



BY EMAIL and RESS

Jay Shepherd
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Direct: 416-804-2767

October 29, 2019
Our File No. 20150245

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

Attn: Christine Long, Registrar and Board Secretary

Dear Ms. Long;

Re: EB-2015-0245 – DSM Framework – SEC Cost Claim

We are counsel for the School Energy Coalition. We enclose the cost claim of the School Energy Coalition for the period October 1, 2018 to October 11, 2019, on the Board's form and enclosing docket details.

SEC counsel Jay Shepherd attended all but three of the EAC meetings. For the three he missed, we have included only prep time, as his views were expressed by email in each case. The claim includes 2.2 hours relating to prep for a meeting subsequent to the claim period, so it will be claimed in the next cost claim. SEC has not claimed 22.9 hours of Mr. Shepherd's time that exceeded the Board's limits for this work.

All of which is respectfully submitted.

Yours very truly,
SHEPHERD RUBENSTEIN
PROFESSIONAL CORPORATION

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

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.**

File # EB- <u>2015-0245</u>	Process: <u>Evaluation Advisory Committee</u>
Party: <u>School Energy Coalition</u>	Affiant's Name: <u>Mark Rubenstein</u>
HST Number: <u>83673-5464-RT0001</u>	HST Rate Ontario: <u>13.0%</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, Mark Rubenstein, 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 October 29, 2019
(date)

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



Commissioner for taking Affidavits

File # EB- 2015-0245

Process: Evaluation Advisory Committee

Party: School Energy Coalition

Summary of Fees and Disbursements Being Claimed

Legal/consultant fees	\$34,320.00
Disbursements	\$0.00
HST	\$4,461.60
Total Cost Claim	\$38,781.60

Payment Information

Make cheque payable to: Shepherd Rubenstein Professional Corporation in trust

Send payment to this address: 2200 Yonge Street
Suite 1302
Toronto, Ontario
M4S 2C6

Detail of Fees and Disbursements Being Claimed

Statement of Fees Being Claimed

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

Statement(s) of Disbursements Being Claimed

Statement of Disbursements being claimed is found on the fourth 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: <input checked="" type="checkbox"/>	Year Called to Bar: 1980	Completed Years Practicing/Years of Relevant Experience: 39
Analyst/Consultant: <input type="checkbox"/>		
CV attached: <input type="checkbox"/>	CV not required: <input type="checkbox"/>	

Name:		
Counsel/Articling Student/Paralegal: <input type="checkbox"/>	Year Called to Bar:	Completed Years Practicing/Years of relevant experience:
Analyst/Consultant: <input type="checkbox"/>		
CV attached: <input type="checkbox"/>	CV not required: <input type="checkbox"/>	

Name:		
Counsel/Articling Student/Paralegal: <input type="checkbox"/>	Year Called to Bar:	Completed Years Practicing/Years of relevant experience:
Analyst/Consultant: <input type="checkbox"/>		
CV attached: <input type="checkbox"/>	CV not required: <input type="checkbox"/>	

Name:		
Counsel/Articling Student/Paralegal: <input type="checkbox"/>	Year Called to Bar:	Completed Years Practicing/Years of relevant experience:
Analyst/Consultant: <input type="checkbox"/>		
CV attached: <input type="checkbox"/>	CV not required: <input type="checkbox"/>	

Name:		
Counsel/Articling Student/Paralegal: <input type="checkbox"/>	Year Called to Bar:	Completed Years Practicing/Years of relevant experience:
Analyst/Consultant: <input type="checkbox"/>		
CV attached: <input type="checkbox"/>	CV not required: <input type="checkbox"/>	

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



Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



File # EB- 2015-0245

Process #VALUE!

Party School Energy Coalition

HST Rate: 13%

		1	2	3	4
	Activity	2016 TRM Update - Review and Comment	EAC Call - 2016 AV	2017/2018 CPSV FR - RFP Scope of Work - review and comment	EAC Call - 2017/18 CPSV FR SOW
	Date	October 5, 2018	October 10, 2018	November 8, 2018	November 13, 2018
	Hours	<i>Up to 1 hour</i>	<i>Up to 3 hours</i>	<i>Up to 2 hours</i>	<i>Up to 3 hours</i>
Individual Whose Fees are Being Claimed	Hourly rate				
Jay Shepherd	\$330.00	1.00	3.00	2.00	3.00
0					
	Total:	1.00	3.00	2.00	3.00

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



5	6	7	8	9	10
EAC - sub-committee boiler baseline and whole home review	EAC Call - 2017/18 CPSV FR SOW pt.2	Ad hoc - APS Measure Review (Chis Neme ONLY)	C&I Prescriptive: Draft Measure-specific verification reports - review and comment	EAC Call - C&I Prescriptive GRR reports	2017/2018 CPSV - Proposal Review (Bob Wirtshafter ONLY)
November 14, 2018	November 21, 2018	Multiple Dates	January 4, 2019	January 14, 2019	January 15, 2019
<i>Up to 1.5 hours</i>	<i>Up to 3 hours</i>	<i>Up to 30 hours</i>	<i>Up to 2 hours</i>	<i>Up to 3 hours</i>	<i>Up to 8 hours</i>
	3.00		2.00	3.00	
-	3.00		2.00	3.00	-

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



11	12	13	14	15	16
Draft C&I Prescriptive Net Savings Report - review and comment	2018 EC - Proposal Review (Bob Wirtshafter ONLY)	2017/2018 CPSV FR Work Plan - review and comment	EAC Meeting - 2017/2018 CSPV Kick-off	2017/2018 CPSV FR: Gross Sample Design - review and comment	EAC Call - C&I Prescriptive NTG Results
January 25, 2019	February 7, 2019	February 22, 2019	February 28, 2019	March 22, 2019	March 28, 2019
<i>Up to 2 hours</i>	<i>Up to 8 hours</i>	<i>Up to 1.5 hours</i>	<i>Up to 5.25 hours</i>	<i>Up to 2 hours</i>	<i>Up to 3 hours</i>
2.00		1.50	5.25	2.00	3.00
2.00	-	1.50	5.25	2.00	3.00

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



17	18	19	20	21	22
2017/2018 CPSV FR: FR Sample Design - review and comment	EAC Call - FR Sample Design Memo	2017/2018 CPSV FR: FR Interview Guide & Methodology - review and comment	EAC Call - FR Interview Guide and Methodology	C&I Prescriptive: Net Savings Report - review and comment	EAC Call - C&I Prescriptive Draft NTG Report
April 5, 2019	April 9, 2019	April 12, 2019	April 18, 2019	April 26, 2019	May 10, 2019
<i>Up to 2 hours</i>	<i>Up to 3 hours</i>	<i>Up to 2 hours</i>	<i>Up to 3 hours</i>	<i>Up to 2 hours</i>	<i>Up to 3 hours</i>
2.00	3.00	2.00	3.00	2.00	3.00
2.00	3.00	2.00	3.00	2.00	3.00

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



23	24	25	26	27	28
EAC Call - Vendor Survey/Methodology	2017/2018 CPSV FR - Final Participant IDI Probe Guide - Review and Comment	2017 AV - Memo	2017/2018 CPSV FR: Batch 1 Site Reports (15) - review and comment	EAC Call - Site Reports Batch 1	2017/2018 CPSV FR: Batch 2 Site Reports (13) - review and comment
May 22, 2019	May 24, 2019	June 28, 2019	July 12, 2019	July 17, 2019	July 26, 2019
<i>Up to 3 hours</i>	<i>Up to 0.5 hour</i>	<i>Up to 0.25 hour</i>	<i>Up to 3.75 hours</i>	<i>Up to 3 hours</i>	<i>Up to 3.25 hours</i>
3.00	0.50	0.25	3.75	3.00	3.25
3.00	0.50	0.25	3.75	3.00	3.25

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



29	30	31	32	33	34
EAC Call - Site Reports Batch 2	2017/2018 CPSV FR: Batch 3 Site Reports (15) - review and comment	EAC Call - Site Reports Batch 3	2017 AV: Draft Results - Non-Savings Metrics - review and comment	EAC Call - 2017 AV: Draft Results - Non- Savings Metrics	2017/2018 CPSV FR: Batch 4 Site Reports (11) - review and comment
July 31, 2019	August 9, 2019	August 14, 2019	August 16, 2019	August 21, 2019	August 23, 2019
<i>Up to 3 hours</i>	<i>Up to 3.75 hours</i>	<i>Up to 3 hours</i>	<i>Up to 1.5 hours</i>	<i>Up to 3 hours</i>	<i>Up to 2.75 hours</i>
3.00	3.75	1.00	1.50	1.00	2.75
3.00	3.75	1.00	1.50	1.00	2.75

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



35	36	37	38	39	40
EAC Call - Site Reports Batch 4	2017 AV: Draft Results - Non-Custom Savings Metrics	2017/2018 CPSV FR: Batch 5 Site Reports - review and comment	2017 TRM - Draft Updated TRM Measures	EAC Call - Site Reports Batch 5	EAC Call - 2017 AV: Draft Results - Non- Custom Savings Metrics
August 28, 2019	September 6, 2019	September 6, 2019	September 6, 2019	September 11, 2019	September 12, 2019
<i>Up to 3 hours</i>	<i>Up to 1.5 hours</i>	<i>Up to 2.5 hours</i>	<i>Up to 1 hour</i>	<i>Up to 3 hours</i>	<i>Up to 3 hours</i>
1.00	1.50	2.50	1.00	3.00	3.00
1.00	1.50	2.50	1.00	3.00	3.00

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



41	42	43	44	45	46
2017/2018 CPSV FR: FR SOW review	2018 Updated Free Ridership Application - comment	2017/2018 CPSV FR: Batch 6 Site Reports - review and comment	2017 TRM - Draft TRM Work Plan - Review & Comment	EAC Call - Site Reports Batch 6	2017 AV: Draft DSMSI and LRAM Calcs - review and comment
September 13, 2019	September 16, 2019	September 20, 2019	September 25, 2019	September 25, 2019	October 4, 2019
<i>Up to 0.5 hour</i>	<i>Up to 0.5 hour</i>	<i>Up to 3.25 hours</i>	<i>Up to 1 hour</i>	<i>Up to 3 hours</i>	<i>Up to 1 hour</i>
0.50	0.50	3.25	1.00	3.00	1.00
0.50	0.50	3.25	1.00	3.00	1.00

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



47	48	49	50			
2017/2018 CPSV FR: Batch 7 Site Reports - review and comment	EAC Call - Site Reports Batch 7	EAC Call - 2017 AV: Draft DSMSI and LRAM Calcs	2018 AV: Draft Results - non-custom savings metrics - review and comment			
October 4, 2019	October 9, 2019	October 10, 2019	October 11, 2019			
<i>Up to 2.75 hours</i>	<i>Up to 3 hours</i>	<i>Up to 3 hours</i>	<i>Up to 1.5 hours</i>			
				Subtotal	HST	Total
2.75	3.00	3.00	1.50	\$34,320.00	\$4,461.60	\$38,781.60
				\$0.00	\$0.00	\$0.00
				\$0.00	\$0.00	\$0.00
				\$0.00	\$0.00	\$0.00
2.75	3.00	3.00	1.50	\$34,320.00	\$4,461.60	
				Total legal/consultant fees:		\$38,781.60

Date	Explanation	Lwyr	Hours
20181003	Various emails	JCS	0.1
20181005	Many emails	JCS	0.3
20181009	Prep for meeting, Many emails	JCS	0.9
20181010	Attend meeting by conf call, Many emails, Prep	JCS	2.1
20181015	Many emails	JCS	0.2
20181016	Review statement of activities, Many emails	JCS	0.2
20181019	Various emails	JCS	0.1
20181020	Review final verification report	JCS	0.5
20181030	Various emails, Review Board letter and report	JCS	0.4
20181101	Many emails	JCS	0.2
20181105	Many emails and scheduling	JCS	0.4
20181106	Many emails	JCS	0.1
20181107	Many emails	JCS	0.2
20181108	Review SOW and drafting comments, Review comments of others	JCS	2.0
20181109	Comments on statement of work, Many emails, Review comments of others	JCS	1.7
20181112	Prep for meeting	JCS	0.8
20181113	Attend at meeting, Prep, Various emails	JCS	1.3
20181119	Many emails.Review SOW	JCS	0.7
20181120	Complete review and provide comments, edit	JCS	2.0
20181121	Attend meeting, Various emails	JCS	1.2
20181122	Many emails	JCS	0.6
20181123	Many emails, Revising and reviewing SOW	JCS	1.2
20181126	Many emails, Review new wording	JCS	0.4
20181127	Many emails	JCS	0.3
20181203	Many emails	JCS	0.1
20181204	Many emails, Review final SOW	JCS	0.2
20181212	Many emails, Check meeting notes, Review reports	JCS	0.4
20181217	Review reports, Many emails, Review request for services	JCS	1.3
20181227	Review 2017 draft Reports	JCS	2.3
20181228	Comments on 2017 draft reports	JCS	2.9
20190104	Many emails	JCS	0.1
20190105	Many emails	JCS	0.1
20190107	Various emails	JCS	0.1
20190108	Various emails	JCS	0.1
20190114	Memo of suggestions, Many emails, Conf. call meeting	JCS	2.2
20190205	Various emails	JCS	0.1
20190211	Many emails, Review statement of work	JCS	0.5
20190212	Many emails	JCS	0.3
20190213	Many emails	JCS	0.1
20190221	Many emails	JCS	0.4
20190222	Many emails	JCS	0.3
20190226	Many emails, Review comments	JCS	0.5

20190227	Review slides, Many emails	JCS	0.6
20190228	Attend a meeting, Many emails	JCS	4.6
20190304	Many emails	JCS	0.1
20190306	Various emails, Review Jones memo	JCS	0.3
20190309	Review consolidated schedule, Many emails	JCS	0.3
20190311	Many emails, Review Neme comments	JCS	0.3
20190314	Many emails, Scheduling	JCS	0.1
20190315	Many emails, Review sample design memo	JCS	0.6
20190318	Many emails, Review results	JCS	0.4
20190319	Many emails	JCS	0.4
20190320	Many emails	JCS	0.2
20190321	Many emails, Review comments	JCS	0.4
20190322	Many emails	JCS	0.3
20190325	Many emails	JCS	0.6
20190326	Many emails, Review reports	JCS	1.6
20190327	Review 2014 report, Analysis and comments to EAC, Many emails	JCS	2.5
20190328	Attend at meeting, Prep, Many emails	JCS	1.9
20190329	Many emails	JCS	0.2
20190401	Various emails	JCS	0.1
20190404	Many emails	JCS	0.1
20190405	Many emails, Scheduling, Review comments of others	JCS	0.5
20190408	Many emails, Prep for meeting, Review comments on report	JCS	1.0
20190409	Attend at meeting, Many emails, Analysis of issues, Comments on FR memo	JCS	3.6
20190410	Client reporting, Many emails	JCS	0.4
20190411	Many emails	JCS	0.1
20190412	Many emails	JCS	0.3
20190415	Many emails, Review new materials, Revised sample design	JCS	0.4
20190416	Review 2017 Workplan, Review Prescriptive Report, Many emails	JCS	3.3
20190417	Prep for meeting, Many emails, Review of Annual Verification Plan	JCS	2.5
20190418	Attend at meeting, Many emails, Review utility annual reports	JCS	4.5
20190419	Various emails	JCS	0.1
20190422	Download documents, Scheduling, Many emails	JCS	1.0
20190423	Various emails, Continue review of annual reports 2017	JCS	1.1
20190425	Various emails	JCS	0.1
20190430	Review C/I report	JCS	1.6
20190503	Many emails, Review comments of others	JCS	0.4
20190504	Review C/I Report	JCS	1.0
20190505	Comments on C/I prescriptive report	JCS	0.5
20190506	Many emails, Review comments of others	JCS	0.6
20190507	Research	JCS	2.0
20190509	Prep for meeting	JCS	1.8
20190510	Attend at meeting, Many emails	JCS	2.2
20190514	Various emails	JCS	0.1

20190516	Many emails and scheduling	JCS	0.5
20190517	Various emails and scheduling	JCS	0.1
20190521	Prep for meeting	JCS	1.2
20190522	Prep, Attend at meeting	JCS	2.2
20190523	Many emails, Rescheduling	JCS	0.2
20190531	Many emails, Review comments	JCS	0.2
20190603	Various emails	JCS	0.1
20190606	Review and track new schedule	JCS	0.3
20190610	Check schedule	JCS	0.3
20190612	Download C&I Precriptive Report	JCS	0.3
20190620	Various emails and Scheduling	JCS	0.1
20190701	Download and review Batrch 1 Site reports	JCS	0.3
20190708	Review Batch 1, File comments, Review Kesik comments, Many emails	JCS	3.5
20190709	Review Wirtshcafter comments on Batch 1	JCS	0.2
20190710	Review Neme comments on Batch 1	JCS	0.2
20190712	Review Utility comments on Batch 1	JCS	0.3
20190715	Batch 2 - download and initial review, Many emails, Review new Batch 1 material	JCS	0.6
20190716	Review Batch 2, Review Wirtschafter comments, Many emails	JCS	3.0
20190717	Attend at meeting, Many emails	JCS	2.0
20190718	Various emails	JCS	0.1
20190719	Scheduling, Many emails	JCS	0.3
20190720	Batch 2 comments	JCS	1.0
20190722	Review Ted's comments, Review ppt for non-savings metrics	JCS	0.8
20190725	Review Neme comments, Various emails	JCS	0.3
20190726	Batch 3 reports (attempted download), Review Enbridge comments	JCS	0.4
20190729	Various emails	JCS	0.1
20190731	Attend meeting, Many emails, Review Bob's comments on Batch 3	JCS	2.0
20190801	Complete review of Batch 3	JCS	1.0
20190803	Draft, revise and send comments on Batch 3	JCS	2.0
20190804	Review Wirtschafter comments on Batch 3	JCS	0.3
20190805	Review Neme comments on Batch 3	JCS	0.2
20190808	Many emails, Review Ted's Batch 3 comments	JCS	0.4
20190811	Various emails	JCS	0.1
20190813	Various emails, Download Batch 4	JCS	0.4
20190815	Many emails	JCS	0.2
20190817	Review 2017 Verification report, Review Bob's Batch 4 comments, Review Batch 4, Many emails	JCS	2.1
20190819	Complete review of Batch 4, Batch 4 comments	JCS	2.2
20190824	Download Batch 5, Review non-custom powerpoint, Review Enbridge Batch 4, Research	JCS	0.8
20190829	Review Neme comments	JCS	0.3

20190830	Review Kesik comments	JCS	0.2
20190906	Review and comment on Batch 5, Review Enbridge comments, Many emails	JCS	4.1
20190909	Many emails	JCS	0.2
20190911	Attend at meeting, Many emails, Review Bob's Batch 6 comments	JCS	2.2
20190912	Attend at meeting, Many emails, Batch 6 comments	JCS	2.0
20190913	Review scope of work, Many emails	JCS	0.4
20190916	Many emails, Review FR materials, Review Batch 6 comments	JCS	0.7
20190917	Review non-custom savings	JCS	1.0
20190920	Many emails, Review new filings, Review Batch 6 comments	JCS	0.3
20190923	Many emails, Review values	JCS	0.4
20190924	Prep for meeting, Various emails	JCS	0.8
20190925	Attend at meeting, Many emails, Review comments, Review TRM workplan	JCS	2.2
20190927	Many emails	JCS	0.2
20190930	Various emails	JCS	0.1
20191003	Many emails, Review draft calculations	JCS	0.4
20191004	Many emails, Review batch 7, Review comments of others and Enbridge comments on calcs, Research	JCS	2.7
20191005	Finish Batch 7 review, Draft and send comments	JCS	2.2
20191006	Various emails	JCS	0.1
20191007	Review summary of activities	JCS	0.1
20191008	Prep for meeting	JCS	0.7
20191009	Attend at meeting	JCS	1.7
20191010	Various emails	JCS	0.1
20191011	Research on baseline vs. NTG, Many emails, Outline of analytical paper	JCS	1.1
			129.1

Less NTG vs. Baseline included above (in next claim)	2.2
Gross claim	126.9
Actual claim	104.0
Unclaimed hours	22.9