

CASE PARTICPATION & PRESENTATIONS OF
GEOFF MARKE, PH.D.

Company Name	Employed Agency	Case Number or Venue	Issues
Missouri American Water	Office of the Public Counsel (OPC)	WR-2024-0320	Direct: Regulatory Principles, Rate Design, Income Eligible Programs, Lead Line Replacement, Customer Experience, Universal Affordability Tariff
Union Electric Company d/b/a Ameren Missouri	OPC	ER-2024-0319	Direct: Rush Island Clean Air Act Remediation Costs, Forced Arbitration, Property Manager Portal, Lawsuits, AMI Opt-Out, Public Service Announcements, Income Eligible Programs
Empire District Electric Company /Evergy Metro / Evergy West /Union Electric Company d/b/a Ameren Missouri	OPC	EO-2025-0073 EO-2025-0074 EO-2025-0075 EO-2025-0076	Memorandum: Data Center Modeling; Carbon Sequestration; Supercritical Carbon Dioxide Power Cycle; Generation Interconnection Costs and Project Delays
Evergy Missouri West & Evergy Missouri Metro	OPC	EO-2024-0153 EO-2024-0154	Memorandums: Response to Evergy Missouri Metro and Evergy Missouri West Triennial Integrated Resource Plan, Summary of Deficiencies Identified by OPC
Evergy Missouri West	OPC	ER-2024-0189	Direct: Consolidation of Affiliates, Public Service Announcements, Customer Experience, and Program evaluation Surrebuttal: Consolidation of Affiliates, Decoupling Tracker, Public Service Announcements, Customer Experience, and Program Evaluation
Evergy Missouri West & Evergy Missouri Metro	OPC	EO-2023-0369 EO-2023-0370	Direct: Redistribution: Winners & Losers, Avoided Costs, The Principal-Agent Problem: HVAC Contractors, The Rebound Effect, Duplicative Funding and Attribution: The Inflation Reduction Act (IRA), Demand Response and Aggregators of Retail Choice ("ARCs"), Rate Design: Fixed Cost Recovery and Time of Use Rates, Building Energy Codes and Standards Rebuttal: Challenges before the Commission, Demand Side Response Programs, Business Programs, Residential Programs, Pilot Programs, Low-Income Programs, Urban Heat Island, Hard-to-Reach Education Programs, Throughput

			Disincentive, Earnings Opportunity, EM&V, Alternative Path Forward Surrebuttal: Response to stakeholders concerns
Union Electric Company d/b/a Ameren Missouri	OPC	EO-2023-0136	Direct: Redistribution: Winners & Losers, Avoided Costs, The Principal-Agent Problem: HVAC Contractors, The Rebound Effect, Duplicative Funding and Attribution: The Inflation Reduction Act (IRA), Demand Response and Aggregators of Retail Choice (“ARCs”), Rate Design: Fixed Cost Recovery and Time of Use Rates, Building Energy Codes and Standards Rebuttal: EM&V, DSM Programs, Earnings Opportunity, Throughput Mechanism Surrebuttal: Response to stakeholders concerns
Evergy Missouri West	OPC	EO-2023-0277	Surrebuttal: Managerial Mismanagement and Inaction, Understanding the Prudence Standard
Evergy Missouri West & Evergy Missouri Metro	OPC	EO-2024-0002	Surrebuttal: Market Failure: Information Asymmetry
The Raytown Water Company		WR-2023-0344	Direct: Economic Utility Regulation and The Prudent Investment Test, AMI, Insurance Premium Expense, Late Fees Rebuttal: AMI, Insurance Premium Surrebuttal: AMI, Late Fees
Evergy Missouri West & Evergy Missouri Metro	OPC	ET-2024-0061	Memorandum: Response to Evergy Metro/West’s Request to Change the Default TOU Residential Rate
Empire District Electric Company /Evergy Metro / Evergy West /Union Electric Company d/b/a Ameren Missouri	OPC	EO-2024-0045 EO-2024-0044 EO-2024-0043 EO-2024-0042	Memorandum: Rate Design: Pricing as a Resource Candidate; Solar Adoption as a result of IRA subsidies; Estimated Generation Interconnection Costs; Power Purchase Agreements as Resource Candidates; Mothball Energy Generation; Resource Adequacy; and Modeling for Low, Medium, High Participation of Aggregator of Retail Customer (“ARCs”)
Evergy Missouri West & Evergy Missouri Metro	OPC	EW-2023-0199	Memorandum: Response to Evergy Metro/West TOU Stakeholder Meetings and Comments to Date
Confluence Rivers Utility Operating Company	OPC	WR-2023-0006	Direct: Business Model and Associated Risks, Automated Meter Infrastructure, Late Fees, Budget Billing

			<p>Rebuttal: Third-Party Contracts, Customer Service, Meters, Fire Protection</p> <p>Surrebuttal: Customer Experience, Late Fees, Meters</p>
Union Electric Company d/b/a Ameren Missouri	OPC	ER-2022-0337	<p>Direct: Economic Indicators, Customer Value Rankings, High Prairie Wind Farm, Blues Power Play Goal for Kids, Private LTE Network, Tripsavers, Income Eligible Programs</p> <p>Surrebuttal: High Prairie Wind Farm, Rush Island Power Plant, Blues Power Play Goal for Kids, Private LTE Network, Tripsavers, Dues and Donations, Income Eligible Programs, Rate Design</p>
Union Electric Company d/b/a Ameren Missouri	OPC	EA-2022-0245	<p>Rebuttal: Boomtown Solar, Renewable Solutions Program</p> <p>Surrebuttal: IRP, Public Interest, Decisional Prudence, Renewable Solutions Program</p>
Missouri American Water	OPC	WR-2022-0303	<p>Direct: Affiliate Transaction Rules, Utility Excavation Coordination, Lead Line Replacement Funding, Critical Needs Program, Rehousing Program, Late Fees</p> <p>Surrebuttal: Single Tariff Pricing, Affiliate Transactions, Lead Line Replacement, Utility Excavation Coordination, Low-Income Programs, Late Fees</p>
Empire District Electric Company /Evergy Metro / Evergy West /Union Electric Company d/b/a Ameren Missouri	OPC	EO-2023-0102 EO-2023-0101 EO-2023-0100 EO-2023-0099	<p>Memorandum: Performance Base Accreditation of Existing and Planned Units, Aggregator of Retail Customer Participation, Over-Reliance on Market to Meet Energy Needs, Inflation Reduction Act, Additive Manufacturing, Voltage Optimization</p>
Spire Missouri Inc.	OPC	GR-2022-0179	<p>Direct: Stranded Assets: Diaphragm Meters, Spire STL Pipeline</p> <p>Rebuttal: Rate Design, Class Cost of Service, Low-Income Programs, Stranded Assets, Affiliate Transactions: Spire STL Pipeline</p>
Empire District Electric Company d/b/a Liberty	OPC	EO-2021-0331	<p>Memorandum: OPC Report to The Empire District Electric Company d/b/a Liberty 2022 Triennial Integrated Resource Plan</p>
Evergy Missouri West	OPC	EF-2022-0155	<p>Surrebuttal: Securitized Utility Tariff Charge</p>
Evergy Missouri West & Evergy Missouri Metro	OPC	EO-2022-0064 EO-2022-0065	<p>Surrebuttal: Renewable Energy Credits</p>

Evergy Missouri West & Evergy Missouri Metro	OPC	ER-2022-0130 ER-2022-0129	Direct: Management Actions, Sibley Power Plant, Automated Metering Infrastructure, Clean Charge Network, Plant-In-Service Accounting, Low-Income Programs and Late Fees Rebuttal: Customer Experience, Rate Design, CCOS, Cost Trackers, AMI, Merger Costs, Clean Charge Network, Emergency Conservation Plan, Solar Subscription, Economic Development Surrebuttal: Customer Experience, Cost Trackers, Income Eligible Programs, Late Fees, AMI Service Disconnect Meters, Clean Charge Network, Uplight Software, Voltage Optimization, Stranded Asset: Sibley Power Plant
Empire District Electric Company d/b/a Liberty	OPC	EO-2022-0040	Rebuttal: Stranded Asset: Asbury Power Plant, Securitized Utility Tariff Charge Surrebuttal: Stranded Asset: Asbury Power Plant
Empire District Gas Company d/b/a Liberty	OPC	GR-2021-0320	Direct: Low-Income Programs and Late Fees
Empire District Electric Company d/b/a Liberty	OPC	EU-2021-0274	Rebuttal: Accounting Authority Order Storm Uri
Evergy Missouri West	OPC	EO-2022-0061	Rebuttal: Special High Load Factor Market Rate for a Data Center Facility
Empire District Electric Company d/b/a Liberty	OPC	ER-2021-0312	Direct: Cost and Quality of Service, Stranded Asset, Customer Savings Plan, AMI, Low-Income Recommendations, Late Fees, Data Privacy & Green Button Rebuttal: Customer Experience, Stranded Assets, T&D Investments, CCOS, Rate Design Surrebuttal: Stranded Asset, Wind Investments, Resource Adequacy, Peer Ranking, Billing, Community Involvement, Low Income Programs, Late Fees, Data Access, PISA
Empire District Electric Company /Evergy Metro / Evergy West /Union Electric Company d/b/a Ameren Missouri	OPC	EO-2022-0057 EO-2022-0056 EO-2022-0055 EO-2022-0054	Memorandum: "Economic" Generation, Additive Manufacturing, Urban Heat Island
Evergy Missouri West & Evergy Missouri Metro	OPC	EO-2021-0349 EO-2021-0350	Memorandum: TOU Rate Design Report Evergy Missouri West & Evergy Missouri Metro Comments

<p>Union Electric Company d/b/a Ameren Missouri</p>	<p>OPC</p>	<p>GR-2021-0241 ER-2021-0240</p>	<p>Direct: AMI, PAYS, Late Fees, Low-Income Recommendations Rebuttal: COVID-19 Response, Customer Affordability, Residential Rate Design, Decoupling Tracker, 12M Aluminum Smelter Rate, Class Cost of Services Studies, Low-Income Programs, Community Solar, Green Button Surrebuttal: High Prairie Wind Farm, PISA, Voltage Optimization, Rate Design, CCOS, Advertising, Low-Income Programs, Late Fees</p>
<p>Working Case: FERC 2222 Regarding Participation of DER Aggregators into the RTOs</p>	<p>OPC</p>	<p>EW-2021-0267</p>	<p>Memorandum: Aggregators of Retail Customers (ARCs) for Commercial & Industrial Demand Response</p>
<p>Evergy Missouri West & Evergy Missouri Metro</p>	<p>OPC</p>	<p>ET-2021-0151</p>	<p>Rebuttal: EV subsidies and EV charging stations Surrebuttal: Response to ChargePoint</p>
<p>Spire Missouri Inc.</p>	<p>OPC</p>	<p>GR-2021-0108</p>	<p>Direct: AMI, Corporate Governance: Workplace Discrimination Rebuttal: Subsidized Natural Gas Expansion, Multi-Family Pilot, Energy Efficiency, Rate Design, Low-Income Programs Surrebuttal: AMI, AMI Opt-Out, Corporate Governance: Workplace Discrimination, Propane Storage, Research and Development, Bad Debt & Uncollectable, Rate Design</p>
<p>Empire District Electric Company /Kansas City Power & Light & KCP&L Greater Missouri Operations Company/Union Electric Company d/b/a Ameren Missouri</p>	<p>OPC</p>	<p>EO-2021-0069 EO-2021-0068 EO-2021-0067 EO-2021-0066</p>	<p>Memorandum: Impact of falling energy market prices in SPP(Metro, West, and Empire specific), Reliable Power, Additive Manufacturing (“AM” or 3D Printing”), Virtual Power Plants, Small Modular Reactors, Combustion Turbine Conversion to Combined Cycle Units, Grain Belt Express Energy, Long Duration Storage Memorandum: Response to Sierra Club’s Evergy Metro and West Recommendations Memorandum: Response to Sierra Club and NRDC’s Ameren Missouri Recommendations</p>

Missouri American Water	OPC	WR-2020-0344	Direct: COVID-19, Future Test Year, Cost Allocation Manual and Affiliate Transaction Rules for Large Water Utilities Direct: Rate Design Surrebuttal: Policy, Future Test Year, Affiliate Transactions Rule, Consolidated Tariff Pricing, Rate Design, Lead Line Replacement
Evergy Missouri West & Evergy Missouri Metro	OPC	EO-2020-0227	Rebuttal: Inefficient Management, Residential Demand Response Surrebuttal: Demand Response Programs
Working Case: To consider best practices for recovery of past-due utility customer payments after the COVID-19 pandemic	OPC	AW-2020-0356	Memorandum: Response to Staff Report on COVID-19 Past-Due Utility Customer Payments
Spire Missouri Inc.	OPC	GO-2020-0416	Memorandum: Notice of prudence concerns regarding natural gas Advanced Metering Infrastructure (“AMI”) investment
Evergy Missouri West & Evergy Missouri Metro	OPC	EU-2020-0350	Rebuttal: Authorized Accounting Order for: Lost Revenues, COVID-19 Expenses, Bad Debt Expense Surrebuttal: Disconnection Moratorium, Arrearage Management Plans, Economic Relief Pilot Program, Outreach, Energy Efficiency, Administrative Procedures
Empire District Electric Company	OPC	EO-2020-0284	Memorandum: Customer Savings Plan, Stateline Combined Cycle Upgrade, DSM, COVID-19 Impact on Modeling, Executive Order on Securing the US Bulk-Power System, SPP Effective Load Carrying Capability, All-Source RFP
Evergy Missouri West	OPC	EO-2020-0281	Memorandum: Wind Power PPAs, DSM COVID-19 Impact on Modeling, Executive Order on Securing the US Bulk-Power System, SPP Effective Load Carrying Capability, Utility-Scale Solar, All-Source RFP
Evergy Missouri Metro	OPC	EO-2020-0280	Memorandum: Wind Power PPAs, DSM, COVID-19 Impact on Modeling, Executive Order on Securing the US Bulk-Power System, SPP Effective Load Carrying Capability, Utility-Scale Solar, All-Source RFP

Empire District Electric Company	OPC	ER-2019-0374	<p>Direct: Cost and Quality of Service, Stranded Asset, AMI/CIS deployment</p> <p>Rebuttal: Customer Experience, Weather Normalization Rider, Energy Efficiency, Low-Income Pilot Program</p> <p>Rebuttal: Class Cost of Service, Rate Design, Low Income Pilot Program</p> <p>Surrebuttal: Cost and Quality of Service, Reliability Metrics, Asbury Power Plant, Rate Design & CCOS, DSM Programs</p>
Union Electric Company d/b/a Ameren Missouri	OPC	EA-2019-0371	<p>Rebuttal: Solar + Storage</p>
Union Electric Company d/b/a Ameren Missouri	OPC	ER-2019-0335	<p>Direct: Keeping Current Bill Assistance Program</p> <p>Rebuttal: Smart Energy Plan, Keeping Current, Coal Power Plants, CCOS, Rate Design, Pure Power RECs</p> <p>Surrebuttal: Coal Power Plants</p>
Rule Making	OPC	AW-2020-0148	<p>Memorandum: Residential Customer Disconnections and Data Standardization</p> <p>Presentation: Service Disconnection Data Standardization Virtual Rulemaking Workshop</p>
Empire District Electric Company /Kansas City Power & Light & KCP&L Greater Missouri Operations Company/Union Electric Company d/b/a Ameren Missouri	OPC	EO-2020-0047 EO-2020-0046 EO-2020-0045 EO-2020-0044	<p>Memorandum: Additive Manufacturing, Cement Block Battery Storage, Virtual Power Plant, Customer-Side Renewable Generation, Historical Review of energy forecasts (KCPL, GMO and Empire-Specific) and Rush Island and Labadie Power Plant Environmental Retrofits (Ameren specific)</p>
Union Electric Company d/b/a Ameren Missouri	OPC	EA-2019-0181	<p>Rebuttal: Need for the Wind Project, Economic Valuation, Pre-Site Energy Assessment Omissions</p>
KCP&L Greater Missouri Operations Company & Kansas City Power and Light Company	OPC	EO-2019-0132	<p>Rebuttal: Response to KCPL's MEEIA application, Equitable Energy Efficiency Baseline, WattTime: Automated Emissions Reduction, PAYS, Urban Heat Island Mitigation</p> <p>Surrebuttal: Market Potential Study, Single Family Low-Income</p>
KCP&L Greater Missouri Operations Company	OPC	EC-2019-0200	<p>Surrebuttal: Deferral Accounting and Stranded Assets</p>

Union Electric Company d/b/a Ameren Missouri	OPC	ED-2019-0309	Memorandum: on the “Aluminum Smelter Rate”
Empire District Electric Company	OPC	EO-2019-0046	Memorandum: Response to The Empire District Electric Company d/b/a Liberty Plant In Service Accounting (PISA) Report
KCP&L Greater Missouri Operations Company	OPC	EO-2019-0067	Rebuttal: Renewable Energy Credits
Union Electric Company d/b/a Ameren Missouri	OPC	EO-2019-0314	Memorandum: Notice of Deficiency to Annual IRP Update
Rule Making	OPC	WX-2019-0380	Memorandum: on Affiliate Transaction Rules for Water Corporations
Working Case: Evaluate Potential Mechanisms for Facilitating Installation of Electric Vehicle Charging Stations	OPC	EW-2019-0229	Memorandum: on Policy Surrounding Electric Vehicles and Electric Vehicle Charging Stations
Rule Making	OPC	EX-2019-0050	Memorandum on Solar Rebates and Low Income Customers
Union Electric Company d/b/a Ameren Missouri	OPC	GR-2019-0077	Direct: Billing Practices Rebuttal: Rate Design, Decoupling, Energy Efficiency, Weatherization, CHP
Empire District Electric Company	OPC	EA-2019-0010	Rebuttal: Levelized Cost of Energy, Wind in the Southwest Power Pool Surrebuttal: SPP Market Conditions, Property Taxes, Customer Protections
Empire District Electric Company /Kansas City Power & Light & KCP&L Greater Missouri Operations Company/Union Electric Company d/b/a Ameren Missouri	OPC	EO-2019-0066 EO-2019-0065 EO-2019-0064 EO-2019-0063	Memorandum: Additive Manufacturing and Cement Block Battery Storage (IRP: Special Contemporary Topics)
Working Case: Allocation of Solar Rebates from SB 564	OPC	EW-2019-0002	Memorandum on Solar Rebates and Low Income Customers
Rule Making Workshop	OPC	AW-2018-0393	Memorandum: Supplemental Response to Staff Questions pertaining to Rules Governing the Use of Customer Information
Union Electric Company d/b/a Ameren Missouri	OPC	ET-2018-0132	Rebuttal: Line Extension, Charge Ahead – Business Solutions, Charge Ahead – Electric Vehicle Infrastructure

			Supplemental Rebuttal: EV Adoption Performance Base Metric
Union Electric Company d/b/a Ameren Missouri	OPC	EO-2018-0211	Rebuttal: MEEIA Cycle III Application Surrebuttal: Cost Effectiveness Tests, Equitable Energy Efficiency Baseline
Union Electric Company d/b/a Ameren Missouri	OPC	EA-2018-0202	Rebuttal: Renewable Energy Standard Rate Adjustment Mechanism, Conservation Surrebuttal: Endangered and Protected Species
Kansas City Power & Light & KCP&L Greater Missouri Operations Company	OPC	ER-2018-0145 ER-2018-0146	Direct: Smart Grid Data Privacy Protections Rebuttal: Clean Charge Network, Community Solar, Low Income Community Solar, PAYS, Weatherization/Economic Relief Pilot Program, Economic Development Rider, Customer Information System and Billing Rebuttal: TOU Rates, IBR Rates, Customer Charge, Restoration Charge Surrebuttal: KCPL-GMO Consolidation, Demand Response, Clean Charge Network, One CIS: Privacy, TOU Rates, Billing & Customer Experience
Union Electric Company d/b/a Ameren Missouri	OPC	ET-2018-0063	Rebuttal: Green Tariff
Liberty Utilities	OPC	GR-2018-0013	Surrebuttal: Decoupling
Empire District Electric Company	OPC	EO-2018-0092	Rebuttal: Overview of proposal, MO PSC regulatory activity, Federal Regulatory Activity, SPP Activity and Modeling, Ancillary Considerations Surrebuttal Response to parties Affidavit in opposition to the non-unanimous stipulation and agreement
Great Plains Energy Incorporated, Kansas City Power & Light Company, KCP&L Greater Missouri Operations Company, and Westar Energy, Inc.	OPC	EM-2018-0012	Rebuttal: Merger Commitments and Conditions, Outstanding Concerns
Missouri American Water	OPC	WR-2017-0285	Direct: Future Test Year, Cost Allocation Manual and Affiliate Transaction Rules for Large Water Utilities, Lead Line Replacement Direct: Rate Design, Cost Allocation of Lead Line Replacement

			<p>Rebuttal: Lead Line Replacement, Future Test Year, Decoupling, Residential Usage, Public-Private Coordination</p> <p>Rebuttal: Rate Design</p> <p>Surrebuttal: Affiliate Transaction Rules, Decoupling, Inclining Block Rates, Future Test Year, Single Tariff Pricing, Lead Line Replacement</p>
Missouri Gas Energy / Laclede Gas Company	OPC	GR-2017-0216 GR-2017-0215	<p>Rebuttal: Decoupling, Rate Design, Customer Confidentiality, Line Extension in Unserved and Underserved Areas, Economic Development Rider & Special Contracts</p> <p>Surrebuttal: Pay for Performance, Alagasco & EnergySouth Savings, Decoupling, Rate Design / Energy Efficiency, Economic Development Rider: Combined Heat & Power</p>
Indian Hills Utility	OPC	WR-2017-0259	Direct: Rate Design
Rule Making	OPC	EW-2018-0078	Memorandum: Cogeneration and net metering - Disclaimer Language regarding rooftop solar
Empire District Electric Company	OPC	EO-2018-0048	Memorandum: Integrated Resource Planning: Special Contemporary Topics Comments
Kansas City Power & Light	OPC	EO-2018-0046	Memorandum: Integrated Resource Planning: Special Contemporary Topics Comments
KCP&L Greater Missouri Operations Company	OPC	EO-2018-0045	Memorandum: Integrated Resource Planning: Special Contemporary Topics Comments
Missouri American Water	OPC	WU-2017-0296	<p>Direct: Lead line replacement pilot program</p> <p>Rebuttal: Lead line replacement pilot program</p> <p>Surrebuttal: Lead line replacement pilot program</p>
KCP&L Greater Missouri Operations Company	OPC	EO-2017-0230	Memorandum on Integrated Resource Plan, preferred plan update
Working Case: Emerging Issues in Utility Regulation	OPC	EW-2017-0245	<p>Memorandum on Emerging Issues in Utility Regulation</p> <p>Presentation: Inclining Block Rate Design Considerations</p> <p>Presentation: Missouri Integrated Resource Planning: And the search for the “preferred plan.”</p>

			Memorandum: Draft Rule 4 CSR 240-22.055 DER Resource Planning
Rule Making	OPC	EX-2016-0334	Memorandum on Missouri Energy Efficiency Investment Act Rule Revisions
Great Plains Energy Incorporated, Kansas City Power & Light Company, KCP&L Greater Missouri Operations Company, and Westar Energy, Inc.	OPC	EE-2017-0113 / EM-2017-0226	Direct: Employment within Missouri, Independent Third Party Management Audits, Corporate Social Responsibility
Union Electric Company d/b/a Ameren Missouri	OPC	ET-2016-0246	Rebuttal: EV Charging Station Policy Surrebuttal: EV Charging Station Policy
Kansas City Power & Light		ER-2016-0285	Direct: Consumer Disclaimer Direct: Response to Commission Directed Questions Rebuttal: Customer Experience, Greenwood Solar Facility, Dues and Donations, Electric Vehicle Charging Stations Rebuttal: Class Cost of Service, Rate Design Surrebuttal: Clean Charge Network, Economic Relief Pilot Program, EEI Dues, EPRI Dues
Union Electric Company d/b/a Ameren Missouri	OPC	ER-2016-0179	Direct: Consumer Disclaimer, Transparent Billing Practices, MEEIA Low-Income Exemption Direct: Rate Design Rebuttal: Low-Income Programs, Advertising, EEI Dues Rebuttal: Grid-Access Charge, Inclining Block Rates, Economic Development Riders
KCP&L Greater Missouri Operations Company	OPC	ER-2016-0156	Direct: Consumer Disclaimer Rebuttal: Regulatory Policy, Customer Experience, Historical & Projected Customer Usage, Rate Design, Low-Income Programs Surrebuttal: Rate Design, MEEIA Annualization, Customer Disclaimer, Greenwood Solar Facility, RESRAM, Low-Income Programs
Empire District Electric Company, Empire District Gas Company,	OPC	EM-2016-0213	Rebuttal: Response to Merger Impact Surrebuttal: Resource Portfolio, Transition Plan

Liberty Utilities (Central) Company, Liberty Sub-Corp.			
Working Case: Polices to Improve Electric Regulation	OPC	EW-2016-0313	Memorandum on Performance-Based and Formula Rate Design
Working Case: Electric Vehicle Charging Facilities	OPC	EW-2016-0123	Memorandum on Policy Considerations of EV stations in rate base
Empire District Electric Company	OPC	ER-2016-0023	Rebuttal: Rate Design, Demand-Side Management, Low-Income Weatherization Surrebuttal: Demand-Side Management, Low-Income Weatherization, Monthly Bill Average
Missouri American Water	OPC	WR-2015-0301	Direct: Consolidated Tariff Pricing, Rate Design Study Rebuttal: District Consolidation, Rate Design, Residential Usage/Decoupling Rebuttal: Demand-Side Management (DSM), Supply-Side Management (SSM) Surrebuttal: District Consolidation/Decoupling Mechanism, Residential Usage, SSM, DSM, Special Contracts
Working Case: Decoupling Mechanism	OPC	AW-2015-0282	Memorandum: Response to Comments
Rule Making	OPC	EW-2015-0105	Missouri Energy Efficiency Investment Act Rule Revisions, Comments
Union Electric Company d/b/a Ameren Missouri	OPC	EO-2015-0084	Triennial Integrated Resource Planning Comments
Union Electric Company d/b/a Ameren Missouri	OPC	EO-2015-0055	Rebuttal: Demand-Side Investment Mechanism, MEEIA Cycle II Application Surrebuttal: Potential Study, Overearnings, Program Design Supplemental Direct: Third-party mediator (Delphi Panel), Performance Incentive Supplemental Rebuttal: Select Differences between Stipulations Rebuttal: Pre-Pay Billing
The Empire District Electric Company	OPC	EO-2015-0042	Integrated Resource Planning: Special Contemporary Topics Comments
KCP&L Greater Missouri Operations Company	OPC	EO-2015-0041	Integrated Resource Planning: Special Contemporary Topics Comments

Kansas City Power & Light	OPC	EO-2015-0040	Integrated Resource Planning: Special Contemporary Topics Comments
Union Electric Company d/b/a Ameren Missouri	OPC	EO-2015-0039	Integrated Resource Planning: Special Contemporary Topics Comments
Kansas City Power & Light	OPC	ER-2014-0370	Direct (Revenue Requirement): Solar Rebates Rebuttal: Rate Design, Low-Income Weatherization, Solar Rebates Surrebuttal: Economic Considerations, Rate Design, Cyber Security Tracker
Rule Making	OPC	EX-2014-0352	Memorandum Net Metering and Renewable Energy Standard Rule Revisions,
The Empire District Electric Company	OPC	ER-2014-0351	Rebuttal: Rate Design, Energy Efficiency and Low-Income Considerations
Rule Making	OPC	AW-2014-0329	Utility Pay Stations and Loan Companies, Rule Drafting, Comments
Union Electric Company d/b/a Ameren Missouri	OPC	ER-2014-0258	Direct: Rate Design, Cost of Service Study, Economic Development Rider Rebuttal: Rate Design, Cost of Service, Low Income Considerations Surrebuttal: Rate Design, Cost-of-Service, Economic Development Rider
KCP&L Greater Missouri Operations Company	OPC	EO-2014-0189	Rebuttal: Sufficiency of Filing Surrebuttal: Sufficiency of Filing
KCP&L Greater Missouri Operations Company	OPC	EO-2014-0151	Renewable Energy Standard Rate Adjustment Mechanism (RESRAM) Comments
Liberty Natural Gas	OPC	GR-2014-0152	Surrebuttal: Energy Efficiency
Summit Natural Gas	OPC	GR-2014-0086	Rebuttal: Energy Efficiency Surrebuttal: Energy Efficiency
Union Electric Company d/b/a Ameren Missouri	OPC	EO-2012-0142	Direct: PY2013 EM&V results / Rebound Effect Rebuttal: PY2013 EM&V results Surrebuttal: PY2013 EM&V results Direct: Cycle I Performance Incentive Rebuttal: Cycle I Performance Incentive
Kansas City Power & Light	Missouri Public Service Commission Staff	EO-2014-0095	Rebuttal: MEEIA Cycle I Application testimony adopted
KCP&L Greater Missouri Operations Company	Missouri Division of Energy (DE)	EO-2014-0065	Integrated Resource Planning: Special Contemporary Topics Comments

Kansas City Power & Light	DE	EO-2014-0064	Integrated Resource Planning: Special Contemporary Topics Comments
The Empire District Electric Company	DE	EO-2014-0063	Integrated Resource Planning: Special Contemporary Topics Comments
Union Electric Company d/b/a Ameren Missouri	DE	EO-2014-0062	Integrated Resource Planning: Special Contemporary Topics Comments
The Empire District Electric Company	DE	EO-2013-0547	Triennial Integrated Resource Planning Comments
Working Case: State-Wide Advisory Collaborative	OPC	EW-2013-0519	Presentation: Does Better Information Lead to Better Choices? Evidence from Energy-Efficiency Labels Presentation: Customer Education & Demand-Side Management Presentation: MEEIA: Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis Presentation: Wouldn't it be Nice: The PAYS Statewide Model Discussion
Independence-Missouri	OPC	Indy Energy Forum 2014	Presentation: Energy Efficiency
Independence-Missouri	OPC	Indy Energy Forum 2015	Presentation: Rate Design
NARUC – 2017 Winter, Washington D.C.	OPC	Committee on Consumer Affairs	Presentation: PAYS Tariff On-Bill Financing
NASUCA – 2017 Mid-Year, Denver	OPC	Committee on Water Regulation	Presentation: Regulatory Issues Related to Lead-Line Replacement of Water Systems
NASUCA – 2017 Annual Baltimore,	OPC	Committee on Utility Accounting	Presentation: Lead Line Replacement Accounting and Cost Allocation
NARUC – 2018 Annual, Orlando	OPC	Committee on Consumer Affairs	Presentation: PAYS Tariff On-Bill Financing Opportunities & Challenges
Critical Consumer Issues Forum (CCIF)—New Orleans	OPC	Examining Policies for Delivering Smart Mobility	Presentation: Missouri EV Charging Station Policy in 4 Acts: Missouri Office of the Public Counsel Perspective
Michigan State, Institute of Public Utilities, 2019	OPC	Camp NARUC: Fundamentals	Presentation: Revenue Requirement
NARUC/US AID, Republic of North Macedonia, Skopje 2019	OPC	NARUC /US AID: Cybersecurity Baltic Countries	Presentation: Case Study: The Missouri Experience, Cybersecurity and Data Privacy
Kansas, Clean Energy Business Council (“CEBC”), 2020	OPC	Climate and Energy Project	Presentation: PAYS ® (“Pay As You Save”) or: How I learned to Stop Worrying and Love DSM
Michigan State, Institute of Public Utilities, 2020	OPC	Camp NARUC: Fundamentals	Presentation: Fundamentals of Economic Regulation / Performance Base Regulation

Renew Missouri	OPC	MoBar Continued Learning Education Credit	Presentation: Regulatory Incentives and Utility Performance
Missouri Bar Association	OPC	MoBar Fall Environmental & Energy Law Committee	Presentation: The Virus, The Economy and Regulated Utility Service: An Overview of Utilities and Stakeholders Response to COVID-19 and the Recession to Date
University of Missouri and City of Columbia, MO., 2021	OPC	Advancing Renewables in the Midwest	Presentation: The Heat Is On: Demand Side Management of Urban Heat Islands
NARUC/US AID, Indonesia, Jakarta 2021 (Virtual)	OPC	Indonesia Ministry of Energy and Mineral Resources (MEMR)	Presentation: Introduction to Tariff Setting & Review: Utility Revenue Requirement, Cost Allocation & Rate Design
Michigan State, Institute of Public Utilities, 2021	OPC	Camp NARUC: Fundamentals	Presentation: Fundamentals of Economic Regulation
National Community Action Partnership	OPC	2022 Management Leadership & Training Conference	Presentation: Maximizing Weatherization Funds in Public Utility Commission Proceedings
Rocky Mountain Institute 2022	OPC	E-Accelerator Electricity Innovation Lab (Champion)	Presentation: Project Voltron (First Statewide Inclusive Utility Investment Program)
The American Council for an Energy-Efficient Economy (ACEEE) White Plains, New York	OPC	2022 Energy Efficiency Finance Forum	Presentation: Project Voltron (First Statewide Inclusive Utility Investment Program)
Missouri State Emergency Management Association (SEMA), Midwest FEMA Summit 2022	OPC	2 nd Annual Virtual Resiliency Summit	Presentation: It's Not Always Sunny on the Grid: Overview of Challenges Faced and Resilient Actions Taken to Keep the Lights On
Michigan State, Institute of Public Utilities, 2022	OPC	Camp NARUC: Fundamentals	Presentation: Fundamentals of Economic Regulation
Renewable Energy Wildlife Institute (REWI) 2022 (Virtual)	OPC	Illinois, Indiana, & Missouri Wind Energy & Wildlife Workshop	Presentation: What is the role of the local planning Board/Commission & Public Service/Utility Commission: Economic Regulation
NARUC/US AID, Tbilisi, Georgia 2022 (Virtual)	OPC	Georgian National Energy and Water Supply Regulatory Commission (GNERC)	Presentation: Evaluating Cybersecurity Investments and Policy: Case Study on Missouri
14 th Wind Wildlife Research Meeting, Kansas City, MO. 2022	OPC	US Department of Energy and Renewable Energy Wildlife Institute (REWI)	Presentation: Local, State, and Market Considerations on the Build-Out of Renewable Energy to Meet Net-Zero Projections

NARUC / US State Department Luanda, Angola 2023	OPC	Regulatory Institute for Electricity and Water Services of Angola (IRSEA)	Presentation: Quality of Service: Power Reliability; Quality of Service: Utility Performance Metrics; Quality of Service: Green Tariffs, Missouri Experience
NARUC/US AID, Countries of Albania, Armenia, Bosnia and Herzegovina, Georgia, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, and Ukraine 2023(Virtual)	OPC	NARUC /US AID: Cybersecurity Baltic Countries	Presentation: Evaluating Cybersecurity Investments and Policy: Case Study on Missouri
Midwest Energy Initiative, Kansas City, Missouri 2023	OPC	Midwest Energy Policy Series 2023 on Energy Infrastructure	Presentation: Other People’s Money: Economic Development Tariffs and (“Unique”) Large Power Users
Financial Research Institute (“FRI”) of the University of Missouri at Washington University, St. Louis, MO.	OPC	2023 Advanced Seminar on Transformational Water Utility Pricing & Rate Design	Presentation: The Price is Right: Economic & Pricing Principles for Public Utility Regulation Presentation: One Things Leads to Another: Regulatory Consideration of the Remediation and Extraction of Lead Line Replacement Presentation: Communication Breakdown: The Critical Role of Education and Outreach
NARUC & NASUCA – 2023 Summer, Austin, Texas	OPC	NARUC Committee on Water	Panel(s): Strategies for Small Systems to Address Current Challenges; and Use of Infrastructure Surcharges; and It Takes a Village to Build a National Map of Water Utility Service Area Boundaries - the Benefits of Commissions and Consumer Advocates Being Part of the Village
Michigan State, Institute of Public Utilities, 2023	OPC	Camp NARUC: Fundamentals	Presentation: Fundamentals of Economic Regulation
Financial Research Institute (“FRI”) of the University of Missouri	OPC	2023 Public Utility Symposium: “Let’s Get Critical! Let Me Hear Your System Plan: Utility Planning, Project Development, and Security in the 21st Century”	Panel: Don’t Stop Believing: Siting and Location of New Infrastructure
Critical Consumer Issues Forum (CCIF)—	OPC	Exploring Rate Design & Other Regulatory Tools:	Panel: Innovative Rate Design Concepts: Time-Varying Rates

Savannah, Georgia, 2024		Maximizing Grid Value & the Customer Experience	
NARUC 2024 Summer, West Palm Beach, Florida	OPC	NARUC Committee on Water	Panel: Closing the Funding Gap: Strategies for Today and Tomorrow (Consumer Advocate Perspective)
Michigan State, Institute of Public Utilities, 2024	OPC	Camp NARUC: Fundamentals	Presentation: Fundamentals of Economic Regulation
Equitable Electricity Planning and Policy Kansas City, MO. 2024	OPC	NARUC/NASCUA/NASEO	Presentation: Better Together: Missouri Investor-Owned Utility Income Eligible Programs
Rulemaking on Customer Information & Data Privacy Jefferson City, MO. 2024	OPC	OX-2025-0106	Presentation: Customer Information