



## Jay Shepherd

Professional Corporation  
2200 Yonge Street,  
Suite 1302  
Toronto, Ontario M4S 2C6

### **BY EMAIL and RESS**

February 14, 2016  
Our File No. 20140219

Ontario Energy Board  
2300 Yonge Street  
27<sup>th</sup> Floor  
Toronto, Ontario  
M4P 1E4

### **Attn: Kirsten Walli, Board Secretary**

Dear Ms. Walli:

### **Re: EB-2014-0219 – Capital Recovery Mechanisms – SEC Cost Claim**

We are counsel for the School Energy Coalition. We enclose the cost claim of the School Energy Coalition, on the Board's form and enclosing docket details.

We note that this was a continuation of a previous consultative working group. During the continuation, new instructions as to cost claims were not provided. We have used the previous Board form, and have allocated the additional work as best we could consistent with how the consultation actually unfolded. If further information or allocation is required, please advise and we will do so.

All of which is respectfully submitted.

Yours very truly,  
**JAY SHEPHERD P. C.**

Jay Shepherd

cc: Wayne McNally, SEC (email)  
Interested Parties

**Ontario Energy Board**  
**COST CLAIM FOR CONSULTATIONS**



**Affidavit and Summary of Fees and Disbursements**

This form should be used by a party (defined in the Practice Direction on Cost Awards as including a participant in a consultation process) in a consultation before the Board to identify the fees and disbursements that form the party's cost claim. Paper and electronic copies of this form and itemized receipts must be filed with the Board and served on one or more other parties as directed by the Board in the applicable Board Notice of Hearing for Cost Awards. Please ensure all required fields are filled in and the Affidavit portion is signed and sworn or affirmed.

**Instructions**

- Required data input is indicated by yellow-shaded fields. Formulas are present in the document to assist with the calculation of the cost claim.
- All claims must be in Canadian dollars. If applicable, state exchange rate and country of initial currency.  
Rate: \_\_\_\_\_ Country: \_\_\_\_\_
- A separate "Statement of Disbursements Being Claimed" is required for each consultant or lawyer/articling student/paralegal. However only one "Statement of Fees Being Claimed" and one "Summary of Fees and Disbursements Being Claimed" covering the whole of the party's cost claim should be provided.
- The cost claim must be supported by a completed Affidavit signed by a representative of the party.
- A CV for each consultant must be attached unless, for a given consultant, a CV has been provided to the Board in another process within the last 24 months.
- **Except as provided in section 7.03 of the Practice Direction on Cost Awards, itemized receipts must be provided.**

<b>File # EB-</b>	<b>2014-0219</b>	<b>Process:</b>	<b>Policy Options for Funding Capital Investments</b>
<b>Party:</b>	<b>School Energy Coalition</b>	<b>Affiant's Name:</b>	<b>Jay Shepherd</b>
<b>HST Number:</b>	<b>83673-5464-RT0001</b>	<b>HST Rate Ontario:</b>	<b>13.00%</b>
	Full Registrant <input checked="" type="checkbox"/>	Qualifying Non-Profit	<input type="checkbox"/>
	Unregistered <input type="checkbox"/>	Tax Exempt	<input type="checkbox"/>
	Other <input type="checkbox"/>		

**Affidavit**

I, **Jay Shepherd**, of the City/Town of **Toronto**  
in the Province/State of **Ontario**, swear or affirm that:

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 all of the documentation in support of this cost claim, including the attached "Summary of Fees and Disbursements Being Claimed", "Statement of Fees Being Claimed" and "Statement(s) of Disbursements Being Claimed".
3. The attached "Summary of Fees and Disbursements Being Claimed", "Statement of Fees Being Claimed" and "Statement(s) of Disbursements Being Claimed" include only costs incurred and time spent directly for the purposes of the Party's participation in the Ontario Energy Board process referred to above.
4. This cost claim does not include any costs for work done, or time spent, by a person that is an employee or officer of the Party as described in sections 6.05 and 6.09 of the Board's Practice Direction on Cost Awards.

**Signature of Affiant**

**Sworn or affirmed before me** at the City/Town of **Toronto**,  
in the Province/State of **Ontario**, on **February-17-16**  
(date)

**Ontario Energy Board**  
**COST CLAIM FOR CONSULTATIONS**  
**Affidavit and Summary of Fees and Disbursements**



**Commissioner for taking Affidavits**

**File # EB-** 2014-0219 **Process:** Policy Options for Funding Capital Investments

**Party:** School Energy Coalition

**Summary of Fees and Disbursements Being Claimed**

Legal/consultant fees	\$9,570.00
Disbursements	\$0.00
HST	\$1,244.10
<b>Total Cost Claim</b>	<b>\$10,814.10</b>

**Detail of Fees and Disbursements Being Claimed**

**Statement of Fees Being Claimed**

Statement of Fees being claimed for Eligible Activity is found on the second tab of this workbook.

**Statement(s) of Disbursements Being Claimed**

Statement of Disbursements being claimed is found on the third tab of this workbook.

# Ontario Energy Board

## COST CLAIM FOR CONSULTATIONS

### Affidavit and Summary of Fees and Disbursements



#### Individual Whose Costs are Being Claimed

Name: Jay Shepherd

Counsel/Articling Student/Paralegal: ☒

Consultant: ☐

CV attached: ☐

Completed Years  
Practicing/Years of relevant  
experience

35

CV not required: ☒

Name:

Counsel/Articling Student/Paralegal: ☐

Consultant: ☐

CV attached: ☐

Completed Years  
Practicing/Years of relevant  
experience

CV not required: ☐

Name:

Counsel/Articling Student/Paralegal: ☐

Consultant: ☐

CV attached: ☐

Completed Years  
Practicing/Years of relevant  
experience

CV not required: ☐

Name:

Counsel/Articling Student/Paralegal: ☐

Consultant: ☐

CV attached: ☐

Completed Years  
Practicing/Years of relevant  
experience

CV not required: ☐

Name:

Counsel/Articling Student/Paralegal: ☐

Consultant: ☐

CV attached: ☐

Completed Years  
Practicing/Years of relevant  
experience

CV not required: ☐

**Ontario Energy Board**  
**COST CLAIM FOR CONSULTATIONS**  
**Affidavit and Summary of Fees and Disbursements**

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2014-0219

## Policy Options for Funding Capital Investments

**School Energy Coalition**

13%

**EB-2014-0219**

Eligible Activity ---->	EB-2014-0219					
	Preparation for working group meeting on Capital Funding Mechanisms (up to 10 hours)		Attendance at, and reporting on working group meeting on Capital Funding Mechanisms (up to 10 hours)	Post-meeting work, discussions with staff and other industry participants following the June 25 working group meeting (up to 10 hours)		
Individual Whose Fees are Being	Hourly rate	<i>After 25-June-14</i>	<i>Multiple</i>	<i>After 25-July-14</i>	Subtotal	Total
Jay Shepherd	\$330.00	10.00	9.00	10.00	\$9,570.00	\$10,814.10
					\$0.00	\$0.00
					\$0.00	\$0.00
					\$0.00	\$0.00
					\$0.00	\$0.00

Date	Explanation	Lwyr	Hours
20140919	Review Board report, many emails, re-calculate threshold	JCS	1.4
20150407	Review KPMG report, many emails	JCS	2.8
20150408	Review spreadsheets and model scenario, many emails	JCS	4.5
20150429	Review agenda, review notes re report	JCS	0.5
20150430	Attend at stakeholder meeting, many emails, analysis of issues	JCS	6.8
20150505	Various emails, scheduling	JCS	0.1
20150527	Many emails	JCS	0.1
20150528	Many emails	JCS	0.1
20150603	Review revised material, email Keith	JCS	1.0
20150604	Review new materials	JCS	1.5
20150612	Review meeting materials	JCS	1.0
20150614	Prepare for meeting, various emails, review spreadsheets	JCS	2.6
20150615	Review material, many emails	JCS	1.1
20150622	Review new materials	JCS	1.5
20150623	Review new material, many emails	JCS	1.0
20150625	Review new materials	JCS	1.2
20160122	Initial review of report, Various emails	JCS	0.6
20160125	Review report of the Board, Modelling, Many emails	JCS	1.2
			29.0