

**Kevin Monte de Ramos, cmvp**  
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CANADA

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*US Citizen working in Canada*

### Recognized Leadership

*"Kevin ... I congratulate you. Developing an improved customer service function in a company like ours is a massive effort, and probably one of the largest change programs that we have ever undertaken. You clearly demonstrated the Southern Style as a key member of the team, and I wish to thank you for your dedication."*

- **A. W. Dahlberg**  
CEO and President of Southern Company

### *Summary of Experience*

- ❖ Twenty-one years managing **energy/electricity research** for utilities, state energy agencies, and energy service companies; crossing all sectors: residential, commercial, institutional, and industrial. Entered research field as a biochemist working at the Ohio State University's Comprehensive Cancer Center.
- ❖ Authored over 100 research reports, 30 published articles, and the book "*Poverty and the Public Utility: building shareholder value through low-income initiatives*" (Pennwell, 2005).
- ❖ Experienced **public speaker, event facilitator, and trainer**: paid keynote speaker, invited featured guest, conference panellist, sales presentations, board inquiries, and training workshops. Highlights include sharing podium with the **Secretary of the Department of Health and Human Services** and an invitation to summarize a decade of findings before the **California Public Utility Commission**.
- ❖ Demonstrated success with **organizational management**; having fiscal and supervisory responsibilities from my very first research position at The Ohio State University through owning/operating a management consultancy for the past ten years.
- ❖ Continuing transition to C-level management within leading research organization.

### *Extended Consulting Assignments*

#### **Ontario Power Authority**

Manager - Evaluation, Measurement, and Verification  
March 2010 to March 2011

#### Summary of Responsibility

Hired to plan and manage research projects that inform government agencies, regulatory bodies, and involved stakeholders about energy-related policy and programmatic impacts. Served as the 'go-to-guy' for projects requiring sophisticated experimental designs; namely, time-of-use rates evaluation, energy market characterization studies, and market transformational impact assessments.

Coached junior staff on the use of advanced logic modeling techniques to design, develop, and evaluate energy efficiency initiatives. Asked to standardize requirements for evaluation planning, logic modeling, and research reports within the scope of *Ontario's EM&V Protocols and Requirements*, a set of research protocols referenced by the **Ontario Energy Board** to ensure independent and unbiased impact evaluations are used to verify energy savings claimed by utilities with respect to **Green Energy and Green Economy Act of 2009**.

#### Achievements and Highlights

- ❖ Represented the Ontario Power Authority on **Ontario's Low-Income Working Group**; working with the Ministry of Energy and Infrastructure, electric utilities, and key trade associations to specify programmatic requirements.
- ❖ Co-designed \$72 million **Provincial Home Retrofit Program** for low-income households and occupants of social housing; presented design before internal Executive Committee gaining approval for its funding.

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- ❖ Led stakeholder sessions to introduce and answer questions regarding the proposed low-income home retrofit program; ultimately gaining approval for its implementation within the 2011-2014 Conservation and Demand Management Portfolio
- ❖ Served as the primary author of *Ontario's Evaluation, Measurement, & Verification Protocols and Requirements*; contributing author to the eighteen *Supporting and Technical Guidelines*.
- ❖ Represented EM&V concerns as a member of **Ontario's Integrated Power System Planning Committee**.
- ❖ Led a multidisciplinary team to assess needs and developed an innovative approach for an **annual market characterization study** that informs a broad range of functions at the **Ontario Power Authority**.

### Hydro Quebec

Internal Consultant - Knowledge Transfer  
Montreal, QC  
October 2007 - March 2010

#### Summary of Responsibility

Initially hired to recommend approaches to document market trends associated with energy end-uses within the CI&I sectors. Work quickly evolved into a three-year engagement; whereby, utility program managers were coached on the use of market transformational strategies to affect lasting and measurable market impacts.

Supported all levels of management across 34 individual mandates; notably, program theory development, evaluation planning, and capability building. Enjoyed the diversity of programs where my talents were applied: commercial building retrofits, residential appliance replacements, home energy audits, arena refrigeration system optimization, small industrial process improvements, 80+, electronic thermostats, doors and windows, new construction practices/standards, sustainable urban development, three-phase water heaters, and conservation voltage reduction.

#### Achievements and Highlights

- ❖ Supported client involvement in the **Canadian Demand Side Management Alliance**, a consortium of utilities working together to address regulatory trends, share evaluation findings, develop analytical methods, and identify energy savings opportunities.
- ❖ Presented behavioral impacts of refrigeration replacement program at the **International Energy Program Evaluation Conference** in Paris (June, 2010); "*Behavioural analytics for use in causal attribution in a market transformational energy efficiency program*". The paper featured the use of a behavioral dashboard to demonstrate market changes and provide for causal attribution.
- ❖ Developed **logic model training course** that was adapted by client; embedded in corporate professional development curriculum for program designers and evaluators.
- ❖ Presented **business case for market transformational programming** before the Executive Board; gaining \$1.7 in funding for supporting research.
- ❖ Reviewed survey instruments and assisted in the interpretation of research findings; providing management with an assessment of program performance.
- ❖ Demonstrated energy savings resulting from **conservation voltage reduction** using proprietary analytical approaches with the sensitivity to detect the effects of a 1% change in line voltage.

#### Trusted Team Contributor

*"I am pleased to offer this letter of recommendation for Kevin Monte de Ramos. He has worked directly with staff across all market sectors; excepting large industrial. He has earned our trust and has contributed significantly to Hydro Quebec's pursuit of market transformational claims within the scope of our energy efficiency portfolio. ... Kevin's ability to clarify abstract notions into novel approaches will help us attain the ambitious energy efficiency goals established for the Province of Quebec."*

- Patrice Raymond  
Senior Planning Advisor at Hydro Quebec

## ***Employment History***

### ***KMDR Research***

President/Management Consultant - Utilities & Energy  
October 2000 - Present

#### **Summary of Responsibility**

Charged with day-to-day operations of the consultancy: business development, strategic alliances, cash flow management, financing, infrastructure support, capital budgets, accounts payable/receivables, etc. Required to bill 67% of a full-time effort (1275 hours/year) while ensuring customers are fully supported and deliverables meet the standards established by our *Professional Code of Conduct*.

#### **Achievements and Highlights**

- ❖ Created **strategic alliances with industry thought leaders** who contribute their expertise to our organization. Reaping the seeds sown, these alliances were forged through past **employer/employee relationships**. Continually surprised and appreciative by the number of past associates wishing to work with me again and for the companies I have had an opportunity to manage.
- ❖ Established ***Professional Code of Conduct*** to govern our client interactions; summarized as follows: safeguard the trust placed in us, render impartial and independent advice, accept work only in demonstrated areas of expertise, disclose professional fees up front, develop practical solutions for client solutions, deliver professional quality reports and presentations, ensure findings are supported via the scientific method, and **mentor supporting staff to become tomorrows industry leaders**.
- ❖ Structured our organization around a multi-disciplinary consultative roundtable, known internally as the ***Blossoming Flower*** because our organizational chart resembles a daisy. Through this structure, members of the consultative roundtable vet all research activities and subject all deliverables to an **internal peer review**; providing challenging and **engaging mentorship opportunities** for senior and junior staff.
- ❖ Developed a ***Logic Model Template*** that was accepted within *Ontario's EM&V Protocols and Requirements* originating from a ***Logic Model Training Course*** developed for **Hydro Quebec**. Designed the logic model template to inform the scope of each evaluation type: market characterization, process assessment, outcome evaluation, market effects study, and program impact verification.
- ❖ Refined **theory of behavioral change** introduced by Dr. James Prochaska to make it accessible to program managers who are responsible for market interventions; promoting energy efficiency, conservation, renewable energy, and social responsibility.
- ❖ Used technical skills to specify and develop **data warehousing** applications and analytical tools for our clients.

### **Next Century Software, LLC**

CEO/VP - New Product Development  
November 1998 - October 2000

#### **Summary of Responsibility**

Hired to automate the load research process via a combination of meter installation, data acquisition, sampling algorithms, and load shape generation. Managed a team of developers, specified product requirements, developed sales strategy, and positioned product for the electric distribution companies. Role expanded when leading wireless provider sought to acquire the business. Asked to lead M&A talks and assumed role as a corporate officer.

#### **Achievements and Highlights**

- ❖ Established **Guru Assist Program** to arm developers and sales professionals with the latest technologies. Given the long hours dedicated to our efforts, even as a start-up enterprise, we were able to provide team members with cell phones, handheld computers, laptops, virtual private networking, and applications that attracted talent to the small organization.
- ❖ Offered **culturally sensitive vacation options and holiday schedules** to accommodate the diverse backgrounds of our development staff. This allowed us to work 365 days a year in support of an aggressive deployment timeline.

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- ❖ Negotiated **vendor agreements** to complete the infrastructure needed to deliver upon our promise. Established supply chain to obtain smart meters at highly favorable costs, negotiated provider agreements to ensure the meters were installed with the appropriate communication technologies, and contracted with master electricians to certify meter installations.
- ❖ Led M&A discussions for 8-months; finalizing the termsheet to be taken to the corporate board. **ALLTEL's** board closed M&A activities before the buy-out was complete due to impending dot-bust. Asked to facilitate exit strategy when financing options dried up and implementation revenues could not match cash requirements.
- ❖ Developed statistical algorithms to specify sampling requirements, generate sample statistics, estimate population metrics, and forecast electricity demand and energy requirements.

### **DocuCorp International**

Implementation Manager - Utilities/Insurance  
August 1997 - November 1998

#### Summary of Responsibility

Led utility bill print solutions for **Southern Company Services**. Customized aggregated bills for large retailers and industrial accounts, adjusted bill print layout for Y2K concerns, specified requirements for on-line bill presentment, and participated in SAP implementation across the five distribution companies. Developed MS Access application to manage the placement of 300+ professional service employees, forecast revenues, and integrate SEC reporting system. The **Resource Allocation and Revenue Estimate System** remains in place today, over 15 years later. Created **Data Maker**, a productivity tool needed to supplement feeds from **Prudential Insurance** and avoid implementation delays.

### **A&C Enercom**

Evaluation Manager/Senior DSM Consultant  
February 1989 - August 1997

#### Summary of Responsibility

Hired initially as an IT liaison. Promoted after just 6-months to lead program evaluation efforts for **Columbia Gas**. Gained increasing responsibilities and budget authority when the proposal for a data warehousing application, **ESINS: The Energy Services Information System**, was accepted. The tool allowed us to quadruple our output, from two impact assessments per year to more than seven formal impact evaluations and a wide range of *ad hoc* reports. This productivity gain allowed us to participate on **Integrated Resource Planning Committee** as well as satisfy regulatory filing requirements and interrogatories.

Developed *automated end-use profiles* allowing **Georgia Power** and **Savannah Electric** to access key account managers. Managed a broad range of studies for electric and gas utilities: *customer satisfaction and loyalty studies, DR potential studies, energy and non-energy impact assessments, program process assessments, market studies, and economic impact assessments*. Worked with the **Pennsylvania Public Utilities Commission** to establish utility reporting requirements and to scope to impact assessments of the newly formed CAP, CARES, and LIURP initiatives. Also developed a range of important IT solutions to support the implementation of energy efficiency programs; namely, *program tracking systems, truck routing software using MapInfo, and other analysis tools*.

### **The Ohio State University Comprehensive Cancer Center**

Research Assistant II - Analytical Equipment Lab Manager  
February 1987 - September 1989

#### Summary of Responsibility

Assisted in writing grants for breast cancer research. Conducted *in-vitro* experiments and prepared research reports. Administered capital equipment budget and multi-vendor maintenance agreements. Pioneered the 2nd local area network to be installed at the Columbus Campus of **The Ohio State University**. Analyzed data related to the study of estrogen-dependent tumors. Other duties included the planning, tracking and authorization of capital equipment expenditures for the center's analytical equipment lab, supervised use of equipment by center staff and students, managed OEM service contracts, and participated in the center's annual strategic planning efforts.

***Formal Education***

July 1987 - Earned *Bachelor's of Science* (Biochemistry)  
**The Ohio State University** – Columbus, OH

September 1981 - *Undergraduate Studies*  
**Hiram College** - Hiram, OH

***Appointments and Certifications***

- Certified Measurement and Verification Professional (CMVP) by the **Association of Energy Engineers**
- *Organizational Chairman* for **The Founders Party**
- *Member* of Ontario Power Authority's **Integrated Power System Planning Committee**
- *Member* of Ontario's **Energy Assistance Working Group**
- *Member* of Ontario's **Low-Income Working Group**
- *Development Board Member* **Montreal Alzheimer's Association**
- *Youth Entrepreneurial Mentor* for **Matamore Studios**
- *Advisory Board Member* **EnerTouch**, now **Good Cents Select**
- *Corporate Board/Officer* **Next Century Software**
- *President* of **Battelle Institute's Toastmasters**
- *Board Member* at the **Central Ohio Radio Reading Service**
- *Chaired Marketing and Evaluation Subcommittee* of **Columbia Gas Services** on the IRP Committee