



Low-Income Energy Network

January 4, 2011

Kirsten Walli
Board Secretary
Ontario Energy Board
P.O. Box 2319
2300 Yonge Street, Suite 2700
Toronto, Ontario M4P 1E4

Re: EB-2010-0055 - Low-Income Energy Network's request for cost award for comment on the low income amendment to the Union Gas 2011 DSM Plan

Dear Ms. Walli,

Concerning costs in respect of EB-2010-0055, LIEN has directed IndEco to submit a claim for an award of costs incurred by itself. Accompanying this letter is a claim from IndEco Strategic Consulting for LIEN in EB-2010-0055, together with supporting documentation.

Please consider this our request and your authority to have the payment issued to IndEco directly in respect of the award of costs.

Please request that Union Gas make the cost award cheque payable to **IndEco Strategic Consulting** and mail it to:

412 – 77 Mowat Ave.
Toronto, ON
M6K 3E3

Sincerely,

Theresa McClenaghan
Executive Director, Canadian Environmental Law Association
On behalf of **Zee Bhanji**
Coordinator, Low-Income Energy Network

CC: Union Gas

c/o Advocacy Centre for Tenants Ontario (ACTO)
425 Adelaide St. West, 5th floor, Toronto, ON M5V 3C1
Phone: 416-597-5855 ext. 5167 1-866-245-4182
Fax: 416-597-5821 Email: bhanjiz@lao.on.ca

APPENDIX "B"

FORM 3

AFFIDAVIT IN SUPPORT OF COST CLAIM

EB-2010-0055
Board File Number

Low-Income Energy Network
Party Name

Items Claimed excluding GST

Legal/Consultant Fees	+	Disbursements	=	Net Sub-Total
\$ 670.00		\$		\$ 670.00

Goods and Services Tax

..... Full Registrant Qualifying Non-Profit (GST at 2.5%)
..... Unregistered (GST at 5%) Tax Exempt (no GST).....
Other HST at 13% GST at _____ %	


Total Cost Claim

Net Sub-Total	+	HST Total GST Claimed	=	Total Cost Claim
\$ 670.00		\$ 87.10		\$ 757.10

I, (name) Josh Shook _____, of the (City, Town, etc.) City of Toronto in the
(County, Regional Municipality, etc.) of Province of Ontario, **MAKE OATH AND SAY:**

1. I am a representative of the above noted party (the "party") and as such have knowledge of the matters attested to herein.
2. I have examined the above Cost Claim and all of the documentation in support of it.
3. The above Cost Claim represents only costs incurred directly and necessarily by the party for the purpose of its intervention in the Ontario Energy Board process (the file number of which is set out above).
4. The above Cost Claim does not include any costs incurred for work done, or time spent, by employees or officers of the party as described in section 6.05 of the Board's Practice Direction on Cost Awards.

SWORN (OR AFFIRMED) BEFORE ME at the (City, Town, etc.) of
City of Toronto, in the (County, Regional Municipality, etc.) of
Province of Ontario on (date) January 4, 2010.



COMMISSIONER for taking Affidavits



Signature of Deponent

Theresa A. McCloughan
Barrister & Solicitor

RE:

IndEco hours for LIEN on EB-2010-0055 for comment on the low income amendment to the Union Gas 2011 DSM Plan

Date: January 4, 2011

Project: EB-2010-0055

Summary

Breakdown of time spent by Judy Simon and Josh Shook of IndEco Strategic Consulting Inc. on EB-2010-0055 for comment for LIEN on the low income amendment to the Union Gas 2011 DSM Plan.

Task	Number of hours for Judy Simon	Number of hours for Josh Shook
Review of evidence, confirm position with LIEN, and prepare submission	1	0
Filing of submission document using RESS, by courier, and by email to applicant. Preparation of cost awards documents and filing using RESS, by courier, and by email to applicant. Coordinate the approval and filing of submission and cost awards documents.	0	2
Total hours	1	2

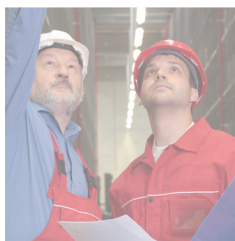
APPENDIX “B”

FORM 1

SUMMARY STATEMENT OF HOURS -CONSULTANTS AND LEGAL COUNSEL

A separate form is required for each consultant or legal counsel

<u>EB-2010-0055</u> Board File Number		<u>Low-Income Energy Network</u> Party Name			
<u>Legal Counsel Name</u>		<u>Year of Call</u>		<u>Law Firm</u>	
<u>Judy Simon</u> Consultant Name		<u>29</u> Years of Relevant Experience (curriculum vitae must be attached)		<u>IndEco Strategic Consulting Inc.</u> Consultant Firm HST	
	Hours	Hourly Rate	Sub-total	GST	Total
Preparation					
Attendance -Technical Conference					
Attendance -Settlement Conference					
Attendance -Oral Hearing					
Argument	1	\$330	\$330.00	\$42.90	\$372.90
Case Management					
TOTALS	1	\$330	\$330.00	\$42.90	\$372.90
Note: All claims must be in Canadian dollars. If applicable, state exchange rate _____, and country of initial currency _____.					



IndEco Strategic
Consulting Inc.

77 Mowat Ave.
Suite 412
Toronto, ON
Canada M6K 3E3

toll free 888 463 3261
local 416 532 4333

indeco.com

JUDY SIMON

Vice President

Judy Simon, Vice President, is an environmental scientist and strategic planner with over 25 years experience in energy efficiency, strategic energy planning, policy analysis, and project management. Judy is an expert in stakeholder consultation, having been involved in more than 250 municipal environmental assessments on energy, waste and water issues and as a part-time Ontario Energy Board (OEB) member for 10 years.

Judy has extensive experience working with government, regulatory agencies, non-governmental organizations and industry. She has been a member of the Toronto Atmospheric Fund (TAF) Grants Committee since April 2008 and served as a member of the TAF Grants and Loans Committee from 2002-2006.

EXPERTISE

- Strategic energy planning
- Energy conservation policy and programming
- Stakeholder engagement and consultation
- Program monitoring, evaluation and reporting
- Electricity and natural gas markets and energy regulation in Ontario
- Energy adjudication
- DSM/CDM, distributed energy, and renewable energy policy analysis, program development and implementation

EMPLOYMENT HISTORY

- Vice President, IndEco (1994 - present)
- President, Judy Simon + Associates (1989 – present)
- Part-time Board Member, Ontario Energy Board (1992- 2002)
- Manager, Technology Policy, Ontario Ministry of Industry, Trade and Technology (1987-1989)
- Manager, Environmental Assessment Branch, Ontario Ministry of Environment (MOE) (1982-1987)
- Environmental Planner, Environmental Assessment Branch, MOE (1981-1982)
- Energy Planner, Conservation and Renewable Energy Group, Ontario Ministry of Energy (1980-1981)
- Energy Researcher, Algas Resources, Trans Canada Pipelines (1978)

PROFESSIONAL QUALIFICATIONS

Master of Environmental Design (Environmental Science), University of Calgary (1980)

Bachelor of Science, University Scholar, Great Distinction, McGill University (1977)

APPEARANCES

2008	Ontario Energy Board, on behalf of GLOBE regarding the OEB low-income policy proceeding
2005	Ontario Energy Board, on behalf of Low-Income Energy Network (LIEN) regarding CDM policies and programs, regulated price plan and other matters
2004	Ontario Energy Board, on behalf of Milton Hydro regarding the approval of its 2005 CDM Plan
2004	Ontario Energy Board, on behalf of Brantford Power regarding the approval of its 2005 CDM Plan
2003	Ontario Energy Board, on behalf of Enbridge Gas Distribution Inc. regarding their DSM framework and incentive mechanisms
1985	Joint Board, Ontario Hydro Southwestern Ontario Transmission System Expansion Program. On behalf of the Ontario Ministry of the Environment regarding Ministry environmental policy and approvals

ADVISORY COMMITTEES AND BOARDS

April 2009 to present	Chairman, Board of Directors, Clean Air Partnership
April 2008 to present	Member, Toronto Atmospheric Fund (TAF) Grants Committee
Jan. 2006 to present	Member, Board of Directors, Clean Air Partnership
Jan. 2005 to July 2006	Member, City of Toronto's Environment Roundtable

Oct. 2002 to March 2006	Member, Grants and Loans Committee, Toronto Atmospheric Fund (TAF)
Apr. 1999 to 2002	Vice President, Environment, Provincial Council of Women
Dec. 1996 to Mar. 2008	President of the Board of Directors, Canadian Environmental Law Association (CELA)
Apr. 1994 to Mar. 2008	Member of the Board of Directors, CELA
May 1992 to May 2002	Part-time Board member of the Ontario Energy Board
Sept. 1990 – Dec. 2001	Member, Environmental Advisory Panel to the President, Ontario Hydro

AWARDS

1981	Commendation from Mayor, City of Toronto, for work on Toronto Recycling Action Committee
1997-1980	Natural Sciences and Engineering Post-graduate Scholarship
1972-1977	McGill University Scholarship
1972 -1977	Steinberg Canada Scholarship

SELECTED PROJECTS

Environmental and energy policy

- Association of Canadian Distillers. Research and analysis of a number of federal and provincial environmental regulations including NPRI, Ontario Regulation 419 (air quality), Ontario Regulation 450 (water use) and Ontario Regulation 127 (emissions reporting). Project manager.
- Canadian Gas Association. Prepared a policy paper on declining average use across gas utilities in Canada and recommendations on treatment in rates. Project manager.
- Canadian Electricity Association. Prepared a report on evaluation of conservation programming which formed the basis of proceedings on a joint CEA-NRCan workshop. Project manager.
- Canadian Environmental Law Association. Prepared a CDM policy paper on the appropriate framework for CDM in Ontario to best meet the needs of low-income consumers, which was

submitted to the OEB as part of the consultation related to the Minister's Directive to the OEB on CDM. Project manager.

- Canadian Gas Association. Conducted a research study to investigate the implications for traditional natural gas distribution franchises of increased competition from alternative energy services for their traditional load base (space and water heating) and best practices in rate design, including decoupling, for dealing with these implications. Project manager.
- Conference Board of Canada. Principle author of discussion paper on successful natural gas regulatory DSM frameworks in Canada, published in November 2005.
- Canadian Energy Efficiency Alliance. Senior advisor on Webinar on best practices with Enbridge Gas Distribution.
- Enbridge Gas Distribution. Surveyed and documented natural gas DSM in North American jurisdictions with Navigant. Project manager.
- Canadian Energy Efficiency Alliance. Co-author of paper, "The Consumer Benefits of Interval Metering, with Marion Fraser, Fraser & Company. Project manager.
- Ministry of Industry, Trade and Technology. Worked with the Cabinet Subcommittee on Free Trade and prepared the Cabinet Subcommittee on Free Trade report which was tabled in the Ontario legislature. Project manager.
- Canadian Energy Efficiency Alliance. Prepared strategy papers on CDM; these were submitted to the OEB and to the Minister of Energy. Project manager. Served as DSM expert to Alliance's DSM policy committee.

Strategic planning

- City of Toronto. Development of facilities energy plan. Senior advisor.
- University Health Network. Prepared a comprehensive energy management plan for each of the hospitals. The plan for Toronto Western and Toronto General Hospitals are complete. Work is ongoing for preparation of plan for Princess Margaret Hospital. Senior advisor.
- MaRS. Prepared an Energy Management Plan for the Toronto Discovery District. With Finn Projects. Senior advisor.
- MaRS. Prepared a District wide energy action plan (2009-2014) for the Toronto Discovery District. Senior advisor.

- Energy Efficiency Office, City of Toronto. Developed a Sustainable Energy Business Plan for the Energy Efficiency Office for 2002. Project manager.
- City of Toronto. Developed the City of Toronto's Implementation Plan for the Environmental Plan. Project manager.
- Energy Efficiency Office, City of Toronto. Developed the Report on the Development of the Energy Plan for Toronto. Senior advisor.
- Ontario Power Authority. Assisted the OPA to design and launch the \$400M program for LDC CDM including establishing the rules for funding, the application process and the contract elements, and development of program templates and detailed program designs for the OPA's Standard LDC programs (Programs in a Box). With Navigant. Project manager.
- Guelph Hydro. Developed a CDM business plan using IndEco's strategic planning process to develop priorities for the plan, and strategies to realize the priorities. Project manager.
- Toronto Hydro and Milton Hydro. Developed business case that helped both utilities to decide to go forward to develop a DSM plan for 2003. Project manager.
- Brewers of Ontario. Developed and implemented a business strategy for enhancement and recognition of environmental performance in packaging. Project manager.
- Brewers of Ontario. Developed an environmental strategy including opportunities to reduce energy use and emissions in new facilities and vehicles. Project manager.

DSM/CDM planning, program development, implementation, monitoring and evaluation

- Toronto Atmospheric Fund. Developed a municipal lighting program design for Toronto Atmospheric Fund. Work involved review of energy forecasts and needs in the GTA, survey of existing municipal and LDC lighting programs in the GTA, evaluation of measures (including TRC calculations), and preparation of written descriptions. Project manager.
- Toronto Atmospheric Fund and the Clean Air Partnership. Provided technical advice on the design of the Lighting Energy Efficiency Acceleration program. Project manager.
- University Health Network. Manage the 3-year (2007-2010) comprehensive energy management program including community based social marketing, employee engagement,

operator training, audit and retrofits. Work is ongoing. Senior advisor.

- Enbridge Gas Distribution. Advised on DSM policies, regulatory treatment of DSM, low-income programs and other matters in the 2006 generic gas DSM hearing and on Enbridge's 3-year DSM plan. Project manager.
- Ontario Energy Board. As Board member, a principal author of natural gas regulatory framework for DSM (E.B.O. 169-III); adjudicator in over 100 cases.

Facilitation, stakeholder consultation, and training

- Ontario Energy Board. Facilitated the development of the short-term 2010 regulatory framework for low-income natural gas demand-side management through the facilitation of a multi-stakeholder working group set up by the Board and prepared a report that documents the framework, consensus and non-consensus positions of working group participants. Senior advisor and facilitator.
- Ontario Energy Board. Facilitated the development of the framework for the Board's emergency low-income energy financial assistance program through the facilitation of a multi-stakeholder working group set up by the Board. The result of this work was documented in a final report to the Board. Senior advisor and facilitator.
- York Region. Design and delivery of social marketing approach to the delivery of York Region's water conservation rebate programs for the residential, multi-residential and ICI sectors. Work is ongoing. Part of a 3-year delivery program (2009-2011). Senior advisor and quality assurance officer.
- MEARIE Group, EDA. Design and delivery of a series of seven CDM courses for Ontario LDC staff. Work is ongoing. Project manager.
- Cities of Ottawa and Mississauga and Canadian Gas Association. Designed and delivered a workshop to local builders, architects, engineers, utilities, energy managers and consultants on conservation and renewable energy opportunities in Ottawa to improve air quality and reduce GHGs. Project manager.
- Independent Electricity System Operator. Through a series of interviews, developed a profile of the hospital and long-term care sector related to energy use and their educational needs related to energy management, with a focus on educational needs related to the switch from the regulated price plan to the

wholesale market. Sectoral reports that included recommendations to the IESO on tools, processes and materials the IESO could develop that would meet these educational needs were prepared. Senior advisor.

- Ontario Power Authority. Designed and delivered a stakeholder consultation process for the \$400M CDM program including the design and delivery of the Program Design Advisory Group and Program Operations Design Group activities. With Navigant Consulting. Project Manager.

Best practices

- Canadian Gas Association. Preparation of 2010 update to DSM best practices report (2009). Project manager.
- York Region. Identified and documented best practices related to municipal water conservation programs in North America for the residential, multi-residential and ICI sectors. Work is ongoing. Senior advisor.
- Canadian Gas Association and Canadian Electricity Association. Designed and facilitated a seminar session on best practices in DSM/CDM and preparation of a report which documented the results, issues and lessons learned from the series of 4 workshops held across Canada over 2007-08. Project manager and lead facilitator.
- Association of Energy Service Professionals. With Mike Brophy of Enbridge, prepared a paper and delivered it at the AESP Conference in San Diego, Feb. 2009 on best practices in gas DSM monitoring and evaluation. Project manager.
- Electricity Distributors Association. Presented a comparison of CDM in US jurisdictions and in Ontario and Ontario at EnerCom 2007. Project manager.
- Association of Energy Service Professionals. Published a paper and delivered a presentation on DSM Best Practices at the Canadian Natural Industry conference, Winter 2007.
- Canadian Gas Association. Identified and documented natural gas DSM best practices among natural gas utilities across Canada with Bruce Vernon & Associates. Project Manager.

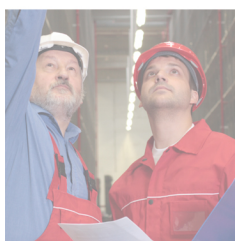
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<u>EB-2010-0055</u> Board File Number		<u>Low-Income Energy Network</u> Party Name			
_____ Legal Counsel Name		_____ Year of Call		_____ Law Firm	
<u>Josh Shook</u> Consultant Name		<u>3</u> Years of Relevant Experience (curriculum vitae must be attached)		<u>IndEco Strategic Consulting Inc.</u> Consultant Firm HST	
	Hours	Hourly Rate	Sub-total	GST	Total
Preparation					
Attendance -Technical Conference					
Attendance -Settlement Conference					
Attendance -Oral Hearing					
Argument					
Case Management	2	\$170	\$340.00	\$44.20	\$384.20
TOTALS	2	\$170	\$340.00	\$44.20	\$384.20
Note: All claims must be in Canadian dollars. If applicable, state exchange rate_____, and country of initial currency _____.					



IndEco Strategic
Consulting Inc.

77 Mowat Ave.
Suite 412
Toronto, ON
Canada M6K 3E3

toll free 888 463 3261
local 416 532 4333

indecocom

JOSH SHOOK

Consultant

Josh is an environmental scientist with a broad range of experience spanning the globe. He has managed numerous projects in the areas of energy efficiency, water conservation, environmental education, strategic planning, sustainable transportation, and ecotourism.

Josh specializes in project management, program administration, social marketing, and scientific research and analysis. Josh has experience working in the private, public, and non-profit sectors with a focus on local campaigns with global impacts.

EXPERTISE

- Environmental project management and community based social marketing
- Facilitation of meetings, educational workshops, and strategic planning sessions
- Scientific and social research and data analysis
- Developing and maintaining administrative, financial and corporate procedures
- Identifying wild birds by sight & sound, nest searching & colour-band re-sighting

EMPLOYMENT HISTORY

- Consultant & Office Administrator, IndEco (2007 - present)
- Field Biologist, Arizona Game & Fish Department (2006)
- Field Biologist, Ontario Breeding Bird Atlas (2002 & 2005)
- Overnight Youth Support Worker, Change Now Youth Drop In and Resource Centre (2003 – 2005)
- Administrative Coordinator, Guelph International Resource Centre (2002 – 2003)
- Water Project Coordinator, Guelph International Resource Centre (2001)
- Local Affairs Commissioner, University of Guelph Central Student Association (1999 – 2000)

PROFESSIONAL QUALIFICATIONS

Bachelor of Science, Dean's Honour List, University of Guelph (1999)

OTHER SIGNIFICANT ITEMS

1993	Dean's Scholarship, University of Guelph
1993	H.P. Jolly Award, University of Guelph
1992 – 1995	Canada Scholarship in Science and Engineering, University of Guelph,
1992	Governor General's Academic Medal, G.L. Roberts CVI

SELECTED PROJECTS

Project management

- York Region. Coordination of 3-year Rain barrel sales events at multiple locations within the region with a distribution target of 4,000 per year. Project manager. Work is ongoing.
- Niagara Peninsula Energy, Canadian Niagara Power, Niagara-on-the-Lake Hydro, and Algoma Power. Managing inbound call centre for utility customer inquiries on the Ontario Power Authority (OPA) Electricity Retrofit Incentive Program (ERIP). Project manager.
- Welland Hydro. Presentation to utility customers and channel partners on ERIP. Project manager.
- Guelph International Resource Centre. Coordinated organizational strategic planning process. Project manager.
- Guelph International Resource Centre. Coordinated multi-year Water Project, including a Rainbarrel Water Conservation, Education and fund-raiser. Project manager.
- Change Now Youth Drop In and Resource Centre. Coordinated staff training, data entry and backups of the new federal Homeless Individuals and Families Information System. Project manager.
- University of Guelph Central Student Association. Negotiated Universal Student Transit Pass with the City of Guelph and ran successful referendum campaign for student adoption. Project manager.
- Participatory Research Associates. Facilitated a unique participatory development process in four isolated First Nations communities in Guyana, South America. Conducted community meetings, training workshops and baseline community needs assessment. Project advisor.

Conservation and demand management (CDM) planning, program development, implementation, evaluation and reporting

- Hydro One Networks. Implemented direct and indirect marketing and promotion elements for Power Savings Blitz program, including: distribution of brochures, direct mail postcards, 'push' postcards, and window clings; and making reminder calls to customers with scheduled assessments. Consultant.
- Barrie Hydro. Managed channel partner network of contractors, consultants, suppliers, etc. to facilitate surpassing Electricity Retrofit Incentive Program targets. Kept channel partners informed about program, encouraged participation by their customers, and implemented incentive program. Project manager.
- Barrie Hydro. Developed and implemented telemarketing direct marketing campaign for Power Savings Blitz program to meet participation targets. Developed and maintained scheduling, data collection, and tracking systems. Campaign manager.
- Barrie Hydro, Niagara Erie Power Alliance (NEPA) Group of utilities, Peterborough Utilities Services. Budget management for ERIP program involving program budgets, customer incentives, subcontractors, channel partner incentives, and target achievement incentives. Account manager.
- Barrie Hydro. Participated in marketing campaigns for all OPA Local Distribution Company (LDC) CDM programs, including The Great Refrigerator Roundup, ERIP, Summer Sweepstakes, peaksaver, and Power Savings Blitz. Preparation of marketing plan, attended community events, and encouraging business associations to promote the programs. Consultant.

Research and data analysis

- State of Arizona Game and Fish Department. Surveyed and monitored breeding success of Endangered Southwestern Willow Flycatchers in the field. Field researcher.
- Ontario Breeding Bird Atlas. Surveyed for breeding birds in remote northern Ontario. Field researcher.
- Guelph Social History Project. Conducted videotaped social history interviews with seniors for the Guelph Civic Museum archives. Social researcher.
- University of Guelph, Math & Statistics Department, College of Physical & Engineering Science. Researched and wrote two



chapters on chlorine exposure and hormones in cow's milk for a new Environmental Risk Assessment textbook. Technical researcher.

- Ontario Ministry of Agriculture and Food. Conducted surveys, data entry and analysis on alternative livestock practices. Project analyst.