



Kathleen A. Kelly

Vice President and Principal Consultant

Kathleen A. Kelly provides strategic planning, business management and process improvement, and solution-based advisory services to diverse clients in the energy industry. Her principal practice areas are organizational and business process effectiveness, regulatory policy and case strategy, economic and integrated resource planning, and management reviews. She has advised utilities, regulators, and major customers on issues including disruptive technologies, regulatory policy shifts, and balanced resource economics and planning.

INDUSTRY EXPERIENCE

Daymark Energy Advisors | www.daymarkea.com | Worcester, MA

Daymark Energy Advisors is a consultancy that provides economic planning and strategic advisory services to the North American electric and natural gas industries.

Vice President and Principal Consultant | 2016–Present

- Manage day to day operations profitably
- Establish operational efficiencies and continuous improvement strategies
- Develop, organize, and manage client proposals and project teams
- Allocate resources to address diverse client projects

Consulting practice includes:

- Strategic planning and advisory services around industry disruptions
- Organizational and business process effectiveness
- Regulatory policy and case strategy
- Economic and integrated resource planning

Lummus Consultants International | Boston, MA

Lummus Consultants International, formerly Stone & Webster Management Consultants, delivers independent consulting, technical, and advisory services to the power, process, petrochemical, refining, infrastructure, and government segments.

Vice President and Practice Lead, Utility and Strategy Practice | 2001–2015

Executive Consultant | 1997–2001

- Responsibilities and consulting practices same as above

Boston Edison Company (now Eversource) | Boston, MA

Director, Regulation and Restructuring | 1994–1997

Rates and Marketing Manager | 1991–1994

Manager of DSM Planning & Evaluation | 1985–1991

Division Manager of Rate Design | 1983–1985

Division Manager of Demand and Revenue Forecasting | 1979–1983

Forecasting Analyst, Senior Analyst | 1977–1979

PAPERS, TESTIMONY & PRESENTATIONS

Expert Testimony

FORUM	ON BEHALF OF	TOPIC
New Brunswick Energy Utilities Board	New Brunswick Public Intervenor	Review and testimony relative to New Brunswick Power's Automated Metering Infrastructure (AMI) capital investment request particularly with respect to the cost-effectiveness, potential savings to customers, and performance metrics and reporting Matter 452
Manitoba Public Utilities Board	Manitoba Public Utilities Board Staff	Independent expert review of Manitoba's three-year energy efficiency plan and testimony
Arkansas Public Service Commission	Arkansas Public Service Commission General Staff	Testimony on Net Energy Metering (NEM) including grandfathering, consideration of gradualism in NEM rate design, and cost-shifting concerns Docket 16-027-R
New York State Department of Public Service	New York State Department of State Utility Intervention Unit	Reviewed and provided testimony on the appropriateness of the Earnings Adjustment Mechanisms (EAMs) included in the PBR and the revenue requirement implications of those over the three-year plan. Dockets 19-E-0065 and 19-G-0066
Public Utilities Commission of Ohio	Public Utilities Commission Staff	Independent audit of AEP-Ohio's implementation and savings estimates from its GridSMART AMI program Case No. 18-1618-EL-RDR
Guam Public Utilities Commission	Guam Public Utilities Commission Staff	Independent review of Guam Power Authority's request for modified Net Energy Metering Tariff and conditions Docket 19-04
Manitoba Public Utilities Board	Manitoba Public Utilities Board Staff	Independent expert and testimony on the load forecast of Manitoba Hydro as it related to its General Rate Application 2018
Washington Utilities and Transportation Commission	Washington Office of the Attorney General	Testimony on treatment of distribution stranded costs in competitive situations and tariff proposal of PacifiCorp Docket UE-161204
Utah Public Service Commission	Utah Public Service Commission Division Staff	Testimony on the financial and operational evaluation of Dominion Resources' proposed acquisition of Questar Gas Company Docket Number 16-057-01
New York State Department of Public Service	New York State Department of State Utility Intervention Unit	Testimony on policy with regard to allocation of gas system costs to electric customers in Consolidated Edison rate case 16-E-0061
Oklahoma Corporation Commission	Oklahoma Hospital Association (OHA)	Testimony with respect to aspects of Oklahoma Gas & Electric's proposed revenue allocation and rate design and the impact of these on OHA members. Cause No. PUD 201500273
Indiana Utility Regulatory Commission	Indiana & Michigan (I&M)	I&M DSM plans, incentive structure and cost recovery, and speed of program adoption Cause No. 43306. October 2008.

FORUM	ON BEHALF OF	TOPIC
Indiana Utility Regulatory Commission	Northern Indiana Public Service Company (NIPSCO)	DSM cost recovery and incentive proposal Cause No. 43618. December 2008.
Massachusetts Department of Public Utilities	Boston Edison Company (now Eversource)	Review of Boston Edison’s electric restructuring plan, testimony on rate plan D.P.U. 96-23. 1996–1997.
New Jersey Board of Public Utilities	New Jersey Board of Public Utilities Audit Staff	Investigated and audited utilities’ electric restructuring. Provided testimony regarding findings and recommendations for improvement. Rockland Electric Company, Restructuring Plan Aspects, Docket No. EA97060398
Massachusetts Department of Public Utilities	Boston Edison Company	Investigation into industry restructuring, testified and participated in technical sessions on policies, issues and rate design including real time pricing D.P.U. 95-30. 1995–1997.
Massachusetts Department of Public Utilities	Boston Edison Company	Testified in support of DSM budgets, DSM cost recovery and incentive plan, DSM monitoring and evaluation plan D.P.U. 90-335. 1990–1992.
Massachusetts Department of Public Utilities	Boston Edison Company	Testified in support of rate changes D.P.U. 89-100. 1989–1990.
Massachusetts Department of Public Utilities	Boston Edison Company	Periodic testimony relative to DSM implementation plans, evaluation results, and cost recovery projections and reconciliations 1985 – 1994.
Massachusetts Energy Facilities Siting Council	Boston Edison Company	Periodic testimony to support long term energy and demand forecasts 1979–1984.

Invited Speaker, Papers & Conference Presentations

- *Benefits and Costs of Utility Scale and Behind the Meter Solar Resources in Maryland*, report prepared for the Maryland Public Service Commission as part of the Commission’s Public Conference 44, Transforming Maryland’s Electric Grid, November 2018.
- *Independent Expert Consultant Report: Load Forecast Review*, public and confidential versions of a report prepared for the Manitoba Public Utilities Board regarding Manitoba Hydro’s electricity load forecast submitted in its 2017/18 and 2018/19 General Rate Application, November 2017.
- *Innovative Approaches to a Win-Win Renewable Solution*, paper presented at Renewable Energy World, December 2014.
- *Providing Equivalent Incentives to Utilities*, presented at the RKS Research & Consulting Energy Efficiency Seminar, Dallas TX, March 2008.
- *Strategies and Tactics (for organizational improvement)*, presented at the National Rural Electric Cooperative Association (NRECA) CEO Conference, Phoenix, AZ, January 2006.

- *Cooperative Restructuring Issues*, paper presented at the 10th National Energy Services Conference, Tucson, AZ, December 1999.
- *Issues and Trends in Pricing*, Professional Pricing Society, Annual Conference, Chicago, IL, October 1995.
- *Selling Evaluation*, Sixth International Energy Program Evaluation Conference, August 1993. Published.
- *A Brief History of a Measurement and Evaluation Department: Boston Edison Company*, Edison Times, IRP Quarterly, April 1993.
- *Competition in the Energy Markets and its Impact on IRP*, National Association of Regulatory Utility Commissioners (NARUC), May 1993.
- *Managing Evaluations*, ACEEE Summer Study Program 1992. Published.
- Several Industry Restructuring speaking engagements.
- Several DSM speaking invitations, 1985 - 1994.
- Several Forecasting speaking invitations, 1980 - 1984.
- Numerous publications on subjects including Demand Planning Process, Conservation and Load Management, DSM Monitoring, Evaluation, Forecasting, and Business Planning.

EDUCATION

M.B.A. Finance | Northeastern University, Boston, MA

B.S. Mathematics | University of Massachusetts, Boston, MA

A.B. Economics | University of Massachusetts, Boston, MA

Professional training and skills:

Negotiation Skills for Executives

Proficient in MS Office and knowledgeable in energy market simulation modeling programs