



Office of the
Utilities Consumer
Advocate



Annual Report 2023-2024



utilitiesconsumer
advocate

Alberta
Government

Honourable Nathan Neudorf
Minister of Affordability and Utilities
423 Legislature Building
Edmonton, AB T5K 2B6

Dear Minister Neudorf:

The Power & Natural Gas Consumers' Panel is responsible for providing advice and guidance regarding current and emerging energy consumer issues to the UCA and is accountable to the Minister of Utilities and Affordability. The Panel ensures its plans and priorities are reflected in the UCA Strategic Plan and the UCA Annual Report.

The Panel last met on May 28th, 2024, to review the Office of the Utilities Consumer Advocate's (UCA) Annual Report for Fiscal Year 2023-24, as mandated. The Panel includes representation from key municipal, business, and agricultural associations, as well as a cross-section of public members with diverse expertise on utility issues. As representatives of the ratepayers that the UCA is mandated to represent, we assess that the knowledge and expertise of the UCA provides a significant return on investment for small business, farm, and residential ratepayers.

High inflation negatively impacted many households, farms, and small businesses across Alberta creating an affordability crisis that was exacerbated by volatile electricity prices. While the Government introduced a variety of measures this last year to stabilize energy costs, the UCA complemented these efforts through ramping up its consumer education program through a winter utility awareness campaign to inform consumers of their retail energy options to help them save money.

The Panel would also like to highlight the following from the UCA Annual Report:

- Over \$829 million in avoided utilities costs for consumers from UCA evidence cited in Alberta Utilities Commission rate decisions.
- The UCA conducted a large winter utility consumer awareness campaign to remind customers they have options when it comes to purchasing power and natural gas in Alberta, and that they can visit ucahelps.alberta.ca for more information on their options, and UCA services.
- There were over 1.5 million visits to the UCA website where consumers learned about their utility service options and what to consider as they chose the products and providers that best met their household and/or business' needs.
- Over 26,000 Albertans called the UCA Mediation Team regarding their utility services with over 1100 calls resulting in mediations to help resolve disputes with their retailers.
- The UCA's Winter Utility Reconnection Program protected 267 households who might otherwise have faced dangerous freezing temperatures without power or heat.
- The Panel reviewed the UCA's key performance metrics, both their processes and targets, and the Panel's recommendations are accurately reflected in the Annual Report.
- The UCA has also consistently achieved operational surpluses against its budget allocations over the past few years. Ratepayers only pay for the UCA's actual expenditures, meaning the UCA is cost-efficient too.

Taken together, the Panel recommends you accept this Annual Report, and recover the UCA's 2023-24 expenditures from the Balancing Pool and Natural Gas Distributors through the usual Ministerial Orders issued annually. The Panel looks forward to a continued effort to ensure the concerns of small business, farm, and residential energy utility consumers are understood and addressed.

Sincerely,

Annette Clews
Chair, Power and Natural Gas Consumers' Panel

Honourable Nathan Neudorf
Minister of Affordability and Utilities
423 Legislature Building
Edmonton, AB T5K 2B6

Dear Minister Neudorf:

RE: ANNUAL REPORT FOR 2023-24

The Office of the Utilities Consumer Advocate's (UCA) activities over the past year focused on supporting small business, farm, and residential utilities consumers through the affordability challenges brought on by high inflation. These efforts were aligned with Service Alberta's and subsequently Affordability and Utilities' business plan outcomes to protect consumers and make everyday life more affordable for them.

Finally, UCA operations provided consumer education and mediation services to consumers to help them understand and choose the services best suited to their distinct household and/or business' needs, and to resolve any disputes with their utility providers in a timely and efficient manner.

The UCA will continue to assist small business, farm, and residential consumers with their utilities services as Alberta's economy recovers. The UCA will continue to innovate its programs and services to ensure they continue delivering exceptional value to utilities ratepayers.

Sincerely,



Chris Hunt

Advocate

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1. Executive Summary

The UCA works with small businesses, farmers, and residential consumers to help reduce their energy costs through representing their interests at regulatory proceedings and advising them on their options for energy utility services.

Elevated inflation has had a detrimental impact on many households, farms, and small businesses across Alberta, leading to an affordability crisis exacerbated by unpredictable electricity prices. In response, the Government implemented various measures over the past year to stabilize energy costs. Concurrently, the UCA intensified its consumer education efforts through a winter utility awareness campaign, aiming to inform consumers about their retail energy options and empower them to make cost-saving choices.



Over \$829 million in cost disallowances. Saving consumers money!

Consumers saved \$300 for every dollar spend on Regulatory Affairs!

The UCA intervened in 45 Alberta Utilities Commission (AUC) proceedings during fiscal 2023-24*. These regulatory proceedings examined the various components that go into delivery charges and other regulated charges on power and natural gas bills.

- The AUC agreed with UCA on 78% of issues contested with utility companies during these proceedings.
- UCA evidence and arguments cited in AUC regulatory decisions resulted in cost disallowances of over \$829 million, real savings that helped preserve a competitive business environment and protect consumers.

The UCA Operations Section advises small business, farm, and residential consumers on their energy utility services options through the UCA's mediation and consumer education programs.

- The UCA Mediation Team provided timely and efficient dispute resolution between consumers and their utility providers. The UCA received 26,269 calls and 2,086 emails from consumers in fiscal 2023-24, resulting in 1,177 mediations by the UCA. These mediations required the UCA to contact the utility provider on behalf of the consumer to resolve a dispute.
- The UCA directly helped reconnect 38 households under the Winter Utility Reconnection Program. This initiative was a last line of consumer protection for households entering winter in Alberta without essential heat and power services.

26,269 calls from Albertans and mediation services for 1,177 customers

The UCA's consumer education program conducted 34 outreach events. This outreach was complemented by 1,542,889 consumer visits to the UCA website, over 1.9 times more than the previous year.

During Fiscal Year 2023-2024, the UCA informed more consumers about their utility options, helped consumers resolve disputes with the utility providers, and helped contain consumer electricity costs, while delivering its services even more efficiently. The UCA delivered all its programs for \$6.95 million in Fiscal Year 2023-2024 providing a modest operational surplus from a budget of nearly \$7.6 million. The UCA continues to innovate and deliver value to the electricity and natural gas ratepayers who fund it.

2. Introduction

The UCA empowers small business, farm, and residential consumers of electricity, natural gas, and water utilities in Alberta through its three core functions:



Advocacy

The UCA acts as the voice of electricity and natural gas consumers in dozens of regulatory proceedings every year to ensure the lowest-possible rates for Alberta utility consumers, consistent with safe, reliable, reasonable service. The UCA works closely with other governmental departments and agencies, and utility service providers, to ensure consumer interests are addressed in policies, regulations, and industry practices.



Mediation

When consumers have exhausted known avenues of issue resolution, the UCA will investigate and attempt to resolve their concerns through mediation with utility companies.



Education

The UCA provides information and advice to consumers so they understand their utility services, and how to make informed choices about how to purchase electricity and natural gas based on their individual circumstances.

The UCA's mandate is set out in Schedule 13.1 of the Government Organization Act.

Vision

Alberta's small business, farm, and residential utility consumers are confident the UCA provides them with the information and representation they need to protect their interests.

Mission

The UCA advocates, mediates, and educates for Alberta's small business, farm, and residential utilities consumers to provide the information they need to make informed decisions about their utilities services, mediate disputes with their utilities providers, and represent the interests of electricity and natural gas consumers at regulatory proceedings to ensure they receive reliable services at reasonable prices.

3. UCA Advocates

Regulatory Affairs Program Activities

45

AUC Proceeding Interventions

\$829M

Cost Disallowances 2023-24 FY

\$2.75B

Cost Disallowances Since 2013

The AUC may accept a “Cost Disallowance” based on evidence from interveners. E.g. An applicant may request \$6M for new computers. The UCA presents evidence to show they only need \$4M. The AUC accepts the evidence and disallows this cost; this represents a cost disallowance of \$2M (6M-4M).

The UCA advocates for safe, reliable, cost-effective utility service that meets the needs of consumers today and tomorrow. The Alberta Utilities Commission (AUC) reviews hundreds of applications each year through regulatory proceedings. The UCA typically intervenes in the few dozen proceedings annually that could have the most impact on consumers. Most of the AUC proceedings where the UCA intervenes address service quality, terms and conditions, or rates for consumers.

The UCA intervened in 45 AUC proceedings during the 2023-24 FY; 27 of those proceedings were concluded and decisions were issued by the end of the FY on March 31st, 2024. UCA evidence and arguments cited by the AUC in its decisions prevented unjustified expenses from being downloaded to consumers.

Utility companies

utilities consumer advocate

Shareholder Interests

Public Interest

Ratepayer Interests

Alberta Utilities Commission

Table 1 below summarizes the participation and value of UCA regulatory interventions in AUC proceedings since 2021. **These cost disallowances are significant, totaling \$2.75 billion since 2013, and over \$829 million during FY 2023-24.** The UCA has included a performance measure of a rolling three-year average for cost disallowances to adjust for the variance in the number of AUC proceedings and decisions that occur from year to year. For 2023-24, that rolling three-year average was \$329 million.

Table 1 - UCA Participation in AUC Regulatory Proceedings 2021-2024			
	2021-22	2022-23	2023-24
# of proceedings, for which an AUC decision was issued in the FY	31	19	27
# of issues contained in those proceedings	255	177	195
# of issues UCA Intervened in	115	77	148
AUC agreed with UCA on (% of issues)	58%	61%	78%
UCA Regulatory Affairs Program Costs (millions)	2.56	2.87	2.76
UCA Evidence/Argument Cited in AUC Decision as Cost Disallowances (millions)	\$92	\$63	\$829
Cost Disallowances per \$ invested in UCA Regulatory Affairs	\$36	\$22	\$300
Rolling Three Year Average of Cost Disallowances (millions)	\$181	\$146	\$328

** The significant variance in annual cost disallowances is largely tied to the value of issues being examined by the AUC in their proceedings and the decisions published in each fiscal year. For example, AUC Decision 2941-D01-2015 Generic Cost of Capital included cost disallowances of \$239.6 million and was published on March 23, 2015; had it been published nine days later, it would have counted against 2015-16 statistics.*



Table 2 below demonstrates the strong return on investment consumers have received from the UCA's Regulatory Affairs program during 2023-24; for every \$1 dollar invested, \$300 in cost disallowances were recorded. This return is significantly above the targeted three-year rolling average on >\$50 in cost disallowances for every \$1 invested. Some of the contributing factors to this were significant Alberta Utilities Commission rate proceedings during this fiscal year, with long term impacts; several of the most important rate proceedings had decisions issued during Fiscal Year 2023-24. The UCA will explore opportunities to intervene in more proceedings in Fiscal Year 2023-24 in order to find more cost disallowances for consumers.

Table 2 – UCA Regulatory Affairs Performance Measures			
Performance Measures	Target 3 year rolling average	Actual 3 year rolling average	2023/24
Cost disallowances per dollar invested in UCA Regulatory Affairs.	>\$50	\$119	\$300
Success rate on the issues contested at the AUC.	>66%	66%	78%
% of Regulatory Affairs budget spent on external legal counsel and contractors.	<75%	65%	64%

As well as regulatory interventions, the UCA continued to undertake “best practices” research and provide input to AUC, Alberta Electric System Operator (AESO), Department of Energy and other industry bodies, on policy related to terms and conditions, distributed energy resources, and metering practices.

The UCA was an active participant, representing consumer interests, in discussions regarding AUC Rules and AESO initiatives, including the AESO’s ongoing transmission/distribution integrated planning workshops, and bulk regional tariff design consultations.

The UCA continues to make utility billing consistency and transparency a priority. Some of the most significant benefits customers will see in 2025 can be attributed to the UCA’s market policy work on local access fees (LAFs). In Calgary alone, the City collected almost \$200M more than budgeted in 2023 as a result of having a variable LAF calculation linked to RRO prices. Legislative amendments proposed by the UCA will ensure a fair and reasonable LAF for all Albertans.



The UCA continues to make utility billing consistency and transparency a priority. Some of the most significant benefits customers will see in 2025 can be attributed to the UCA’s market policy work on local access fees (LAFs).

4. UCA Mediates

Mediation Program Activities

26,269

Phone Calls Received

2,086

Emails Received

1,177

Times Mediation Services Were Provided

With the Alberta Utilities Commission and participating natural gas/electricity retailers, successfully reconnected services to 267 households who were without electricity and/or natural gas services as of November 1, 2023.

The UCA received 26,269 calls from Albertans through the 310-4UCA (310-4822) line during FY 2023-24, and 2,086 emails to UCAhelps@gov.ab.ca. The majority of calls to the UCA are customers looking for advice and information about their utility situation. Mediation Officers provided consumers with a list of retailers and product offers, education about the energy market, and information that will help a customer to make an informed choice about their utility service providers. Of the total calls and emails, 1,177 provided mediation services. These services included investigating concerns raised by consumers and attempts to resolve their concerns through mediation with utility companies. The most common reasons for mediation are: billing issues; late bills; concerns about billing and customer service; and disconnections for non-payment or non-application.

Each year, the UCA participates in the AUC's Winter Utility Reconnection Project. The UCA is supplied with the names and contact information for Albertan consumers whose electricity and/or natural gas services are being disconnected at the beginning of the winter season. Multiple attempts are made to reach those individuals through phone calls and letters in an effort to assist in the reconnection process. This includes providing information and advice, mediating payment arrangements, and connecting consumers with support programs, if required. As part of the AUC Winter Utility Reconnection Program, in October 2023 the UCA received 1,806 files from retailers for investigation, and in partnership with the Alberta Utilities Commission and participating natural gas/electricity retailers, successfully reconnected services to 267 households who were without electricity and/or natural gas services as of November 1, 2023. The UCA directly helped reconnect 38 disconnected households during the 2023-24 winter season who had not come to an arrangement with their retailer.

Table 3 – UCA Mediation Performance Measures

Performance Measures	Service Targets	2023/2024 Actuals
Abandoned Call Rate	7%	6.95%
Average Wait Time	1.56 min	1.35 min
Average Days to Close an Energy Utility Mediation	14 days	9 days
Average Days to Close a Water Utility Mediation	28 days	8 days
Winter Utility Disconnection Program completed	December 15th	December 15th

5. UCA Educates

Consumer Education Program Activities

1.5M

Website Visits

180,644

People Reached Through Social Media

34

Events Held

The UCA Consumer Education and Awareness Program includes three complementary components:

1. The www.ucahelps.alberta.ca website
2. UCA social media channels
3. UCA consumer outreach program

Website

The www.ucahelps.alberta.ca website is the foundation of the UCA Consumer Education and Awareness Program. The UCA website provides an important objective source of information for consumers about retail choice, their monthly bills, helpful tips and hints, and where to go for help. The site also includes detailed information about the energy markets, and utility regulatory processes and decisions. The website includes a cost-comparison tool so that consumers can easily review the products available in their area. During 2023-24, the UCA promoted its website through advertising that resulted in over 1.5 million visits to the UCA website. The website provides Albertans with helpful information on what their options are when it comes to purchasing power and natural gas for their homes and businesses.

Social Media

The UCA reached 180,644 people through our social media accounts (LinkedIn, Facebook and Instagram) for FY 23/24. The high reach over the past year can be attributed to an increased focus on the utility market following a spike in utility prices and announcements by the provincial government regarding electricity prices. An advertising campaign also contributed to a substantial amount of reach.

Consumer Outreach Program

Over the past year, the Consumer Education Team's delivery of outreach activities was a mix of virtual events through online webinars and presentations, and in-person events. The Consumer Education Team conducted a total of 34 events. The team continued a strategy of indirect engagement with relevant stakeholder organizations, such as business, seniors, and newcomer associations, as well as social and indigenous community groups. Education resources were shared with these organizations for distribution to their member. These activities also enabled the Consumer Education Team to share feedback that facilitated improvements to the UCA website and social media posts, as well as referrals to the UCA Mediation Team and the identification of regulatory and policy issues to the Regulatory Affairs Section.

6. Financial Information

The UCA's financial results (unaudited) for the 2023-24 FY are presented in Table 4.

Table 4 – Financial Report, 2023-24 Fiscal Year ending March 31st, 2024			
STATEMENT OF OPERATIONS ¹			
(thousands of dollars)	2023-24	2023-24	2023-24
Expense	Budget	Actual	Variance
Operations	977	947	30
Mediation Services	653	703	(-50)
Regulatory Affairs	4403	2765	1638
Consumer Education & Awareness	1562	2522	(960)
Power & Natural Gas Consumers Panel	17	11	6
Valuation/Depreciation Adjustment	0	0	0
Total Expense	7612	6948	664

¹The UCA is funded 80 per cent by the Balancing Pool and 20 percent by Natural Gas Utilities.

For FY 2023-24, the UCA had an overall budget surplus of \$664 thousand. The surplus was the result of the following:

- The Regulatory Affairs program, which had a surplus of over \$1.6 million, was the single largest contributor to the overall variance, due to vacant staff positions and fewer AUC proceedings requiring legal counsel and regulatory/technical consultants.
- The surplus from Regulatory Affairs was redirected to support additional Consumer Education & Awareness efforts, particularly \$1.5 million in advertising campaigns promoting UCA services and the UCA website. The Consumer Education & Awareness program also provided a \$604 thousand dollar grant to the Empower Me program which will expand the community based education program from Edmonton and Calgary to Lethbridge, Red Deer, Fort McMurray and Grande Prairie so it is provincial in scope.

By leveraging some virtual meetings, the Power and Natural Gas Consumer's Panel managed its expenses prudently and continued its trend of running surpluses relative to its budget allocation.



7. Power & Natural Gas Consumer's Panel Activities

The Power and Natural Gas Consumers' Panel is an advisory agency accountable to the Minister of Affordability and Utilities and is responsible for providing advice and guidance regarding current and emerging energy consumer issues. The Panel is comprised of five public members and a member from Alberta Municipalities, Rural Municipalities of Alberta, Alberta Chamber of Commerce and Alberta Federation of Agriculture.

The Panel met four times during Fiscal Year 2023-2024.

July 2023

Reviewed the UCA Annual report for 2022-23 and recommended its acceptance by the Minister of Service Alberta.

September 2023

In-depth analysis into a number of grid modernization, regulatory, and policy issues impacting affordability for consumers. The Panel recommended the UCA continue its vigilance in finding cost savings for consumers through interventions in Alberta Utilities Commission rate proceedings, reviewing approaches to the Regulated Rate Option (RRO) for electricity, take action to improve transparency and stability for municipal local access and franchise fees, and work with agencies to better define and address economic withholding.

November 2023

Discussed transmission policy, municipal local access and franchise fees, and the UCA Strategic Plan. The Panel sought clarification regarding issues being examined through the Government's transmission policy review and the stakeholder engagement process for that review. The Panel provided input and refinements to the draft UCA Strategic Plan. The Panel also decided to write the City of Calgary and recommend they discontinue the use RRO prices as part of their calculation of local access fees for electricity consumers, particularly as this practice resulted in fees in Calgary that were triple those in Edmonton, which exacerbated affordability issues for electricity consumers in that city.

March 2024

Discussed the RRO, refinements to the UCA Strategic Plan, return on equity rates for distribution utilities and how these impact consumer bills, as well as the UCA Consumer Education and Awareness program. The Panel recommended the UCA continue to update its education program to reflect changes in the retail electricity market, and consumer interest in products such as micro-generation and electric vehicles that can have a significant impact on their utility bills.

8. Appendices

Appendix A

UCA's Mandate

The UCA is established by the Government Organization Act, Schedule 13.1. The Act assigns the following responsibilities to the UCA:

- (a) to represent the interests of Alberta's small business, farm and residential consumers of electricity and natural gas before proceedings of the Alberta Utilities Commission and other bodies whose decisions may affect the interests of those consumers;
- (b) to disseminate independent and impartial information about the regulatory process relating to electricity and natural gas, including an analysis of the impact of decisions of the Alberta Utilities Commission, other bodies and the courts relating to electricity and natural gas;
- (c) to inform and educate consumers about electricity, natural gas and water utilities issues;
- (d) to disseminate independent and impartial information to assist electricity and natural gas consumers in choosing a distributor, provider or retailer, including:
 - (i) complaints made under this Schedule, the Electric Utilities Act or the Alberta Utilities Commission Act and the outcome of any recommendation, hearing or settlement,
 - (ii) investigations, orders, administrative penalties or convictions conducted, awarded or made under the Electric Utilities Act, the Alberta Utilities Commission Act or the Consumer Protection Act,
 - (iii) compliance records of a distributor, provider or retailer in adhering to the standards and codes prescribed under the Electric Utilities Act, the Alberta Utilities Commission Act and the Consumer Protection Act, and
 - (iv) any other matters the Utilities Consumer Advocate considers necessary to carry out the purposes of this clause;
- (e) to assist in the resolution of any consumer issue, complaint or dispute between a consumer and a distributor, provider or retailer relating to the provision of electricity, natural gas or water as the Utilities Consumer Advocate considers appropriate and, if a resolution is not reached, to refer the complaint to the person, body or authority the Utilities Consumer Advocate considers appropriate;
- (f) to develop and undertake activities that the Utilities Consumer Advocate considers appropriate for the purposes of:
 - (i) preventing the disconnection of electricity or natural gas provided by a retailer or provider to a consumer, or
 - (ii) facilitating the reconnection of electricity or natural gas provided by a retailer or provider to a consumer;
- (g) to carry out such other responsibilities relating to electricity, natural gas and water as the responsible Minister determines.

The UCA's mandate is set out in Schedule 13.1 of the Government Organization Act.

Appendix B

Proceeding Intervention Criteria

The UCA may intervene in a proceeding based on the combination of the priorities below (high, medium or discretionary) and the resources available.

Proceeding and Policy Priorities

1. Base load high priority work - mandatory participation

- Generic Cost of Capital
- General Revenue Applications (GRAs), General Tariff Applications (GTAs) and all subsequent related proceedings including:
 - Interim requests that are excessive
 - Review and Variance requests
 - Appeals to the Alberta Court of Appeal
- Retail energy and non-energy proceedings and all subsequent related proceedings
- Regulated Rate Initiative proceedings including PBR and Capital Trackers

2. Medium priority work - participation depending on constraints

- Policy matters and generic proceedings that affect multiple un-affiliated utilities
 - AUC initiated
 - Utility Asset Disposition
 - Code of Conduct
 - Minimum Filing Requirements
 - Service Quality
 - Distribution Inquiry
 - Department of Energy initiated
 - Harmonization of regulations
 - Market consultations
 - Others
 - Industry initiated
 - Transmission constraint management
- Policy matters for affiliated utilities that have the potential to set precedents
 - Pension management
 - Others
- Complaints by or on behalf of specific customers

3. Discretionary work - optional participation

- Facilities Applications
- Needs Identification
- Markets - AESO Rules
- National Energy Board matters related to TransCanada Alberta System (NGTL)
- Interim filings
- Compliance filings
- True up or rider applications
- Research on policy implications of emerging technologies on utilities

Appendix B

Issue Intervention Criteria

Within proceedings, the UCA will take positions on specific issues based on the following criteria. The validity of these specific criteria and the success on specific issues will be monitored and modified on an ongoing basis.

1. Impact on Alberta consumers - potential benefit or harm

(a) Costs

- (i) timing
- (ii) magnitude
- (iii) direct channel to consumers
- (iv) reasonableness or prudence

(b) Service reliability and quality

- (i) for all service types (retail, distribution, transmission and wholesale)
- (ii) for both physical operations and customer service

(c) Terms and conditions of service

(d) Intergenerational equity

(e) Legitimate or reasonable request from constituents

2. Past successes or failures on specific, related or similar issues

(a) Have we exhausted all avenues?

(b) Was the best case put forward?

3. Resource availability to address the specific issues

(a) Internal

(b) External

4. Regulatory precedent, support or impact

(a) Aligned with the regulatory compact

(b) Within Alberta

(c) In other Canadian jurisdictions

(d) In other jurisdictions including the US

5. Regulatory Affairs principles to be defended

6. Alternative means exist for addressing the issues (i.e. another proceeding or policy input)

7. Are the UCA's interests adequately represented by other interveners?

Appendix C

Power & Natural Gas Consumers' Panel Biographies

Panel Mandate

Created under s. 7 of the *Government Organization Act*, the Power and Natural Gas Consumer's Panel ("the Committee") is an advisory agency accountable to the Minister of Affordability and Utilities ("Minister") and responsible for providing advice and guidance regarding current and emerging energy consumer issues.

Panel Members FY 2023-24

Annette Clews



Chair, Public Member

Annette Clews lives in Sundre, Alberta. She has owned a small business since 2017, transitioning the company to a web-based store in 2019. From 2013 to 2017, she was an adjudicator on the Surface Rights Board and Land Compensation Board for the province of Alberta. Annette was a councillor for the Town of Sundre from 2001 to 2008, then acting Mayor from 2008 to 2010.

In 2010 Annette was elected Mayor and served in this capacity until 2013. During that time, she completed several certifications, including basic economic development, municipal development board, municipal affairs assessment review board, municipal finance courses, incident command system ICS,

dispute resolution, and effective leadership skills. Throughout her mayoral term, she successfully completed many projects for the community that required multiple levels of government involvement.

In 2009, Annette and other council members from local communities were recognized at AUMA, winning the Minister of Municipal Affairs Award of Excellence for inter-municipal cooperation. In 2013, Annette received the Queen Elizabeth II Diamond Jubilee medal for dedication to her community.

Mike Pashak



Member representing Alberta Urban Municipalities Association

Mike is a third-generation property owner on Sylvan Lake, and is in his second term on Council for the Summer Village of Half Moon Bay. He is President of the Association of Summer Villages of Alberta, which provides a forum for all Summer Villages and represents the interests of members at all levels of government. Mike is an executive-level business professional with 30 years of experience in the electric utility industry. He has a proven ability to build relationships with governments, regulators, industry peers and stakeholders.

Humphrey Banack



Member representing Alberta Federation of Agriculture

Mr. Humphrey Banack and his family operate a 7000-acre third generation grains and oilseeds farm in the Round Hill area, 50 miles southeast of Edmonton. His farm has grown from a small mixed operation into a larger, more complex operation requiring considerable management time. Humphrey has been involved with the Alberta Federation of Agriculture since 2003, serving as president for four years. He served as Vice-president of the Canadian Federation of Agriculture from 2011 to 2017, meeting agricultural producers from across Canada and around the world. Mr. Banack was born and raised in the Round Hill area and has been deeply involved in the community his entire life. He understands the growing challenges that rural communities face today such as decreasing population, increasing costs, and providing the necessary programs that enliven rural communities.

Faith-Michael Uzoka



Public Member

Faith-Michael Uzoka (BSc, MS, MBA, PhD) is a Professor in the Department of Mathematics and Computing at Mount Royal University (MRU), Calgary. He has about 30 years of university teaching and research experience in four countries. Michael is an accomplished scholar with over 100 academic publications that have made global impacts in various aspects of human endeavour, especially in medical decision support systems. He has worked with research collaborators to develop award-winning innovations; e.g., automatic pill dispenser, smart medical assistant, and a system for the early differential diagnosis of tropical confusable diseases. Michael served as a Canadian Commonwealth Scholar, Carnegie African Diaspora Fellow, and Research Development Officer (MRU). He is passionate about equity, diversity and inclusion (EDI) and places a high premium on EDI's value in governance and community relations. Michael chairs the EDI Committee of the Faculty of Science and Technology and sits on the President's Advisory Committee on EDI at MRU.

Karen Rosvold



Member representing Rural Municipalities of Alberta

Karen Rosvold was elected to the RMA Board of Directors in November 2022 as the Director for District 4. Karen has served as a councillor for the County of Grande Prairie since winning a by-election in May 2016. During that time, she concurrently served on the board for the Family Community Support Services Association of Alberta (FCSSAA). She also continues to serve on the boards for the County of Grande Prairie Library, Grand Spirit Housing Management, and many more. Committee work for the RMA includes the Affordable Housing Task Force, the AFRRCS Council and the FCSS Steering Committee. Karen and her husband live near LaGlance, Alberta. They continue to farm approximately 3,000 acres of land and raise around 300 head of cattle together with their son and his family. In addition to farming and her public service, Karen has worked in customer service, property management, automotive service, and finance. Being a proud mother and grandmother, she feels driven to make a difference for her family in her community.

Don Oszli



Member representing Alberta Chambers of Commerce

Don Oszli is a Managing Partner in the public accounting firm, Pivotal LLP. He holds a Bachelor of Commerce from the University of Alberta and is a Chartered Accountant, Certified Management Accountant and Certified Internal Auditor. Throughout his career, Don has chaired a number of industry association committees, including the Travel Alberta Board of Directors, Red Deer Chamber of Commerce Board of Directors, Institute of Chartered Accountants Audit Committee, Alberta Chambers of Commerce Executive, Red Deer Regional Airport Authority and The Leadership Centre. Since 2017, Don has served as the Chair of Parkland Class, a not-for-profit corporation and registered charity employing 600 people and providing disability support for adults and children in need. He became a Fellow of the Institute of Chartered Accountants in 2004 and was awarded the Gus Bakke Memorial Award by the Canadian Home Builders Association, as well as the Queen's Golden Jubilee Award. For the past 25 years, Don has taught at the Institute of Chartered Professional Accountants of Alberta and created new professional development course material. He has authored numerous publications, including Orientation to Public Practice (Level I and Level II) and Public Accounting Registration Criteria (PARC) Modules 3, 4 and 5, published by the Institute of Chartered Accountants.

Richard Dunn



Public Member

Richard Dunn is a Professional Engineer with extensive senior-level experience with major Canadian energy producers who brings a solid understanding of a broad range of government-related matters, including policy and regulatory development as well as complex regulatory applications. Collaborating extensively with Indigenous Peoples, stakeholders, governments, regulators and other industry players, Richard's teams have focused on delivering involved regulatory applications as well as efficient and evidence-based policy and regulatory development, considering factors such as environmental science, health, social, economics, engineering, and safety. Examples of relevant policy and regulatory development include royalty and tax program design as well as greenhouse gas policy and regulation. Richard holds a Bachelor of Applied Science in Mechanical Engineering degree from the University of British Columbia and a Master of Engineering in Chemical Engineering from the University of Calgary. He has served on several boards, including the Executive of the Business Council of British Columbia and the University of Calgary Senate. Richard and his wife Bev are proud to have three adult children and two grandchildren.

Michael Ng, Public Member



Public Member

Michael Ng is a professional engineer (PEng), project manager (PMP), and operational lead with diverse industry experience. Born and raised in Alberta, he started his career as a field engineer in Alberta's oil patch, Michael advanced into design work, working as an electrical engineer on refineries. When an opportunity arose in project management, Michael shifted his career into the utility industry, executing over \$800 million in projects for a transmission facility owner (TFO). His career highlights include the system upgrades associated with the Keephills 3 generator, installing Alberta's first phase-shifting transformer, and successful energization of the Heartland Transmission Line, including Alberta's first SOOKV gas-insulated line. Most recently, Michael returned to oil and gas, and served as an operational director for a consulting company, leading organizational change and strategic planning, while driving performance through a tumultuous economy. Michael has also focused on AC (alternating current) interference mitigation in his career. He developed a standardized approach for this work within the TFO, completed his MBA Capstone project on this topic, and later continued to advance AC mitigation through his latest role in the service industry.

Appendices (cont.)

Appendix D

Objectives

Regulatory Affairs - Program Objectives

The UCA Regulatory Affairs program supports the following Affordability and Utilities 2023-26 Business Plan Outcomes and Key Objectives:

Affordability and Utilities Outcome 1 - Everyday life is more affordable for Albertans

Key Objective 1.1	Lead, facilitate and coordinate the Government of Alberta's ongoing efforts to identify and advance opportunities to address affordability and cost of living concerns of Albertans.
Key Objective 1.3	Educate, mediate, and advocate for Alberta's small business, farm, and residential electricity, natural gas and water consumers through the Utilities Consumer Advocate.

UCA Regulatory Affairs Program Objectives

One	Assist regulatory decision-makers with gaining a richer understanding of issues under their consideration by: <ul style="list-style-type: none">• intervening in regulator proceedings;• conducting independent analysis of applications to regulatory agencies (particularly the AUC); and• presenting evidence and arguments on behalf of small business, farm, and residential consumers of electricity and natural gas.
Two	Pursue results oriented regulatory interventions and consumer focused input into GOA policy development concerning energy issues by: <ul style="list-style-type: none">• responding to government priorities and policy direction by providing expert analysis and advice that represents consumers' best interests; and• prioritizing effort to issues of significance to consumers because of their financial, service quality, precedential, or other regulatory implications. See Appendix B – Proceeding Intervention Criteria for more details.
Three	Ensure timely UCA reporting of regulatory results, successes, and future challenges, including informing the Minister of Affordability and Utilities on critical issues arising from regulatory applications.
Four	Reduce regulatory burden by identifying opportunities to address reoccurring regulatory issues and improving standardization of terms, tariffs, and conditions through collaboration with industry and other stakeholders, generic regulatory proceedings, or updates to regulation.

Appendices (cont.)

Appendix D

Objectives

Mediation Program Objectives

The UCA Mediation program supports the following Affordability and Utilities 2023-26 Business Plan Outcomes and Key Objectives:

Affordability and Utilities Outcome 1 - Everyday life is more affordable for Albertans	
Key Objective 13	Educate, mediate and advocate for Alberta's small business, farm, and residential electricity, natural gas and water consumers through the Utilities Consumer Advocate.
UCA Mediation Program Objectives	
One	Resolve disputes between consumers and energy service providers through timely and effective mediation.
Two	Contact disconnected residential consumers through the Winter Utility Reconnection Program in order to assist with activating their gas and/or electricity service during winter months.
Three	Support Affordability and Utilities by advising the Minister of critical and sensitive issues and on trends identified from mediation activities.

Consumer Education Program Objectives

The UCA Mediation program supports the following Affordability and Utilities 2023-26 Business Plan Outcomes and Key Objectives:

Affordability and Utilities Outcome 1 - Everyday life is more affordable for Albertans	
Key Objective 1.3	Educate, mediate and advocate for Alberta's small business, farm, and residential electricity, natural gas and water consumers through the Utilities Consumer Advocate.
UCA Consumer Education Program Objectives	
One	Electricity and natural gas consumers are aware of the energy utility service options available to them.
Two	Electricity and natural gas consumers know where to find independent and impartial information tools to assist in choosing their provider.
Three	Electricity and natural gas consumers are aware of the regulatory protections and oversight of the utilities sector, natural gas and electricity markets.
Four	Electricity, natural gas, and water utility consumers understand the line items on their monthly utility bills.
Five	Electricity, natural gas, and water utility consumers are aware of mediation services available to them if they have a dispute with their utility provider.
Six	Electricity, natural gas, and water utility consumers know where they can learn more about electricity, natural gas, and water utilities issues.

Appendix E

Glossary

Alberta Electric System Operator – the not-for-profit organization that manages and operates the provincial power grid.

Alberta Utilities Commission – regulates the utilities sector, natural gas and electricity markets to protect social, economic and environmental interests of Alberta where competitive market forces do not.

Balancing Pool – The Balancing Pool is responsible to help manage certain assets, revenues and expenses arising from the transition to competition in Alberta's electric industry.

Cost Disallowance – A cost disallowance is the difference between costs in a regulated utility's application to a regulator, and the cost the regulator approves. The UCA uses cost disallowances as a performance indicator but only counts those where a regulator has cited UCA evidence and/or arguments in its decision.

Distribution Utility – is responsible for the local delivery of electricity, natural gas, or water services within a specific service territory, often one or more municipalities.

Energy Retailer – companies that sell electricity and/or natural gas directly to customers and provide billing services for energy distributors.

Transmission Utility – is responsible for the transportation of large volumes of electricity or natural gas, usually over large distances across the province.

Utility Payment Deferral Program Act – legislation that enabled financial support to utilities to enable them to provide payment deferrals to customers during the early stages of the COVID-19 pandemic.