

**CASE PARTICIPATION & PRESENTATIONS OF
GEOFF MARKE, PH.D.**

| Company Name | Employed Agency | Case Number or Venue | Issues |
|--|------------------------------------|--|--|
| Evergy Missouri West & Evergy Missouri Metro | Office of the Public Counsel (OPC) | EO-2025-0154 | Rebuttal: Large Load Power Service Tariff (Data Centers) |
| Evergy Missouri West | OPC | EA-2024-0292 | Rebuttal: Evergy Missouri West Solar Farms |
| Spire Missouri Inc. | OPC | GR-2025-0107 | Direct: Spire Income Eligible Rate Rebuttal: Energy Efficiency, Income-Eligible Programs, Disconnection Practices, Rate Design/Class Cost of Service Surrebuttal: Decoupling, Energy Efficiency, Weatherization, ISRS Reporting, Rate Design |
| Missouri American Water & Confluence Rivers | OPC | SM-2025-0067 | Rebuttal: Business Models, Consolidated Pricing, Acquisition Premium |
| Evergy Missouri West & Evergy Missouri Metro | OPC | EO-2025-0251 EO-2025-0250 | Memorandum: Response to Evergy Missouri Metro and Evergy Missouri West Annual Integrated Resource Plan, Summary of Deficiencies Identified by OPC |
| Missouri American Water | OPC | WR-2024-0320 | Direct: Regulatory Principles, Rate Design, Income Eligible Programs, Lead Line Replacement, Customer Experience, Universal Affordability Tariff Rebuttal: Customer Experience: MyWater Application, Universal Affordability Tariff, Resource Planning Rebuttal: Customer Experience, Universal Affordability Tariff, Resource Planning |
| 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 Rebuttal: Forced Arbitration/Property Management Portal, Income Eligible Programs, Public Service Announcements, Rate Design, High Prairie Wind Farm |
| Empire District Electric Company /Evergy Metro / Evergy West | OPC | EO-2025-0073 EO-2025-0074 EO-2025-0075 | Memorandum: Data Center Modeling; Carbon Sequestration; Supercritical Carbon |

| | | | |
|---|-----|------------------------------|---|
| /Union Electric Company d/b/a Ameren Missouri | | EO-2025-0076 | 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") |
| Rulemaking | OPC | AX-2023-0175 | Memorandum: Comments and history related to the proposed submitted rule 20 CSR 4240-13.075: Service Disconnection Reporting Requirements for Electric, Gas, Sewer, and Water |
| 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 Rebuttal: Third-Party Contracts, Customer Service, Meters, Fire Protection Surrebuttal: Customer Experience, Late Fees, Meters |
| Union Electric Company d/b/a Ameren Missouri | OPC | ER-2022-0337 | Direct: Economic Indicators, Customer Value Rankings, High Prairie Wind Farm, Blues Power Play Goal for Kids, Private LTE Network, Tripsavers, Income Eligible Programs 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 |
| Union Electric Company d/b/a Ameren Missouri | OPC | EA-2022-0245 | Rebuttal: Boomtown Solar, Renewable Solutions Program Surrebuttal: IRP, Public Interest, Decisional Prudence, Renewable Solutions Program |
| Missouri American Water | OPC | WR-2022-0303 | Direct: Affiliate Transaction Rules, Utility Excavation Coordination, Lead Line Replacement Funding, Critical Needs Program, Rehousing Program, Late Fees Surrebuttal: Single Tariff Pricing, Affiliate Transactions, Lead Line Replacement, Utility Excavation Coordination, Low-Income Programs, Late Fees |
| 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 | 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 |
| Spire Missouri Inc. | OPC | GR-2022-0179 | Direct: Stranded Assets: Diaphragm Meters, Spire STL Pipeline Rebuttal: Rate Design, Class Cost of Service, Low-Income Programs, Stranded Assets, Affiliate Transactions: Spire STL Pipeline |
| Empire District Electric Company d/b/a Liberty | OPC | EO-2021-0331 | Memorandum: OPC Report to The Empire District Electric Company d/b/a Liberty 2022 Triennial Integrated Resource Plan |
| Evergy Missouri West | OPC | EF-2022-0155 | Surrebuttal: Securitized Utility Tariff Charge |
| Evergy Missouri West & Evergy Missouri Metro | OPC | EO-2022-0064 EO-2022-0065 | Surrebuttal: Renewable Energy Credits |
| 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 |
| Union Electric Company d/b/a Ameren Missouri | OPC | GR-2021-0241 ER-2021-0240 | 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 |

| | | | |
|--|-----|--|---|
| Working Case: FERC 2222 Regarding Participation of DER Aggregators into the RTOs | OPC | EW-2021-0267 | Memorandum: Aggregators of Retail Customers (ARCs) for Commercial & Industrial Demand Response |
| Evergy Missouri West & Evergy Missouri Metro | OPC | ET-2021-0151 | Rebuttal: EV subsidies and EV charging stations Surrebuttal: Response to ChargePoint |
| Spire Missouri Inc. | OPC | GR-2021-0108 | 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 |
| Empire District Electric Company /Kansas City Power & Light & KCP&L Greater Missouri Operations Company/Union Electric Company d/b/a Ameren Missouri | OPC | EO-2021-0069 EO-2021-0068 EO-2021-0067 EO-2021-0066 | 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 |
| 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- | OPC | AW-2020-0356 | Memorandum: Response to Staff Report on COVID-19 Past-Due Utility Customer Payments |

| | | | |
|---|-----|--------------|---|
| due utility customer payments after the COVID-19 pandemic | | | |
| 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 Expenses 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 | Direct: Cost and Quality of Service, Stranded Asset, AMI/CIS deployment Rebuttal: Customer Experience, Weather Normalization Rider, Energy Efficiency, Low-Income Pilot Program Rebuttal: Class Cost of Service, Rate Design, Low Income Pilot Program Surrebuttal: Cost and Quality of Service, Reliability Metrics, Asbury Power Plant, Rate Design & CCOS, DSM Programs |
| Union Electric Company d/b/a Ameren Missouri | OPC | EA-2019-0371 | Rebuttal: Solar + Storage |

| | | | |
|--|-----|--|---|
| Union Electric Company d/b/a Ameren Missouri | OPC | ER-2019-0335 | Direct: Keeping Current Bill Assistance Program Rebuttal: Smart Energy Plan, Keeping Current, Coal Power Plants, CCOS, Rate Design, Pure Power RECs Surrebuttal: Coal Power Plants |
| Rule Making | OPC | AW-2020-0148 | Memorandum: Residential Customer Disconnections and Data Standardization Presentation: Service Disconnection Data Standardization Virtual Rulemaking Workshop |
| 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 | 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) |
| Union Electric Company d/b/a Ameren Missouri | OPC | EA-2019-0181 | Rebuttal: Need for the Wind Project, Economic Valuation, Pre-Site Energy Assessment Omissions |
| KCP&L Greater Missouri Operations Company & Kansas City Power and Light Company | OPC | EO-2019-0132 | Rebuttal: Response to KCPL's MEEIA application, Equitable Energy Efficiency Baseline, WattTime: Automated Emissions Reduction, PAYS, Urban Heat Island Mitigation Surrebuttal: Market Potential Study, Single Family Low-Income |
| KCP&L Greater Missouri Operations Company | OPC | EC-2019-0200 | Surrebuttal: Deferral Accounting and Stranded Assets |
| 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 Rebuttal: Lead Line Replacement, Future Test Year, Decoupling, Residential Usage, Public-Private Coordination Rebuttal: Rate Design Surrebuttal: Affiliate Transaction Rules, Decoupling, Inclining Block Rates, Future Test Year, Single Tariff Pricing, Lead Line Replacement |
| Missouri Gas Energy / Laclede Gas Company | OPC | GR-2017-0216 GR-2017-0215 | Rebuttal: Decoupling, Rate Design, Customer Confidentiality, Line Extension in Unserved and Underserved Areas, Economic Development Rider & Special Contracts |

| | | | |
|---|-----|-----------------------------|---|
| | | | Surrebuttal: Pay for Performance, Alagasco & EnergySouth Savings, Decoupling, Rate Design / Energy Efficiency, Economic Development Rider: Combined Heat & Power |
| 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 | Direct: Lead line replacement pilot program Rebuttal: Lead line replacement pilot program Surrebuttal: Lead line replacement pilot program |
| 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 | Memorandum on Emerging Issues in Utility Regulation Presentation: Inclining Block Rate Design Considerations Presentation: Missouri Integrated Resource Planning: And the search for the “preferred plan.” 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, Liberty Utilities (Central) Company, Liberty Sub-Corp. | OPC | EM-2016-0213 | Rebuttal: Response to Merger Impact Surrebuttal: Resource Portfolio, Transition Plan |
| Working Case: Policies 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 | <p>Presentation: Does Better Information Lead to Better Choices? Evidence from Energy-Efficiency Labels</p> <p>Presentation: Customer Education & Demand-Side Management</p> <p>Presentation: MEEIA: Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis</p> <p>Presentation: Wouldn't it be Nice: The PAYS Statewide Model Discussion</p> |
| 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 |

| | | | |
|---|-----|---|---|
| Missouri Energy Initiative, University of Missouri 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 | OPC | NARUC /US AID: Cybersecurity Baltic Countries | Presentation: Evaluating Cybersecurity Investments and Policy: Case Study on Missouri |

| | | | |
|---|-----|--|---|
| Herzegovina, Georgia, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, and Ukraine 2023(Virtual) | | | |
| 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 Thing 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)— Savannah, Georgia, 2024 | OPC | Exploring Rate Design & Other Regulatory Tools: Maximizing Grid Value & the Customer Experience | Panel: Innovative Rate Design Concepts: Time-Varying Rates |
| 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 |
| Maine Public Utilities Commission, 2025 | OPC | Docket #: 2024-00231 Deliberative Pricing Session: Time of Use Rates | Presentation: Peaks and Valleys: Missouri's Time of Use Rate Experience |
| Missouri Energy Initiative (MEI), University of Missouri 2025 | OPC | Advancing Renewables in the Midwest | Presentation: If I had a Statewide Energy Efficiency Program: Missouri DSM Today and in the Future |
| NARUC 2025 Summer, Boston, Massachusetts | OPC | NARUC Committee on Gas | Panel: Harnessing Energy Efficiency and Demand Response for Grid Resilience |