



BY EMAIL and RESS

Jay Shepherd
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Direct: 416-804-2767

September 28, 2017
Our File: EB20150040

Ontario Energy Board
2300 Yonge Street
27th Floor
Toronto, Ontario
M4P 1E4

Attn: Kirsten Walli, Board Secretary

Dear Ms. Walli:

Re: EB-2015-0040 – Pension OPEBs Consultation – SEC Cost Claim

We enclose the cost claim for the School Energy Coalition, on the Board's form and including docket details.

Jay Shepherd had carriage of this matter, which included several rounds of submissions, and a stakeholder conference. We have followed the lead of LPMA in including preparation and attendance at the stakeholder conference under Other Conferences. This includes the initial work of research and analysis on the issues. Drafting and finalizing submissions, and reviewing the submissions of others, are included under Argument Preparation.

Time spent by Mark Rubenstein has not been claimed.

All of which is respectfully submitted.

Yours very truly,
Shepherd Rubenstein

A handwritten signature in dark ink, appearing to read "Jay Shepherd", is written over a light blue horizontal line.

Jay Shepherd

cc: Wayne McNally, SEC (by email)
Interested parties (by email)

Ontario Energy Board
COST CLAIM FOR HEARINGS



Affidavit and Summary of Fees and Disbursements

This form should be used by a party to a hearing 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 order. Please ensure all required (yellow-shaded) 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 embedded in the form to assist with calculations.
- All claims must be in Canadian dollars. If applicable, state exchange rate and country of initial currency.
Rate: Country:
- A separate "Detail of Fees and Disbursements Being Claimed" (comprising a "Statement of Fees Being Claimed" and a "Statement of Disbursements Being Claimed") is required for each lawyer, analyst/consultant and articling student/paralegal. However, only one "Summary of Fees and Disbursements" 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/analyst must be attached unless provided to the Board as prescribed on the Cost Award Tariff.

Except as provided in section 7.03 of the Practice Direction on Cost Awards, itemized receipts must be provided.

File # EB- <u>2015-0040</u>	Process: <u>Pension & OPEBs Consultation</u>
Party: <u>School Energy Coalition</u>	Affiant's Name: <u>Jay Shepherd</u>
HST Number: <u>83673-5464-RT0001</u>	HST Rate Ontario: <u>13.00%</u>
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(s) of Fees Being Claimed" and "Statement(s) of Disbursements Being Claimed".
3. The attached "Summary of Fees and Disbursements Being Claimed", "Statement(s) 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 September 28, 2017.
(date)

Commissioner for taking Affidavits

Ontario Energy Board
COST CLAIM FOR HEARINGS



Affidavit and Summary of Fees and Disbursements

File # EB- 2015-0040

Process: Pension & OPEBs Consultation

Party: School Energy Coalition

Summary of Fees and Disbursements Being Claimed

Legal/consultant/other fees	\$	19,800.00
Disbursements	\$	-
HST	\$	2,574.00
Total Cost Claim	\$	22,374.00

Payment Information

Make cheque payable to: Shepherd Rubenstein Professional Corporation, in trust

Send payment to this address: 2200 Yonge Street

Suite 1302

Toronto, Ontario

M4S2C6

Ontario Energy Board

COST CLAIM FOR HEARINGS



Detail of Fees and Disbursements Being Claimed

File # EB- <u>2015-0040</u>	Process: <u>Pension & OPEBs Consultation</u>
Party: <u>School Energy Coalition</u>	Service Provider Name: <u>Jay Shepherd</u>

SERVICE PROVIDER TYPE (check one)	Year Called to Bar	Completed Years Practising/Years of Relevant Experience
Legal Counsel <input checked="" type="checkbox"/>	1980	37
Articling Student/Paralegal <input type="checkbox"/>		
Consultant <input type="checkbox"/>		
Analyst <input type="checkbox"/>		
For Consultant/Analyst: <input type="checkbox"/> CV attached		Hourly Rate: <u>\$330</u>
<input type="checkbox"/> CV provided within previous 24 months		HST Rate Charged (enter %): <u>13.0%</u>

Statement of Fees Being Claimed					
	Hours	Hourly Rate	Subtotal	HST	Total
Pre-hearing Conference					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Technical Conference					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Interrogatories					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Responses		\$ 330.00	\$ -	\$ -	\$ -
Issues Conference					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
ADR - Settlement Conference					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Proposal Preparation		\$ 330.00	\$ -	\$ -	\$ -
Argument					
Preparation	26.6	\$ 330.00	\$ 8,778.00	\$ 1,141.14	\$ 9,919.14
Oral Hearing					
Preparation		\$ 330.00	\$ -	\$ -	\$ -
Attendance		\$ 330.00	\$ -	\$ -	\$ -
Other Conferences					
Preparation	21.4	\$ 330.00	\$ 7,062.00	\$ 918.06	\$ 7,980.06
Attendance	12.0	\$ 330.00	\$ 3,960.00	\$ 514.80	\$ 4,474.80
Case Management		\$ 170.00	\$ -	\$ -	\$ -
TOTAL SERVICE PROVIDER FEES			\$ 19,800.00	\$ 2,574.00	\$ 22,374.00

Ontario Energy Board

COST CLAIM FOR HEARINGS



Detail of Fees and Disbursements Being Claimed

File # EB- 2015-0040

Process: Pension & OPEBs Consultation

Party: School Energy Coalition

Service Provider Name: Jay Shepherd

Statement of Disbursements Being Claimed			
	Net Cost	HST	Total
Scanning/Photocopy			\$ -
Printing		\$ -	\$ -
Courier			\$ -
Telephone/Fax			\$ -
Transcripts			\$ -
Travel: Air			\$ -
Travel: Car			\$ -
Travel: Rail			\$ -
Travel (Other):			\$ -
Parking			\$ -
Taxi			\$ -
Accommodation			\$ -
Meals			\$ -
Other:			\$ -
Other:			\$ -
Other:			\$ -
TOTAL DISBURSEMENTS:	\$ -	\$ -	\$ -

Date	Explanation	Lwyr	Hours
20150514	Review Board letter, meeting with Mark Rubenstein, review past cases	JCS	1.0
20150521	Notice of intervention	JCS	0.2
20150522	emails/review OPG corr fwd to JCS/review SEC letter	MR	0.3
20150522	Review OPG letter, NOI revise and file, draft and file procedural letter, client reporting and query, many emails, telephone call with	JCS	2.2
20150610	emails/review letter	MR	0.2
20150610	Review Board letter and scheduling, review SEP letter	JCS	0.3
20150624	Research, various emails	JCS	1.1
20150628	Meeting with Larry Kaufman	JCS	0.6
20150629	Review US pension issues, email to Larry	JCS	1.3
20150724	Many emails, meeting with Mark Rubenstein	JCS	0.3
20150731	review submissions	MR	2.5
20160518	Various emails	JCS	0.1
20160519	Review letter, Review submissions	JCS	1.3
20160519	emails/prelim review of report	MR	1.5
20160520	Review submissions	JCS	2.0
20160624	Review Board letter and scheduling	JCS	0.3
20160627	Email Jennifer	JCS	0.1
20160712	Various emails	JCS	0.1
20160714	Review studies	JCS	3.0
20160715	Review studies and meeting prep	JCS	3.0
20160717	Review studies and meeting prep	JCS	1.1
20160718	Review presentations	JCS	1.4
20160719	Attend at Stakeholder Forum, Prep	JCS	8.3
20160720	Attend at Stakeholder Forum, Prep, Many emails, Meeting with Mark Rubenstein	JCS	5.7
20160810	Review Board letter and scheduling, Review materials	JCS	2.1
20160818	Many emails	JCS	0.3
20160922	review submissions	MR	0.6
20160922	Review Board materials, Draft submissions, Many emails	JCS	2.0
20160923	Review Board materials, Draft submissions	JCS	4.3
20160924	Finalize and file submissions, Review submissions of others	JCS	6.0
20170518	Review report, Various emails	JCS	1.3
20170616	Draft, revise and file submissions	JCS	5.6
20170616	review SEC sub	MR	0.3
20170623	Review submissions	JCS	3.0
20170914	Review Board report	JCS	2.0
			65.4

Mark
Jay

5.4
60.0