

## PROFESSIONAL PHILOSOPHY & CAREER ARC

I am a regulatory strategist and policy contributor with 21 years of experience in the energy sector across three countries and three regulatory jurisdictions. My career has been defined by progression from hands-on engineering to executive leadership. I began as a graduate engineer optimizing HVAC setpoints and combined heat and power plant designs. As a professional, I applied this optimization mindset across expanding domains: creating optimal dispatch strategies for power plant portfolios, critiquing emission portfolio management approaches, and developing capital optimization frameworks for generation, transmission, and distribution systems. This progression—from technical systems to portfolio management to rate design to policy development—reflects both deepening technical acumen and expanding strategic perspective. I understand engineers and geoscientists across career stages and disciplines because I have worked in and across them. I have navigated different regulatory models (fully regulated Indiana, nodal Texas, single-zone Alberta), different professional cultures (Indian, American, Canadian), and different technical domains (generation, transmission, distribution). My philosophy is straightforward: regulation and strategy should enable professional excellence, not constrain it.

## PROFILE

- Regulatory strategist and policy leader with 21 years of demonstrated success bringing non-controversial approvals and sustained stakeholder trust across multiple jurisdictions and complex regulatory environments.
- Deep expertise in generation, transmission, and distribution systems and markets—from technical optimization through portfolio management to capital planning and rate design. Understands the full value chain engineers work in.
- Governance and strategic leadership proven through direction of multi-disciplinary teams, development of long-term roadmaps (Distribution System, Energy Storage, Distributed Energy Resources), and advisory support to executive leadership on policy, acquisitions, and business strategy.
- Risk oversight and compliance grounded in structured frameworks that anticipate, assess, and mitigate financial, operational, and reputational risks. Canadian Risk Management (CRM) designation. Experience across regulatory, market, and corporate governance environments.
- Forward-thinking approach to emerging challenges: AI, automation, energy transition, and the evolving role of regulation in supporting professional development, diversity, and innovation in the engineering profession.

## REGULATORY UNDERSTANDING

My sustained regulatory effectiveness is reflected in the non-controversial approval of major applications including FortisAlberta 2022–2024 tariffs and rates, AESO 2010–2018 tariffs and rates, and key need applications for transmission substations (Ksituan River 754S, Buck Lake 454S, ENMAX No. 21). I led the coordination, facilitation, and consolidation of evidence for these proceedings, demonstrating the ability to work across technical, legal, and stakeholder dimensions.

- Managed or contributed to over 100 regulatory proceedings across Indiana, Texas, and Alberta

- Testified as expert witness in 12 regulatory proceedings (IURC and AUC)
- Instituted and managed compliance programs for market rules, tariff, and policy matters
- Developed and implemented regulatory risk frameworks that anticipate exposure and enable proactive mitigation
- Worked across multiple regulatory models: vertically integrated (Indiana), nodal (Texas), and single-zone (Alberta) electricity markets

## GOVERNANCE EXPERIENCE

I have demonstrated governance capability through executive-level advisory work, board-level communications, and leadership of cross-functional committees.

- Prepared written materials for executive and board review including white papers on data center service models, Distribution System Operator (DSO) frameworks, and market design impact analysis
- Collaborated with C-suite executives on acquisitions, business cases, efficiency metrics, demand-side management, and performance-based regulation parameters
- Current member, Code of Conduct Committee, FortisAlberta (2023–present)
- Chair, Transmission Tariff Working Group, AESO (2017–2018): Directed multi-disciplinary team through industry consultation and technical design
- Project Management Professional (PMP), Project Management Institute
- Canadian Risk Management (CRM) designation, Risk and Insurance Management Society (RIMS)

## STRATEGIC MINDSET

I supported corporate strategy development by leading key roadmap initiatives that bridged technical innovation and organizational capability. My approach is systems-level thinking: identifying emerging trends, translating them into strategic implications, and guiding business units in execution.

- Contributed to Distribution System Roadmap: Multi-year plan integrating technology evolution with regulatory frameworks and investment priorities
- Supported development of Energy Storage Roadmap and Distributed Energy Resources (DER) Roadmap: Strategic positioning and operational frameworks
- Formalized robust process for developing alternatives, prioritizing value, and performing life-cycle cost comparisons—improved regulatory approval timelines and stakeholder acceptance
- Created rate projection model (still used by customers) to communicate bill drivers and support transparent decision-making
- Harvard Business School Online: Certificates in Strategy Execution, Disruptive Strategy, and Business Strategy (2024–2025)

## RISK OVERSIGHT

I manage end-to-end regulatory and organizational risk from strategy through implementation and compliance. My approach combines structured risk analysis with cross-functional collaboration to identify emerging exposures and develop controls.

- Anticipate and assess financial, operational, and reputational risks in policy, tariff, and strategic initiatives
- Apply structured analysis to inform decisions under uncertainty

- Develop monitoring and reporting mechanisms to ensure ongoing compliance and early warning of emerging issues
- Lead cross-functional teams to identify second-order effects and interdependencies
- Canadian Risk Management (CRM) designation through RIMS
- Experience in regulatory, market, project, and organizational/reputational risk

## **PROFESSIONAL EXPERIENCE**

### **FortisAlberta Inc. | 2021–Present**

#### **Manager – Tariff Development | 2023–Present**

- Manage all aspects of distribution tariff including services, rates, terms, conditions, policies, and practices
- Develop frameworks for DSO model, non-wires solutions, demand-side management, and data center loads
- Represent company in market redesign, transmission tariff, self-supply, and rate harmonization engagements
- Create new revenue services including EV fast charging infrastructure
- Lead review and refresh of tariff policies and practices in collaboration with operations, finance, and legal

#### **Manager – Rate Design, Regulatory | 2021–2023**

- Managed development, approval, implementation, and operation of rates, fees, and investment levels
- Testified as expert witness opposing AESO 2021 rates application; AUC rejected application in full
- Secured approval of Phase II compliance filing; contributed to approval of 2023 cost-of-service (COS) application

### **Alberta Electric System Operator (AESO) | 2009–2020**

#### **Specialist – Regulatory | 2016–2020**

- Led strategic planning, strategic initiatives, rate proposals, and stakeholder engagements
- Testified as expert witness in 2018 Tariff and Alberta Electric Distribution System-Connected Generation Inquiry
- Directed multi-disciplinary team to design transmission rate options for industry consultation
- Supported energy storage strategic initiatives in market design and tariff design

#### **Senior Tariff Analyst – Regulatory | 2009–2015**

- Led public policy, legislation, regulation, engineering, and economic analyses
- Compiled and communicated government policies, regulator decisions, and technical/economic facts to executive leadership
- Testified before AUC in 2014 tariff application and 2011 Generic Cost of Capital proceeding
- Managed annual performance assessment for 30 generating units (flawless execution)
- Created connection project database and designed point-of-delivery cost function and investment models

### **Electric Reliability Council of Texas (ERCOT) | 2007–2008**

#### **Market Rules Analyst**

- Facilitated preparation of ERCOT's comments and impact analyses for protocol changes

- Participated in stakeholder committees including Load Profiling Working Group and Operations Working Group
- Synthesized complex technical discussions into concise, accurate summaries for internal review

#### **Office of Utility Consumer Counselor (OUCC), State of Indiana | 2004–2006**

##### **Utility Analyst**

- Led commentary on federal EPA environmental standards, NERC reliability standards, and FERC/MISO rules
- Prepared and filed testimony in demand-side management and integrated resource plan proceedings
- Led negotiated settlements on environmental compliance, power purchase agreements, and control performance standards (over \$1.5 billion value, three years)
- Secured performance guarantees and cost reductions through technical analysis and stakeholder negotiation

##### **AWARDS & RECOGNITION**

- Selected for the prestigious Fortis Inc. Leadership Lab
- AESO EmPower Award: Recognized for managing 2018 tariff application and securing non-controversial approval
- ERCOT Exceptional Performer Award: Recognized for integrating external and internal considerations in complex regulatory analyses

##### **EDUCATION**

- Master of Science in Mechanical Engineering, Texas A&M University, College Station, USA
- Bachelor of Technology in Mechanical Engineering, Indian Institute of Technology (IIT) Bombay, India

##### **PROFESSIONAL LICENSES & CERTIFICATIONS**

- Professional Engineer (P.Eng.), Association of Professional Engineers, Geoscientists and Geologists of Alberta (APEGA)
- Project Management Professional (PMP), Project Management Institute (PMI)
- Canadian Risk Management (CRM), Risk and Insurance Management Society (RIMS)
- Microsoft Certified Azure AI Fundamentals
- Certificate in Strategy Execution, Harvard Business School Online
- Certificate in Disruptive Strategy, Harvard Business School Online
- Certificate in Business Strategy, Harvard Business School Online
- Investment Foundations Certificate, CFA Institute
- Elements of AI (Certificate of Completion), University of Helsinki