

APPENDIX H
Curriculum Vitae

CURRICULUM VITAE

David B. Charleson

EDUCATION

- 1998 Executive Program, Queen's University
- 1988 Honours Bachelor of Math (Math and Business), University of Waterloo

BUSINESS EXPERIENCE

- 2007– Present Enbridge Gas New Brunswick, Fredericton, New Brunswick
- 2007 – Present General Manager
- Responsible for providing overall strategic and policy direction for EGNB and for overseeing its ongoing development and operations.
- 1988 - 2007 Enbridge Gas Distribution Inc., North York, Ontario
- 2004 - 2007 Director, Energy Policy and Analysis
- Responsible for development and execution of short and long term strategies regarding gas supply planning, gas acquisition, and gas supply risk management.
- 2003 – 2004 Manager, Energy Strategy
- Responsible for the development of a Company strategy related to upstream transportation, storage, and commodity.
- 2001 - 2003 Manager, Strategic & Key Accounts
- Responsible for the effective management of relationships with large volume customers, Agents, Brokers, and Marketers.
- 2000 - 2001 Manager, IT Strategy & Support
- Responsible for ensuring the appropriate execution and delivery of IT services for the organization from a service provider.

1997 - 2000	Manager, Accounting Systems
	Responsible for the effective operations of the Accounts Payable, Inventory Accounting, Payroll and Plant Systems departments.
1996 - 1997	Manager, Volume and O&M Budgets
	Responsible for the management of the day-to-day operation of the Volumetric and Operating and Maintenance sections of the Budget department, including the production and defence of all relevant budgets and background materials.
1991 - 1996	Information Technology Supervisor, Information Services
	Responsible for leading a team of 20 IS, contract, and business professionals in the development, implementation, and support of the organizations general ledger and budget preparation system.
1988 – 1991	Information Services, Positions of Progressive Responsibility

REGULATORY EXPERIENCE

New Brunswick Energy and Utilities Board	Appeared as a witness in numerous regulatory proceedings, representing Enbridge Gas New Brunswick on matters related to rates, financial review, the rate setting methodology, construction permits and NB Power rates.
Ontario Energy Board	Appeared as a witness in numerous regulatory proceedings, representing Enbridge Gas Distribution on matters including Volumetric and O&M Budgets, Utility Unbundling, Performance Based Rates, Business systems, Gas / Electric Industry Interfaces, and Gas Supply related matters.
National Energy Board	Appeared as a witness representing Enbridge Gas Distribution's interests in 2 TransCanada Pipelines service design proceedings.

OTHER EXPERIENCE

2005 – 2007	Director, Newmarket Hydro Limited, Newmarket, Ontario
2006 – 2007	Independent Electricity System Operator (IESO) Technical Panel, Natural Gas Sector Representative, Toronto, Ontario

CURRICULUM VITAE

Lori A. Stickles

EDUCATION

- 2003 Certified General Accountant Designation, Certified General Accountants Association of New Brunswick
- 1990 Bachelor Business Administration, University of New Brunswick, Fredericton, New Brunswick

BUSINESS EXPERIENCE

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|----------------|--|
| 2004 – Present | Enbridge Gas New Brunswick, Fredericton, New Brunswick |
| 2008 – Present | Manager, Financial Services

Responsible for leadership and strategic direction of financial services functions. |
| 2005 – 2008 | Manager, Financial Reporting

Responsible for leading financial accounting and reporting functions. |
| 2004 – 2005 | Staff Accountant

Responsible for day to day accounting and reporting functions. |
| 2005 | Mathis Instruments, Fredericton, New Brunswick |
| 2005 – 2005 | Controller

Responsible for overseeing the day to day financial management functions. |
| 2000 – 2004 | Beaverbrook Art Gallery, Fredericton, New Brunswick |
| 2000 – 2004 | Manager of Finance

Responsible for overseeing the day to day financial management functions. |
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REGULATORY EXPERIENCE

New Brunswick Energy and Utilities Board	Appeared as a witness in two regulatory proceedings representing Enbridge Gas New Brunswick on matters related to rate setting, and financial review.
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OTHER EXPERIENCE

2007 – 2009	President, Certified General Accountants Association Chapter Board, Fredericton, New Brunswick
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H. EDWIN OVERCAST

Director

A specialist in the practice areas of regulatory policy and economics, energy pricing and rate design, economic analysis, strategic planning, legislative analysis, industry restructuring analysis, competitive analysis and open access and unbundling implementation.

Strategic Planning

Mergers & Acquisitions

Due Diligence Support

Pricing and Rate Design

Economic Analysis

Legislative Analysis

Industry Restructuring

Organizational Management

Competitive Market Analysis

Expert Testimony

Open Access and Unbundling Implementation

Professional Employment

1999-Present Energy Management Solutions, Black & Veatch
Company
Director

1989-1999 AGL Resources, Inc.
*Vice President, Strategy Planning and Business
Development*

1978-1989 Northeast Utilities
Director, Rates and Load Research

1975-1978 Tennessee Valley Authority
Economist, Rate Branch

1990-1995 Georgia State University
Instructor, Economics (part-time)

Education

Virginia Polytechnic Institute
and State University, Ph.D.,
1972

King College, BA in
Economics, 1969

Years Experience

35 years

Joined Black & Veatch

2005

1974-1975 East Tennessee State University
*Assistant Professor of Economics
Associate Director of Bureau of Business and Economic
Research*

1972-1974 Elon College
Assistant Professor of Economics

Professional Experience

Utility Ratemaking and Regulatory Policy Analysis

Dr. Overcast has been responsible for a wide variety of electric and gas pricing and cost analyses. He has had operational and strategic responsibility for both the electric and gas utility tariff design, including comprehensive unbundling cost analyses and tariff administration. He has provided expert testimony before state and federal regulatory agencies on a number of rate and regulatory policy issues related to unbundling, cost of service (marginal, fully allocated and unbundled cost studies, alternative regulation), performance-based regulation and price cap regulation, strategic and market-sensitive pricing, bypass economics, integrated resource planning, weather normalization adjustments, sales and revenue forecasts, pro forma adjustments and revenue requirements, rate and regulatory policy for cogenerators, energy buy-back rates, revenue sharing and adjustment mechanisms, competition and fuel switching, transmission pricing and a variety of policy issues including unbundling proposals, line extension policy

and rate discounting and recovery. He has testified before the FERC in electric, gas and oil pipeline matters.

Dr. Overcast has also testified in both federal and state courts on matters related to rate design, mergers and acquisitions, anti-trust and regulatory policy. He has testified before both federal and state legislative bodies on deregulation, restructuring, regulatory policy and other issues arising out of restructuring legislation including stranded cost recovery, competition and public policy.

Economic Analysis

Dr. Overcast has been responsible for variety of economic analyses related to merger and acquisition, new business development, bypass, special contracts, marginal cost, time-of-use pricing, service area expansion, pipeline and other facilities expansion, competitive pricing, anti-trust, municipalization, new product development and others. He has provided forecasts of sales, prices, peak day and other similar analyses for planning and regulatory proceedings. He has prepared economic analyses of unbundling and the potential impact on revenue, earnings, stock price and economic value added.

Strategic Planning

Dr. Overcast has been responsible for the development of strategic plans for both the regulated and non-regulated business units. His experience includes corporate reorganization to position a regulated enterprise to open its markets to competition; the preparation of business plans for regulated and non-regulated companies including energy marketing initiatives and other service providers. He has helped to prepare estimates of financial performance for unregulated energy marketing companies and evaluated joint ventures and a variety of retail marketing plans.

He has participated in the planning for a variety of regulatory initiatives. He has had primary responsibility for the development of the legislative model used in Georgia for permitting open access and unbundling.

Legislative Analysis

Dr. Overcast has been responsible for the assessment of a variety of legislative proposals in the areas of the regulatory policy, restructuring analysis, competition and unbundling. He has participated extensively in the legislative process, testifying before committees, negotiating with various interested parties, and working with the staff of legislators. He has worked extensively with lobbyists providing background material and responding to questions raised during the legislative process. He was appointed by the lieutenant governor to serve on a study committee of the Georgia legislature reviewing issues related to the impact of deregulation on franchise fees.

Competitive Analysis

Dr. Overcast has prepared extensive analysis of competition for residential, commercial and industrial customers. That analysis has included comparisons of total and marginal cost for end-use applications, alternate production technologies, alternate fuel analysis, bypass pipelines, self-generation, cogeneration and other competitive analyses. He has also prepared extensive analysis of potential competitors in the opening of markets. He has managed the competitive alternate fuel program for gas utilities and developed a discount analysis required to avoid uneconomic bypass and to maximize revenue contribution from such discount programs. He has also negotiated contracts to avoid bypass for both gas and electric customers and to displace liquid fuels in vehicles.

Open Access and Unbundling Implementation

Dr. Overcast has had the unique experience of playing a significant role in the complete open access and unbundling implementation for natural gas LDCs. He was instrumental in the design of the model adopted by the Georgia legislature and testified throughout the legislative process on the proposed legislation. After the legislation became law, he oversaw the rate case filing required to implement open access and unbundling. His experience includes cost analysis and rate design for an open access tariff. He has been directly involved in the many facets of unbundling service to all retail customers. His firsthand experience provides him with insight and a unique perspective with respect to the questions that arise as a utility—gas or electric—unbundles.

Publications and Presentations

“Restoring Financial Balance,” Public Utilities Fortnightly, November 2011

“Impact of Volatile Fuel Prices on Electric Costs: Stakeholder Tactics,” Natural Gas and Electricity, August 2008

“Fixed Cost Recovery: An Inconvenient Truth,” American Gas, June 2007

“The Hidden Risks of Regulation and Their Effects on Utility Returns,” Natural Gas and Electricity, June 2006.

“Electric Utilities and Risk Compensation, with Richard J. Rudden, Howard S. Gorman and Leonard S. Hyman, EEI Monograph, June 2006.

“Energy Competition Knows No Bounds,” presented at the DOE-NARUC North American Summit on Harmonizing Business Practices in Energy Restructuring, November 2000.

“Load Research Troubleshooting—A Pragmatic Approach,” presented to the Northeast Regional AEIC Load Research Conference, September 1988.

“Using Load Research Data to Assess Competitive Threats,” presented to the Northeast Regional AEIC Load Research Conference, September 1987.

“Using Load Research Data to Design and Analyze Commercial and Industrial Time-of-Day Rates,” presented to the International Association of Energy Economists, 1987.

“Pricing in Competitive Markets,” presented to the PG&E Energy Expo 1986, April 1986.

“Philosophy of Rate Design,” presented to the China Energy Research Society of the China Association for Science and Technology, June 1985.

“Competition in the U.S. Electric Markets,” presented to the North American Energy Markets Conference, March 1985.

“Electric Utility Competition in the United States,” *Energy Exploration & Exploitation*, 1986.

“Avoided Costs—The Balancing of Objectives,” *Proceedings of the Eighth Annual Symposium on Problems of Regulated Industries*, 1982.

“An Overview of Alternative Tariff Structures,” *Proceedings of the Eighth Biennial Conference of the Central Electricity Generating Board*, Ontario Hydro and the Tennessee Valley Authority (co-authored).

“A Differential Approach to the Repeated Prisoner’s Dilemma,” *Theory and Decision*, 1971 (co-authored).

“Problems and Perspectives in Public Choice,” *Public Finance and Public Choice*, A Training Program for Local Public Officials, 1974.

“The Economic Impact of the East Tennessee State University Medical School,” *The Bureau of Business and Economic Research*, East Tennessee State University, 1975.

“Determinants of the Demand of Substandard Housing,” presented at the Western Economic Association Meeting, 1970 (co-presented).

Honors

Who's Who Worldwide—Business Leaders

Citizens Ambassador Program of People to People International - IAEE Delegate, 1985

SGA Outstanding Professor, Elon College, 1973-1974

Omicron Delta Epsilon, honorary fraternity in Economics

H.B. Earhart Foundation Fellow 1970-1971 and 1971-1972

Woodrow Wilson Fellowship Nominee, 1969

National Science Foundation Undergraduate Internship, 1968

Other Activities

Appointed by Georgia Lt. Governor to serve on Joint Study Committee on Franchise Fees and Conditions, Rights of Way and Tax Implications of Competitive Markets.

Instructor - AGA and EEI Rate Fundamentals Courses

Conference speaker - SGA, SEGA, AGA, NARUC, trade associations and seminars

Vice President - A Better Chance, Glastonbury, CT

Member and Vice Chairman - Glastonbury Sewer Commission

Member Democratic Town Committee, Glastonbury, CT