over 40 publications or articles dealing with utility and energy issues.</p> <p>Since 1986, Mr. Chernick has served as the President of Resource Insight, Inc. (RII). RII is a nationally recognized consulting firm that specializes in the</p>

	<p>regulation of electric and gas utilities and provides policy and technical analysis, strategic advice, assistance in settlement negotiations, and expert testimony. Mr. Chernick supervises several other experts and provides SBUA with expertise on a range of issues, including analyzing complex public policy and economics matters. Prior to his position at RII, Mr. Chernick served as a Research Associate at Analysis and Inference, Inc. from 1981-1986, and he started his career from 1977-1981 as a Utility Rate Analyst for the Massachusetts Attorney General. In these capacities, he has advised a variety of clients on utility matters.</p> <p>Mr. Chernick received a Master of Science degree in Technology and Policy from the Massachusetts Institute of Technology in February 1978 with as focus on the role of technology in public policy formulation, analysis, and evaluation. He has a Bachelor of Science degree from the Civil Engineering Department at the Massachusetts Institute of Technology in June 1974.</p> <p>A copy of Mr. Chernick’s professional qualifications is included herewith as <u>Attachment #4</u>.</p> <p>Based on Mr. Chernick’s experience, education, and current role, SBUA submits that it is reasonable for the Commission to consider Mr. Chernick to have qualifications as a Level V Public Policy Analyst. Mr. Chernick also performs economic analysis for SBUA, and economists with over 15 years of experience are placed at Level V with a 2021 hourly rate range of \$188.53 (low), \$268.89 (middle), to \$370.45 (high). Therefore, SBUA submits that it is reasonable for the Commission to consider Mr. Chernick as a Public Policy Analyst that also performs economic analysis with over 40 years of directly relevant experience and set his 2021 rate at \$465 per hour.</p>
Comment 5	<p><b><u>2019 and 2020 Hourly Rates for Expert John D. Wilson:</u></b> SBUA seeks an hourly rate for the work of attorney John Wilson of \$350 for his work in 2019 and \$360 for his work in 2020. SBUA made an identical request in A.19-09-009. Pending a decision on this compensation claim, the same 2019 and 2020 hourly rates will apply here. SBUA requests that the Commission refer to and rely on the showing in this other docket to support Mr. Wilson’s 2019 and 2020 rates.</p>
Comment 6	<p><b><u>2019 Hourly Rate for Expert James Harvey:</u></b> SBUA seeks an hourly rate for expert James Harvey of \$190 for the work he performed in 2019. Mr. Harvey is a public policy analyst for clients representing the environment, small business, and electricity regulators. At the time of the work that he did in this proceeding, he had approximately two and a half years of experience doing this work.</p> <p>A copy of Mr. Harvey’s professional qualifications is included herewith as <u>Attachment #5</u>.</p> <p>The requested 2019 hourly rate for services provided by Mr. Harvey in this proceeding are justified based on the two and half years of experience this expert has in the energy industry and “take into consideration the market rates paid to</p>

	persons of comparable training and experience who offer similar services,” <i>see</i> PUC § 1806. His requested compensation is within the established 2019 range of rates for his level of experience.
Comment 7	<p><b><u>2021 Hourly Rate for General Counsel James M. Birkelund:</u></b> Per Resolution ALJ-393 and the Market Rate Study, the hourly rate for a Legal Director with Mr. Birkelund’s years of experience (20+ years) ranges from \$529.38 (low) to \$884.06 (high). SBUA requests a 2021 hourly rate for James Birkelund of \$770, which is within the third quartile of this range and justified for Mr. Birkelund based on his credentials, labor responsibilities as General Counsel, and high level of experience with PUC, energy, and utility matters.</p> <p>Mr. Birkelund received his J.D. from the University of Michigan in 1999 and has over 21 years of legal experience. Mr. Birkelund has been acting as General Counsel for SBUA for over 8 years since 2012.<sup>4</sup></p> <p>As General Counsel, Mr. Birkelund squarely meets each of the requirements for a Level V Legal Director. His responsibilities include:</p> <ul style="list-style-type: none"> <li>• overseeing the legal work of the organization, including providing strategic direction;</li> <li>• coordinating and supervising SBUA’s legal team, including attorneys and experts;</li> <li>• participating in the most complex legal actions; and</li> <li>• overseeing legal operations including case assignments, hiring, supervision and professional development of the legal staff, and budgeting.</li> </ul> <p><i>See</i> Market Rate Study, Legal Director labor role (“Oversees the legal work of the organization, including providing strategic direction. Alternate title may be General Counsel. Responsible for coordinating and supervising a legal team. Participates in the most complex legal actions. Oversees all legal operations including case assignment, hiring, supervision and professional development of the legal staff, as well as budgeting”). We understand the new rates are intended to cover overhead.</p> <p>Mr. Birkelund has dedicated his legal career to energy, environmental, and utility law. His experience as an energy attorney is broad and includes advising on PUC matters in California, Oregon, Washington, D.C., Idaho, South Dakota, and Colorado, as well as in-house counsel experience at a major utility (with over \$1.5 billion in annual revenues) where he advised and routinely commented on energy regulatory issues. Mr. Birkelund also has extensive litigation</p>

<sup>4</sup> *See, e.g.*, A.12-11-009, D.15-06-016 (Decision Granting Compensation to Small Business Utility Advocates for Substantial Contribution to Decision 14-08-032), June 11, 2015, at 17 (Mr. Birkelund acting as SBUA’s General Counsel in 2012).

	<p>experience practicing in federal and California courts and before administrative agencies. He formerly held positions as a Senior Project Attorney at the Natural Resources Defense Council (NRDC) and as an attorney at Morrison &amp; Foerster, LLP. Along with a law degree, Mr. Birkelund has a Master of Science in Resource Policy (1999) from the University of Michigan School of Natural Resources.</p> <p>Mr. Birkelund's professional activities also are extensive and have included:</p> <ul style="list-style-type: none"> <li>• acting as a <i>Judge Pro Tem</i> at the San Francisco Superior Court of California;</li> <li>• serving as an <i>Executive Committee Member</i> at the California Lawyers Association, Environmental Law Section; and</li> <li>• teaching as an <i>Adjunct Professor</i> at Hastings College of Law in San Francisco.</li> </ul> <p>A copy of Mr. Birkelund's professional qualifications is included herewith as <u>Attachment #6</u>.</p> <p>Based on Mr. Birkelund's 20+ years of professional experience, dedication to the fields of energy and utility law, and responsibilities as General Counsel, SBUA submits that the requested rate of \$770 hour is reasonable and well justified under Resolution ALJ-393.</p>
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**D. CPUC Comments, Disallowances, and Adjustments (CPUC completes)**

Item	Reason

**PART IV: OPPOSITIONS AND COMMENTS**

**Within 30 days after service of this Claim, Commission Staff or any other party may file a response to the Claim (*see* § 1804(c))**

<b>A. Opposition: Did any party oppose the Claim?</b>	
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If so:

Party	Reason for Opposition	CPUC Discussion

<b>B. Comment Period: Was the 30-day comment period waived (see Rule 14.6(c)(6))?</b>	
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If not:

<b>Party</b>	<b>Comment</b>	<b>CPUC Discussion</b>

**(Green items to be completed by Intervenor)**

### **FINDINGS OF FACT**

1. **SMALL BUSINESS UTILITY ADVOCATES** [has/has not] made a substantial contribution to D.21-07-010.
2. The requested hourly rates for **SMALL BUSINESS UTILITY ADVOCATES'** representatives [, as adjusted herein,] are comparable to market rates paid to experts and advocates having comparable training and experience and offering similar services.
3. The claimed costs and expenses [, as adjusted herein,] are reasonable and commensurate with the work performed.
4. The total of reasonable compensation is \$\_\_\_\_\_.

### **CONCLUSION OF LAW**

1. The Claim, with any adjustment set forth above, [satisfies/fails to satisfy] all requirements of Pub. Util. Code §§ 1801-1812.

### **ORDER**

1. **SMALL BUSINESS UTILITY ADVOCATES** shall be awarded \$\_\_\_\_\_.
2. Within 30 days of the effective date of this decision, \_\_\_\_\_ shall pay **SMALL BUSINESS UTILITY ADVOCATES** the total award. [for multiple utilities: "Within 30 days of the effective date of this decision, ^, ^, and ^ shall pay **SMALL BUSINESS UTILITY ADVOCATES** their respective shares of the award, based on their California-jurisdictional [industry type, for example, electric] revenues for the ^ calendar year, to reflect the year in which the proceeding was primarily litigated. If such data is unavailable, the most recent [industry type, for example, electric] revenue data shall be used."] Payment of the award shall include compound interest at the rate earned on prime, three-month non-financial

commercial paper as reported in Federal Reserve Statistical Release H.15, beginning [date], the 75<sup>th</sup> day after the filing of **SMALL BUSINESS UTILITY ADVOCATES'** request, and continuing until full payment is made.

3. The comment period for today's decision [is/is not] waived.
4. This decision is effective today.

Dated \_\_\_\_\_, at San Francisco, California.



## APPENDIX

### Compensation Decision Summary Information

Compensation Decision:		Modifies Decision?	
Contribution Decision(s):	D.21-07-010		
Proceeding(s):	A.10-07-009; A.19-03-002		
Author:			
Payer(s):			

### Intervenor Information

Intervenor	Date Claim Filed	Amount Requested	Amount Awarded	Multiplier?	Reason Change/Disallowance
SMALL BUSINESS UTILITY ADVOCATES	9/13/21	\$ 253,178.05		N/A	

### Hourly Fee Information

First Name	Last Name	Attorney, Expert, or Advocate	Hourly Fee Requested	Year Hourly Fee Requested	Hourly Fee Adopted
Jennifer	Weberski	Attorney	\$460	2019	
Jennifer	Weberski	Attorney	\$470	2020	
Jennifer	Weberski	Attorney	\$625	2021	
Ivan	Jimenez	Attorney	\$245	2019	
John	Wilson	Expert	\$350	2019	
John	Wilson	Expert	\$360	2020	
Paul	Chernick	Expert	\$400	2019	
Paul	Chernick	Expert	\$430	2020	
Paul	Chernick	Expert	\$465	2021	
James	Harvey	Expert	\$190	2019	
Amy	Umaretiya	Expert	\$220	2019	
Amy	Umaretiya	Expert	\$225	2020	
James	Birkelund	Attorney	\$495	2019	
James	Birkelund	Attorney	\$510	2020	
James	Birkelund	Attorney	\$770	2021	

**(END OF APPENDIX)**

## **ATTACHMENT 2**

Timesheets for SBUA Attorneys and Resource Insight, Inc. Experts

**Application 10-07-009/ A. 19-03-002 - Request for Intervenor Compensation**  
**Attachment 2. Time Sheet Records with Allocation of Hours Contribution to D.21-07-010**

**Time Sheet Entries for Litigation Supervisor Jennifer Weberski**

**Issue Identification**

<b><u>Issue 1</u></b>	Hearings
<b><u>Issue 2</u></b>	Settlement Activities
<b><u>Issue 3</u></b>	Demand Charges/Monthly Fees
<b><u>Issue 4</u></b>	Dynamic/Real-Time Pricing/TOU periods
<b><u>Issue 5</u></b>	Marginal Costs, Cost Allocation
<b><u>Issue 6</u></b>	Discovery
<b><u>Issue 7</u></b>	Procedural

<b><u>Date</u></b>	<b><u>Activity</u></b>	<b><u>Issue 1</u></b>	<b><u>Issue 2</u></b>	<b><u>Issue 3</u></b>	<b><u>Issue 4</u></b>	<b><u>Issue 5</u></b>	<b><u>Issue 6</u></b>	<b><u>Issue 7</u></b>
8/19/19	Review Application and filings			2	2	2		
8/20/19	Review SBUA filings; Application			1.25	1.25	1.25		
8/21/19	Prep and review for PHC on 8/22	1.5						
8/22/19	Attend PHC at CPUC	2						
8/22/19	Review Agenda for demand charge workshop on 8/27			0.5				
8/23/19	Review SDG&E data response to CalPA			1				
8/26/19	Review Xnel 8/27 presentation			0.5				
8/27/19	Participate in Demand Charge workshop			5				
8/28/19	Internal discussion with J. Birkelund							
8/29/19	Continue review of Application and pleadings			2.5		2.5		
8/30/19	Continue review of Application and pleadings			3	3.5			
9/2/19	Continue review of Application and pleadings				1.25	1		
9/3/19	Review next steps in workshop reporting			0.5				
9/3/19	Begin discovery drafting			1			1	
9/3/19	Review SDG&E Supplemental testimony			0.5	0.5	0.5		
9/4/19	Internal discussion with J. Birkelund			0.1				
9/5/19	Review CPUC guidance on 10/15 workshop							0.25
9/5/19	Review SDG&E data responses to parties						2.25	
9/6/19	Draft and submit discovery on Supplemental Testimony						1.75	
9/9/19	Review Demand Charge draft report			1.5				
9/12/19	Review filed Demand Charge Report			1.5				
9/12/19	Review SDG&E data response to SBUA						1.5	
9/13/19	Internal discussion with J. Birkelund			0.25				
9/18/19	Call into Escondido PPH			1				
9/18/19	Call with P. Chernick on workshops			1				
9/26/19	Review and discuss Demand Charge Report comments with P. Chernick.			1				
10/3/19	Internal discussion with J. Birkelund			0.25				
10/15/19	Attend dynamic pricing workshop				6			
10/17/19	Internal discussion with J. Birkelund							
10/21/19	Review internal notes from 10/15 workshop			0.25				
10/23/19	Internal discussion with J. Birkelund				0.25			
10/29/19	Review SDG&E Workshop Report				1			
10/30/19	Provide Workshop Report to internal staff				0.25			
10/31/19	Internal discussion with J. Birkelund				0.25			
11/1/19	Review ALJ ruling requesting Supplemental Testimony							0.5
11/6/19	Review Company request for extension and impact on consolidation request							0.5
11/18/19	Review Supplemental Testimony/Data filed by SDG&E per ALJ ruling				0.75			
11/20/19	Internal discussion with J. Birkelund				0.1			
11/25/19	Review new schedule with staff							0.25
11/27/19	Internal discussion with J. Birkelund							0.75

<u>Date</u>	<u>Activity</u>	<u>Issue 1</u>	<u>Issue 2</u>	<u>Issue 3</u>	<u>Issue 4</u>	<u>Issue 5</u>	<u>Issue 6</u>	<u>Issue 7</u>
12/4/19	Review updated response to CalPA			1			1	
12/6/19	Review SDG&E responses to TURN requests						2.25	
12/11/19	Internal discussion with J. Birkelund		0.25					
1/15/20	Receive and begin review of Suppl. Testimony			0.25	0.5	0.5		
1/17/20	Continue review of Suppl. Testimony			1	1	0.25		
2/13/20	Begin review of CalPA Testimony			1	1	1		
2/14/20	Continue review of CalPA Testimony			1	1.75			
3/11/20	Execute NDA with SDGE							0.75
3/20/20	Review ALJ ruling on procedural schedule							0.25
4/6/20	Finalize, edit and serve Direct Testimony of SBUA			2.5	1	1.5		
4/7/20	Review party testimony			2	2	0.5		
4/8/20	Review party testimony			0.75	1	2		
4/30/20	Review ALJ procedural ruling and invite to add. Testimony							0.75
5/4/20	Finalize, edit and serve Rebuttal Testimony of SBUA			4.5				
5/6/20	Review rebuttal testimony			1	1	1		
5/7/20	Review rebuttal testimony			0.75	0.75	0.75		
5/11/20	Research and analyze impacts of D.20-01-002; finalize, file and serve comments on impact of D.20-01-002							2
6/3/20	Participate in settlement conference		1					
6/4/20	Participate in settlement conferences		3					
6/5/20	Review ALJ order on meet and confer							0.5
6/11/20	Participate in settlement conference		1					
6/12/20	Finalize inclusion on Joint Management Statement		0.5					
6/12/20	Review ALJ order on webcast requirements							0.5
6/19/20	Review ALJ ruling canceling hearings and STC							0.25
6/30/20	Review ALJ procedural ruling							0.25
7/12/20	Participate in settlement conference		1					
7/17/20	Review ALJ ruling on dynamic pricing testimony				0.5			
7/24/20	Participate in settlement conference		1.5					
8/3/20	Participate in settlement conference		1.5					
8/6/20	Participate in settlement conference		1.5					
8/6/20	Finalize inclusion on Joint Management Statement		0.5					
8/7/20	Review updated procedural schedule order							0.5
8/10/20	Participate in status conference	0.75						
8/27/20	Participate in settlement conference		1					
8/31/20	Review Supp. Testimony				2			
9/1/20	Review ALJ order setting hearings	0.5						
9/8/20	Participate in settlement conference		1					
9/9/20	Prepare exhibit list for inclusion on JCE		1					
9/10/20	Confer final approval for inclusion on Joint Conference Statement		0.5					
9/11/20	Participate in settlement conference		1					
9/16/20	Participate in settlement conference		1					
9/22/20	Review for final list of exhibits							0.75
9/25/20	Review ruling updating EH schedule							0.25
9/28/20	Participate in EH	3						
10/7/20	Confer final approval for inclusion on Settlement Agreement		0.5					
10/19/20	Review EH schedule ruling	0.25						
10/21/20	Email on JCE and settlement doc		1					
10/22/20	Internal discussion with J. Birkelund		0.25					
10/23/20	Review ruling on status conference and EH		0.5					
10/26/20	Participate in settlement conference		1					
10/26/20	Attend telephonic status conference planning for EH		1					
10/27/20	Email discussion on settlement panel		1					
10/28/20	Participate in settlement conference planning for EH		1					
10/28/20	Internal discussion with J. Birkelund		0.25					
10/29/20	Participate in EH	4						

<u>Date</u>	<u>Activity</u>	<u>Issue 1</u>	<u>Issue 2</u>	<u>Issue 3</u>	<u>Issue 4</u>	<u>Issue 5</u>	<u>Issue 6</u>	<u>Issue 7</u>
10/30/20	Participate in EH	4						
11/2/20	Review TURN Supp. Testimony				0.75			
11/3/20	Review SDGE responses to EH questions	1						
11/5/20	Review JRAP supp filing				0.5			
11/9/20	Review party comments in support of Sett. Agreement		2					
11/16/20	Review party briefs		3					
11/17/20	Review party briefs		2.75					
11/30/20	Review SDAP and SDGE reply comments on Settlement Agreement		1					
2/10/21	Prep for meeting on ERRRA issue on Settlement		0.75					
2/11/21	Parties discussion on ERRRA for Settlement		1					
2/15/21	Review material on Addendum		2					
2/16/21	Call with parties on Addendum		2					
2/23/21	Internal discussion on Addendum		1					
6/9/21	Review PD		2					
6/29/21	Finalize, file and serve comments on PD		2.25					
	<b>Total:</b>	<b>17</b>	<b>43.5</b>	<b>40.35</b>	<b>30.85</b>	<b>14.75</b>	<b>9.75</b>	<b>9</b>

<u>Date</u>	<u>Compensation Hours for J. Weberski</u>	
9/8/21	Prepare comp claim	5
9/10/21	Prepare comp claim	2.5
9/11/21	Prepare comp claim	3
9/12/21	Prepare comp claim	2.5
	<b>Total:</b>	<b>13</b>

**Application 10-07-009/ A. 19-03-002 - Request for Intervenor Compensation**  
**Attachment 2. Time Sheet Records with Allocation of Hours Contribution to D.21-07-010**

**Time Sheet Entries for SBUA Attorney Ivan Jimenez**

**Issue Identification**

<b><u>Issue 1</u></b>	Hearings
<b><u>Issue 2</u></b>	Settlement Activities
<b><u>Issue 3</u></b>	Demand Charges/Monthly Fees
<b><u>Issue 4</u></b>	Dynamic/Real-Time Pricing/TOU periods
<b><u>Issue 5</u></b>	Marginal Costs, Cost Allocation
<b><u>Issue 6</u></b>	Discovery
<b><u>Issue 7</u></b>	Procedural

<b><u>Date</u></b>	<b><u>Activity</u></b>	<b><u>Issue 1</u></b>	<b><u>Issue 2</u></b>	<b><u>Issue 3</u></b>	<b><u>Issue 4</u></b>	<b><u>Issue 5</u></b>	<b><u>Issue 6</u></b>	<b><u>Issue 7</u></b>
4/2/19	Review application and supporting testimony for issues impacting small businesses including cost allocation			0.3	0.3	0.3		
4/8/19	As above; draft Protest			1	1	1.7		
4/8/19	Incorporate edits from J. Birkelund and finalize Protest			0.3	0.2	0.5		
5/1/19	Analyze SDGE TOU/CPP petition for mod. and prep for call with SDG&E			0.2	0.2	0.5		
5/2/19	Setup phone call with SDG&E re PFM re CPP					0.1		
5/2/19	Draft questions for discussion with SDG&E regarding PFM on					0.1		
5/7/19	Confer with J. Birkelund re SDG&E's petition to modify decision on critical peak pricing and SBUA's participation in the Flexible Generation Capacity Working Group as well as hiring an expert to assist with this working group					0.3		
5/7/19	Confer with J. Birkelund re upcoming call with SDG&E (scheduled for 5/8) on their petition to modify D.12-12-004 (dynamic pricing decision)					0.1		
5/7/19	Analyze automatic TOU opt-in vs. optional opt-in and impacts on small businesses					0.1		
5/8/19	Call with SDG&E regarding Petition for Modification (Critical Peak Pricing)					0.3		
5/14/19	Strategize with J. Birkelund re SBUA's response to SDG&E's petition for modification regarding Critical Peak Pricing					0.1		
5/27/19	Draft response to petition for modification of D.12-12-004 re default electric rate for small commercial customer.					2.7		
5/28/19	Confer with J. Birkelund re SBUA's Response to the petition re default electric rate for small commercial customer.					0.1		
5/28/19	Incorporate edits from J. Birkelund and finalize response to petition to					2.4		
6/7/19	Analyze file, application re prep for hearing	1.9						
6/12/19	Analyze PHC statements filed and determine SBUA's positions on issues	1.4						
6/12/19	Represent SBUA during PHC	1						
6/12/19	Confer with CALSSA representative re RTP proposal and potential benefits for small businesses					0.2		
6/12/19	Confer with representative from San Diego Airport Shuttle Company re impact of SDG&E's billing practices and operation of circuits on small businesses						0.4	
6/24/19	Review ALJ ruling consolidating application for GRC 2 and the petition to modify D.12-12-004 (mandating critical peak pricing as default for commercial customers)							0.1
7/12/19	Review scoping memo							0.1
7/16/19	Confer with expert P. Chernick re workshop on demand charges			0.1				
8/2/19	Confer with expert P. Chernick re demand charge workshop			0.2				
8/2/19	Confer with J. Birkelund re public participation hearings						0.1	
8/6/19	Review ALJ ruling setting PHC	0.1						
8/6/19	Confer with expert P. Chernick re demand charges and alternative to demand charges			0.1				
8/6/19	Review ALJ's ruling granting extension of time to submit supplemental information as required in July 26 Ruling						0.1	
8/20/19	Review SDG&E's supplemental testimony on demand charges and confer with expert P. Chernick on demand charge studies			0.4				
	<b>Total:</b>	<b>4.4</b>		<b>2.6</b>	<b>1.7</b>	<b>9.5</b>	<b>0.6</b>	<b>0.2</b>



**Compensation Hours for I. Jimenez**

6/5/19	Research time for filing of NOI in petition for modification re CPP	0.2
6/24/19	Draft NOI	1
6/27/19	Draft NOI	0.5
6/28/19	Strategize w/ J. Birkelund re NOI	0.2
7/12/19	Incorporate edits from J. Birkelund and finalize NOI	0.4
	<b>Total:</b>	<b>2.3</b>

**Application 10-07-009/ A. 19-03-002 - Request for Intervenor Compensation**  
**Attachment 2. Time Sheet Records with Allocation of Hours Contribution to D.21-07-010**

**Time Sheet Entries for SBUA General Counsel James Birkelund**

**Issue Identification**

<b><u>Issue 1</u></b>	Hearings
<b><u>Issue 2</u></b>	Settlement Activities
<b><u>Issue 3</u></b>	Demand Charges/Monthly Fees
<b><u>Issue 4</u></b>	Dynamic/Real-Time Pricing/TOU periods
<b><u>Issue 5</u></b>	Marginal Costs, Cost Allocation
<b><u>Issue 6</u></b>	Discovery
<b><u>Issue 7</u></b>	Procedural

<b><u>Date</u></b>	<b><u>Activity</u></b>	<b><u>Issue 1</u></b>	<b><u>Issue 2</u></b>	<b><u>Issue 3</u></b>	<b><u>Issue 4</u></b>	<b><u>Issue 5</u></b>	<b><u>Issue 6</u></b>	<b><u>Issue 7</u></b>
3/8/19	Read/review SDG&E application.			0.4	0.2	1		
3/8/19	In-person meeting w SBUA expert (P. Chernick) re SBUA positions and strategies.			0.2	0.2	0.2		
3/8/19	Analyze monthly service fees for small commercial customers (SDG&E witness Morien (Chapter 3); formulate SBUA positions re the same.			1.5				
3/27/19	Litigation strategy meeting w attorney (A. Strauss), specification of SBUA issues and discussion of case strategy.			0.3	0.3	0.4		
4/1/19	Continue review of SDG&E testimony (Saxe testimony on marginal distribution demand and customer costs; Emge testimony on revenue allocation).			1.4		1.8		
4/1/19	Outline SBUA case in chief; emails w SBUA experts re the same.			0.3	0.3	0.4		
4/8/19	Edit SBUA protest; review file re MC and revenue allocations for small commercial customers.						2	
5/7/19	Read/analyze Petition for Modification and CCP and TOU issues for small business; outline SBUA positions re the same.				2.4			
5/27/19	Final edits to SBUA response to petition for modification re default electric rate for small commercial customer.				1			
5/28/19	Draft/edit SBUA response to petition to modify; review D.12-12-004 and analyze SDG&E's request to modify the default electricity rate for its small commercial customers.				2.8			
6/10/19	Review ALJ rulings re PHC; crrspnd w S. Nelson re the schedule changes.	0.3						0.1
6/12/19	Confer w Litigation Team re PHC and SBUA positions.	0.2						
6/12/19	Read PHC statements; Litigation Team Meeting re SBUA positions in advance of PHC.	1						
6/25/19	Review ruling consolidating proceedings w A.10-07-009 re petition for modification of Decision (D.) 12-12-004.							0.3
6/25/19	Confer w experts re SDG&E requests to modify the default electric rate for its small commercial customers.			0.3	0.4			
7/5/19	Read email re SDG&E's GRC Phase 2 Supplemental Testimony.							0.1
7/12/19	Read scoping memo.							0.2
	Read ALJ email ruling providing directions for July 29, 2019 workshop.							0.1
7/17/19	Confer w SBUA experts re the same.					0.4		
7/18/19	Emails w parties re agenda for Workshop on SDG&E Marginal Costs and Cost Allocation.					0.1		
7/27/19	Rev SDG&E's presentation materials for the July 29, 2019 workshop on Marginal Costs & Revenue Allocation.					0.7		
7/29/19	Review ALJ ruling re public participation hearings.							0.1
8/4/19	Read SDG&E's request for a partial extension of time to comply with the July 26, 2019 ALJ ruling requiring Supplemental Information.							0.1
8/7/19	Review ALJ's procedural communications re prehearing conference .							0.1
8/8/19	Review ALJ's email re extension of time to submit the information identified in Section 4 of the July 26, 2019 ruling.							0.1
8/19/19	Rev filings, outline SBUA case in chief in prep for PHC.	0.5						
8/20/19	Rev email ruling directing SDG&E to serve 8/12 supplemental testimony in Excel format							0.1
8/23/19	Review SDG&E Response to CalPA Data Request 09.						0.2	
7/30/30	Read SDG&E Motion for One-Month Extension of Evidentiary Hearings.							0.1

<u>Date</u>	<u>Activity</u>	<u>Issue 1</u>	<u>Issue 2</u>	<u>Issue 3</u>	<u>Issue 4</u>	<u>Issue 5</u>	<u>Issue 6</u>	<u>Issue 7</u>
10/30/19	Review/edit comments on SDG&E's Straw Proposal; tcw J. Weberski re the same.		0.5					
2/13/20	Read ALJ's emails re cross-examination estimates schedule.	0.8						
5/1/20	Confer w experts re email ruling inviting comment on Rate Case Plan Changes Ordered in D.20-01-002.							0.5
5/3/20	Read/comment on SBUA rebuttal testimony; read other parties' opening testimony.			0.2	0.3	0.5		
5/11/20	Internal communications w legal team re SBUA comments on Rate Case Plan.							0.1
5/21/20	Review/analyze SDG&E's stlmt list of issues for discussion.		0.5					
5/27/20	Internal communications w legal team re stlmt points; review file re demand charges and TOU.		0.8					
6/10/20	Stlmt crrespnd w SDG&E.		0.5					
6/11/20	Read ALJ Update on Evidentiary Hearing.							0.1
6/11/20	Crrespnd w SDG&E re stlmt update.		0.3					
6/12/20	Crrespnd w SDG&E re stlmt update.		0.1					
6/15/20	Read ALJ email cancelling hearings.	0.1						
6/19/20	Read ALJ email Ruling Postponing Hearing.	0.1						
7/2/20	Analyze terms in COUNTER OFFER OF UCAN, TURN AND CalPA.		1					
7/10/20	Attn to terms, counteroffers, and edits to stlmt agmt.		0.8					
7/13/20	Crrespnd w SDG&E re stlmt talks.		0.2					
7/17/20	Read ALJ ruling re supplemental written testimony on real-time pricing (RTP) rates				0.1			
7/21/20	Emails w parties re stlmt mtg availability.		0.1					
7/23/20	Rev SDG&E settlement term sheet; read proposals of CalPA, UCAN and TURN.		1.2					
7/24/20	Read joint consumer advocates (Cal Advocates, TURN, UCAN) revised stlmt terms.		0.4					
7/28/20	Read SDG&E request for an extension for 1 month delay in scheduling of hearings.							0.1
7/29/20	Stlmt crrespnd w SDG&E, TURN, and CLECA.		0.3					
7/30/20	Emails w SDG&E re stlmt discussions.		0.2					
8/5/20	Emails w parties re Joint Status Conference Statement							0.1
8/20/20	Emails w SDG&E re stlmt call.		0.1					
8/26/20	Rev SDG&E stlmt terms and sheet; analyze cost allocations for small commercial customers.		0.5			1.2		
8/31/20	Read ALJ's Procedural Email Update							0.1
9/2/20	Strategy call w J. Weberski re stlmt terms; rev updated stlmt terms.		1					
9/4/20	Review SDG&E proposed exhibit list.							0.1
9/4/20	Email crrespnd w SDG&E re stlmt terms and negotiations.		0.2					
9/5/20	Review updated redline of SDG&E stlmt term sheet re total rate changes to small commercial customers.		0.5					
9/9/20	Read joint status conference statement.							0.1
9/10/20	Read emails re joint status conference.							0.1
9/10/20	Review parties' updated stlmt offers re TOU.		0.5					
9/11/20	Emails w ALJ and SDG&E status conference and exhibit list.							0.1
9/11/20	Strategy call w J. Weberski on stlmt negotiations.		0.3					
9/11/20	Review updated term sheet; litigation strategy call w J. Weberski re the same.		0.7					
9/15/20	Analyze FEA, CLECA, EPUC edits to stlmt terms.		0.6					
9/16/20	Review updated Exh. List.							0.1
9/16/20	Review additional edits to stlmt terms.		0.8					
9/17/20	Review revisions to stlmt terms.		0.5					
9/19/20	Analyze SDG&E's comparison exhibit relative to stlmt positions.		0.5					
9/22/20	Comms w SDG&E re issues being litigated.				0.1			
9/22/20	Review changes to comparison exhibit.							0.4
	Read SDG&E's emails to ALJ re stlmt update.							0.1
9/23/20	Review updated stlmt terms and issues for litigation; confer w J. Weberski re SBUA's positions.		0.9					
9/24/20	Read updated x-exam estimates.	0.1						
9/30/20	Confer w J. Weberski re the same.	0.5						
9/30/20	Read, review, and approve: 1) draft Joint Motion to Adopt the Settlement Agreement; 2) the Draft Settlement Agreement; and 3) the Draft Settlement Comparison Exhibit.		1					
10/7/20	Cmmns w SCE and J. Weberski re final stlmt terms.		0.5					

<u>Date</u>	<u>Activity</u>	<u>Issue 1</u>	<u>Issue 2</u>	<u>Issue 3</u>	<u>Issue 4</u>	<u>Issue 5</u>	<u>Issue 6</u>	<u>Issue 7</u>
10/7/20	Final review and execution for stlmt agmt.		1					
10/15/20	Emails w parties and ALJ re need for hearings with pending stlmt.	0.2						
10/27/20	Strategy call w J. Weberski re stlmt panel.		0.2					
10/27/20	Crrspnd w settling parties re Settlement Panel Composition.		0.4					
10/27/20	Email crrspnd w SDG&E and parties re stlmt panel.		0.5					
10/30/20	Review SDG&E's response to the status conference bench request for information.							0.4
11/9/20	Read crrspnd w TURN and settling parties re comments on PD re stlmt.		0.3					
11/9/20	Read SD Public School's and SDAP's cmmts on stlmt agmt.		0.4					
11/16/20	Read parties opening briefs, including issues related to PTM and CPP.				0.7			
11/20/20	Read opening briefs on real time pricing.				0.3			
1/21/21	Read email ruling Directing SDG&E and Settling Parties to File Joint Statement.							0.1
7/7/21	Read parties' reply cmmts on PD.				0.5			
	<b>Total:</b>	<b>3.8</b>	<b>18.3</b>	<b>4.6</b>	<b>9.6</b>	<b>8.7</b>	<b>0.2</b>	<b>3.9</b>

<u>Date</u>	<u>Compensation Hours for J. Birkelund</u>	<u>Hours</u>
7/10/19	Draft/edit NOI to claim compensation.	1.9
9/13/21	Rev J. Weberski draft and edit comp claim	2.8
9/14/21	Additional edits to comp claim.	2.5
	<b>Total:</b>	<b>7.2</b>

**Application 10-07-009/ A. 19-03-002 - Request for Intervenor Compensation**  
**Attachment 2. Time Sheet Records with Allocation of Hours Contribution to D.21-07-010**

**Time Sheet Entries for Expert Paul Chernick**

**Issue Identification**

<b><u>Issue 1</u></b>	Hearings
<b><u>Issue 2</u></b>	Settlement Activities
<b><u>Issue 3</u></b>	Demand Charges/Monthly Fees
<b><u>Issue 4</u></b>	Dynamic/Real-Time Pricing/TOU periods
<b><u>Issue 5</u></b>	Marginal Costs, Cost Allocation
<b><u>Issue 6</u></b>	Discovery
<b><u>Issue 7</u></b>	Procedural

<b><u>Date</u></b>	<b><u>Activity</u></b>	<b><u>Issue 1</u></b>	<b><u>Issue 2</u></b>	<b><u>Issue 3</u></b>	<b><u>Issue 4</u></b>	<b><u>Issue 5</u></b>	<b><u>Issue 6</u></b>	<b><u>Issue 7</u></b>
3/8/19	set up project; review application			0.5				
7/16/19	planning for workshops; review filing			2				
7/17/19	planning for workshops; review filing			2				
8/21/19	coordinating on workshop coverage and project management			1.5				
8/26/19	review presentations and participate in SDG&E demand-charge workshop			1.5				
8/27/19	review presentations and participate in SDG&E demand-charge workshop			4.5				
9/10/19	scheduling and coordination with JWeberski			0.5				
9/18/19	review filing				1.5	1.5		
9/26/19	memo on demand charges			4.5				
10/2/19	filing review; discovery notes;						2	
10/12/19	travel for workshop				4.0			
10/12/19	review presentations				5.0			
10/14/19	preparation (review presentations, make notes) for RTP workshop;				4.0			
10/15/19	attendance at RTP workshop				6.5			
10/15/19	travel				2.5			
10/17/19	travel				10.0			
10/19/19	review presentations from workshop, retrieve and review cited sources, download CAISO LMP data to check assertions in presentations, set up analysis of CPP hours				6			
10/20/19	Notes on and responses to presentations from 10/15 workshop				6			
10/21/19	research on rate effects on solar and storage				2			
10/25/19	review discovery;						1	
10/30/19	discovery and project planning; rate design options.						1.5	
10/31/19	discovery and project planning; rate design options.						2	
11/5/19	internal discussion of issues, scope and process				1.5			
11/19/19	review UT Austin analysis of distribution cost drivers				1.2			
11/25/19	scope and scheduling				1.5			
12/9/19	scoping and planning				1.0			
12/18/19	review CPUC rate-design precedents				1.5			
12/23/19	review CAISO determination of peak periods; SDG&E peak hours				2.0			
12/24/19	review CAISO determination of peak periods; SDG&E peak hours				2.0			
1/13/20	LMP and TOU periods; analysis of optimal TOU periods; customer & demand charge trends and effects				2.0			
1/15/20	LMP and TOU periods; analysis of optimal TOU periods; customer & demand charge trends and effects				3.5			
1/27/20	Review documents and organize analysis				1	1		
1/31/20	Review documents and organize analysis				1	1		
2/27/20	review discovery responses						1.5	
3/8/20	outline and draft testimony; supporting analysis			2	2	2		
3/9/20	outline and draft testimony; supporting analysis				2	2		
3/9/20	Draft testimony			2				
3/10/20	Draft testimony			1	1	1		
3/11/20	outline and draft testimony; supporting analysis			2	2	2		
3/11/20	Draft testimony			1				
3/12/20	Draft testimony				3			
3/14/20	Draft testimony					1		
3/30/20	final testimony			2	2			
4/1/20	final testimony					2		
4/29/20	implications of schedule for next GRC; optimal TOU periods; rebuttal				2.0			

<u>Date</u>	<u>Activity</u>	<u>Issue 1</u>	<u>Issue 2</u>	<u>Issue 3</u>	<u>Issue 4</u>	<u>Issue 5</u>	<u>Issue 6</u>	<u>Issue 7</u>
4/30/20	implications of schedule for next GRC; optimal TOU periods; rebuttal				4.0			
5/1/20	implications of schedule for next GRC; optimal TOU periods; rebuttal				4.0			
5/2/20	implications of schedule for next GRC; optimal TOU periods; rebuttal				7.0			
5/3/20	Rebuttal, conf call with allies		4.0					
5/5/20	Rebuttal, conf call with allies		1.0					
5/21/20	settlement conference and stipulation		2.0					
5/29/20	planning for settlement discussions		0.5					
6/3/20	comment language		1.5					
6/3/20	settlement negotiation sessions & prep & follow-up		2.5					
6/4/20	settlement negotiation sessions & prep & follow-up		3.0					
6/5/20	settlement negotiation sessions & prep & follow-up		1.0					
6/11/20	status conference		1.0					
7/1/20	settlement issues; conf call with		1.5					
7/2/20	settlement issues; conf call with		3.8					
7/3/20	settlement issues; conf call with		1.1					
7/5/20	Settlement issues; coordinate with SEIA		0.5					
7/6/20	Settlement issues; coordinate with SEIA		1.3					
7/9/20	Settlement issues; coordinate with SEIA		2.0					
7/17/20	dynamic rate issues				1			
7/19/20	settlement offers and call		0.5					
7/22/20	settlement offers and call		1.0					
7/24/20	settlement offers and call		1.4					
9/16/20	review term sheet; small C&I rate increase		1.5					
9/17/20	review term sheet; small C&I rate increase		1.0					
9/21/20	hearing preparation	0.5						
9/22/20	hearing preparation	0.5						
10/14/20	hearing planning	0.5						
10/15/20	coordination on hearings	0.5						
11/6/20	hearing prep	1.0						
11/18/20	Review scope of motion to admit evidence	1.0						
1/22/21	ERRA update issues		1.0					
2/10/21	review issues for meeting		1.0					
2/11/21	revised settlement meeting		1.0					
2/13/21	review SDG&E updated illustrative rates; identify other data needs.		1.5					
2/15/21	Review SDG&E documents re ERRA and settlement update		2.0					
2/16/21	conference calls on settlment addendum and technical issues		2.0					
2/23/21	Discuss Possible Addendum to Settlement		1.0					
6/28/21	review CalPA comment on RTP		0.5					
6/28/21	Review PD comments		0.5					
	<b>Total:</b>	<b>4.0</b>	<b>42.6</b>	<b>27</b>	<b>95.7</b>	<b>13.5</b>	<b>8</b>	

**Application 10-07-009/ A. 19-03-002 - Request for Intervenor Compensation**  
**Attachment 2. Time Sheet Records with Allocation of Hours Contribution to D.21-07-010**

**Time Sheet Entries for Expert John Wilson**

**Issue Identification**

<b><u>Issue 1</u></b>	Hearings
<b><u>Issue 2</u></b>	Settlement Activities
<b><u>Issue 3</u></b>	Demand Charges/Monthly Fees
<b><u>Issue 4</u></b>	Dynamic/Real-Time Pricing/TOU periods
<b><u>Issue 5</u></b>	Marginal Costs, Cost Allocation
<b><u>Issue 6</u></b>	Discovery
<b><u>Issue 7</u></b>	Procedural

<b><u>Date</u></b>	<b><u>Activity</u></b>	<b><u>Issue 1</u></b>	<b><u>Issue 2</u></b>	<b><u>Issue 3</u></b>	<b><u>Issue 4</u></b>	<b><u>Issue 5</u></b>	<b><u>Issue 6</u></b>	<b><u>Issue 7</u></b>	
11/6/19	Briefing on P2 rate case			0.25	0.5	0.5			-
11/13/19	Review notes				0.5				
2/28/20	SDGE Phase 2 review			1	0.5	0.5			
3/1/20	SDGE Phase 2 review		0.25						
3/6/20	SDGE Phase 2 review			1	1	2			
3/9/20	SDGE Phase 2 testimony			0.5	0.5	0.5			
3/10/20	SDGE Phase 2 testimony			1	1.5	1.5			
3/11/20	SDGE Phase 2 testimony			1	1	1			
3/12/20	SDGE Phase 2 testimony			1.5	1	1.5			
3/13/20	SDGE Phase 2 testimony			1					
	<b>Totals:</b>		<b>0.25</b>	<b>7.25</b>	<b>6.5</b>	<b>7.5</b>			



**Application 10-07-009/ A. 19-03-002 - Request for Intervenor Compensation**  
**Attachment 2. Time Sheet Records with Allocation of Hours Contribution to D.21-07-010**

**Time Sheet Entries for Expert Amy Umaretiya**

**Issue Identification**

<b><u>Issue 1</u></b>	Hearings
<b><u>Issue 2</u></b>	Settlement Activities
<b><u>Issue 3</u></b>	Demand Charges/Monthly Fees
<b><u>Issue 4</u></b>	Dynamic/Real-Time Pricing/TOU periods
<b><u>Issue 5</u></b>	Marginal Costs, Cost Allocation
<b><u>Issue 6</u></b>	Discovery
<b><u>Issue 7</u></b>	Procedural

<b><u>Date</u></b>	<b><u>Activity</u></b>	<b><u>Issue 1</u></b>	<b><u>Issue 2</u></b>	<b><u>Issue 3</u></b>	<b><u>Issue 4</u></b>	<b><u>Issue 5</u></b>	<b><u>Issue 6</u></b>	<b><u>Issue 7</u></b>
07/29/19	workshop/review workpapers			3	2	2		
08/26/19	demand charge workshop/prep			3				
08/27/19	demand charge workshop/prep			6				
09/10/19	demand charge workshop report review			1				
09/18/19	demand charge workshop report review			0.5				
10/03/19	Phase 2 document review			2	2	3		
10/04/19	Phase 2 document review			2		2		
10/18/19	Testimony review			2				
10/24/19	testimony review			2	2	3		
10/25/19	testimony review			3		3		
10/31/19	outline of relevant issues fo demand response			7				
11/01/19	outline of marginal costs relevant issues					7		
11/04/19	summarize relevant decisions				4			
11/05/19	Summarize testimony and relevant decisions				4			
11/06/19	Summarize demand-charge issues from testimony			4				
11/07/19	RTP testimony and analysis				4			
11/08/19	Demand charge Issue analysis			4				
11/12/19	marginal cost analyses					3		
11/13/19	Dynamic pricing options				3			
11/14/19	RTP pricing approaches				3			
11/15/19	marginal cost computations					3		
11/19/19	Demand-charge relationship to marginal costs			1.5		1.5		
11/20/19	Compare demand charges and RTP for matching marginal costs			1	1	1		
11/21/19	mapping marginal costs into RTP pricing				1.25	1.75		
11/22/19	Pricing for marginal cost recovery			1	1	1		
12/17/19	discovery response/testimony review						6	
12/18/19	discovery response/testimony review						7	
12/26/19	testimony/discovery review and prep						7	
12/27/19	testimony/discovery review and prep						7	
12/30/19	discovery review and prep						7	
01/02/20	discovery review and prep						5	
01/14/20	Pricing issues outline update			2	2			
01/15/20	Coordination on RTP and MC				3	3		
01/16/20	meeting on transferring project data to other staff				3	3		
01/21/20	transition outlines to PLC			2	2	2		
01/22/20	Update cross-referencing			1.5	1.5	3		
01/23/20	Compiling testimony/discovery information			3		3		
01/24/20	prepare materials for testimony			2	1	3		
01/27/20	Notes on demand-charge info from testimony and discovery						6	
01/28/20	Identifying discovery by topic						6	
01/29/20	Organizing data from discovery responses						6	
	<b>Total:</b>			<b>53.5</b>	<b>39.75</b>	<b>48.25</b>	<b>57</b>	

**Application 10-07-009/ A. 19-03-002 - Request for Intervenor Compensation**  
**Attachment 2. Time Sheet Records with Allocation of Hours Contribution to D.21-07-010**

**Time Sheet Entries for Expert James Harvey**

**Issue Identification**

<b><u>Issue 1</u></b>	Hearings
<b><u>Issue 2</u></b>	Settlement Activities
<b><u>Issue 3</u></b>	Demand Charges/Monthly Fees
<b><u>Issue 4</u></b>	Dynamic/Real-Time Pricing/TOU periods
<b><u>Issue 5</u></b>	Marginal Costs, Cost Allocation
<b><u>Issue 6</u></b>	Discovery
<b><u>Issue 7</u></b>	Procedural

<b><u>Date</u></b>	<b><u>Activity</u></b>	<b><u>Issue 1</u></b>	<b><u>Issue 2</u></b>	<b><u>Issue 3</u></b>	<b><u>Issue 4</u></b>	<b><u>Issue 5</u></b>	<b><u>Issue 6</u></b>	<b><u>Issue 7</u></b>
10/21/19	Research CAISO gas turbine peak period to assess TOU periods			3.5				
	<b>Total:</b>			<b>3.5</b>				

## **ATTACHMENT 3**

Resumé / Professional Qualifications of Jennifer L. Weberski

# Jennifer L. Weberski

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jennifer@utilityadvocates.org

(703) 489-2924

548 Market St., #11200, San Francisco, CA 94104

## PROFILE

Accomplished administrative law professional focused on utility regulation and the environment, with over 20 years of attorney experience in energy efficiency, demand response, consumer engagement, utility rate regulation and energy policy before state Public Utilities Commissions.

## KEY ACCOMPLISHMENTS AND QUALIFICATIONS

- Provide analysis, legal & policy guidance to the Environmental Defense Fund with particular focus on the following proceedings at the California Public Utilities Commission & CAISO: Climate Change Proceedings, Demand Response, Time-of Use Rates, Transportation Electrification, Resource Adequacy, Natural Gas Greenhouse Gas Emissions, and General Rate cases.
- Lead counsel on the Washington Gas Light Company rate proceeding, wherein the Office of the People's Counsel was successful in defeating substantial claims asserted by the utility for a rate increase. As lead, I successfully defeated the utility's proposed \$50 million pipeline replacement program as unwarranted. Ultimately, the utility was granted less than 30% of the requested rate increase.
- Lead representative on the Productivity Improvement Working Group tasked with reviewing and analyzing proposed utility projects for cost/benefit to consumers, reviewing resource planning and vegetation management plans to ensure adequate reliability.
- Co-lead representative of the Office of the People's Counsel on the Board of Directors of the PowerCentsDC pilot program designed to test customer engagement with advanced pricing signals for electric service. The pilot program was conceived by the Office and included the participation of the local electric utility, the public service commission and the local union of electrical workers.
- Represented the Office on the Mayor's Pipeline Undergrounding Task Force and the Emergency Response Subcommittee of the Task Force to address the adequacy of electric service in the District and the cost/benefits of undergrounding primary and secondary cable to address issues of reliability.

# Jennifer L. Weberski

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jennifer@utilityadvocates.org

(703) 489-2924

548 Market St., #11200, San Francisco, CA 94104

## PROFESSIONAL EXPERIENCE

SMALL BUSINESS UTILITY ADVOCATES, San Francisco, CA 2019-Present  
Litigation Supervisor

- Provide a variety of litigation expertise and management, including preparation and presentation of matters before the CA Public Utilities Commission, in the interest of small business utility consumers.
- Serve as lead advocate and litigation manager on numerous CPUC proceedings, including General Rate Cases Phase I & II, rulemaking proceedings and utility applications.

ENVIRONMENTAL DEFENSE FUND, Walnut Creek, CA 2013-2018  
Independent Attorney Consultant

- Provide comprehensive analysis and policy advocacy, including both written and oral representation, for the Environmental Defense Fund (EDF) as a subject matter expert consultant before the California Public Utilities Commission. Participate in workshops, hearings and CPUC proceedings on behalf of EDF.
- Responsible for ensuring that EDF's core Clean Energy and Natural Gas overall strategy and policy positions contribute effectively to the overall effort in California to address natural gas emissions, transportation electrification, demand response, time-of use electric rates, energy efficiency and energy storage.
- Serve as co-lead on numerous CPUC proceedings, including rate proceedings, including filing of testimony, conducting cross-examination and settlement negotiations.

OFFICE OF THE PEOPLE'S COUNSEL, Washington, D.C.

Supervisor of Litigation 2010-2013  
Assistant People's Counsel 2003-2010

- Responsible for the supervision and management of the Litigation Division personnel of the Office, consisting of attorneys, technical and administrative staff. Responsibilities include the supervision and management of all tasks, deadlines, submissions and external meetings assigned to the Litigation Division and its personnel.
- Review and analyze complex financial, regulatory and legal applications and statements from public utilities. Responsibilities include the issuing of discovery and

# Jennifer L. Weberski

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discovery responses, testimony and briefs and conducting cross-examination and oral advocacy during litigation.

- Direct and manage financial and legal consultants and Office staff during administrative hearings and investigations. Responsible for the project management of formal proceedings before the Public Service Commission, including the quantity and quality of work produced by outside and internal staff.
- Responsible for the drafting and editing of all Litigation Division consumer outreach materials, including the Annual Report, consumer Fact Sheets, web articles and Mid-Year updates. In addition to the published materials, responsible for the coordination and participation of in-person briefings for both Office staff and external stakeholders on Litigation Division activities.
- Responsible for communicating the Litigation Division policy positions and activities into understandable text and ideas for lay consumers, council members, and other non-legal stakeholders.

CONNECTICUT OFFICE OF CONSUMER COUNSEL, New Britain, CT      1997-2003  
Staff Attorney

- Responsible for the investigation, legal research, case preparation, both through written filings and oral presentation, of water, electric, natural gas and telecommunications cases before the CT Department of Public Utility Control and the Connecticut courts.
- Applied knowledge of federal and state statutes, legal processes and forms to administrative hearings and appeals before the Connecticut courts.
- Represented the Office before the Connecticut legislature committee tasked with drafting statutes governing the licensing of electric suppliers and educating the public on electric deregulation.

## EDUCATION

UNIVERSITY OF CONNECTICUT SCHOOL OF LAW, Hartford, CT

WESTERN MICHIGAN UNIVERSITY, Lee Honors College, Kalamazoo, MI

## BAR LICENSES

State of Connecticut, 1997

District of Columbia, 2003

## **ATTACHMENT 4**

Resumé / Professional Qualifications of Paul L. Chernick

## PAUL L. CHERNICK

Resource Insight, Inc.  
5 Water Street  
Arlington, Massachusetts 02476

### SUMMARY OF PROFESSIONAL EXPERIENCE

- 1986–Present* **President, Resource Insight, Inc.** Consults and testifies in utility and insurance economics. Reviews utility supply-planning processes and outcomes: assesses prudence of prior power planning investment decisions, identifies excess generating capacity, analyzes effects of power-pool-pricing rules on equity and utility incentives. Reviews electric-utility rate design. Estimates magnitude and cost of future load growth. Designs and evaluates conservation programs for electric, natural-gas, and water utilities, including hook-up charges and conservation cost recovery mechanisms. Determines avoided costs due to cogenerators. Evaluates cogeneration rate risk. Negotiates cogeneration contracts. Reviews management and pricing of district heating systems. Determines fair profit margins for automobile and workers' compensation insurance lines, incorporating reward for risk, return on investments, and tax effects. Determines profitability of transportation services. Advises regulatory commissions in least-cost planning, rate design, and cost allocation.
- 1981–86* **Research Associate, Analysis and Inference, Inc.** (Consultant, 1980–81). Researched, advised, and testified in various aspects of utility and insurance regulation. Designed self-insurance pool for nuclear decommissioning; estimated probability and cost of insurable events, and rate levels; assessed alternative rate designs. Projected nuclear power plant construction, operation, and decommissioning costs. Assessed reasonableness of earlier estimates of nuclear power plant construction schedules and costs. Reviewed prudence of utility construction decisions. Consulted on utility rate-design issues, including small-power-producer rates; retail natural-gas rates; public-agency electric rates, and comprehensive electric-rate design for a regional power agency. Developed electricity cost allocations between customer classes. Reviewed district-heating-system efficiency. Proposed power-plant performance standards. Analyzed auto-insurance profit requirements. Designed utility-financed, decentralized conservation program. Analyzed cost-effectiveness of transmission lines.
- 1977–81* **Utility Rate Analyst, Massachusetts Attorney General.** Analyzed utility filings and prepared alternative proposals. Participated in rate negotiations, discovery, cross-examination, and briefing. Provided extensive expert testimony before various regulatory agencies. Topics included demand forecasting, rate design, marginal costs, time-of-use rates, reliability issues, power-pool operations, nuclear-power cost projections, power-plant cost-benefit analysis, energy conservation, and alternative-energy development.



## EDUCATION

SM, Technology and Policy Program, Massachusetts Institute of Technology, February 1978.

SB, Civil Engineering Department, Massachusetts Institute of Technology, June 1974.

## HONORS

Chi Epsilon (Civil Engineering)

Tau Beta Pi (Engineering)

Sigma Xi (Research)

Institute Award, Institute of Public Utilities, 1981.

## PUBLICATIONS

“Price Effects as a Benefit of Energy-Efficiency Programs” (with John Plunkett), *2014 ACEEE Summer Study on Energy Efficiency in Buildings* (5) 57–5-69. 2014.

“Environmental Regulation in the Changing Electric-Utility Industry” (with Rachel Brailove), *International Association for Energy Economics Seventeenth Annual North American Conference* (96–105). Cleveland, Ohio: USAEE. 1996.

“The Price is Right: Restructuring Gain from Market Valuation of Utility Generating Assets” (with Jonathan Wallach), *International Association for Energy Economics Seventeenth Annual North American Conference* (345–352). Cleveland, Ohio: USAEE. 1996.

“The Future of Utility Resource Planning: Delivering Energy Efficiency through Distributed Utilities” (with Jonathan Wallach), *International Association for Energy Economics Seventeenth Annual North American Conference* (460–469). Cleveland, Ohio: USAEE. 1996.

“The Future of Utility Resource Planning: Delivering Energy Efficiency through Distribution Utilities” (with Jonathan Wallach), *1996 Summer Study on Energy Efficiency in Buildings*, Washington: American Council for an Energy-Efficient Economy 7(7.47–7.55). 1996.

“The Allocation of DSM Costs to Rate Classes,” *Proceedings of the Fifth National Conference on Integrated Resource Planning*. Washington: National Association of Regulatory Utility Commissioners. May 1994.

“Environmental Externalities: Highways and Byways” (with Bruce Biewald and William Steinhurst), *Proceedings of the Fifth National Conference on Integrated Resource Planning*. Washington: National Association of Regulatory Utility Commissioners. May 1994.

“The Transfer Loss is All Transfer, No Loss” (with Jonathan Wallach), *The Electricity Journal* 6:6 (July 1993).

“Benefit-Cost Ratios Ignore Interclass Equity” (with others), *DSM Quarterly*, Spring 1992.

“ESCOs or Utility Programs: Which Are More Likely to Succeed?” (with Sabrina Birner), *The Electricity Journal* 5:2, March 1992.

“Determining the Marginal Value of Greenhouse Gas Emissions” (with Jill Schoenberg), *Energy Developments in the 1990s: Challenges Facing Global/Pacific Markets, Vol. II*, July 1991.

“Monetizing Environmental Externalities for Inclusion in Demand-Side Management Programs” (with Emily Caverhill), *Proceedings from the Demand-Side Management and the Global Environment Conference*, April 1991.

“Accounting for Externalities” (with Emily Caverhill). *Public Utilities Fortnightly* 127(5), March 1 1991.

“Methods of Valuing Environmental Externalities” (with Emily Caverhill), *The Electricity Journal* 4(2), March 1991.

“The Valuation of Environmental Externalities in Energy Conservation Planning” (with Emily Caverhill), *Energy Efficiency and the Environment: Forging the Link*. American Council for an Energy-Efficient Economy; Washington: 1991.

“The Valuation of Environmental Externalities in Utility Regulation” (with Emily Caverhill), *External Environmental Costs of Electric Power: Analysis and Internalization*. Springer-Verlag; Berlin: 1991.

“Analysis of Residential Fuel Switching as an Electric Conservation Option” (with Eric Espenhorst and Ian Goodman), *Gas Energy Review*, December 1990.

“Externalities and Your Electric Bill,” *The Electricity Journal*, October 1990, p. 64.

“Monetizing Externalities in Utility Regulations: The Role of Control Costs” (with Emily Caverhill) *Proceedings from the NARUC National Conference on Environmental Externalities*, October 1990.

“Monetizing Environmental Externalities in Utility Planning” (with Emily Caverhill), in *Proceedings from the NARUC Biennial Regulatory Information Conference*, September 1990.

“Analysis of Residential Fuel Switching as an Electric Conservation Option” (with Eric Espenhorst and Ian Goodman), in *Proceedings from the NARUC Biennial Regulatory Information Conference*, September 1990.

“A Utility Planner’s Checklist for Least-Cost Efficiency Investment” (with John Plunkett) in *Proceedings from the NARUC Biennial Regulatory Information Conference*, September 1990.

*Environmental Costs of Electricity* (with Richard Ottinger et al.). Oceana; Dobbs Ferry, New York: September 1990.

“Demand-Side Bidding: A Viable Least-Cost Resource Strategy” (with John Plunkett and Jonathan Wallach), in *Proceedings from the NARUC Biennial Regulatory Information Conference*, September 1990.

“Incorporating Environmental Externalities in Evaluation of District Heating Options” (with Emily Caverhill), *Proceedings from the International District Heating and Cooling Association 81st Annual Conference*, June 1990.

“A Utility Planner’s Checklist for Least-Cost Efficiency Investment,” (with John Plunkett), *Proceedings from the Canadian Electrical Association Demand-Side Management Conference*, June 1990.

“Incorporating Environmental Externalities in Utility Planning” (with Emily Caverhill), *Canadian Electrical Association Demand Side Management Conference*, May 1990.

“Is Least-Cost Planning for Gas Utilities the Same as Least-Cost Planning for Electric Utilities?” in *Proceedings of the NARUC Second Annual Conference on Least-Cost Planning*, September 10–13 1989.

“Conservation and Cost-Benefit Issues Involved in Least-Cost Planning for Gas Utilities,” in *Least Cost Planning and Gas Utilities: Balancing Theories with Realities*, Seminar proceedings from the District of Columbia Natural Gas Seminar, May 23 1989.

“The Role of Revenue Losses in Evaluating Demand-Side Resources: An Economic Re-Appraisal” (with John Plunkett), *Summer Study on Energy Efficiency in Buildings, 1988*, American Council for an Energy Efficient Economy, 1988.

“Quantifying the Economic Benefits of Risk Reduction: Solar Energy Supply Versus Fossil Fuels,” in *Proceedings of the 1988 Annual Meeting of the American Solar Energy Society*, American Solar Energy Society, Inc., 1988, pp. 553–557.

“Capital Minimization: Salvation or Suicide?,” in I. C. Bupp, ed., *The New Electric Power Business*, Cambridge Energy Research Associates, 1987, pp. 63–72.

“The Relevance of Regulatory Review of Utility Planning Prudence in Major Power Supply Decisions,” in *Current Issues Challenging the Regulatory Process*, Center for Public Utilities, Albuquerque, New Mexico, April 1987, pp. 36–42.

“Power Plant Phase-In Methodologies: Alternatives to Rate Shock,” in *Proceedings of the Fifth NARUC Biennial Regulatory Information Conference*, National Regulatory Research Institute, Columbus, Ohio, September 1986, pp. 547–562.

“Assessing Conservation Program Cost-Effectiveness: Participants, Non-participants, and the Utility System” (with A. Bachman), *Proceedings of the Fifth NARUC Biennial Regulatory Information Conference*, National Regulatory Research Institute, Columbus, Ohio, September 1986, pp. 2093–2110.

“Forensic Economics and Statistics: An Introduction to the Current State of the Art” (with Eden, P., Fairley, W., Aller, C., Vencill, C., and Meyer, M.), *The Practical Lawyer*, June 1 1985, pp. 25–36.

“Power Plant Performance Standards: Some Introductory Principles,” *Public Utilities Fortnightly*, April 18 1985, pp. 29–33.

“Opening the Utility Market to Conservation: A Competitive Approach,” *Energy Industries in Transition, 1985–2000*, Proceedings of the Sixth Annual North American Meeting of the International Association of Energy Economists, San Francisco, California, November 1984, pp. 1133–1145.

“Insurance Market Assessment of Technological Risks” (with Meyer, M., and Fairley, W) *Risk Analysis in the Private Sector*, pp. 401–416, Plenum Press, New York 1985.

“Revenue Stability Target Ratemaking,” *Public Utilities Fortnightly*, February 17 1983, pp. 35–39.

“Capacity/Energy Classifications and Allocations for Generation and Transmission Plant” (with M. Meyer), *Award Papers in Public Utility Economics and Regulation*, Institute for Public Utilities, Michigan State University 1982.

*Design, Costs and Acceptability of an Electric Utility Self-Insurance Pool for Assuring the Adequacy of Funds for Nuclear Power Plant Decommissioning Expense*, (with Fairley, W., Meyer, M., and Scharff, L.) (NUREG/CR-2370), U.S. Nuclear Regulatory Commission, December 1981.

*Optimal Pricing for Peak Loads and Joint Production: Theory and Applications to Diverse Conditions* (Report 77-1), Technology and Policy Program, Massachusetts Institute of Technology, September 1977.

## REPORTS

“Review of NS Power Compliance Filing on its Proposed AMI Opt-Out Charge” (with Benjamin Griffiths). October 26, 2018. Filed by the Nova Scotia Consumer Advocate in N.S. UARB Matter No. M08349.

“Avoided Energy Supply Costs in New England: 2018 Report” (with Pat Knight, Max Chang, David White, Benjamin Griffiths, Les Deman, John Rosenkranz, Jason Gifford, and others). March 30, 2018. Cambridge, Mass.: Synapse Energy Economics.

“Review of the NS Power Application for Approval of its 2017 Annually Adjusted Rates and Load Following Setting Methodology” (with Stacia Harper). August 2017. Filed by the Nova Scotia Consumer Advocate in N.S. UARB Matter No. M08114.

“Charge Without a Cause? Assessing Electric Utility Demand Charges on Small Consumers” (with John T. Colgan, Rick Gilliam, Douglas Jester and Mark LeBel). Electricity Rate Design Review No. 1, July 2016.

“Implications of the Proposed Clean Power Plan for Arkansas: Review of Stakeholder Concerns and Assessment of Feasibility.” 2014. Report to Arkansas Audubon, Arkansas Public Policy Panel, and Arkansas Sierra Club.

“Comments on Nova Scotia Power Inc.’s Proposed Capital Expenditure Justification Criteria.” 2013. Filed by the Nova Scotia Consumer Advocate in N.S. UARB Matter No. 05355.

“Avoided Energy Supply Costs in New England: 2013 Report” (with Rick Hornby, David White, John Rosenkranz, Ron Denhardt, Elizabeth Stanton, Jason Gifford, Bob Grace, Max Chang, Patrick Luckow, Thomas Vitolo, Patrick Knight, Ben Griffiths, and Bruce Biewald). 2013. Northborough, Mass.: Avoided-Energy-Supply-Component Study Group, c/o National Grid Company.

“Affordability of Pollution Control on the Apache Coal Units: Review of Arizona Electric Power Cooperative’s Comments on Behalf of the Sierra Club” (with Ben Griffiths). 2012. Filed as part of comments in Docket EPA-R09-OAR-2012-0021 by National Parks Conservation Association, Sierra Club, et al.

“Audubon Arkansas Comments on Entergy’s 2012 IRP.” 2012. Prepared for and filed by Audubon Arkansas in Arkansas PUC Docket No. 07-016-U.

“Economic Benefits from Early Retirement of Reid Gardner” (with Jonathan Wallach). 2012. Prepared for and filed by the Sierra Club in PUC of Nevada Docket No. 11-08019.

“Analysis of Via Verde Need and Economics.” 2012. Appendix V-4 of public comments of the Sierra Club et al. in response to November 30 2011 draft of U.S. Army Corps of Engineers environmental assessment in Department of the Army Environmental Assessment and Statement of Finding for Permit Application SAJ-2010-02881.

“Comments for The Alliance for Affordable Energy on Staff’s ‘Proposed Integrated Resource Planning Rules for Electric Utilities in Louisiana.’” 2011. Filed by the Alliance for Affordable Energy in Louisiana PSC Docket R-30021.

“Avoided Energy Supply Costs in New England: 2011 Report” (with Rick Hornby, Carl Swanson, David White, Jason Gifford, Max Chang, Nicole Hughes, Matthew Wittenstein, Rachel Wilson, and Bruce Biewald). 2011. Northborough, Mass.: Avoided-Energy-Supply-Component Study Group, c/o National Grid Company.

“State of Ohio Energy-Efficiency Technical-Reference Manual Including Predetermined Savings Values and Protocols for Determining Energy and Demand Savings” (with others). 2010. Burlington, Vt.: Vermont Energy Investment Corporation.

“Avoided Energy Supply Costs in New England: 2009 Report” (with Rick Hornby, Carl Swanson, David White, Ian Goodman, Bob Grace, Bruce Biewald, Ben Warfield, Jason Gifford, and Max Chang). 2009. Northborough, Mass.: Avoided-Energy-Supply-Component Study Group, c/o National Grid Company.

“Green Resource Portfolios: Development, Integration, and Evaluation” (with Jonathan Wallach and Richard Mazzini). 2008. Report to the Green Energy Coalition presented as evidence in Ont. Energy Board EB 2007-0707.

“Risk Analysis of Procurement Strategies for Residential Standard Offer Service” (with Jonathan Wallach, David White, and Rick Hornby) report to Maryland Office of People’s Counsel. 2008. Baltimore: Maryland Office of People’s Counsel.

“Avoided Energy Supply Costs in New England: 2007 Final Report” (with Rick Hornby, Carl Swanson, Michael Drunsic, David White, Bruce Biewald, and Jenifer Callay). 2007. Northborough, Mass.: Avoided-Energy-Supply-Component Study Group, c/o National Grid Company.

“Integrated Portfolio Management in a Restructured Supply Market” (with Jonathan Wallach, William Steinhurst, Tim Woolf, Anna Sommers, and Kenji Takahashi). 2006. Columbus, Ohio: Office of the Ohio Consumers’ Counsel.

“Natural Gas Efficiency Resource Development Potential in New York” (with Phillip Mosenthal, R. Neal Elliott, Dan York, Chris Neme, and Kevin Petak). 2006. Albany, N.Y.; New York State Energy Research and Development Authority.

“Natural Gas Efficiency Resource Development Potential in Con Edison Service Territory” (with Phillip Mosenthal, Jonathan Kleinman, R. Neal Elliott, Dan York, Chris Neme, and Kevin Petak. 2006. Albany, N.Y.; New York State Energy Research and Development Authority.

“Evaluation and Cost Effectiveness” (principal author), Ch. 14 of “California Evaluation Framework” Prepared for California utilities as required by the California Public Utilities Commission. 2004.

“Energy Plan for the City of New York” (with Jonathan Wallach, Susan Geller, Brian Tracey, Adam Auster, and Peter Lanzalotta). 2003. New York: New York City Economic Development Corporation.

“Updated Avoided Energy Supply Costs for Demand-Side Screening in New England” (with Susan Geller, Bruce Biewald, and David White). 2001. Northborough, Mass.: Avoided-Energy-Supply-Component Study Group, c/o New England Power Supply Company.

“Review and Critique of the Western Division Load-Pocket Study of Orange and Rockland Utilities, Inc.” (with John Plunkett, Philip Mosenthal, Robert Wichert, and Robert Rose). 1999. White Plains, N.Y.: Pace University School of Law Center for Environmental Studies.

“Avoided Energy Supply Costs for Demand-Side Management in Massachusetts” (with Rachel Brailove, Susan Geller, Bruce Biewald, and David White). 1999. Northborough, Mass.: Avoided-Energy-Supply-Component Study Group, c/o New England Power Supply Company.

“Performance-based Regulation in a Restructured Utility Industry” (with Bruce Biewald, Tim Woolf, Peter Bradford, Susan Geller, and Jerrold Oppenheim). 1997. Washington: NARUC.

“Distributed Integrated-Resource-Planning Guidelines.” 1997. Appendix 4 of “The Power to Save: A Plan to Transform Vermont’s Energy-Efficiency Markets,” submitted to the Vt. PSB in Docket No. 5854. Montpelier: Vermont DPS.

“Restructuring the Electric Utilities of Maryland: Protecting and Advancing Consumer Interests” (with Jonathan Wallach, Susan Geller, John Plunkett, Roger Colton, Peter Bradford, Bruce Biewald, and David Wise). 1997. Baltimore, Maryland: Maryland Office of People’s Counsel.

“Comments of the New Hampshire Office of Consumer Advocate on Restructuring New Hampshire’s Electric-Utility Industry” (with Bruce Biewald and Jonathan Wallach). 1996. Concord, N.H.: NH OCA.

“Estimation of Market Value, Stranded Investment, and Restructuring Gains for Major Massachusetts Utilities” (with Susan Geller, Rachel Brailove, Jonathan Wallach, and Adam Auster). 1996. On behalf of the Massachusetts Attorney General (Boston).

*From Here to Efficiency: Securing Demand-Management Resources* (with Emily Caverhill, James Peters, John Plunkett, and Jonathan Wallach). 1993. 5 vols. Harrisburg, Penn: Pennsylvania Energy Office.

“Analysis Findings, Conclusions, and Recommendations,” vol. 1 of “Correcting the Imbalance of Power: Report on Integrated Resource Planning for Ontario Hydro” (with Plunkett, John, and Jonathan Wallach), December 1992.

“Estimation of the Costs Avoided by Potential Demand-Management Activities of Ontario Hydro,” December 1992.

“Review of the Elizabethtown Gas Company’s 1992 DSM Plan and the Demand-Side Management Rules” (with Jonathan Wallach, John Plunkett, James Peters, Susan Geller, Blair Hamilton, and Andrew Shapiro). 1992. Report to the New Jersey Department of Public Advocate.

*Environmental Externalities Valuation and Ontario Hydro’s Resource Planning* (with E. Caverhill and R. Brailove), 3 vols.; prepared for the Coalition of Environmental Groups for a Sustainable Energy Future, October 1992.

“Review of Jersey Central Power & Light’s 1992 DSM Plan and the Demand-Side Management Rules” (with Jonathan Wallach et al.); Report to the New Jersey Department of Public Advocate, June 1992.

“The AGREIA Project Critique of Externality Valuation: A Brief Rebuttal,” March 1992.

“The Potential Economic Benefits of Regulatory NO<sub>x</sub> Valuation for Clean Air Act Ozone Compliance in Massachusetts,” March 1992.

“Initial Review of Ontario Hydro’s Demand-Supply Plan Update” (with David Argue et al.), February 1992.

“Report on the Adequacy of Ontario Hydro’s Estimates of Externality Costs Associated with Electricity Exports” (with Emily Caverhill), January 1991.

“Comments on the 1991–1992 Annual and Long Range Demand-Side-Management Plans of the Major Electric Utilities,” (with John Plunkett et al.), September 1990. Filed in NY PSC Case No. 28223 in re New York utilities’ DSM plans.

“Power by Efficiency: An Assessment of Improving Electrical Efficiency to Meet Jamaica’s Power Needs,” (with Conservation Law Foundation, et al.), June 1990.

“Analysis of Fuel Substitution as an Electric Conservation Option,” (with Ian Goodman and Eric Espenhorst), Boston Gas Company, December 22 1989.

“The Development of Consistent Estimates of Avoided Costs for Boston Gas Company, Boston Edison Company, and Massachusetts Electric Company” (with Eric Espenhorst), Boston Gas Company, December 22 1989.

“The Valuation of Externalities from Energy Production, Delivery, and Use: Fall 1989 Update” (with Emily Caverhill), Boston Gas Company, December 22 1989.

“Conservation Potential in the State of Minnesota,” (with Ian Goodman) Minnesota Department of Public Service, June 16 1988.

“Review of NEPOOL Performance Incentive Program,” Massachusetts Energy Facilities Siting Council, April 12 1988.

“Application of the DPU’s Used-and-Useful Standard to Pilgrim 1” (With C. Wills and M. Meyer), Massachusetts Executive Office of Energy Resources, October 1987.

“Constructing a Supply Curve for Conservation: An Initial Examination of Issues and Methods,” Massachusetts Energy Facilities Siting Council, June 1985.

“Final Report: Rate Design Analysis,” Pacific Northwest Electric Power and Conservation Planning Council, December 18 1981.

## **PRESENTATIONS**

“Rethinking Utility Rate Design—Retail Demand and Energy Charges,” Solar Power PV Conference, Boston MA, February 24, 2016.

“Residential Demand Charges - Load Effects, Fairness & Rate Design Implications.” Web seminar sponsored by the NixTheFix Forum. September 2015.

“The Value of Demand Reduction Induced Price Effects.” With Chris Neme. Web seminar sponsored by the Regulatory Assistance Project. March 2015.

“Adding Transmission into New York City: Needs, Benefits, and Obstacles.” Presentation to FERC and the New York ISO on behalf of the City of New York. October 2004.



“Plugging Into a Municipal Light Plant.” With Peter Enrich and Ken Barna. Panel presentation as part of the 2004 Annual Meeting of the Massachusetts Municipal Association. January 2004.

“Distributed Utility Planning.” With Steve Litkovitz. Presentation to the Vermont Distributed-Utility-Planning Collaborative. November 1999.

“The Economic and Environmental Benefits of Gas IRP: FERC 636 and Beyond.” Presentation as part of the Ohio Office of Energy Efficiency’s seminar, “Gas Utility Integrated Resource Planning,” April 1994.

“Cost Recovery and Utility Incentives.” Day-long presentation as part of the Demand-Side-Management Training Institute’s workshop, “DSM for Public Interest Groups,” October 1993.

“Cost Allocation for Utility Ratemaking.” With Susan Geller. Day-long workshop for the staff of the Connecticut Department of Public Utility Control, October 1993.

“Comparing and Integrating DSM with Supply.” Day-long presentation as part of the Demand-Side-Management Training Institute’s workshop, “DSM for Public Interest Groups,” October 1993.

“DSM Cost Recovery and Rate Impacts.” Presentation as part of “Effective DSM Collaborative Processes,” a week-long training session for Ohio DSM advocates sponsored by the Ohio Office of Energy Efficiency, August 1993.

“Cost-Effectiveness Analysis.” Presentation as part of “Effective DSM Collaborative Processes,” a week-long training session for Ohio DSM advocates sponsored by the Ohio Office of Energy Efficiency, August 1993.

“Environmental Externalities: Current Approaches and Potential Implications for District Heating and Cooling” (with R. Brailove), International District Heating and Cooling Association 84th Annual Conference. June 1993.

“Using the Costs of Required Controls to Incorporate the Costs of Environmental Externalities in Non-Environmental Decision-Making.” Presentation at the American Planning Association 1992 National Planning Conference; presentation cosponsored by the Edison Electric Institute. May 1992.

“Cost Recovery and Decoupling” and “The Clean Air Act and Externalities in Utility Resource Planning” panels (session leader), DSM Advocacy Workshop. April 15 1992.

“Overview of Integrated Resources Planning Procedures in South Carolina and Critique of South Carolina Demand Side Management Programs,” Energy Planning Workshops; Columbia, S.C. October 21 1991.

“Least Cost Planning and Gas Utilities.” Demand-Side Management and the Global Environment Conference; Washington, D.C. April 22 1991.

Conservation Law Foundation Utility Energy Efficiency Advocacy Workshop; Boston, February 28 1991.

“Least-Cost Planning in a Multi-Fuel Context.” NARUC Forum on Gas Integrated Resource Planning; Washington, D.C., February 24 1991.

“Accounting for Externalities: Why, Which and How?” Understanding Massachusetts’ New Integrated Resource Management Rules. Needham, Massachusetts, November 9 1990.

New England Gas Association Gas Utility Managers’ Conference. Woodstock, Vermont, September 10 1990.

“Quantifying and Valuing Environmental Externalities.” Presentation at the Lawrence Berkeley Laboratory Training Program for Regulatory Staff, sponsored by the U.S. Department of Energy’s Least-Cost Utility Planning Program; Berkeley, California, February 2 1990;

“Conservation in the Future of Natural Gas Local Distribution Companies.” District of Columbia Natural Gas Seminar; Washington, D.C. May 23 1989.

“Conservation and Load Management for Natural Gas Utilities,” Massachusetts Natural Gas Council; Newton, Massachusetts. April 3 1989.

New England Conference of Public Utilities Commissioners, Environmental Externalities Workshop. Portsmouth, New Hampshire, January 22–23 1989.

“Assessment and Valuation of External Environmental Damages.” New England Utility Rate Forum. Plymouth, Massachusetts, October 11 1985; “Lessons from Massachusetts on Long Term Rates for QFs”.

“Reviewing Utility Supply Plans.” Massachusetts Energy Facilities Siting Council; Boston, Massachusetts. May 30 1985.

“Power Plant Performance.” National Association of State Utility Consumer Advocates; Williamstown, Massachusetts. August 13 1984.

“Utility Rate Shock,” National Conference of State Legislatures; Boston, Massachusetts, August 6 1984.

“Review and Modification of Regulatory and Rate Making Policy,” National Governors’ Association Working Group on Nuclear Power Cost Overruns; Washington, D.C., June 20 1984.

“Review and Modification of Regulatory and Rate Making Policy,” Annual Meeting of the American Association for the Advancement of Science, Session on Monitoring for Risk Management; Detroit, Michigan, May 27 1983.

#### **ADVISORY ASSIGNMENTS TO REGULATORY COMMISSIONS**

District of Columbia Public Service Commission, Docket No. 834, Phase II; Least-cost planning procedures and goals. August 1987 to March 1988.

Connecticut Department of Public Utility Control, Docket No. 87-07-01, Phase 2; Rate design and cost allocations. March 1988 to June 1989.

Austin City Council, Austin Energy Rates, March to June 2012.

Puerto Rico Energy Commission, Puerto Rico Electric Power Authority, rate design issues, September 2015 to present.

## EXPERT TESTIMONY

1. **Mass. EFSC 78-12/MDPU 19494, Phase I;** Boston Edison 1978 forecast; Massachusetts Attorney General. June 1978.

Appliance penetration projections, price elasticity, econometric commercial forecast, peak demand forecast. Joint testimony with Susan C. Geller.

2. **Mass. EFSC 78-17,** Northeast Utilities 1978 forecast; Massachusetts Attorney General. September 1978.

Specification of economic/demographic and industrial models, appliance efficiency, commercial model structure and estimation.

3. **Mass. EFSC 78-33,** Eastern Utilities Associates 1978 forecast; Massachusetts Attorney General. November 1978.

Household size, appliance efficiency, appliance penetration, price elasticity, commercial forecast, industrial trending, peak demand forecast.

4. **Mass. DPU 19494, Phase II;** Boston Edison Company construction program; Massachusetts Attorney General. April 1979.

Review of numerous aspects of the 1978 demand forecasts of nine New England electric utilities, constituting 92% of projected regional demand growth, and of the NEPOOL demand forecast. Joint testimony with Susan Geller.

5. **Mass. DPU 19494, Phase II;** Boston Edison Company construction program; Massachusetts Attorney General. April 1979.

Reliability, capacity planning, capability responsibility allocation, customer generation, co-generation rates, reserve margins, operating reserve allocation. Joint testimony with S. Finger.

6. **U.S. ASLB NRC 50-471,** Pilgrim Unit 2; Commonwealth of Massachusetts. June 1979.

Review of the Oak Ridge National Laboratory and NEPOOL demand forecast models; cost-effectiveness of oil displacement; nuclear economics. Joint testimony with Susan Geller.

7. **Mass. DPU 19845**, Boston Edison time-of-use-rate case; Massachusetts Attorney General. December 1979.

Critique of utility marginal cost study and proposed rates; principles of marginal cost principles, cost derivation, and rate design; options for reconciling costs and revenues. Joint testimony with Susan Geller.

8. **Mass. DPU 20055**, petition of Eastern Utilities Associates, New Bedford G. & E., and Fitchburg G. & E. to purchase additional shares of Seabrook Nuclear Plant; Massachusetts Attorney General. January 1980.

Review of demand forecasts of three utilities purchasing Seabrook shares; Seabrook power costs, including construction cost, completion date, capacity factor, O&M expenses, interim replacements, reserves and uncertainties; alternative energy sources, including conservation, cogeneration, rate reform, solar, wood and coal conversion.

9. **Mass. DPU 20248**, petition of Massachusetts Municipal Wholesale Electric Company to purchase additional share of Seabrook Nuclear Plant; Massachusetts Attorney General. June 1980.

Nuclear power costs; update and extension of MDPU 20055 testimony.

10. **Mass. DPU 200**, Massachusetts Electric Company rate case; Massachusetts Attorney General. June 1980.

Rate design; declining blocks, promotional rates, alternative energy, demand charges, demand ratchets; conservation: master metering, storage heating, efficiency standards, restricting resistance heating.

11. **Mass. EFSC 79-33**, Eastern Utilities Associates 1979 forecast; Massachusetts Attorney General. July 1980.

Customer projections, consistency issues, appliance efficiency, new appliance types, commercial specifications, industrial data manipulation and trending, sales and resale.

12. **Mass. DPU 243**, Eastern Edison Company rate case; Massachusetts Attorney General. August 1980.

Rate design: declining blocks, promotional rates, alternative energy, master metering.

13. **Texas PUC 3298**, Gulf States Utilities rates; East Texas Legal Services. August 1980.

Inter-class revenue allocations, including production plant in-service, O&M, CWIP, nuclear fuel in progress, amortization of canceled plant residential rate design; interruptible rates; off-peak rates. Joint testimony with M. B. Meyer.

- 14. Mass. EFSC 79-1**, Massachusetts Municipal Wholesale Electric Company Forecast; Massachusetts Attorney General. November 1980.

Cost comparison methodology; nuclear cost estimates; cost of conservation, co-generation, and solar.
- 15. Mass. DPU 472**, recovery of residential conservation-service expenses; Massachusetts Attorney General. December 1980.

Conservation as an energy source; advantages of per-kWh allocation over per-customer-month allocation.
- 16. Mass. DPU 535**; regulations to carry out Section 210 of PURPA; Massachusetts Attorney General. January 1981 and February 1981.

Filing requirements, certification, qualifying-facility status, extent of coverage, review of contracts; energy rates; capacity rates; extra benefits of qualifying facilities in specific areas; wheeling; standardization of fees and charges.
- 17. Mass. EFSC 80-17**, Northeast Utilities 1980 forecast; Massachusetts Attorney General. March 1981.

Specification process, employment, electric heating promotion and penetration, commercial sales model, industrial model specification, documentation of price forecasts and wholesale forecast.
- 18. Mass. DPU 558**, Western Massachusetts Electric Company rate case; Massachusetts Attorney General. May 1981.

Rate design including declining blocks, marginal cost conservation impacts, and promotional rates. Conservation, including terms and conditions limiting renewable, cogeneration, small power production; scope of current conservation program; efficient insulation levels; additional conservation opportunities.
- 19. Mass. DPU 1048**, Boston Edison plant performance standards; Massachusetts Attorney General. May 1982.

Critique of company approach, data, and statistical analysis; description of comparative and absolute approaches to standard-setting; proposals for standards and reporting requirements.
- 20. DC PSC FC785**, Potomac Electric Power rate case; DC Peoples Counsel. July 1982.

Inter-class revenue allocations, including generation, transmission, and distribution plant classification; fuel and O&M classification; distribution and service allocators. Marginal cost estimation, including losses.

21. **N.H. PSC DE 81-312**, Public Service of New Hampshire supply and demand; Conservation Law Foundation et al. October 1982.
- Conservation program design, ratemaking, and effectiveness. Cost of power from Seabrook nuclear plant, including construction cost and duration, capacity factor, O&M, replacements, insurance, and decommissioning.
22. **Mass. Division of Insurance**, hearing to fix and establish 1983 automobile insurance rates; Massachusetts Attorney General. October 1982.
- Profit margin calculations, including methodology, interest rates, surplus flow, tax flows, tax rates, and risk premium.
23. **Ill. CC 82-0026**, Commonwealth Edison rate case; Illinois Attorney General. October 1982.
- Review of Cost-Benefit Analysis for nuclear plant. Nuclear cost parameters (construction cost, O&M, capital additions, useful life, capacity factor), risks, discount rates, evaluation techniques.
24. **N.M. PSC 1794**, Public Service of New Mexico application for certification; New Mexico Attorney General. May 1983.
- Review of Cost-Benefit Analysis for transmission line. Review of electricity price forecast, nuclear capacity factors, load forecast. Critique of company ratemaking proposals; development of alternative ratemaking proposal.
25. **Conn. DPUC 830301**, United Illuminating rate case; Connecticut Consumers Counsel. June 17 1983.
- Cost of Seabrook nuclear power plants, including construction cost and duration, capacity factor, O&M, capital additions, insurance and decommissioning.
26. **Mass. DPU 1509**, Boston Edison plant performance standards; Massachusetts Attorney General. July 15 1983.
- Critique of company approach and statistical analysis; regression model of nuclear capacity factor; proposals for standards and for standard-setting methodologies.
27. **Mass. Division of Insurance**, hearing to fix and establish 1984 automobile-insurance rates; Massachusetts Attorney General. October 1983.
- Profit margin calculations, including methodology, interest rates.
28. **Conn. DPUC 83-07-15**, Connecticut Light and Power rate case; Alloy Foundry. October 3 1983.
- Industrial rate design. Marginal and embedded costs; classification of generation, transmission, and distribution expenses; demand versus energy charges.

29. **Mass. EFSC 83-24**, New England Electric System forecast of electric resources and requirements; Massachusetts Attorney General. November 14 1983, Rebuttal, February 2 1984.

Need for transmission line. Status of supply plan, especially Seabrook 2. Review of interconnection requirements. Analysis of cost-effectiveness for power transfer, line losses, generation assumptions.

30. **Mich. PSC U-7775**, Detroit Edison Fuel Cost Recovery Plan; Public Interest Research Group in Michigan. February 21 1984.

Review of proposed performance target for new nuclear power plant. Formulation of alternative proposals.

31. **Mass. DPU 84-25**, Western Massachusetts Electric Company rate case; Massachusetts Attorney General. April 6 1984.

Need for Millstone 3. Cost of completing and operating unit, cost-effectiveness compared to alternatives, and its effect on rates. Equity and incentive problems created by CWIP. Design of Millstone 3 phase-in proposals to protect ratepayers: limitation of base-rate treatment to fuel savings benefit of unit.

32. **Mass. DPU 84-49 and 84-50**, Fitchburg Gas & Electric financing case; Massachusetts Attorney General. April 13 1984.

Cost of completing and operating Seabrook nuclear units. Probability of completing Seabrook 2. Recommendations regarding FG&E and MDPU actions with respect to Seabrook.

33. **Mich. PSC U-7785**, Consumers Power fuel-cost-recovery plan; Public Interest Research Group in Michigan. April 16 1984.

Review of proposed performance targets for two existing and two new nuclear power plants. Formulation of alternative policy.

34. **FERC ER81-749-000 and ER82-325-000**, Montaup Electric rate cases; Massachusetts Attorney General. April 27 1984.

Prudence of Montaup and Boston Edison in decisions regarding Pilgrim 2 construction: Montaup's decision to participate, the Utilities' failure to review their earlier analyses and assumptions, Montaup's failure to question Edison's decisions, and the utilities' delay in canceling the unit.

35. **Maine PUC 84-113**, Seabrook-1 investigation; Maine Public Advocate. September 13 1984.

Cost of completing and operating Seabrook Unit 1. Probability of completing Seabrook 1. Comparison of Seabrook to alternatives. Rate effects. Recommendations regarding utility and PUC actions with respect to Seabrook.

- 36. Mass. DPU 84-145**, Fitchburg Gas and Electric rate case; Massachusetts Attorney General. November 6 1984.

Prudence of Fitchburg and Public Service of New Hampshire in decision regarding Seabrook 2 construction: FGE's decision to participate, the utilities' failure to review their earlier analyses and assumptions, FGE's failure to question PSNH's decisions, and utilities' delay in halting construction and canceling the unit. Review of literature, cost and schedule estimate histories, cost-benefit analyses, and financial feasibility.

- 37. Penn. PUC R-842651**, Pennsylvania Power and Light rate case; Pennsylvania Consumer Advocate. November 1984.

Need for Susquehanna 2. Cost of operating unit, power output, cost-effectiveness compared to alternatives, and its effect on rates. Design of phase-in and excess capacity proposals to protect ratepayers: limitation of base-rate treatment to fuel savings benefit of unit.

- 38. N.H. PSC 84-200**, Seabrook Unit-1 investigation; New Hampshire Consumer Advocate. November 1984.

Cost of completing and operating Seabrook Unit 1. Probability of completing Seabrook 1. Comparison of Seabrook to alternatives. Rate and financial effects.

- 39. Mass. Division of Insurance**, hearing to fix and establish 1986 automobile insurance rates; Massachusetts Attorney General. November 1984.

Profit-margin calculations, including methodology and implementation.

- 40. Mass. DPU 84-152**, Seabrook Unit 1 investigation; Massachusetts Attorney General. December 1984.

Cost of completing and operating Seabrook. Probability of completing Seabrook 1. Seabrook capacity factors.

- 41. Maine PUC 84-120**; Central Maine Power rate case; Maine PUC Staff. December 1984.

Prudence of Central Maine Power and Boston Edison in decisions regarding Pilgrim 2 construction: CMP's decision to participate, the utilities' failure to review their earlier analyses and assumptions, CMP's failure to question Edison's decisions, and the utilities' delay in canceling the unit. Prudence of CMP in the planning and investment in Sears Island nuclear and coal plants. Review of literature, cost and schedule estimate histories, cost-benefit analyses, and financial feasibility.



- 42. Maine PUC 84-113, Seabrook 2 investigation; Maine PUC Staff. December 1984.**

Prudence of Maine utilities and Public Service of New Hampshire in decisions regarding Seabrook 2 construction: decisions to participate and to increase ownership share, the utilities' failure to review their earlier analyses and assumptions, failure to question PSNH's decisions, and the utilities' delay in halting construction and canceling the unit. Review of literature, cost and schedule estimate histories, cost-benefit analyses, and financial feasibility.

- 43. Mass. DPU 1627, Massachusetts Municipal Wholesale Electric Company financing case; Massachusetts Executive Office of Energy Resources. January 1985.**

Cost of completing and operating Seabrook nuclear unit 1. Cost of conservation and other alternatives to completing Seabrook. Comparison of Seabrook to alternatives.

- 44. Vt. PSB 4936, Millstone 3 costs and in-service date; Vermont Department of Public Service. January 1985.**

Construction schedule and cost of completing Millstone Unit 3.

- 45. Mass. DPU 84-276, rules governing rates for utility purchases of power from qualifying facilities; Massachusetts Attorney General. March 1985 and October 1985.**

Institutional and technological advantages of Qualifying Facilities. Potential for QF development. Goals of QF rate design. Parity with other power sources. Security requirements. Projecting avoided costs. Capacity credits. Pricing options. Line loss corrections.

- 46. Mass. DPU 85-121, investigation of the Reading Municipal Light Department; Wilmington (Mass.) Chamber of Commerce. November 1985.**

Calculation on return on investment for municipal utility. Treatment of depreciation and debt for ratemaking. Geographical discrimination in street-lighting rates. Relative size of voluntary payments to Reading and other towns. Surplus and disinvestment. Revenue allocation.

- 47. Mass. Division of Insurance, hearing to fix and establish 1986 automobile insurance rates; Massachusetts Attorney General and State Rating Bureau. November 1985.**

Profit margin calculations, including methodology, implementation, modeling of investment balances, income, and return to shareholders.

- 48. N.M. PSC 1833, Phase II; El Paso Electric rate case; New Mexico Attorney General. December 1985.**

Nuclear decommissioning fund design. Internal and external funds; risk and return; fund accumulation, recommendations. Interim performance standard for Palo Verde nuclear plant.

- 49. Penn. PUC R-850152, Philadelphia Electric rate case; Utility Users Committee and University of Pennsylvania. January 1986.**

Limerick-1 rate effects. Capacity benefits, fuel savings, operating costs, capacity factors, and net benefits to ratepayers. Design of phase-in proposals.

- 50. Mass. DPU 85-270; Western Massachusetts Electric rate case; Massachusetts Attorney General. March 1986.**

Prudence of Northeast Utilities in generation planning related to Millstone 3 construction: decisions to start and continue construction, failure to reduce ownership share, failure to pursue alternatives. Review of industry literature, cost and schedule histories, and retrospective cost-benefit analyses.

- 51. Penn. PUC R-850290, Philadelphia Electric auxiliary service rates; Albert Einstein Medical Center, University of Pennsylvania, and Amtrak. March 1986.**

Review of utility proposals for supplementary and backup rates for small power producers and cogenerators. Load diversity, cost of peaking capacity, value of generation, price signals, and incentives. Formulation of alternative supplementary rate.

- 52. N.M. PSC 2004, Public Service of New Mexico Palo Verde issues; New Mexico Attorney General. May 1986.**

Recommendations for power-plant performance standards for Palo Verde nuclear units 1, 2, and 3.

- 53. Ill. CC 86-0325, Iowa-Illinois Gas and Electric Co. rate investigation; Illinois Office of Public Counsel. August 1986.**

Determination of excess capacity based on reliability and economic concerns. Identification of specific units associated with excess capacity. Required reserve margins.

- 54. N.M. PSC 2009**, El Paso Electric rate moderation program; New Mexico Attorney General. August 1986.

Prudence of EPE in generation planning related to Palo Verde nuclear construction, including failure to reduce ownership share and failure to pursue alternatives. Review of industry literature, cost and schedule histories, and retrospective cost-benefit analyses.

Recommendation for rate-base treatment; proposal of power plant performance standards.

- 55. City of Boston Public Improvements Commission**, transfer of Boston Edison district heating steam system to Boston Thermal Corporation; Boston Housing Authority. December 1986.

History and economics of steam system; possible motives of Boston Edison in seeking sale; problems facing Boston Thermal; information and assurances required prior to Commission approval of transfer.

- 56. Mass. Division of Insurance**, hearing to fix and establish 1987 automobile insurance rates; Massachusetts Attorney General and State Rating Bureau. December 1986 and January 1987.

Profit margin calculations, including methodology, implementation, derivation of cash flows, installment income, income tax status, and return to shareholders.

- 57. Mass. DPU 87-19**, petition for adjudication of development facilitation program; Hull (Mass.) Municipal Light Plant. January 1987.

Estimation of potential load growth; cost of generation, transmission, and distribution additions. Determination of hook-up charges. Development of residential load estimation procedure reflecting appliance ownership, dwelling size.

- 58. N.M. PSC 2004**, Public Service of New Mexico nuclear decommissioning fund; New Mexico Attorney General. February 1987.

Decommissioning cost and likely operating life of nuclear plants. Review of utility funding proposal. Development of alternative proposal. Ratemaking treatment.

- 59. Mass. DPU 86-280**, Western Massachusetts Electric rate case; Massachusetts Energy Office. March 1987.

Marginal cost rate design issues. Superiority of long-run marginal cost over short-run marginal cost as basis for rate design. Relationship of Consumer reaction, utility planning process, and regulatory structure to rate design approach. Implementation of short-run and long-run rate designs. Demand versus energy charges, economic development rates, spot pricing.

- 60. Mass. Division of Insurance** 87-9, 1987 Workers' Compensation rate filing; State Rating Bureau. May 1987.

Profit-margin calculations, including methodology, implementation, surplus requirements, investment income, and effects of 1986 Tax Reform Act.

- 61. Texas PUC** 6184, economic viability of South Texas Nuclear Plant #2; Committee for Consumer Rate Relief. August 1987.

Nuclear plant operating parameter projections; capacity factor, O&M, capital additions, decommissioning, useful life. STNP-2 cost and schedule projections. Potential for conservation.

- 62. Minn. PUC** ER-015/GR-87-223, Minnesota Power rate case; Minnesota Department of Public Service. August 1987.

Excess capacity on MP system; historical, current, and projected. Review of MP planning prudence prior to and during excess; efforts to sell capacity. Cost of excess capacity. Recommendations for ratemaking treatment.

- 63. Mass. Division of Insurance** 87-27, 1988 automobile insurance rates; Massachusetts Attorney General and State Rating Bureau. September 2 1987. Rebuttal October 1987.

Underwriting profit margins. Effect of 1986 Tax Reform Act. Biases in calculation of average margins.

- 64. Mass. DPU** 88-19, power Sales Contract from Riverside Steam and Electric to Western Massachusetts Electric; Riverside Steam and Electric. November 1987.

Comparison of risk from QF contract and utility avoided-cost sources. Risk of oil dependence. Discounting cash flows to reflect risk.

- 65. Mass. Division of Insurance** 87-53, 1987 Workers' Compensation rate refiling; State Rating Bureau. December 1987.

Profit-margin calculations including updating of data, compliance with Commissioner's order, treatment of surplus and risk, interest rate calculation, and investment tax rate calculation.

- 66. Mass. Division of Insurance**, 1987 and 1988 automobile insurance remand rates; Massachusetts Attorney General and State Rating Bureau. February 1988.

Underwriting profit margins. Provisions for income taxes on finance charges. Relationships between allowed and achieved margins, between statewide and nationwide data, and between profit allowances and cost projections.

- 67. Mass. DPU 86-36**, investigation into the pricing and ratemaking treatment to be afforded new electric generating facilities which are not qualifying facilities; Conservation Law Foundation. May 1988.

Cost recovery for utility conservation programs. Compensating for lost revenues. Utility incentive structures.

- 68. Mass. DPU 88-123**, petition of Riverside Steam & Electric; Riverside Steam and Electric Company. May 1988 and November 1988.

Estimation of avoided costs of Western Massachusetts Electric Company. Nuclear capacity factor projections and effects on avoided costs. Avoided cost of energy interchange and power plant life extensions. Differences between median and expected oil prices. Salvage value of cogeneration facility. Off-system energy purchase projections. Reconciliation of avoided cost projection.

- 69. Mass. DPU 88-67**, Boston Gas Company; Boston Housing Authority. June 1988.

Estimation of annual avoidable costs, 1988 to 2005, and levelized avoided costs. Determination of cost recovery and carrying costs for conservation investments. Standards for assessing conservation cost-effectiveness. Evaluation of cost-effectiveness of utility funding of proposed natural gas conservation measures.

- 70. R.I. PUC 1900**, Providence Water Supply Board tariff filing; Conservation Law Foundation, Audubon Society of Rhode Island, and League of Women Voters of Rhode Island. June 1988.

Estimation of avoidable water supply costs. Determination of costs of water conservation. Conservation cost-benefit analysis.

- 71. Mass. Division of Insurance 88-22**, 1989 automobile insurance rates; Massachusetts Attorney General and State Rating Bureau; Profit Issues, August 1988, supplemented August 1988; Losses and Expenses, September 1988.

Underwriting profit margins. Effects of 1986 Tax Reform Act. Taxation of common stocks. Lag in tax payments. Modeling risk and return over time. Treatment of finance charges. Comparison of projected and achieved investment returns.

- 72. Vt. PSB 5270 Module 6**, investigation into least-cost investments, energy efficiency, conservation, and the management of demand for energy; Conservation Law Foundation, Vermont Natural Resources Council, and Vermont Public Interest Research Group. September 1988.

Cost recovery for utility conservation programs. Compensation of utilities for revenue losses and timing differences. Incentive for utility participation.

73. **Vt. House of Representatives, Natural Resources Committee**, House Act 130; “Economic Analysis of Vermont Yankee Retirement”; Vermont Public Interest Research Group. February 1989.

Projection of capacity factors, operating and maintenance expense, capital additions, overhead, replacement power costs, and net costs of Vermont Yankee.

74. **Mass. DPU 88-67** Phase II, Boston Gas company conservation program and rate design; Boston Gas Company. March 1989.

Estimation of avoided gas cost; treatment of non-price factors; estimation of externalities; identification of cost-effective conservation.

75. **Vt. PSB 5270**, status conference on conservation and load management policy settlement; Central Vermont Public Service, Conservation Law Foundation, Vermont Natural Resources Council, Vermont Public Interest Research Group, and Vermont Department of Public Service. May 1989.

Cost-benefit test for utility conservation programs. Role of externalities. Cost recovery concepts and mechanisms. Resource allocations, cost allocations, and equity considerations. Guidelines for conservation preapproval mechanisms. Incentive mechanisms and recovery of lost revenues.

76. **Boston Housing Authority Court 05099**, Gallivan Boulevard Task Force vs. Boston Housing Authority, et al.; Boston Housing Authority. June 1989.

Effect of master-metering on consumption of natural gas and electricity. Legislative and regulatory mandates regarding conservation.

77. **Mass. DPU 89-100**, Boston Edison rates; Massachusetts Energy Office. June 1989.

Prudence of decision to spend \$400 million from 1986–88 to return Pilgrim nuclear plant to service. Projections of nuclear capacity factors, O&M, capital additions, and overhead. Review of decommissioning cost, tax effect of abandonment, replacement power cost, and plant useful life estimates. Requirements for prudence and used-and-useful analyses.

78. **Mass. DPU 88-123**, petition of Riverside Steam and Electric Company; Riverside Steam and Electric. July 1989. Rebuttal, October 1989.

Reasonableness of Northeast Utilities’ 1987 avoided cost estimates. Projections of nuclear capacity factors, economy purchases, and power plant operating life. Treatment of avoidable energy and capacity costs and of off-system sales. Expected versus reference fuel prices.

79. **Mass. DPU 89-72**, Statewide Towing Association police-ordered towing rates; Massachusetts Automobile Rating Bureau. September 1989.

Review of study supporting proposed increase in towing rates. Critique of study sample and methodology. Comparison to competitive rates. Supply of towing services. Effects of joint products and joint sales on profitability of police-ordered towing. Joint testimony with I. Goodman.

80. **Vt. PSB 5330**, application of Vermont utilities for approval of a firm power and energy contract with Hydro-Quebec; Conservation Law Foundation, Vermont Natural Resources Council, Vermont Public Interest Research Group. December 1989. Surrebuttal February 1990.

Analysis of a proposed 20-year power purchase. Comparison to efficiency investment. Critique of conservation potential analysis. Analysis of Vermont electric energy supply. Planning risk of large supply additions. Valuation of environmental externalities. Identification of possible improvements to proposed contract.

81. **Mass. DPU 89-239**, inclusion of externalities in energy-supply planning, acquisition, and dispatch for Massachusetts utilities. Boston Gas Company. December 1989; April 1990; May 1990.

Critique of Division of Energy Resources report on externalities. Methodology for evaluating external costs. Proposed values for environmental and economic externalities of fuel supply and use.

82. **California PUC**, incorporation of environmental externalities in utility planning and pricing; Coalition of Energy Efficient and Renewable Technologies. February 1990.

Approaches for valuing externalities for inclusion in setting power purchase rates. Effect of uncertainty on assessing externality values.

83. **Ill. CC 90-0038**, proceeding to adopt a least-cost electric-energy plan for Commonwealth Edison Company; City of Chicago. May 25 1990. Joint rebuttal testimony with David Birr, August 1990.

Problems in Commonwealth Edison's approach to demand-side management. Potential for cost-effective conservation. Valuing externalities in least-cost planning.

84. **Md. PSC 8278**, adequacy of Baltimore Gas & Electric's integrated resource plan; Maryland Office of People's Counsel. September 1990.

Rationale for demand-side management. BG&E's problems in approach to DSM planning. Potential for cost-effective conservation. Valuation of environmental externalities. Recommendations for short-term DSM program priorities.

- 85. Ind. URC**, integrated-resource-planning docket; Indiana Office of Utility Consumer Counselor. November 1990.

Integrated resource planning process and methodology, including externalities and screening tools. Incentives, screening, and evaluation of demand-side management. Potential of resource bidding in Indiana.

- 86. Mass. DPU** 89-141, 90-73, 90-141, 90-194, 90-270; preliminary review of utility treatment of environmental externalities in October qualifying-facilities filings; Boston Gas Company. November 1990.

Generic and specific problems in Massachusetts utilities' RFPs with regard to externality valuation requirements. Recommendations for corrections.

- 87. Mass. EFSC** 90-12/90-12A, adequacy of Boston Edison proposal to build combined-cycle plant; Conservation Law Foundation. December 1990.

Problems in Boston Edison's treatment of demand-side management, supply option analysis, and resource planning. Recommendations of mitigation options.

- 88. Maine PUC** 90-286, adequacy of conservation program of Bangor Hydro Electric; Penobscot River Coalition. February 1991.

Role of utility-sponsored DSM in least-cost planning. Bangor Hydro's potential for cost-effective conservation. Problems with Bangor Hydro's assumptions about customer investment in energy efficiency measures.

- 89. Va. SCC** PUE900070, commission investigation; Southern Environmental Law Center. March 1991.

Role of utilities in promoting energy efficiency. Least-cost planning objectives of and resource acquisition guidelines for DSM. Ratemaking considerations for DSM investments.

- 90. Mass. DPU** 90-261-A, economics and role of fuel-switching in the DSM program of the Massachusetts Electric Company; Boston Gas Company. April 1991.

Role of fuel-switching in utility DSM programs and specifically in Massachusetts Electric's. Establishing comparable avoided costs and comparison of electric and gas system costs. Updated externality values.

- 91. Private arbitration**, Massachusetts Refusetech Contractual Request for Adjustment to Service Fee; Massachusetts Refusetech. May 1991.

NEPCo rates for power purchases from the New England Solid Waste Compact plant. Fuel price and avoided cost projections vs. realities.



92. **Vt. PSB 5491**, cost-effectiveness of Central Vermont's commitment to Hydro Quebec purchases; Conservation Law Foundation. July 1991.

Changes in load forecasts and resale markets since approval of HQ purchases. Effect of HQ purchase on DSM.

93. **S.C. PSC 91-216-E**, cost recovery of Duke Power's DSM expenditures; South Carolina Department of Consumer Affairs. Direct, September 13 1991; Surrebuttal October 1991.

Problems with conservation plans of Duke Power, including load building, cream skimming, and inappropriate rate designs.

94. **Md. PSC 8241 Phase II**, review of Baltimore Gas & Electric's avoided costs; Maryland Office of People's Counsel. September 1991.

Development of direct avoided costs for DSM. Problems with BG&E's avoided costs and DSM screening. Incorporation of environmental externalities.

95. **Bucksport (Maine) Planning Board**, AES/Harriman Cove shoreland zoning application; Conservation Law Foundation and Natural Resources Council of Maine. October 1991.

New England's power surplus. Costs of bringing AES/Harriman Cove on line to back out existing generation. Alternatives.

96. **Mass. DPU 91-131**, update of externalities values adopted in Docket 89-239; Boston Gas Company. October 1991. Rebuttal, December 1991.

Updates on pollutant externality values. Addition of values for chlorofluorocarbons, air toxics, thermal pollution, and oil import premium. Review of state regulatory actions regarding externalities.

97. **Fla. PSC 910759**, petition of Florida Power Corporation for determination of need for proposed electrical power plant and related facilities; Floridians for Responsible Utility Growth. October 1991.

Florida Power's obligation to pursue integrated resource planning and failure to establish need for proposed facility. Methods to increase scope and scale of demand-side investment.

98. **Fla. PSC 910833-EI**, petition of Tampa Electric Company for a determination of need for proposed electrical power plant and related facilities; Floridians for Responsible Utility Growth. October 1991.

Obligation to pursue integrated resource planning, failure to establish need for proposed facility. Methods to increase scope and scale of demand-side investment.

99. **Penn. PUC I-900005, R-901880**; investigation into demand-side management by electric utilities; Pennsylvania Energy Office. January 1992.

Appropriate cost recovery mechanism for Pennsylvania utilities. Purpose and scope of direct cost recovery, lost revenue recovery, and incentives.

100. **S.C. PSC 91-606-E**, petition of South Carolina Electric and Gas for a certificate of public convenience and necessity for a coal-fired plant; South Carolina Department of Consumer Affairs. January 1992.

Justification of plant certification under integrated resource planning. Failures in SCE&G's DSM planning and company potential for demand-side savings.

101. **Mass. DPU 92-92**, adequacy of Boston Edison's street-lighting options; Town of Lexington. June 1992.

Efficiency and quality of street-lighting options. Boston Edison's treatment of high-quality street lighting. Corrected rate proposal for the Daylux lamp. Ownership of public street lighting.

102. **S.C. PSC 92-208-E**, integrated-resource plan of Duke Power Company; South Carolina Department of Consumer Affairs. August 1992.

Problems with Duke Power's DSM screening process, estimation of avoided cost, DSM program design, and integration of demand-side and supply-side planning.

103. **N.C. UC E-100 Sub 64**, integrated-resource-planning docket; Southern Environmental Law Center. September 1992.

General principles of integrated resource planning, DSM screening, and program design. Review of the IRPs of Duke Power Company, Carolina Power & Light Company, and North Carolina Power.

104. **Ont. EAB Ontario Hydro Demand/Supply Plan Hearings, *Environmental Externalities Valuation and Ontario Hydro's Resource Planning*** (3 vols.); Coalition of Environmental Groups. October 1992.

Valuation of environmental externalities from fossil fuel combustion and the nuclear fuel cycle. Application to Ontario Hydro's supply and demand planning.

105. **Texas PUC 110000**, application of Houston Lighting and Power company for a certificate of convenience and necessity for the DuPont Project; Destec Energy, Inc. September 1992.

Valuation of environmental externalities from fossil fuel combustion and the application to the evaluation of proposed cogeneration facility.

- 106. Maine BEP**, in the matter of the Basin Mills Hydroelectric Project application; Conservation Intervenors. November 1992.
- Economic and environmental effects of generation by proposed hydro-electric project.
- 107. Md. PSC 8473**, review of the power sales agreement of Baltimore Gas and Electric with AES Northside; Maryland Office of People's Counsel. November 1992.
- Non-price scoring and unquantified benefits; DSM potential as alternative; environmental costs; cost and benefit estimates.
- 108. N.C. UC E-100 Sub 64**, analysis and investigation of least cost integrated resource planning in North Carolina; Southern Environmental Law Center. November 1992.
- Demand-side management cost recovery and incentive mechanisms.
- 109. S.C. PSC 92-209-E**, in re Carolina Power & Light Company; South Carolina Department of Consumer Affairs. November 1992.
- Demand-side-management planning: objectives, process, cost-effectiveness test, comprehensiveness, lost opportunities. Deficiencies in CP&L's portfolio. Need for economic evaluation of load building.
- 110 Fla. DER** hearings on the Power Plant Siting Act; Legal Environmental Assistance Foundation. December 1992.
- Externality valuation and application in power-plant siting. DSM potential, cost-benefit test, and program designs.
- 111. Md. PSC 8487**, Baltimore Gas and Electric Company electric rate case. Direct January 1993; rebuttal February 1993.
- Class allocation of production plant and O&M; transmission, distribution, and general plant; administrative and general expenses. Marginal cost and rate design.
- 112. Md. PSC 8179**, Approval of amendment to Potomac Edison purchase agreement with AES Warrior Run; Maryland Office of People's Counsel. January 29 1993.
- Economic analysis of proposed coal-fired cogeneration facility.
- 113. Mich. PSC U-10102**, Detroit Edison rate case; Michigan United Conservation Clubs. February 17 1993.
- Least-cost planning; energy efficiency planning, potential, screening, avoided costs, cost recovery, and shareholder incentives.

- 114. Ohio PUC 91-635-EL-FOR, 92-312-EL-FOR, 92-1172-EL-ECP;** Cincinnati Gas and Electric demand-management programs; City of Cincinnati. April 1993.
- Demand-side-management planning, program designs, potential savings, and avoided costs.
- 115. Mich. PSC U-10335,** Consumers Power rate case; Michigan United Conservation Clubs. October 1993.
- Least-cost planning; energy efficiency planning, potential, screening, avoided costs, cost recovery, and shareholder incentives.
- 116. Ill. CC 92-0268,** electric-energy plan for Commonwealth Edison; City of Chicago. Direct, February 1 1994; rebuttal, September 1994.
- Cost-effectiveness screening of demand-side management programs and measures; estimates by Commonwealth Edison of costs avoided by DSM and of future cost, capacity, and performance of supply resources.
- 117. FERC 2422 et al.,** application of James River–New Hampshire Electric, Public Service of New Hampshire, for licensing of hydro power; Conservation Law Foundation; 1993.
- Cost-effective energy conservation available to the Public Service of New Hampshire; power-supply options; affidavit.
- 118. Vt. PSB 5270-CV-1,-3, and 5686;** Central Vermont Public Service fuel-switching and DSM program design, on behalf of the Vermont Department of Public Service. Direct, April 1994; rebuttal, June 1994.
- Avoided costs and screening of controlled water-heating measures; risk, rate impacts, participant costs, externalities, space- and water-heating load, benefit-cost tests.
- 119. Fla. PSC 930548-EG–930551-EG,** conservation goals for Florida electric utilities; Legal Environmental Assistance Foundation, Inc. April 1994.
- Integrated resource planning, avoided costs, rate impacts, analysis of conservation goals of Florida electric utilities.
- 120. Vt. PSB 5724,** Central Vermont Public Service Corporation rate request; Vermont Department of Public Service. Joint surrebuttal testimony with John Plunkett. August 1994.
- Costs avoided by DSM programs; Costs and benefits of deferring DSM programs.
- 121. Mass. DPU 94-49,** Boston Edison integrated-resource-management plan; Massachusetts Attorney General. August 1994.
- Least-cost planning, modeling, and treatment of risk.

- 122. Mich. PSC U-10554**, Consumers Power Company DSM program and incentive; Michigan Conservation Clubs. November 1994.
- Critique of proposed reductions in DSM programs; discussion of appropriate measurements of cost-effectiveness, role of DSM in competitive power markets.
- 123. Mich. PSC U-10702**, Detroit Edison Company cost recovery, on behalf of the Residential Ratepayers Consortium. December 1994.
- Impact of proposed changes to DSM plan on energy costs and power-supply-cost-recovery charges. Critique of proposed DSM changes; discussion of appropriate measurements of cost-effectiveness, role of DSM in competitive power markets.
- 124. N.J. BRC EM92030359**, environmental costs of proposed cogeneration; Freehold Cogeneration Associates. November 1994.
- Comparison of potential externalities from the Freehold cogeneration project with that from three coal technologies; support for the study “The Externalities of Four Power Plants.”
- 125. Mich. PSC U-10671**, Detroit Edison Company DSM programs; Michigan United Conservation Clubs. January 1995.
- Critique of proposal to scale back DSM efforts in light of potential for competition. Loss of savings, increase of customer costs, and decrease of competitiveness. Discussion of appropriate measurements of cost-effectiveness, role of DSM in competitive power markets.
- 126. Mich. PSC U-10710**, power-supply-cost-recovery plan of Consumers Power Company; Residential Ratepayers Consortium. January 1995.
- Impact of proposed changes to DSM plan on energy costs and power-supply-cost-recovery charges. Critique of proposed DSM changes; discussion of appropriate measurements of cost-effectiveness, role of DSM in competitive power markets.
- 127. FERC 2458 and 2572**, Bowater–Great Northern Paper hydropower licensing; Conservation Law Foundation. February 1995.
- Comments on draft environmental impact statement relating to new licenses for two hydropower projects in Maine. Applicant has not adequately considered how energy conservation can replace energy lost due to habitat-protection or -enhancement measures.
- 128. N.C. UC E-100 Sub 74**, Duke Power and Carolina Power & Light avoided costs; Hydro-Electric–Power Producer’s Group. February 1995.
- Critique and proposed revision of avoided costs offered to small hydro-power producers by Duke Power and Carolina Power and Light.

- 129. New Orleans City Council** UD-92-2A and -2B, least-cost IRP for New Orleans Public Service and Louisiana Power & Light; Alliance for Affordable Energy. Direct, February 1995; rebuttal, April 1995.
- Critique of proposal to scale back DSM efforts in light of potential competition.
- 130. D.C. PSC FC917 II**, prudence of DSM expenditures of Potomac Electric Power Company; Potomac Electric Power Company. Rebuttal testimony, February 1995.
- Prudence of utility DSM investment; prudence standards for DSM programs of the Potomac Electric Power Company.
- 131. Ont. Energy Board EBRO 490**, DSM cost recovery and lost-revenue–adjustment mechanism for Consumers Gas Company; Green Energy Coalition. April 1995.
- Demand-side-management cost recovery. Lost-revenue–adjustment mechanism for Consumers Gas Company.
- 132. New Orleans City Council CD-85-1**, New Orleans Public Service rate increase; Alliance for Affordable Energy. Rebuttal, May 1995.
- Allocation of costs and benefits to rate classes.
- 133. Mass. DPU Docket DPU-95-40**, Mass. Electric cost-allocation; Massachusetts Attorney General. June 1995.
- Allocation of costs to rate classes. Critique of cost-of-service study. Implications for industry restructuring.
- 134. Md. PSC 8697**, Baltimore Gas & Electric gas rate increase; Maryland Office of People’s Counsel. July 1995.
- Rate design, cost-of-service study, and revenue allocation.
- 135. N.C. UC E-2 Sub 669**; Carolina P&L certification of 500 MW combustion turbine; Southern Environmental Law Center. December 1995.
- Need for new capacity. Purchased-power options. Energy-conservation potential and model programs.
- 136. Arizona CC U-1933-95-317**, Tucson Electric Power rate increase; Residential Utility Consumer Office. January 1996.
- Review of proposed rate settlement. Used-and-usefulness of plant. Rate design. DSM potential.

- 137. Ohio PUC 95-203-EL-FOR; Campaign for an Energy-Efficient Ohio. February 1996**

Long-term forecast of Cincinnati Gas and Electric Company, especially its DSM portfolio. Opportunities for further cost-effective DSM savings. Tests of cost effectiveness. Role of DSM in light of industry restructuring; alternatives to traditional utility DSM.

- 138 Vt. PSB 5835, Central Vermont Public Service Company rates; Vermont Department of Public Service. February 1996.**

Design of load-management rates of Central Vermont Public Service Company.

- 139. Md. PSC 8720, Washington Gas Light DSM; Maryland Office of People's Counsel. May 1996.**

Avoided costs of Washington Gas Light Company; integrated least-cost planning.

- 140. Mass. DPU 96-100, Massachusetts Utilities' Stranded Costs; Massachusetts Attorney General. Oral testimony in support of "estimation of Market Value, Stranded Investment, and Restructuring Gains for Major Massachusetts Utilities," July 1996.**

Stranded costs. Calculation of loss or gain. Valuation of utility assets.

- 141. Mass. DPU 96-70, Essex County Gas Company rates; Massachusetts Attorney General. July 1996.**

Market-based allocation of gas-supply costs of Essex County Gas Company.

- 142. Mass. DPU 96-60, Fall River Gas Company rates; Massachusetts Attorney General. Direct, July 1996; surrebuttal, August 1996.**

Market-based allocation of gas-supply costs of Fall River Gas Company.

- 143. Md. PSC 8725, Maryland electric-utilities merger; Maryland Office of People's Counsel. July 1996.**

Proposed merger of Baltimore Gas & Electric Company, Potomac Electric Power Company, and Constellation Energy. Cost allocation of merger benefits and rate reductions.

- 144. N.H. PUC DR 96-150, Public Service Company of New Hampshire stranded costs; New Hampshire Office of Consumer Advocate. December 1996.**

Market price of capacity and energy; value of generation plant; restructuring gain and stranded investment; legal status of PSNH acquisition premium; interim stranded-cost charges.

- 145. Ont. Energy Board** EBRO 495, LRAM and shared-savings incentive for DSM performance of Consumers Gas; Green Energy Coalition. March 1997.
- LRAM and incentive mechanisms in rates for the Consumers Gas Company.
- 146. New York PSC** 96-E-0897, Consolidated Edison restructuring plan; City of New York. April 1997.
- Electric-utility competition and restructuring; critique of proposed settlement of Consolidated Edison Company; stranded costs; market power; rates; market access.
- 147. Vt. PSB** 5980, proposed statewide energy plan; Vermont Department of Public Service. Direct, August 1997; rebuttal, December 1997.
- Justification for and estimation of statewide avoided costs; guidelines for distributed IRP.
- 148. Mass. DPU** 96-23, Boston Edison restructuring settlement; Utility Workers Union of America. September 1997.
- Performance incentives proposed for the Boston Edison company.
- 149. Vt. PSB** 5983, Green Mountain Power rate increase; Vermont Department of Public Service. Direct, October 1997; rebuttal, December 1997.
- In three separate pieces of prefiled testimony, addressed the Green Mountain Power Corporation's (1) distributed-utility-planning efforts, (2) avoided costs, and (3) prudence of decisions relating to a power purchase from Hydro-Quebec.
- 150. Mass. DPU** 97-63, Boston Edison proposed reorganization; Utility Workers Union of America. October 1997.
- Increased costs and risks to ratepayers and shareholders from proposed reorganization; risks of diversification; diversion of capital from regulated to unregulated affiliates; reduction in Commission authority.
- 151. Mass. DTE** 97-111, Commonwealth Energy proposed restructuring; Cape Cod Light Compact. Joint testimony with Jonathan Wallach, January 1998.
- Critique of proposed restructuring plan filed to satisfy requirements of the electric-utility restructuring act of 1997. Failure of the plan to foster competition and promote the public interest.
- 152. N.H. PUC** Docket DR 97-241, Connecticut Valley Electric fuel and purchased-power adjustments; City of Claremont, N.H. February 1998.
- Prudence of continued power purchase from affiliate; market cost of power; prudence disallowances and cost-of-service ratemaking.
- 153. Md. PSC** 8774, APS-DQE merger; Maryland Office of People's Counsel. February 1998.



Proposed power-supply arrangements between APS's potential operating subsidiaries; power-supply savings; market power.

- 154. Vt. PSB 6018**, Central Vermont Public Service Co. rate increase; Vermont Department of Public Service. February 1998.

Prudence of decisions relating to a power purchase from Hydro-Quebec. Reasonableness of avoided-cost estimates. Quality of DU planning.

- 155. Maine PUC 97-580**, Central Maine Power restructuring and rates; Maine Office of Public Advocate. May 1998; Surrebuttal, August 1998.

Determination of stranded costs; gains from sales of fossil, hydro, and biomass plant; treatment of deferred taxes; incentives for stranded-cost mitigation; rate design.

- 156. Mass. DTE 98-89**, purchase of Boston Edison municipal street lighting; Towns of Lexington and Acton. Affidavit, August 1998.

Valuation of municipal streetlighting; depreciation; applicability of unbundled rate.

- 157. Vt. PSB 6107**, Green Mountain Power rate increase; Vermont Department of Public Service. Direct, September 1998; Surrebuttal drafted but not filed, November 2000.

Prudence of decisions relating to a power purchase from Hydro-Quebec. Least-cost planning and prudence. Quality of DU planning.

- 158. Mass. DTE 97-120**, Western Massachusetts Electric Company proposed restructuring; Massachusetts Attorney General. Joint testimony with Jonathan Wallach, October 1998. Joint surrebuttal with Jonathan Wallach, January 1999.

Market value of the three Millstone nuclear units under varying assumptions of plant performance and market prices. Independent forecast of wholesale market prices. Value of Pilgrim and TMI-1 asset sales.

- 159. Md. PSC 8794 and 8804**, BG&E restructuring and rates; Maryland Office of People's Counsel. Direct, December 1998; rebuttal, March 1999.

Implementation of restructuring. Valuation of generation assets from comparable-sales and cash-flow analyses. Determination of stranded cost or gain.

- 160. Md. PSC 8795**; Delmarva Power & Light restructuring and rates; Maryland Office of People's Counsel. December 1998.

Implementation of restructuring. Valuation of generation assets and purchases from comparable-sales and cash-flow analyses. Determination of stranded cost or gain.

- 161. Md. PSC 8797**, Potomac Edison Company restructuring and rates; Maryland Office of People's Counsel. Direct, January 1999; rebuttal, March 1999.
- Implementation of restructuring. Valuation of generation assets and purchases from comparable-sales and cash-flow analyses. Determination of stranded cost or gain.
- 162. Conn. DPUC 99-02-05**, Connecticut Light and Power Company stranded costs; Connecticut Office of Consumer Counsel. April 1999.
- Projections of market price. Valuation of purchase agreements and nuclear and non-nuclear assets from comparable-sales and cash-flow analyses.
- 163. Conn. DPUC 99-03-04**, United Illuminating Company stranded costs; Connecticut Office of Consumer Counsel. April 1999.
- Projections of market price. Valuation of purchase agreements and nuclear assets from comparable-sales and cash-flow analyses.
- 164. Wash. UTC UE-981627**, PacifiCorp–Scottish Power merger, Office of the Attorney General. June 1999.
- Review of proposed performance standards and valuation of performance. Review of proposed low-income assistance.
- 165. Utah PSC 98-2035-04**, PacifiCorp–Scottish Power merger, Utah Committee of Consumer Services. June 1999.
- Review of proposed performance standards and valuation of performance.
- 166. Conn. DPUC 99-03-35**, United Illuminating Company proposed standard offer; Connecticut Office of Consumer Counsel. July 1999.
- Design of standard offer by rate class. Design of price adjustments to preserve rate decrease. Market valuations of nuclear plants. Short-term stranded cost
- 167. Conn. DPUC 99-03-36**, Connecticut Light and Power Company proposed standard offer; Connecticut Office of Consumer Counsel. Direct, July 1999; supplemental, July 1999.
- Design of standard offer by rate class. Design of price adjustments to preserve rate decrease. Market valuations of nuclear plants. Short-term stranded cost.
- 168. W. Va. PSC 98-0452-E-GI**, electric-industry restructuring, West Virginia Consumer Advocate. July 1999.
- Market value of generating assets of, and restructuring gain for, Potomac Edison, Monongahela Power, and Appalachian Power. Comparable-sales and cash-flow analyses.

- 169. Ont. Energy Board** RP-1999-0034, Ontario performance-based rates; Green Energy Coalition. September 1999.
- Rate design. Recovery of demand-side-management costs under PBR. Incremental costs.
- 170. Conn. DPUC** 99-08-01, standards for utility restructuring; Connecticut Office of Consumer Counsel. Direct, November 1999; supplemental, January 2000.
- Appropriate role of regulation. T&D reliability and service quality. Performance standards and customer guarantees. Assessing generation adequacy in a competitive market.
- 171. Conn. Superior Court** CV 99-049-7239, Connecticut Light and Power Company stranded costs; Connecticut Office of Consumer Counsel. Affidavit, December 1999.
- Errors of the Conn. DPUC in deriving discounted-cash-flow valuations for Millstone and Seabrook, and in setting minimum bid price.
- 172. Conn. Superior Court** CV 99-049-7597, United Illuminating Company stranded costs; Connecticut Office of Consumer Counsel. December 1999.
- Errors of the Conn. DPUC, in its discounted-cash-flow computations, in selecting performance assumptions for Seabrook, and in setting minimum bid price.
- 173. Ont. Energy Board** RP-1999-0044, Ontario Hydro transmission-cost allocation and rate design; Green Energy Coalition. January 2000.
- Cost allocation and rate design. Net vs. gross load billing. Export and wheeling-through transactions. Environmental implications of utility proposals.
- 174. Utah PSC** 99-2035-03, PacifiCorp Sale of Centralia plant, mine, and related facilities; Utah Committee of Consumer Services. January 2000.
- Prudence of sale and management of auction. Benefits to ratepayers. Allocation and rate treatment of gain.
- 175. Conn. DPUC** 99-09-12, Nuclear Divestiture by Connecticut Light & Power and United Illuminating; Connecticut Office of Consumer Counsel. January 2000.
- Market for nuclear assets. Optimal structure of auctions. Value of minority rights. Timing of divestiture.
- 176. Ont. Energy Board** RP-1999-0017, Union Gas PBR proposal; Green Energy Coalition. March 2000.
- Lost-revenue-adjustment and shared-savings incentive mechanisms for Union Gas DSM programs. Standards for review of targets and achievements, computation of lost revenues. Need for DSM expenditure true-up mechanism.

177. **N.Y. PSC 99-S-1621**, Consolidated Edison steam rates; City of New York. April 2000.
- Allocation of costs of former cogeneration plants, and of net proceeds of asset sale. Economic justification for steam-supply plans. Depreciation rates. Weather normalization and other rate adjustments.
178. **Maine PUC 99-666**, Central Maine Power alternative rate plan; Maine Public Advocate. Direct, May 2000; Surrebuttal, August 2000.
- Likely merger savings. Savings and rate reductions from recent mergers. Implications for rates.
179. **Mass. EFSB 97-4**, Massachusetts Municipal Wholesale Electric Company gas-pipeline proposal; Town of Wilbraham, Mass. June 2000.
- Economic justification for natural-gas pipeline. Role and jurisdiction of EFSB.
180. **Conn. DPUC 99-09-03**; Connecticut Natural Gas Corporation merger and rate plan; Connecticut office of Consumer Counsel. September 2000.
- Performance-based ratemaking in light of mergers. Allocation of savings from merger. Earnings-sharing mechanism.
181. **Conn. DPUC 99-09-12RE01**, Proposed Millstone sale; Connecticut Office of Consumer Counsel. November 2000.
- Requirements for review of auction of generation assets. Allocation of proceeds between units.
182. **Mass. DTE 01-25**, Purchase of streetlights from Commonwealth Electric; Cape Light Compact. January 2001
- Municipal purchase of streetlights; Calculation of purchase price under state law; Determination of accumulated depreciation by asset.
183. **Conn. DPUC 00-12-01 and 99-09-12RE03**, Connecticut Light & Power rate design and standard offer; Connecticut Office of Consumer Counsel. March 2001.
- Rate design and standard offer under restructuring law; Future rate impacts; Transition to restructured regime; Comparison of Connecticut and California restructuring challenges.
184. **Vt. PSB 6460 & 6120**, Central Vermont Public Service rates; Vermont Department of Public Service. Direct, March 2001; Surrebuttal, April 2001.
- Review of decision in early 1990s to commit to long-term uneconomic purchase from Hydro Québec. Calculation of present damages from imprudence.
185. **N.J. BPU EM00020106**, Atlantic City Electric Company sale of fossil plants; New Jersey Ratepayer Advocate. Affidavit, May 2001.

Comparison of power-supply contracts. Comparison of plant costs to replacement power cost. Allocation of sales proceeds between subsidiaries.

- 186. N.J. BPU GM00080564**, Public Service Electric and Gas transfer of gas supply contracts; New Jersey Ratepayer Advocate. Direct, May 2001.

Transfer of gas transportation contracts to unregulated affiliate. Potential for market power in wholesale gas supply and electric generation. Importance of reliable gas supply. Valuation of contracts. Effect of proposed requirements contract on rates. Regulation and design of standard-offer service.

- 187. Conn. DPUC 99-04-18 Phase 3, 99-09-03 Phase 2**; Southern Connecticut Natural Gas and Connecticut Natural Gas rates and charges; Connecticut Office of Consumer Counsel. Direct, June 2001; supplemental, July 2001.

Identifying, quantifying, and allocating merger-related gas-supply savings between ratepayers and shareholders. Establishing baselines. Allocations between affiliates. Unaccounted-for gas.

- 188. N.J. BPU EX01050303**, New Jersey electric companies' procurement of basic supply; New Jersey Ratepayer Advocate. August 2001.

Review of proposed statewide auction for purchase of power requirements. Market power. Risks to ratepayers of proposed auction.

- 189. N.Y. PSC 00-E-1208**, Consolidated Edison rates; City of New York. October 2001.

Geographic allocation of stranded costs. Locational and postage-stamp rates. Causation of stranded costs. Relationship between market prices for power and stranded costs.

- 190. Mass. DTE 01-56**, Berkshire Gas Company; Massachusetts Attorney General. October 2001.

Allocation of gas costs by load shape and season. Competition and cost allocation.

- 191. N.J. BPU EM00020106**, Atlantic City Electric proposed sale of fossil plants; New Jersey Ratepayer Advocate. December 2001.

Current market value of generating plants vs. proposed purchase price.

- 192. Vt. PSB 6545**, Vermont Yankee proposed sale; Vermont Department of Public Service. January 2002.

Comparison of sales price to other nuclear sales. Evaluation of auction design and implementation. Review of auction manager's valuation of bids.

- 193. Conn. Siting Council 217**, Connecticut Light & Power proposed transmission line from Plumtree to Norwalk; Connecticut Office of Consumer Counsel. March 2002.

Nature of transmission problems. Potential for conservation and distributed resources to defer, reduce or avoid transmission investment. CL&P transmission planning process. Joint testimony with John Plunkett.

- 194. Vt. PSB 6596**, Citizens Utilities rates; Vermont Department of Public Service. Direct, March 2002; rebuttal, May 2002.

Review of 1991 decision to commit to long-term uneconomic purchase from Hydro Québec. Alternatives; role of transmission constraints. Calculation of present damages from imprudence.

- 195. Conn. DPUC 01-10-10**, United Illuminating rate plan; Connecticut Office of Consumer Counsel. April 2002

Allocation of excess earnings between shareholders and ratepayers. Asymmetry in treatment of over- and under-earning. Accelerated amortization of stranded costs. Effects of power-supply developments on ratepayer risks. Effect of proposed rate plan on utility risks and required return.

- 196. Conn. DPUC 01-12-13RE01**, Seabrook proposed sale; Connecticut Office of Consumer Counsel. July 2002

Comparison of sales price to other nuclear sales. Evaluation of auction design and implementation. Assessment of valuation of purchased-power contracts.

- 197. Ont. Energy Board RP-2002-0120**, review of transmission-system code; Green Energy Coalition. October 2002.

Cost allocation. Transmission charges. Societal cost-effectiveness. Environmental externalities.

- 198. N.J. BPU ER02080507**, Jersey Central Power & Light rates; N.J. Division of the Ratepayer Advocate. Phase I December 2002; Phase II (oral) July 2003.

Prudence of procurement of electrical supply. Documentation of procurement decisions. Comparison of costs for subsidiaries with fixed versus flow-through cost recovery.

- 199. Conn. DPUC 03-07-02**, CL&P rates; AARP. October 2003

Proposed distribution investments, including prudence of prior management of distribution system and utility's failure to make investments previously funded in rates. Cost controls. Application of rate cap. Legislative intent.

- 200. Conn. DPUC 03-07-01**, CL&P transitional standard offer; AARP. November 2003.

Application of rate cap. Legislative intent.

- 201. Vt. PSB 6596**, Vermont Electric Power Company and Green Mountain Power Northwest Reliability transmission plan; Conservation Law Foundation. December 2003.
- Inadequacies of proposed transmission plan. Failure of to perform least-cost planning. Distributed resources.
- 202. Ohio PUC 03-2144-EL-ATA**, Ohio Edison, Cleveland Electric, and Toledo Edison Cos. rates and transition charges; Green Mountain Energy Co. February 2004.
- Pricing of standard-offer service in competitive markets. Critique of anticompetitive features of proposed standard-offer supply, including non-bypassable charges.
- 203. N.Y. PSC 03-G-1671 & 03-S-1672**, Consolidated Edison company steam and gas rates; City of New York. Direct March 2004; rebuttal April 2004; settlement June 2004.
- Prudence and cost allocation for the East River Repowering Project. Gas and steam energy conservation. Opportunities for cogeneration at existing steam plants.
- 204. N.Y. PSC 04-E-0572**, Consolidated Edison rates and performance; City of New York. Direct, September 2004; rebuttal, October 2004.
- Consolidated Edison's role in promoting adequate supply and demand resources. Integrated resource and T&D planning. Performance-based ratemaking and streetlighting.
- 205. Ont. Energy Board RP 2004-0188**, cost recovery and DSM for Ontario electric-distribution utilities; Green Energy Coalition. Exhibit, December 2004.
- Differences in ratemaking requirements for customer-side conservation and demand management versus utility-side efficiency improvements. Recovery of lost revenues or incentives. Reconciliation mechanism.
- 206. Mass. DTE 04-65**, Cambridge Electric Light Co. streetlighting; City of Cambridge. Direct, October 2004; supplemental, January 2005.
- Calculation of purchase price of street lights by the City of Cambridge.
- 207. N.Y. PSC 04-W-1221**, rates, rules, charges, and regulations of United Water New Rochelle; Town of Eastchester and City of New Rochelle. Direct, February 2005.
- Size and financing of proposed interconnection. Rate design. Water-mains replacement and related cost recovery. Lost and unaccounted-for water.
- 208. N.Y. PSC 05-M-0090**, system-benefits charge; City of New York. Comments, March 2005.

- Assessment and scope of, and potential for, New York system-benefits charges.
- 209. Md. PSC 9036**, Baltimore Gas & Electric rates; Maryland Office of People's Counsel. Direct, August 2005.
- Allocation of costs. Design of rates. Interruptible and firm rates.
- 210. B.C. UC 3698388**, British Columbia Hydro resource-acquisition plan; British Columbia Sustainable Energy Association and Sierra Club of Canada BC Chapter. September 2005.
- Renewable energy and DSM. Economic tests of cost-effectiveness. Costs avoided by DSM.
- 211. Conn. DPUC 05-07-18**, financial effect of long-term power contracts; Connecticut Office of Consumer Counsel. September 2005.
- Assessment of effect of DSM, distributed generation, and capacity purchases on financial condition of utilities.
- 212. Conn. DPUC 03-07-01RE03 & 03-07-15RE02**, incentives for power procurement; Connecticut Office of Consumer Counsel. Direct, September 2005; Additional, April 2006.
- Utility obligations for generation procurement. Application of standards for utility incentives. Identification and quantification of effects of timing, load characteristics, and product definition.
- 213. Conn. DPUC Docket 05-10-03**, Connecticut L&P; time-of-use, interruptible, and seasonal rates; Connecticut Office of Consumer Counsel. Direct and Supplemental Testimony February 2006.
- Seasonal and time-of-use differentiation of generation, congestion, transmission and distribution costs; fixed and variable peak-period timing; identification of pricing seasons and seasonal peak periods; cost-effectiveness of time-of-use rates.
- 214. Ont. Energy Board Case EB-2005-0520**, Union Gas rates; School Energy Coalition. Evidence, April 2006.
- Rate design related to splitting commercial rate class into two classes. New break point, cost allocation, customer charges, commodity rate blocks.
- 215. Ont. Energy Board EB-2006-0021**, Natural-gas demand-side-management generic issues proceeding; School Energy Coalition. Evidence, June 2006.
- Multi-year planning and budgeting; lost-revenue adjustment mechanism; determining savings for incentives; oversight; program screening.
- 216. Ind. URC 42943 and 43046**, Vectren Energy DSM proceedings; Citizens Action Coalition. Direct, June 2006.
- Rate decoupling and energy-efficiency goals.



- 217. Penn. PUC 00061346**, Duquesne Lighting; Real-time pricing; PennFuture. Direct, July 2006; surrebuttal August 2006.

Real-time and time-dependent pricing; benefits of time-dependent pricing; appropriate metering technology; real-time rate design and customer information

- 218. Penn. PUC R-00061366 et al.**, rate-transition-plan proceedings of Metropolitan Edison and Pennsylvania Electric; Real-time pricing; PennFuture. Direct, July 2006; surrebuttal August 2006.

Real-time and time-dependent pricing; appropriate metering technology; real-time rate design and customer information.

- 219. Conn. DPUC 06-01-08**, Connecticut L&P procurement of power for standard service and last-resort service; Connecticut Office of Consumer Counsel. Reports and technical hearings quarterly since September 2006 to October 2013.

Conduct of auction; review of bids; comparison to market prices; selection of winning bidders.

- 220. Conn. DPUC 06-01-08**, United Illuminating procurement of power for standard service and last-resort service; Connecticut Office of Consumer Counsel. Reports and technical hearings quarterly August 2006 to October 2013.

Conduct of auction; review of bids; comparison to market prices; selection of winning bidders.

- 221. N.Y. PSC 06-M-1017**, policies, practices, and procedures for utility commodity supply service; City of New York. Comments, November and December 2006.

Multi-year contracts, long-term planning, new resources, procurement by utilities and other entities, cost recovery.

- 222. Conn. DPUC 06-01-08**, procurement of power for standard service and last-resort service, lessons learned; Connecticut Office Of Consumer Counsel. Comments and Technical Conferences December 2006 and January 2007.

Sharing of data and sources; benchmark prices; need for predictability, transparency and adequate review; utility-owned resources; long-term firm contracts.

- 223. Ohio PUC PUCO 05-1444-GA-UNC**, recovery of conservation costs, decoupling, and rate-adjustment mechanisms for Vectren Energy Delivery of Ohio; Ohio Consumers' Counsel. February 2007.

Assessing cost-effectiveness of natural-gas energy-efficiency programs. Calculation of avoided costs. Impact on rates. System benefits of DSM.

- 224. N.Y. PSC 06-G-1332**, Consolidated Edison Rates and Regulations; City of New York. March 2007.

Gas energy efficiency: benefits to customers, scope of cost-effective programs, revenue decoupling, shareholder incentives.

- 225. Alb. EUB 1500878**, ATCo Electric rates; Association of Municipal Districts & Counties and Alberta Federation of Rural Electrical Associations. May 2007.

Direct assignment of distribution costs to street lighting. Cost causation and cost allocation. Minimum-system and zero-intercept classification.

- 226. Conn. DPUC 07-04-24**, review of capacity contracts under Energy Independence Act; Connecticut Office of Consumer Counsel. Direct (with Jonathan Wallach), June 2007.

Assessment of proposed capacity contracts for new combined-cycle, peakers and DSM. Evaluation of contracts for differences, modeling of energy, capacity and forward-reserve markets. Corrections of errors in computation of costs, valuation of energy-price effects of peakers, market-driven expansion plans and retirements, market response to contracted resource additions, DSM proposal evaluation.

- 227. N.Y. PSC 07-E-0524**, Consolidated Edison electric rates; City of New York. September 2007.

Energy-efficiency planning. Recovery of DSM costs. Decoupling of rates from sales. Company incentives for DSM. Advanced metering. Resource planning.

- 228. Man. PUB 136-07**, Manitoba Hydro rates; Resource Conservation Manitoba and Time to Respect Earth's Ecosystem. February 2008.

Revenue allocation, rate design, and demand-side management. Estimation of marginal costs and export revenues.

- 229. Mass. EFSB 07-7**, DPU 07-58 & -59; proposed Brockton Power Company plant; Alliance Against Power Plant Location. March 2008

Regional supply and demand conditions. Effects of plant construction and operation on regional power supply and emissions.

- 230. Conn. DPUC 08-01-01**, peaking generation projects; Connecticut Office of Consumer Counsel. Direct (with Jonathan Wallach), April 2008.

Assessment of proposed peaking projects. Valuation of peaking capacity. Modeling of energy margin, forward reserves, other project benefits.

- 231. Ont. Energy Board 2007-0905**, Ontario Power Generation payments; Green Energy Coalition. April 2008.

Cost of capital for Hydro and nuclear investments. Financial risks of nuclear power.

- 232. Utah PSC 07-035-93**, Rocky Mountain Power Rates; Utah Committee of Consumer Services. July 2008

Cost allocation and rate design. Cost of service. Correct classification of generation, transmission, and purchases.

- 233. Ont. Energy Board** 2007-0707, Ontario Power Authority integrated system plan; Green Energy Coalition, Penimba Institute, and Ontario Sustainable Energy Association. Evidence (with Jonathan Wallach and Richard Mazzini), August 2008.

Critique of integrated system plan. Resource cost and characteristics; finance cost. Development of least-cost green-energy portfolio.

- 234. N.Y. PSC** 08-E-0596, Consolidated Edison electric rates; City of New York. September 2008.

Estimated bills, automated meter reading, and advanced metering. Aggregation of building data. Targeted DSM program design. Using distributed generation to defer T&D investments.

- 235. Conn. DPUC** 08-07-01, Integrated resource plan; Connecticut Office of Consumer Counsel. September 2008.

Integrated resource planning scope and purpose. Review of modeling and assumptions. Review of energy efficiency, peakers, demand response, nuclear, and renewables. Structuring of procurement contracts.

- 236. Man. PUB** 2008 MH EIIR, Manitoba Hydro intensive industrial rates; Resource Conservation Manitoba and Time to Respect Earth's Ecosystem. November 2008.

Marginal costs. Rate design. Time-of-use rates.

- 237. Md. PSC** 9036, Columbia Gas rates; Maryland Office of People's Counsel. January 2009.

Cost allocation and rate design. Critique of cost-of-service studies.

- 238. Vt. PSB** 7440, extension of authority to operate Vermont Yankee; Conservation Law Foundation and Vermont Public Interest Research Group. Direct, February 2009; Surrebuttal, May 2009.

Adequacy of decommissioning funding. Potential benefits to Vermont of revenue-sharing provision. Risks to Vermont of underfunding decommissioning fund.

- 239. N.S. UARB** M01439, Nova Scotia Power DSM and cost recovery; Nova Scotia Consumer Advocate. May 2009.

Recovery of demand-side-management costs and lost revenue.

- 240. N.S. UARB** M01496, proposed biomass project; Nova Scotia Consumer Advocate. June 2009.

Procedural, planning, and risk issues with proposed power-purchase contract. Biomass price index. Nova Scotia Power's management of other renewable contracts.

- 241. Conn. Siting Council 370A**, Connecticut Light & Power transmission projects; Connecticut Office of Consumer Counsel. July 2009. Also filed and presented in **MA EFSB 08-02**, February 2010.

Need for transmission projects. Modeling of transmission system. Realistic modeling of operator responses to contingencies

- 242. Mass. DPU 09-39**, NGrid rates; Mass. Department of Energy Resources. August 2009.

Revenue-decoupling mechanism. Automatic rate adjustments.

- 243. Utah PSC 09-035-23**, Rocky Mountain Power rates; Utah Office of Consumer Services. Direct, October 2009; rebuttal, November 2009.

Cost-of-service study. Cost allocators for generation, transmission, and substation.

- 244. Utah PSC 09-035-15**, Rocky Mountain Power energy-cost-adjustment mechanism; Utah Office of Consumer Services. Direct, November 2009; surrebuttal, January 2010.

Automatic cost-adjustment mechanisms. Net power costs and related risks. Effects of energy-cost-adjustment mechanisms on utility performance.

- 245. Penn. PUC R-2009-2139884**, Philadelphia Gas Works energy efficiency and cost recovery; Philadelphia Gas Works. December 2009.

Avoided gas costs. Recovery of efficiency-program costs and lost revenues. Rate impacts of DSM.

- 246. B.C. UC 3698573**, British Columbia Hydro rates; British Columbia Sustainable Energy Association and Sierra Club British Columbia. February 2010.

Rate design and energy efficiency.

- 247. Ark. PSC 09-084-U**, Entergy Arkansas rates; National Audubon Society and Audubon Arkansas. Direct, February 2010; surrebuttal, April 2010.

Recovery of revenues lost to efficiency programs. Determination of lost revenues. Incentive and recovery mechanisms.

- 248. Ark. PSC 10-010-U**, Energy efficiency; National Audubon Society and Audubon Arkansas. Direct, March 2010; reply, April 2010.

Regulatory framework for utility energy-efficiency programs. Fuel-switching programs. Program administration, oversight, and coordination. Rationale for commercial and industrial efficiency programs. Benefit of energy efficiency.

- 249. Ark. PSC 08-137-U**, Generic rate-making; National Audubon Society and Audubon Arkansas. Direct, March 2010; supplemental, October 2010; reply, October 2010.

Calculation of avoided costs. Recovery of utility energy-efficiency-program costs and lost revenues. Shareholder incentives for efficiency-program performance.

- 250. Plymouth, Mass., Superior Court** Civil Action No. PLCV2006-00651-B (Hingham Municipal Lighting Plant v. Gas Recovery Systems LLC et al.), Breach of agreement; defendants. Affidavit, May 2010.

Contract interpretation. Meaning of capacity measures. Standard practices in capacity agreements. Power-pool rules and practices. Power planning and procurement.

- 251. N.S. UARB M02961**, Port Hawkesbury biomass project; Nova Scotia Consumer Advocate. June 2010.

Least-cost planning and renewable-energy requirements. Feasibility versus alternatives. Unknown or poorly estimated costs.

- 252. Mass. DPU 10-54**, NGrid purchase of long-term power from Cape Wind; Natural Resources Defense Council et al. July 2010.

Effects of renewable-energy projects on gas and electric market prices. Impacts on system reliability and peak loads. Importance of PPAs to renewable development. Effectiveness of proposed contracts as price edges.

- 253. Md. PSC 9230**, Baltimore Gas & Electric rates; Maryland Office of People's Counsel. Direct, July 2010; rebuttal, surrebuttal, August 2010.

Allocation of gas- and electric-distribution costs. Critique of minimum-system analyses and direct assignment of shared plant. Allocation of environmental compliance costs. Allocation of revenue increases among rate classes.

- 254. Ont. Energy Board 2010-0008**, Ontario Power Generation facilities charges; Green Energy Coalition. Evidence, August 2010.

Critique of including a return on CWIP in current rates. Setting cost of capital by business segment.

- 255. N.S. UARB 03454**, Heritage Gas rates; Nova Scotia Consumer Advocate. October 2010.

Cost allocation. Cost of capital. Effect on rates of growth in sales.

- 256. Man. PUB 17/10**, Manitoba Hydro rates; Resource Conservation Manitoba and Time to Respect Earth's Ecosystem. December 2010.

Revenue-allocation and rate design. DSM program.

- 257. N.S. UARB M03665**, Nova Scotia Power depreciation rates; Nova Scotia Consumer Advocate. February 2011.
- Depreciation and rates.
- 258. New Orleans City Council UD-08-02**, Entergy IRP rules; Alliance for Affordable Energy. December 2010.
- Integrated resource planning: Purpose, screening, cost recovery, and generation planning.
- 259. N.S. UARB M03665**, depreciation rates of Nova Scotia Power; Nova Scotia Consumer Advocate. February 2011.
- Steam-plant retirement dates, post-retirement use, timing of decommissioning and removal costs.
- 260. N.S. UARB M03632**, renewable-energy community-based feed-in tariffs; Nova Scotia Consumer Advocate. March 2011.
- Adjustments to estimate of cost-based feed-in tariffs. Rate effects of feed-in tariffs.
- 261. Mass. EFSB 10-2/DPU 10-131, 10-132**; NStar transmission; Town of Sandwich, Mass. Direct, May 2011; Surrebuttal, June 2011.
- Need for new transmission; errors in load forecasting; probability of power outages.
- 262. Utah PSC 10-035-124**, Rocky Mountain Power rate case; Utah Office of Consumer Services. June 2011.
- Load data, allocation of generation plants, scrubbers, power purchases, and service drops. Marginal cost study: inclusion of all load-related transmission projects, critique of minimum- and zero-intercept methods for distribution. Residential rate design.
- 263. N.S. UARB M04104**; Nova Scotia Power general rate application; Nova Scotia Consumer Advocate. August 2011.
- Cost allocation: allocation of costs of wind power and substations. Rate design: marginal-cost-based rates, demand charges, time-of-use rates.
- 264. N.S. UARB M04175**, Load-retention tariff; Nova Scotia Consumer Advocate. August 2011.
- Marginal cost of serving very large industrial electric loads; risk, incentives and rate design.
- 265. Ark. PSC 10-101-R**, Rulemaking re self-directed energy efficiency for large customers; National Audubon Society and Audubon Arkansas. July 2011.

Structuring energy-efficiency programs for large customers.

- 266. Okla. CC PUD 201100077**, current and pending federal regulations and legislation affecting Oklahoma utilities; Sierra Club. Comments July, October 2011; presentation July 2011.

Challenges facing Oklahoma coal plants; efficiency, renewable and conventional resources available to replace existing coal plants; integrated environmental compliance planning.

- 267. Nevada PUC 11-08019**, integrated analysis of resource acquisition, Sierra Club. Comments, September 2011; hearing, October 2011.

Scoping of integrated review of cost-effectiveness of continued operation of Reid Gardner 1–3 coal units.

- 268. La. PSC R-30021**, Louisiana integrated-resource-planning rules; Alliance for Affordable Energy. Comments, October 2011.

Scoping of integrated review of cost-effectiveness of continued operation of Reid Gardner 1–3 coal units.

- 269. Okla. CC PUD 201100087**, Oklahoma Gas and Electric Company electric rates; Sierra Club. November 2011.

Resource monitoring and acquisition. Benefits to ratepayers of energy conservation and renewables. Supply planning

- 270. Ky. PSC 2011-00375**, Kentucky utilities' purchase and construction of power plants; Sierra Club and National Resources Defense Council. December 2011.

Assessment of resources, especially renewables. Treatment of risk. Treatment of future environmental costs.

- 271. N.S. UARB M04819**, demand-side-management plan of Efficiency Nova Scotia; Nova Scotia Consumer Advocate. May 2012.

Avoided costs. Allocation of costs. Reporting of bill effects.

- 272. Kansas CC 12-GIMX-337-GIV**, utility energy-efficiency programs; The Climate and Energy Project. June 2012.

Cost-benefit tests for energy-efficiency programs. Collaborative program design.

- 273. N.S. UARB M04862**, Port Hawksbury load-retention mechanism; Nova Scotia Consumer Advocate. June 2012.

Effect on ratepayers of proposed load-retention tariff. Incremental capital costs, renewable-energy costs, and costs of operating biomass cogeneration plant.

- 274. Utah PSC 11-035-200**, Rocky Mountain Power Rates; Utah Office of Consumer Council. June 2012.

Cost allocation. Estimation of marginal customer costs.

- 275. Ark. PSC 12-008-U**, environmental controls at Southwestern Electric Power Company's Flint Creek plant; Sierra Club. Direct, June 2012; rebuttal, August 2012; further, March 2013.

Costs and benefits of environmental retrofit to permit continued operation of coal plant, versus other options including purchased gas generation, efficiency, and wind. Fuel-price projections. Need for transmission upgrades.

- 276. U.S. EPA EPA-R09-OAR-2012-0021**, air-quality implementation plan; Sierra Club. September 2012.

Costs, financing, and rate effects of Apache coal-plant scrubbers. Relative incomes in service territories of Arizona Coop and other utilities.

- 277. Arkansas PSC Docket No. 07-016-U**; Entergy Arkansas' integrated resource plan; Audubon Arkansas. Comments, September 2012.

Estimation of future gas prices. Estimation of energy-efficiency potential. Screening of resource decisions. Wind costs.

- 278. Vt. PSB 7862**, Entergy Nuclear Vermont and Entergy Nuclear Operations petition to operate Vermont Yankee; Conservation Law Foundation. October 2012.

Effect of continued operation on market prices. Value of revenue-sharing agreement. Risks of underfunding decommissioning fund.

- 279. Man. PUB 2012-13 GRA**, Manitoba Hydro rates; Green Action Centre. November 2012.

Estimation of marginal costs. Fuel switching.

- 280. N.S. UARB M05339**, Capital Plan of Nova Scotia Power; Nova Scotia Consumer Advocate. January 2013.

Economic and financial modeling of investment. Treatment of AFUDC.

- 281. N.S. UARB M05416**, South Canoe wind project of Nova Scotia Power; Nova Scotia Consumer Advocate. January 2013.

Revenue requirements. Allocation of tax benefits. Ratemaking.

- 282. N.S. UARB 05419**; Maritime Link transmission project and related contracts, Nova Scotia Consumer Advocate and Small Business Advocate. Direct, April 2013; supplemental (with Seth Parker), November 2013.

Load forecast, including treatment of economy energy sales. Wind power cost forecasts. Cost effectiveness and risk of proposed project. Opportunities for improving economics of project.



- 283. Ont. Energy Board** 2012-0451/0433/0074, Enbridge Gas Greater Toronto Area project; Green Energy Coalition. June 2013, revised August 2013.
- Estimating gas pipeline and distribution costs avoidable through gas DSM and curtailment of electric generation. Integrating DSM and pipeline planning.
- 284. N.S. UARB** 05092, tidal-energy feed-in-tariff rate; Nova Scotia Consumer Advocate. August 2013.
- Purchase rate for test and demonstration projects. Maximizing benefits under rate-impact caps. Pricing to maximize provincial advantage as a hub for emerging tidal-power industry.
- 285. N.S. UARB** 05473, Nova Scotia Power 2013 cost-of-service study; Nova Scotia Consumer Advocate. October 2013.
- Cost-allocation and rate design.
- 286. B.C. UC** 3698715 & 3698719; performance-based ratemaking plan for FortisBC companies; British Columbia Sustainable Energy Association and Sierra Club British Columbia. Direct (with John Plunkett), December 2013.
- Rationale for enhanced gas and electric DSM portfolios. Correction of utility estimates of electric avoided costs. Errors in program screening. Program potential. Recommended program ramp-up rates.
- 287. Conn. PURA** Docket No. 14-01-01, Connecticut Light and Power Procurement of Standard Service and Last-Resort Service. July and October 2014.
- Proxy for review of bids. Oversight of procurement and selection process.
- 288. Conn. PURA** Docket No. 14-01-02, United Illuminating Procurement of Standard Service and Last-Resort Service. January, April, July, and October 2014.
- Proxy for review of bids. Oversight of procurement and selection process.
- 289. Man. PUB** 2014, need for and alternatives to proposed hydro-electric facilities; Green Action Centre. Evidence (with Wesley Stevens) February 2014.
- Potential for fuel switching, DSM, and wind to meet future demand.
- 290. Utah PSC** 13-035-184, Rocky Mountain Power Rates; Utah Office of Consumer Services. May 2014.
- Class cost allocation. Classification and allocation of generation plant and purchased power. Principles of cost-causation. Design of backup rates.
- 291. Minn. PSC** E002/GR-13-868, Northern States Power rates; Clean Energy Intervenor. Direct, June 2014; rebuttal, July 2014; surrebuttal, August 2014.
- Inclining-block residential rate design. Rationale for minimizing customer charges.

- 292. Cal. PUC** Rulemaking 12-06-013, electric rates and rate structures; Natural Resources Defense Council. September 2014.
- Redesigning residential rates to simplify tier structure while maintaining efficiency and conservation incentives. Effect of marginal price on energy consumption. Realistic modeling of consumer price response. Benefits of minimizing customer charges.
- 293. Md. PSC** 9361, proposed merger of PEPco Holdings into Exelon; Sierra Club and Chesapeake Climate Action Network. Direct, December 2014; surrebuttal, January 2015.
- Effect of proposed merger on Consumer bills, renewable energy, energy efficiency, and climate goals.
- 294. N.S. UARB** M06514, 2015 capital-expenditure plan of Nova Scotia Power; Nova Scotia Consumer Advocate. January 2015.
- Economic evaluation of proposed projects. Treatment of AFUDC, overheads, and replacement costs of lost generation. Computation of rate effects of spending plan.
- 295. Md. PSC** 9153 et al., Maryland energy-efficiency programs; Maryland Office of People's Counsel. January 2015.
- Costs avoided by demand-side management. Demand-reduction-induced price effects.
- 296. Québec Régie de L'énergie** R-3867-2013 phase 1, Gaz Métro cost allocation and rate structure; ROÉÉ. February 2015
- Classification of the area-spanning system; minimum system and more realistic approaches. Allocation of overhead, energy-efficiency, gas-supply, engineering-and-planning, and billing costs.
- 297. Conn. PURA** Docket No. 15-01-01, Connecticut Light and Power Procurement of Standard Service and Last-Resort Service. February and July 2015.
- Proxy for review of bids. Oversight of procurement and selection process.
- 298. Conn. PURA** Docket No. 15-01-02, United Illuminating Procurement of Standard Service and Last-Resort Service. February, July, and October 2015.
- Proxy for review of bids. Oversight of procurement and selection process.
- 299. Ky. PSC** 2014-00371, Kentucky Utilities electric rates; Sierra Club. March 2015.
- Review basis for higher customer charges, including cost allocation. Design of time-of-day rates.

- 300. Ky. PSC 2014-00372**, Louisville Gas and Electric electric rates; Sierra Club. March 2015.
- Review basis for higher customer charges, including cost allocation. Design of time-of-day rates.
- 301. Mich. PSC U-17767**, DTE Electric Company rates; Michigan Environmental Council, Sierra Club, and Natural Resource Defense Council. May 2015.
- Cost effectiveness of pollution-control retrofits versus retirements. Market prices. Costs of alternatives.
- 302. N.S. UARB M06733**, supply agreement between Efficiency One and Nova Scotia Power; Nova Scotia Consumer Advocate. June 2015.
- Avoided costs. Cost-effectiveness screening of DSM. Portfolio design. Affordability and bill effects.
- 303. Penn. PUC P-2014-2459362**, Philadelphia Gas Works DSM, universal-service, and energy-conservation plans; Philadelphia Gas Works. Direct, May 2015; Rebuttal, July 2015.
- Avoided costs. Recovery of lost margin.
- 304. Ont. Energy Board EB-2015-0029/0049**, 2015–2020 DSM Plans Of Enbridge Gas Distribution and Union Gas, Green Energy Coalition. Evidence July 31, 2015, Corrected August 12, 2015.
- Avoided costs: price mitigation, carbon prices, marginal gas supply costs, avoidable distribution costs, avoidable upstream costs (including utility-owned pipeline facilities).
- 305. PUC Ohio 14-1693-EL-RDR**, AEP Ohio Affiliate purchased-power agreement, Sierra Club. September 2015.
- Economics of proposed PPA, market energy and capacity projections. Risk shifting. Lack of price stability and reliability benefits. Market viability of PPA units.
- 306. N.S. UARB M06214**, NS Power Renewable-to-Retail rate, Nova Scotia Consumer Advocate. November 2015.
- Review of proposed design of rate for third-party sales of renewable energy to retail customers. Distribution, transmission and generation charges.
- 307. PUC Texas Docket No. 44941**, El Paso Electric rates; Energy Freedom Coalition of America. December 2015.
- Cost allocation and rate design. Effect of proposed DG rate on solar customers. Load shapes of residential customers with and without solar. Problems with demand charges.

- 308. N.S. UARB M07176**, NS Power 2016 Capital Expenditures Plan, Nova Scotia Consumer Advocate. February 2016.

Economic evaluation of proposed projects, including replacement energy costs and modeling of equipment failures. Treatment of capitalized overheads and depreciation cash flow in computation of rate effects of spending plan.

- 309. Md. PSC 9406**, BGE Application for recovery of Smart Meter costs, Maryland Office of People's Counsel. Direct February 2016, Rebuttal March 2016, Surrebuttal March 2016.

Assessment of benefits of Smart Meter programs for energy revenue, load reductions and price mitigation; capacity load reductions and price mitigation; free riders and load shifting in peak-time rebate (PTR) program; cost of PTR participation; effect of load reductions on PJM capacity obligations, capacity prices and T&D costs.

- 310. City of Austin TX**, Austin Energy 2016 Rate Review, Sierra Club and Public Citizen. May 2016

Allocation of generation costs. Residential rate design. Geographical rate differentials. Recognition of coal-plant retirement costs.

- 311. Manitoba PUB**, Manitoba Hydro Cost of Service Methodology Review, Green Action Centre. June 2016, reply August 2016.

Allocation of generation costs. Identifying generation-related transmission assets. Treatment of subtransmission. Classification of distribution lines. Allocation of distribution substations and lines. Customer allocators. Shared service drops.

- 312. Md. PSC 9418**, PEPCo Application for recovery of Smart Meter costs, Maryland Office of People's Counsel. Direct July 2016, Rebuttal August 2016, Surrebuttal September 2016.

Assessment of benefits of Smart Meter programs for energy revenue, load reductions and price mitigation; load reductions in dynamic-pricing (DP) program; cost of DP participation; effect of load reductions on PJM capacity obligations, capacity prices and T&D costs.

- 313. Md. PSC 9424**, Delmarva P&L Application for recovery of Smart Meter costs, Maryland Office of People's Counsel. Direct September 2016, Rebuttal October 2016, Surrebuttal October 2016.

Estimation of effects of Smart Meter programs—dynamic pricing (DP), conservation voltage reduction and an informational program—on wholesale revenues, wholesale prices and avoided costs; estimating load reductions from the DP program; cost of DP participation; effect of load reductions on PJM capacity obligations, capacity prices and T&D costs.

- 314. N.H. PUC** Docket No. DE 16-576, Alternative Net Metering Tariffs, Conservation Law Foundation. Direct October 2016, Reply December 2016.

Framework for evaluating rates for distributed generation. Costs avoided and imposed by distributed solar. Rate design for distributed generation.

- 315. Puerto Rico Energy Commission** CEPR-AP-2015-0001, Puerto Rico Electric Power Authority rate proceeding, PR Energy Commission. Report December 2016.

Comprehensive review of structure of electric utility, cost causation, load data, cost allocation, revenue allocation, marginal costs, retail rate designs, identification and treatment of customer subsidies, structuring rate riders, and rates for distributed generation and net metering.

- 316. N.S. UARB** M07745, NS Power 2017 Capital Expenditures Plan, Nova Scotia Consumer Advocate. January 2017.

Computation and presentation of rate effects. Consistency of assumed plant operation and replacement power costs. Control of total cost of small projects. Coordination of information-technology investments. Investments in biomass plant with uncertain future.

- 317. N.S. UARB** M07746, NS Power Enterprise Resource Planning project, Nova Scotia Consumer Advocate. February 2017.

Estimated software project costs. Costs of internal and contractor labor. Affiliate cost allocation.

- 318. N.S. UARB** M07767, NS Power Advanced Metering Infrastructure projects, Nova Scotia Consumer Advocate. February 2017.

Design and goals of the AMI pilot program. Procurement. Coordination with information-technology and software projects.

- 319. Québec Régie de l'énergie** R-3867-2013 phase 3A; Gaz Métro estimates of marginal O&M costs; ROEE. March 2017.

Estimation of one-time, continuing and periodic customer-related operating and maintenance cost. Costs related to loads and revenues. Dealing with lumpy costs.

- 320. N.S. UARB** M07718, NS Power Maritime Link Cost Recovery, Nova Scotia Consumer Advocate. April 2017.

Usefulness of transmission interconnection prior to operation of the associated power plant.

- 321. Mass. DPU 17-05**, Eversource Rate Case, Cape Light Compact. Direct April 2017, Rebuttal May 2017.
- Critique of proposed performance-based ratemaking mechanism. Proposal for improvements.
- 322. PUCO 16-1852**, AEP Ohio Electric Security Plan, Natural Resources Defense Council. May 2017.
- Residential customer charge. Cost causation. Effect of rate design on consumption.
- 323. Iowa Utilities Board RPU-2017-0001**, Interstate Power and Light rate case, Natural Resources Defense Council. Direct August 2017, Reply September 2017.
- Critique of proposed demand-charge pilot rates for residential and small commercial customers. Defects of demand rates and shortcomings of IPL experimental proposal design.
- 324. N.S. UARB M08087**, NS Power 2017 Load Forecast, Nova Scotia Consumer Advocate. Direct August 2017.
- Review of forecast methodology, including extrapolation of drivers of commercial load from US national data; treatment of non-firm and competitive loads; behind-the-meter generation and controlling peak-load growth.
- 325. Québec Régie de l'énergie R-3867-2013 phase 3B**; Gaz Métro line-extension policy; ROÉÉ. September 2017.
- The costs of adding new load. Estimating the durability of revenues from line extensions.
- 326. Mass. EFSB 17-02**; Eversource proposed Hudson-Sudbury transmission line; Town of Sudbury. Direct October 2017, Supplemental January 2018..
- Accuracy of ISO New England regional load forecasts. Potential for distributed solar, storage and demand response.
- 327. Manitoba PUB**, Manitoba 2017/18 & 2018/19 General Rate Application; Green Action Coalition. October 2017.
- Marginal costs. Rate design. Affordability rate design for low-income and electric-heating customers. Design of residential inclining blocks. Problems with demand charges and demand ratchets. Cost-of-service study improvements.
- 328. N.S. UARB M08383**, NS Power 2018 Annually Adjusted Rates; Consumer Advocate. January 2018.
- Projection of incremental dispatch cost. Computing administrative charges. Methodological issues.

- 329. N.S. UARB M08349**, NS Power's Advanced Metering Infrastructure Proposal; Consumer Advocate. January 2018.

Estimation of AMI benefits: load balancing among feeders, critical peak pricing, avoided costs of meters for distributed generation. NS Power's claims of benefits from accounting credits (AFUDC, overheads, and converting write-offs to reduced revenue) and shifting costs to customers (earlier billing, higher recorded usage). Realistic AMI meter life. Excessive charge for customers who opt out of AMI.

- 330. N.S. UARB M08350**, NS Power 2018 Annual Capital Expenditures Plan; Consumer Advocate. February 2018.

Overlap between ACE projects and AMI project. Hydro project planning and valuation of lost hydro energy output.

- 331. Conn. PURA Docket No. 08-01-01RE05**, Proposed Amendment to Peaker Contracts; Connecticut Consumers Counsel. May 2018.

Dividing increased revenues from ISO-NE's Pay-for-Performance mechanism between contract generators and ratepayers.

- 332. Kansas CC Docket No. 18-WSEE-328-RTS**, Westar Rate Case; Sierra Club. Direct June 2018. Rebuttal June 2018. Supplement July 2018.

Costs and benefits of running Westar coal plants. Costs of renewables and other alternatives. Recommendation regarding planning, coal retirement schedule, and acquisition of leased capacity.

- 333. Cal. PUC Application 17-09-006**; Pacific Gas and Electric Gas Cost Allocation Proceeding; Small Business Utility Advocates. Direct June 2018.

Allocation of gas distribution system costs. Allocation of costs of energy-efficiency programs.

- 334. N.S. UARB M08670**, NS Power 2018 Load Forecast, Nova Scotia Consumer Advocate. Direct July 2018.

Review of forecast methodology, including treatment of future energy-efficiency programs, treatment of third-party supply and behind-the-meter generation.

- 335. Iowa Utilities Board RPU-2018-0003**, MidAmerican Energy Request for Approval of Ratemaking Principles for Wind XII; Sierra Club. Direct August 2018.

Cost and benefits of continued operation of six MidAmerican coal-fired units.

- 336. Cal. PUC A.18-02-016, 03-001, 03-002; 2018 Energy Storage Plans; Small Business Utility Advocates. Direct, Rebuttal and Supplement, August 2018.**

Reliance on substation-sited storage. Need for increased emphasis on customer-sited and shared storage. Maximizing benefits, total and for small business. Oversized SDG&E proposed projects. Cost recovery. Storage technology diversity.

- 337. La. PSC U-34794; Cleco Corp Purchase of NRG Assets and Contracts; Sierra Club. Direct, September 2018.**

Economics of NRG generation resources, Cleco Power coal plants and wholesale sales contracts. Risks of the proposed transaction.

- 338. Cal. PUC A.18-11-005; Southern California Gas Demand-Response Proposal; Small Business Utility Advocates. Direct March 2019, Rebuttal April 2019.**

Potential benefits of gas demand response and SoCalGas failure to identify potential benefits from its programs. Program design. Cost allocation.

- 339. Cal. PUC A.18-11-003; Pacific Gas & Electric Electric Vehicle Rate; Small Business Utility Advocates. Direct April 2019, Rebuttal May 2019.**

Critique of subscription demand charge. Time-of-use periods. Outreach to small business. Time-of-use price differentials.

- 340. Cal. PUC A.18-07-024; Southern California Gas and San Diego Gas & Electric Triennial Cost Allocation Proceeding; Small Business Utility Advocates. Direct April 2019.**

Core commercial declining blocks. Computation of customer charges. Embedded versus marginal cost allocation. Marginal cost computation. Allocation of self-generation incentives.

- 341. Vt. PUC 19-0397-PET; Screening Values for Energy-Efficiency Measures; Conservation Law Foundation. Direct May 2019.**

Conceptual basis for including price-suppression benefits to consumers. Avoided T&D costs. Avoided externalities with a renewable energy standard. Risk mitigation.

- 342. N.S. UARB M09096; EfficiencyOne Application for 2020–2022 DSM Plan; Consumer Advocate. May 2019**

Evaluate NS Power critique of EfficiencyOne proposal. Comparability of efficiency budgets. Affordability. Energy-efficiency programs and resource planning.

- 343. N.S. UARB M09191; NS Power 2019 Load Forecast Report; Consumer Advocate. July 2019.**



Review load-forecast treatment of energy efficiency, fuel switching, electric vehicles, behind-the-meter solar, AMI-enabled programs, and the changing trend in lighting efficiency.

- 344. Iowa Utilities Board RPU-2019-001;** Interstate Power and Light Rate Case; Sierra Club. Direct August 2019; Rebuttal September 2019.

Economics of continued operation of five coal units: fuel, O&M, capital additions, overheads, market revenues, and cost of renewable resources. Recommend retirement of all units.

- 345. Maine PUC 2019-00101;** Unitil Precedent Agreement for Westbrook Xpress, Conservation Law Foundation. August 2019.

The role of fuel conversions in Unitil's load forecast. Mandates for reducing greenhouse gas emissions. Efficient electric end uses as alternatives to gas system expansion. Risks of and alternatives to new pipeline supply.

- 346. Maine PUC 2019-00105;** Bangor Natural Gas Precedent Agreement for Westbrook Xpress, Conservation Law Foundation. August 2019.

Mandates for reducing greenhouse gas emissions. Efficient electric end uses as alternatives to gas system expansion. Risks of and alternatives to new pipeline supply.

- 347. Wisconsin PSC 6690-UR-126;** Wisconsin Public Service Corporation 2020 Rate Case, Sierra Club. Direct August 2019, Surrebuttal October 2019.

Economics of continued operation of four coal units: fuel, O&M, capital additions, overheads, market revenues, and cost of renewable resources. Recommend retirement of uneconomic units.

- 348. Wisconsin PSC 05-UR-109;** Wisconsin Electric Power Company 2020 Rate Case; Sierra Club. Direct August 2019, Surrebuttal October 2019

Economics of continued operation of six coal units: fuel, O&M, capital additions, overheads, market revenues, and cost of renewable resources. Recommend retirement of uneconomic units.

- 349 N.S. UARB M09277;** NS Power Maritime Link Cost Recovery, Nova Scotia Consumer Advocate. August 2019.

Benefits of the Maritime Link transmission line prior to operation of associated power supply and connecting transmission facilities.

- 350. N.H. PUC DG 17-198;** Liberty Utilities Petition to Approve Firm Supply, Transportation Agreements, and the Granite Bridge Project; Conservation Law Foundation. September 2019.

Need for transportation contracts and new pipeline. Alternative of switching oil and propane to efficient electric end uses. Limited life of gas infrastructure and effect on ratepayer costs.

- 351. Colorado PUC** 19AL-0268E; Public Service of Colorado Rate Case; Sierra Club. September 2019.

Prudence of management of superheater tube failures. Unfavorable economics of coal plants nationally. Need for continuing review of coal-plant economics and benefits of retirement.

- 352. N.H. PUC** DG 17-152; Liberty Utilities Least Cost Integrated Resource Plan; Conservation Law Foundation. September 2019.

Integrated planning for gas utilities in an era of carbon constraints. Heat pump electrification versus gas conversion of oil-fired space and water heating.

- 353. N.S. UARB** M09420; NS Power Application for an Extra-Large Industrial Active Demand Control Tariff; Nova Scotia Consumer Advocate. December 2019.

Estimating incremental costs, including lost wheeling revenues, variable O&M, and variable capital cost; updating and reconciliation of incremental costs.

- 354. Cal. PUC** A.19-07-006; San Diego Gas & Electric Fast-Charging and Heavy-Duty Electric Vehicle Proposal; Small Business Utility Advocates. Direct January 2020, Rebuttal February 2020.

Interim rate proposal. Critique of subscription and demand charges. Time-of-use periods. Recovery of lost revenues.

- 355. N.S. UARB** M09519; NS Power Smart Grid Application; Nova Scotia Consumer Advocate. February 2020. Joint testimony with John D. Wilson.

Differentiating capital costs from expenses. Inclusion of decommissioning costs in project plan. Selection of the Distributed Energy Resources Management System.

- 356. N.S. UARB** M09499; NS Power 2020 Annual Capital Expenditure Plan; Nova Scotia Consumer Advocate. February 2020. Joint testimony with John D. Wilson.

Planning for hydro life extension or retirement. Appropriate levels of contingency in project budgets. Aggregation of multi-year capital programs. Cost-control efforts.

- 357. Cal. PUC** A.19-03-002; San Diego Gas & Electric General Rate Application, Phase 2; Small Business Utility Advocates. Direct March 2020; Rebuttal May 2020.

Problems with proposed increases in the Monthly Service Fees and reliance on demand charges in for medium non-residential customers. Improving hours for the TOU periods.

- 358. N.S. UARB M09609;** NS Power Authorization to Overspend on Gaspereau Dam Works; Nova Scotia Consumer Advocate. May 2020. Joint testimony with John D. Wilson.

Alternatives to the proposed project, including decommissioning the affected hydro system. Choice of project contingency factor. Estimation of archaeological costs. Replacement energy cost assumptions.

- 359. N.S. UARB M09609;** NS Power Advanced Distribution Management System Upgrade; Nova Scotia Consumer Advocate. May 2020. Joint testimony with John D. Wilson.

Need for the ADMS. Integration with the Distributed Energy Resources Management System.

- 360. Cal. PUC A.19-10-012;** San Diego Gas & Electric Power Your Drive Electric Vehicle Charging Program; Small Business Utility Advocates. Direct May 2020; Rebuttal June 2020. Joint testimony with John D. Wilson.

Ensuring that utility-installed chargers advance California goal for electric vehicles. Budget controls. Reporting requirements. Evaluation, monitoring and verification processes. Outreach to small business customers.

- 361. N.S. UARB M09499;** Authorization to Overspend for Various Distribution Routines; Nova Scotia Consumer Advocate. June 2020.

Guidelines for reporting cost overruns due to extreme weather. Documentation of drivers of equipment deterioration and replacement. Tracking costs of connecting new customers.

- 362. N.S. UARB M09499;** NS Power 2020 Load Forecast Report; Nova Scotia Consumer Advocate. July 2020. Joint testimony with John D. Wilson.

Impacts of the COVID-19 recession on load. Additional appropriate end-use studies. Improvements to modelling of electrification and factors. Effects of AMI and time-varying pricing on data availability and load.

- 363. Cal. PUC A.20-03-002, et al;** Pacific Gas & Electric, Southern California Edison and San Diego Gas & Electric 2020 Energy Storage Procurement and Investment Plans; Small Business Utility Advocates. Direct and Rebuttal September 2020.

Adequacy of transmission, distribution and customer-side storage acquisition. Extending residential smart water-heater and new-home storage programs to small commercial customers.

- 364. Penn. PUC P-2014-2459362;** Philadelphia Gas Works DSM Plan; Philadelphia Gas Works. October 2020.

Avoided costs of commodity and delivery. Water heater load shape. DRIPE.

- 365. Cal. PUC A.19-11-019;** Pacific G&E Marginal Costs, Revenue Allocation, and Rate Design; Small Business Utility Advocates. Joint testimony with John D. Wilson. Direct November 2020. Rebuttal February 2021. Supplemental direct on real-time pricing May 2021.

Marginal capacity costs for distribution, generation, transmission and customer access. Customer charges, demand charges, TOU differentials and periods, and real-time pricing.

- 366. N.S. UARB M09777;** NS Power Time Varying Pricing; Nova Scotia Consumer Advocate. February 2021. Joint testimony with John D. Wilson.

Net load as measure of capacity need. Effect of proposed TVP tariffs on load, capacity savings, and energy costs. Limits of TOU rates for long winter peaks. Improved critical-peak pricing (CPP) tariffs. Treatment of demand charges. Implementation and evaluation of program. Lost revenue adjustment mechanism.

- 367. Cal. PUC A.20-10-011;** Pacific G&E Day-Ahead Real-time Commercial Electric Vehicle Tariff; Small Business Utility Advocates. Direct April 20, Rebuttal May 2021.

Rate design for real-time pricing tariff. Allocation of marginal generation capacity cost to hours. Maintaining revenue neutrality. Marketing the tariff to small businesses. Evaluation plan.

- 368. Cal. PUC R.20-08-020;** Net Energy Metering Successor Tariff; Small Business Utility Advocates. Direct, June 2021, Rebuttal July 2021

Rate design. Evaluation of alternatives. Required payback to continue behind-the-meter resource development. Encouraging storage and integrating with the grid.

- 369. Cal. PUC A.20-10-012;** Southern California Edison Marginal Costs, Revenue Allocation, and Rate Design; Small Business Utility Advocates. Joint testimony with John D. Wilson. Direct July 2021.

Allocation of marginal generation capacity costs among subfunctions, hours, and classes. Expected marginal generation energy costs. Estimation and allocation of marginal distribution capacity costs. Allocation of customer access costs. Real-time pricing. Updating peak cost periods.

## ACRONYMS AND INITIALISMS

APS	Alleghany Power System	NARUC	National Association of Regulatory Utility Commissioners
ASLB	Atomic Safety and Licensing Board	NEPOOL	New England Power Pool
BEP	Board of Environmental Protection	NRC	Nuclear Regulatory Commission
BPU	Board of Public Utilities	OCA	Office of Consumer Advocate
BRC	Board of Regulatory Commissioners	PSB	Public Service Board
CC	Corporation Commission	PBR	Performance-based Regulation
CMP	Central Maine Power	PSC	Public Service Commission
DER	Department of Environmental Regulation	PUC	Public Utility Commission
DPS	Department of Public Service	PUB	Public Utilities Board
DQE	Duquesne Light	PURA	Public Utility Regulatory Authority
DPUC	Department of Public Utilities Control	PURPA	Public Utility Regulatory Policy Act
DSM	Demand-Side Management	ROEE	Regroupement des organismes environnementaux en énergie
DTE	Department of Telecommunications and Energy	SCC	State Corporation Commission
EAB	Environmental Assessment Board	UARB	Utility and Review Board
EFSB	Energy Facilities Siting Board	USAEE	U.S. Association of Energy Economists
EFSC	Energy Facilities Siting Council	UC	Utilities Commission
EUB	Energy and Utilities Board	URC	Utility Regulatory Commission
FERC	Federal Energy Regulatory Commission	UTC	Utilities and Transportation Commission
ISO	Independent System Operator		
LRAM	Lost-Revenue-Adjustment Mechanism		

## **ATTACHMENT 5**

Resumé / Professional Qualifications of James Harvey

**James E. Harvey**  
Resource Insight, Inc.  
5 Water Street  
Arlington, MA 02476

## **Professional Experience**

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**Research Analyst, Resource Insight, Inc** **February 2019 – Present**

- Provides data analysis, research, and energy market expertise for clients representing the environment, small business, and electricity regulators.
- Evaluates electric utilities' energy and economic performance through data analysis and research to inform expert testimony in regulatory cases.
- Develops cost-benefit analyses on uneconomic fossil fuel generators.
- Runs periodic price proxy analyses for regulators to ensure successful power procurements.
- Works on cost of service studies and ratemaking cases for equitable and efficient rate design by utilities.

**Energy Analyst, Energyzt Advisors** **April 2018 – January 2019**

- Provided research and data analysis for a wide variety of clients spanning the energy industry.
- Responsibilities included advanced analysis of large datasets and research of quantitative and qualitative sources.

**Sales Associate, Summit Ski and Snowboard** **November 2017 – April 2018**

- Sold high quality ski and snowboard gear, outerwear, and tuning services at one of Massachusetts's premium ski shops.

**Research Assistant, Colby College Environmental Studies Program** **February 2017 – May 2017**

- Aided professors in historical ecology research projects, including the continuation of a personal capstone project..

## **Education**

---

**Colby College** **September 2013-May 2017**

- Waterville, ME
- B.A. in Environmental Policy and Creative Writing.
- Related coursework: Domestic/Int'l Environmental Policy, GIS, Environmental & Natural Resource Economics, Ecology, Conservation Biology, Renewable Energy Systems, Marine Fisheries Management.

**DIS - Danish Institute for Study Abroad** **January 2016-May 2016**

- Copenhagen, Denmark
- Semester in Denmark focusing on renewable energy systems and climate change in the arctic

**University of Salamanca** **September 2013-December 2013**

- Salamanca, Spain
- Semester of intensive Spanish language and cultural immersion

## **Skills & Certifications**

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High proficiency in Microsoft Office including Excel. Proficient in Spanish, ArcGIS software, Adobe Suite, Vortex population viability analysis software, STATA data analysis and statistical software, R statistical software.

## **ATTACHMENT 6**

Resumé / Professional Qualifications of James Birkelund





## Small Business Utility Advocates

548 Market St., #11200

San Francisco, CA 94104

T: 415.602.6223

F: 415.789.4556



### **JAMES M. BIRKELUND**

*President and General Counsel*  
2012-present

---

#### **AREAS OF PRACTICE**

Utilities

Energy

Environmental

---

#### **EDUCATION**

University of Michigan, School  
of Law (J.D.), 1999

University of Michigan, School  
of Natural Resources (M.S.),  
Resource Policy, 1999

Colgate University (B.A.),  
Economics and Geology, 1993

---

#### **PRIOR POSITIONS**

*In-House Counsel*, Synergy,  
Public Utility, Perth, Australia  
*Senior Project Attorney*, Natural  
Resources Defense Council  
(NRDC), Los Angeles, CA  
*Associate Attorney*, Morrison &  
Foerster, LLP, San Francisco,  
CA

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#### **BAR ADMISSIONS**

State of California

U.S. Court of Appeals, Ninth  
Circuit

U.S. District Courts, Northern,  
Eastern, and Southern Districts  
of California

### **Profile**

James Birkelund is President and General Counsel for Small Business Utility Advocates (SBUA), a nonprofit organization advocating for small businesses and their utility concerns. Along with acting as General Counsel and representing SBUA since 2012, Mr. Birkelund has over 20 years of professional experience as an attorney. His career has focused on utilities, regulatory, energy, and environmental law. Mr. Birkelund has substantial experience litigating before administrative bodies and courts and representing clients on utility matters.

### **Key Professional Activities**

Represent Small Business Utility Advocates as an intervenor before Public Utility Commissions (PUC), including in California, Oregon, and Washington, D.C.

Advocate on a wide array of CPUC dockets involving electric and natural gas utility services (general rate cases, revenue requirements, marginal costs, rate design), distributed energy resources (transportation electrification, energy efficiency, demand response, energy storage, microgrids, net energy metering, Rule 21 connections), telecommunication matters, climate change adaptation, Pacific Gas and Electric Company's bankruptcy and reorganization, Covid-19 relief (bill debt relief), and wildfire issues (mitigation, deenergization).

Responsible for overseeing and supervising legal teams of attorneys and experts, preparing organizational legal strategies, and developing budgets for SBUA participation in PUC dockets.

### **Other Sample Engagements**

Provided counsel for Native American Tribe on pipeline-related approvals before PUC in South Dakota.

Analyzed and commented on U.S. Department of Energy proposals for nationwide transmission corridors for up to 500kV.

Advised solar industry client on protecting solar incentives by intervening before PUC in Colorado.

Advised small renewable energy companies as outside general counsel, including on regulatory, utility, and transactional matters.

Litigated on behalf of nonprofit clients in federal and California courts on environmental and other matters.

Represented client in providing energy efficiency products to third parties that qualify for loan programs with Southern California Edison.

### **Other Sample Engagements (*continued*)**

Negotiated hydropower agreements with Irrigation District in California, including provisions related to utility connections and net energy metering.

Drafted solar photovoltaic agreements that include provisions related to utility connections and rebate programs.

Successfully represented client in Native American Tribal dispute and won motion to dismiss case in U.S. District Court of Northern California.

Settled environmental action under Clean Water Act on behalf of nonprofit client to force defendant to clean up stormwater discharges.

Advised utility regarding compliance with new and revised utility laws and regulations.

Represented client on matters related to Tehachapi Renewable Transmission Project and Certificate of Public Convenience and Necessity at California PUC.

Negotiated terms of “Hardship Efficiency Program” on behalf of utility to educate low-income households on energy efficiency.

Advised utility on new initiative to procure and sell tradable renewable energy certificates.

Negotiated contracts (up to \$60 million) on behalf of utility’s internal traders to procure and sell energy.

Evaluated and submitted administrative comments on proposed 500-megawatt hydroelectric dam project in Southern California.

Established working group with nonprofit groups to evaluate renewable energy plans, including solar proposals in central desert of California.

Analyzed and advised public officials on San Diego Gas & Electric’s Sunrise Powerlink project before the California PUC.

### **Leadership, Teaching, and Volunteering**

*Judge Pro Tem* (2012-present), California San Francisco Superior Court

*Executive Committee Member* (2017-2020), California Lawyers Association, Environmental Law Section; *Advisor to Executive Committee* (2021-present)

*Adjunct Professor* (2010-2014), Hastings College of Law, San Francisco, California

## **Leadership, Teaching, and Volunteering (*continued*)**

*Council Member* (2007-2008), Venice Neighborhood Community Council, Los Angeles, California

*Member of Environmental Executive Committee* (2007-2008), Los Angeles County Bar Association, Los Angeles, California

## **Sample Conferences and Publications**

*Panel Organizer, Diversity, Equity, Inclusion and Justice before the CPUC*, California Lawyers Association's Yosemite Environmental Law Conference, CA, *conference pending*, Oct. 20, 2021. Speakers include Commissioner Darcie L. Houck.

*Conference Organizer, Courts as Change Agents for Environmental Law Enforcement*, California Lawyers Association Virtual Conference, May 8, 2020.

*Conference Organizer, SB 100 and the Race to a Carbon Free Grid in California: California Lawyers Association 2019 Energy Law Conference*, Oakland, CA, Mar. 28, 2019

*Panel Moderator, Common Law Lawsuits by Municipalities in the Name of Climate Change*, Yosemite Environmental Law Conference, Fish Camp, CA, Oct. 20, 2018

*Panel Moderator, Sea Level Rise and the Law*, California Lawyer's Association Conference, San Francisco, CA, Aug. 20, 2018

*Panel Moderator, Novel Claims to Tackle Climate Change and Air Pollution*, Private Enforcement Conference – Challenges in the Trump Era, Oakland, CA, May 4, 2018

*Author, Discover How Small Businesses Can Fight Against High Utility Costs*, Dynamic, Issue 4, March 2014

# **ATTACHMENT 7**

## Statement of Expenses and Receipts

<b>Date</b>	<b>Description</b>	<b>Amount</b>
7.26-29.19	Airline Flight from BOS to SFO	\$816.60
7.26.19	Uber to BOS	\$16.62
7.29.19	BART Clipper Pass	\$20.00
7.29.19	Lyft from BOS	\$29.87
10.12-18.19	Airline Flight from BOS to SFO (1/2 of full fair)	\$755.10
10.12.19	Lyft to BOS	\$46.84
10.13.19	Meal receipt	\$91.11
10.15.19	Meal receipt	\$96.30
10.17.19	Car rental	\$350.56
10.17.19	2 Meal receipts	\$16.24
10.15-17.19	Gas, Ferry and Muni receipts	\$25.57
10.18.19	Lyft from BOS	\$80.24
<b>TOTAL</b>		<b>\$2,345.05</b>

# AMY J Umaretiya Travel Expense

## 910 SBUA / SDG + E / MC + RD

Flight	816.6
BART Clipper	
Pass	20
Uber to airport	16.62
Lyft from airport	29.87
Total	883.09

| #3673349202

## You're all set to jet.

Thanks for choosing JetBlue. Get ready to enjoy the most legroom in coach, free wi-fi & entertainment, and free snacks & drinks.

Please note: This is not your boarding pass.

Your confirmation code is

# YRHNHB

## Change made easy.

Switch or cancel flights, add extras like Even More Space or pets, update your seat assignment, TrueBlue & KTN numbers, and other traveler details—all in one place.

[Manage trip](#)

You can also manage your trips by [downloading our free mobile app.](#)

## Flights

**BOS**

Boston, MA  
Terminal: C

**SFO**

San Francisco, CA

**Date** Fri, Jul 26  
**Departs** 6:18pm  
**Arrives** 10:12pm  
**Flight** 833

**SFO**

San Francisco, CA  
Terminal:  
International

**BOS**

Boston, MA

**Date** Mon, Jul 29  
**Departs** 10:29pm  
**Arrives** 7:17am  
**Flight** 134

If your booking was made at least 7 days in advance, you may cancel it within 24 hours (by 07/17/2019 11:53 AM EDT) without a cancellation fee. Please [click here](#) for details on our change and cancel policies.

## Traveler Details

**AMY J UMARETIYA**

Frequent Flier: B6 3673349202

Ticket number: 2792130438687

**BOS - SFO:**

personal item.\*

Seat: [Select seat](#)

Notes: Even More Speed

**SFO - BOS:**

Fare: Blue Flex

Bags: Two (2) checked bags, one (1) carry-on, one (1) personal item.\*

Seat: [Select seat](#)

Notes: Even More Speed

\*You may pay for additional bags [online](#) (within 24 hours of departure), or upon arrival at the airport via an airport kiosk or with an airport crewmember. Some restrictions apply.

Get up to 7" more legroom, a fast lane to the TSA checkpoint\*, and early boarding—all the better to nab that overhead bin.

**Add Even More Space**

\*Select cities

## Payment Details

XXXXXXXXXXXX2001

NONREF - NO FEE FOR  
CHG/CX

\$733.02

Taxes & fees

\$83.58

**Total:**

**\$816.60**  
**USD**

Purchase Date: Jul 16, 2019

[Request full receipt](#)

✓ JUL 29 BART CLIPPER WARMSPRINGS 0000 - FREMONT, CA

\$20.00

Doing business as:

BART CLIPPER WARM SPRINGS

45193 WARM SPRINGS BLVD

FREMONT

CA

94539

UNITED STATES

Additional Information: A550146432Z 510-464-6474

510-464-6474

Reference: 320192110794150991

Dispute/Inquire about this Charge

Transaction Details

Description

OTHER TRANSPORTATIO

Enter a Tag Name

Add

CREATE RULE

 PRINT





\$16.62

Nissan Altima 5EYB65

- 1575 Cambridge St, Cambridge, MA 02139, USA
- Terminal A North 1 Harborside Dr, Boston, MA 02111, USA

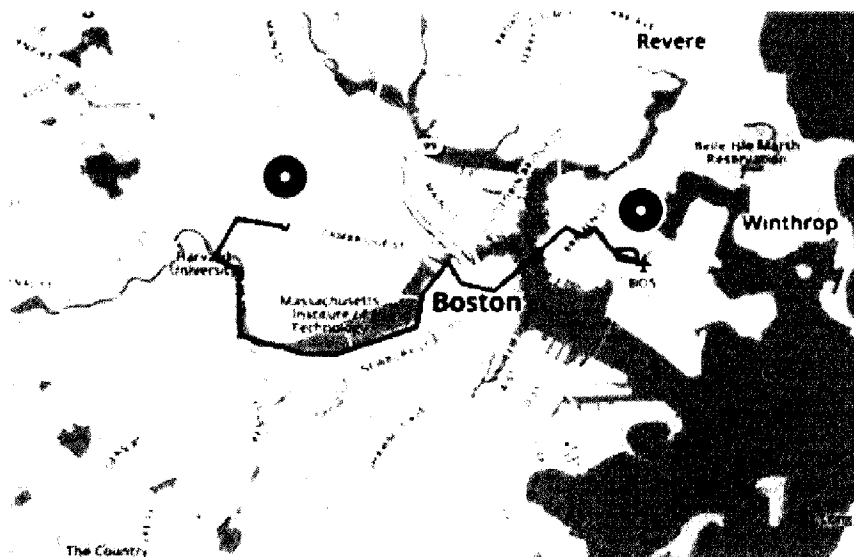


Jul 30, 2019, 9:21 AM



**\$29.87**

Thanks for riding with Larenzal



## Your Trip



**Logan Airport Terminal E**  
Boston

Pickup  
9:21 AM

**1544 Cambridge St**  
Cambridge

Dropoff  
9:53 AM

Paul Chernick

Subject:

FW: JetBlue booking confirmation for PAUL LEE CHERNICK - MAY1A

Check out the details for your trip on Sat, Oct 12

Your confirmation code is

**MAY1A**

Flights

**BOS**

Boston, MA  
Terminal: C

**SFO**

San Francisco, CA

Date: Sat, Oct 12  
Departs: 11:00am  
Arrives: 2:35pm  
Flight: 1333

jetBlue

**SFO**

San Francisco, CA  
Terminal: 1 North

**BOS**

Boston, MA

Date: Thu, Oct 17  
Departs: 2:03pm  
Arrives: 10:48pm  
Flight: 534

jetBlue

Traveler Details

PAUL LEE  
CHERNICK

Frequent Flier: B6 2042052521  
Ticket number: 2792135892250

**BOS - SFO:**

Fare: Blue

Bags: One (1) carry-on, one (1) personal item. This fare option does not include checked bags.\*

Seat: 10A

Notes: Even More Speed, Even More Space

**SFO - BOS:**

Fare: Blue

Bags: One (1) carry-on, one (1) personal item. This fare option does not include checked bags.\*

Seat: 10B

Notes: Even More Speed, Even More Space

Payment Details

Master  
XXXXXXXXXXXX4394

NONREF - FEE FOR CHG/CXL \$997.20  
Extras \$381.00  
Taxes & fees \$132.00  
Total: \$1,510.20 USD

Purchase Date: Oct 1, 2019

Request full receipt

**Paul Chernick**

---

**From:** no-reply@lyftmail.com on behalf of Lyft Ride Receipt <no-reply@lyftmail.com>  
**Sent:** Saturday, October 12, 2019 9:39 AM  
**To:** Paul Chernick  
**Subject:** Your ride with Ganesh on October 12



OCTOBER 12, 2019 AT 8:37 AM

**Thanks for riding with  
Ganesh!**



Lyft fare (22.06mi, 29m 8s)  
Tip

\$40.75  
\$6.11

---

 MasterCard \*4394

**\$46.86**

**Paul Chernick**

---

**From:** no-reply@lyftmail.com on behalf of Lyft Ride Receipt <no-reply@lyftmail.com>  
**Sent:** Friday, October 18, 2019 1:05 AM  
**To:** Paul Chernick  
**Subject:** Your ride with Davin on October 18



OCTOBER 18, 2019 AT 12:17 AM

**Thanks for riding with  
Davin!**



Lyft fare (23.12mi, 34m 15s)	\$66.87
Tip	\$13.37

---

 MasterCard \*4394

**\$80.24**

THE HERTZ CORPORATION  
Phone: 800-654-4173  
Web: www.hertz.com



Rental Agreement No: 146503534  
Date: 10/17/2019  
Document: 909004435563

Direct All Inquiries To:  
THE HERTZ CORPORATION  
PO BOX 26120  
OKLAHOMA CITY, OK 73126-0120

CHARGE DETAIL

Renter: GILA APPLEBY  
Account No.: \*\*\*\*\*9587 VIS  
CDP No.: 240  
CDP Name: AAA NORTHEAST

GILA APPLEBY  
14 SOMERSET RD  
LEXINGTON, MA 02420-3520

RENTAL REFERENCE

Rental Agreement No: 146503534  
Reservation ID: J1803489621  
Frequent Traveler: ZE1  
I.T. No.: VCPUSPP  
Voucher: 0000580688

MISCELLANEOUS INFORMATION

CC AUTH: 01607D DATE: 2019/10/12 AMT: 202.00  
CC AUTH: 01607D DATE: 2019/10/12 AMT: 2.00

Gold Plus Rewards Points

Earned this rental: 1005

RENTAL DETAILS

Rate Plan: IN: VCPW5 OUT: VCPW5  
Rented On: 10/12/2019 16:12 LOC# 124115  
SAN FRANCISCO AP, CA  
Returned On: 10/17/2019 11:53 LOC# 124115  
SAN FRANCISCO AP, CA  
Car Description: CAMRY 2.5 FT 8KLZ186  
Veh. No.: 6965230  
CAR CLASS Charged: C MILEAGE In: 5,000  
Rented: F6 Out: 4,929  
Reserved: C Driven: 71

RENTAL CHARGES

WEEKS	1 @	283.25	283.25
SUBTOTAL			283.25
DISCOUNT		10.00%	-28.33
SUBTOTAL			254.92
CONCESSION FEE RECOVERY			29.14
CA TOURISM FEE			8.92
MOTOR VEHICLE LEASE TAX			7.29
LICENSE & TAX REIMBURSEMENT			7.35
CUSTOMER FACILITY CHARGE			16.00
VOUCHER VALUE			-348.08
TAX		11.75%	26.94

*\$350.56*  
*Total*  
*Deposit*

TOTAL CHARGES 2.48 USD

E-RETURN RECEIPT

THANK YOU FOR RENTING FROM HERTZ

ALL CHARGES HAVE BEEN BILLED TO YOUR ACCOUNT.

Direct All Inquiries To:  
THE HERTZ CORPORATION  
PO BOX 26120  
OKLAHOMA CITY, OK 73126-0120  
UNITED STATES

Renter: GILA APPLEBY  
Account No.: \*\*\*\*\*9587 VIS

Phone: 800-654-4173  
Web: www.hertz.com

TOTAL CHARGES 2.48 USD

TENI EAST KITCHEN  
4015 Broadway  
Oakland, CA 94611  
(510)597-1860

10/15/2019 7:40:11 PM

Card Type: Visa  
Card Number: XXXXXXXXXXXX9587  
Swipe/Manual: Swipe  
Card Owner: appleby/gila a  
Server: Amy 4  
Cashier: Tater 28  
Check #: 5088  
Person #: 1  
Table/Tab #: 80  
Approval: 00981D

Amount 80.30

+Tip 16 —

=Total 96.30

I agree to comply with  
the cardholder agreement.

Customer Signature

CUSTOMER COPY

# WHOLE FOODS<sup>®</sup> MARKET

Mill Valley MLV 415-381-1200

BLOKCF SGL ORGN CFE  
2 @ \$13.99 ea \$27.98 F  
\*Sale\* @ \$11.99 ea -\$4.00  
Prime Extra 10% -\$2.40  
WTG HARVEST TIME BQT \$19.99 T  
\*\*PRIME MEMBER DEAL -\$7.00  
WFM OG LADYFNGERS  
2 @ \$2.99 ea \$5.98 F  
365 WHIPPING CREAM \$2.15 F  
365 MASCARPONE  
2 @ \$3.99 ea \$7.98 F  
BLOOD ORANGE  
0.91 lb @ \$2.99 /lb \$2.72 F  
Tare Weight 0.05 lb  
OG CHERRY TOMATO  
2 @ \$3.99 ea \$7.98 F  
OG RED ONION  
0.90 lb @ \$1.49 /lb \$1.34 F  
Tare Weight 0.02 lb  
OG ZUCCHINI  
1.12 lb @ \$2.99 /lb \$3.35 F  
Tare Weight 0.02 lb  
BMEAT ORIGINAL SAUSAGE  
2 @ \$8.99 ea \$17.98 F  
L&L OG COCONUT BLISS \$6.99 F  
Subtotal: \$104.44  
Total Savings: -\$13.40  
Net Sales: \$91.04  
Tax 8.25% \$1.07  
Total: \$92.11  
Sold Items: 16

Paid:  
Manufacturer Coupon \$1.00  
VISA \$91.11

10/13/2019 15:33:53  
MID:001899898 TID: 1  
206646

CREDIT CARD  
PURCHASE

CARD #: XXXXXXXXXXXX9587  
Chip Card: Visa Credit  
Chip Card AID: A0000000031010  
ATC: 001D  
TC: 8DEBC1B177052B74  
TSI: 7800 ARC: 086770  
INVOICE: 520600055  
Approval Code: 086770  
Entry Method: Chip Read  
Mode: Issuer  
SALE AMOUNT \$91.11

APPROVED BY ISSUER



Terminal 1  
Space B.2.235  
San Francisco, CA 94128  
Phone 415-527-3970

10/17/2019 2:43:29 PM  
Order Id: 8264880482  
-- For Here  
Employee: Jana

1 Super Salad \$10.89  
Balsamic Dressing \$0.00

Sub Total \$10.89

Sales Tax \$1.01  
Order Total \$11.90

Visa \$11.90  
Card#: \*\*\*\*\*9587  
Authorization: 00555D

--> Order Closed <--

Thank You!

# SKYLINE NEWS & GIFT

SFO TERMINAL 1  
BORDING AREA B  
SAN FRANCISCO, CA 94128  
650.821.6822

\* 2 57726 \*

10/17/2019 2:30:21PM Inv. No: 57726

STORE: 2 Reg. No: REG2

Cashier:

Customer:

S/C:

SKU	DESC	QTY	PRICE	TOTAL
1009105	COK DD IC MOCHA	1	3.99	3.99
DD: ICED COFFEE MOCHA	N/A			13.70

1 Unit(s) Subtotal: 3.99  
Tax: 0.35

TOTAL: 4.34

TENDERED VISA 4.34

\*\*\*\*\*

Thank You For Shopping at Skyline News & Gift  
Tell us How are we doing  
800-660-4495

\*\*\*\*\*



GRAND STRAWBERRY PET  
L306964771001  
570 REDWOOD HWY FROM  
MILL VALLEY, CA  
94941  
10/17/2019 08529973  
10:52:01 AM

XXXX XXXX XXXX 9587  
Visa  
INVOICE 006690  
AUTH 09783D

PUMP# 6  
REGULAR 2.014G  
PRICE/GAL \$4.379

FUEL TOTAL \$ 8.82

CREDIT \$ 8.82

Customer-activated Purchase/Capture  
Sequence Number 49380  
Swiped  
APPROVED 09783D

\*\*\*\*\*  
\* RECEIPT \*  
\* NOT VALID FOR TRAVEL \*  
\*\*\*\*\*

GGF  
Larkspur Ferry Terminal  
TVM50323  
Tue 15 Oct 19 08:47AM

Your GGF ticket  
expires 90 days from  
the date of purchase

Payment Type: MASTERCARD  
Purchase:

1 Adult  
To San Francisco

Product price: \$ 12.50

GGF Ticket #: \*\*\*\*\*1029

Credit Card #: \*\*\*\*\*4394

Auth #: 21367P

Ref #: 000018968955

EFT Seq #: 252301

Transaction #: 0000458321



- ➡ Each passenger must have a valid ticket.
- ➡ The same ticket must be used for entry and exit.
- ➡ The value of this ticket, if less than \$11.00, may be increased by inserting into any Ticket Vendor.
- ➡ For information on ticket exchange and refund, call (510) 464-6466 or (510) 839-2220 (TDD).

Sign below, if lost and returned to BART, ticket will be mailed to you.

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ ZIP CODE \_\_\_\_\_

SAN FRANCISCO BAY AREA RAPID TRANSIT DISTRICT

0010204 04070510 2002 010101



INSERT  
THIS  
SIDE UP

04514-1003008



1 5

7 0

0