

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 (via Zoom conference),
in the Province/State of Ontario, on June 15 2021
(date)

Commissioner for taking Affidavits

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



File # **EB- 2015-0245**

Process: **Evaluation Advisory Committee**

Party: **School Energy Coalition**

Summary of Fees and Disbursements Being Claimed

Legal/consultant fees	\$25,245.00
Disbursements	\$0.00
HST	\$3,281.85
Total Cost Claim	\$28,526.85

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

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		
	Year Called to Bar	Completed Years Practicing/Years of Relevant Experience
Counsel/Articling Student/Paralegal: <input checked="" type="checkbox"/>	1980	41
Analyst/Consultant: <input type="checkbox"/>		
CV attached: <input type="checkbox"/>	CV not required: <input checked="" type="checkbox"/>	

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

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

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

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



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

File # EB- 2015-0245

Process Evaluation Advisory Committee

Party School Energy Coalition

HST Rate: 13%

Individual Whose Fees are Being Claimed

Hourly Rate

#	Activity	Date	Maximum Hours
1	EAC Call - 2018 AV: Draft Results - non-custom savings metrics	October 16, 2019	4.0
2	2017/18 CPSV/FR - Baseline and NTG Prep	October 18, 2019	3.0
3	EAC Call - CPSV Baseline Discussion	October 23, 2019	3.0
4	2019 CPSV Scope of Work - comment	November 8, 2019	1.0
5	2019 - Additional Evaluation Activities - comment	November 13, 2019	1.0
6	EAC Call - AV - Non-Savings Metrics (2018)	November 13, 2019	3.0
7	2018 Draft TRM Updates - comments	December 1, 2019	1.0
8	EAC Call - AV - DSMSI & LRAM Calculators (2018)	December 4, 2019	1.5
9	2017-2018 Draft CPSV Report - comment	January 16, 2020	4.0
10	2018 Draft Free Ridership Report - comment	January 16, 2020	4.0
11	Procurement Process - 2019 Custom Program Savings Verification - (Kesik-only)	January 20, 2020	4.0
12	EAC In-person Meeting - 2017 & 2018 Results and Reporting Discussion (including prep)	January 28, 2020	13.0
13	2017 & 2018 Annual Verification Report - comment	February 20, 2020	2.0
14	2017-2017 Custom Evaluation Executive Summary - comment	February 28, 2020	1.0
15	2017-2018 Final CPSV Report and 2018 Final Free Ridership Report - comment	February 28, 2020	3.0
16	EAC Call - Final 2017/2018 AV Reports Review & Discussion	March 4, 2020	4.5
17	EAC Call - 2019 Evaluation Options Discussion & Potential COVID-19 Impacts	April 9, 2020	2.0
18	EAC Call - 2017/2018 Evaluation Post-Mortem	April 22, 2020	2.5
19	EAC Call - 2020-21 EMV Activities Discussion	July 7, 2020	2.0
20	2019 AV Scope of Work - comment	July 7, 2020	1.5



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COST CLAIM FOR CONSULTATIONS

21	2019 DSM Evaluation - CPSV Adjustments - comment	July 27, 2020	0.5
22	2019 TRM Workplan - comment	August 10, 2020	0.5
23	Evaluation Calculator - DSMSI, LRAMVA, Cost Effectiveness - comment	August 31, 2020	2.0
24	EAC Call - eTools Walkthrough	September 1, 2020	3.0
25	2019 Draft TRM Updates - comment	September 30, 2020	1.0
26	2020-2021 EM&V Plan Update - comments	October 12, 2020	2.5
27	2019 Annual Verification Report - comments	November 6, 2020	3.0
28	eTools Study Launch - comments	November 10, 2020	2.0
29	EAC Call - 2019 AV Results - Comments	November 16, 2020	3.0
30	IESO EM&V Protocols Update - comments	December 16, 2020	2.5
31	2019 AV Post Mortem Questionnaire - comment	January 11, 2021	1.0
32	eTools Study - Scope of Work	February 5, 2021	2.0
33	EAC Call - eTools Study Scope of Work Discussion	February 24, 2021	2.0
34	eTools Scope of Work Updates - comments	March 11, 2021	1.5
35	EAC Call - EAC Terms of Reference	April 12, 2021	2.0
36	EAC Meeting - eTools Billing Analysis Discussion	April 15, 2021	2.0
37	2020 AV Scope of Work - comment	May 7, 2021	3.0
38	EAC Meeting - eTools Calculator Discussion	May 27, 2021	4.0
			Subtotal
			HST
			Total

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COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



Jay Shepherd
\$ 330.00

Hours Claimed
-
3.0
3.0
1.0
1.0
1.2
1.0
-
4.0
4.0
-
13.0
2.0
1.0
3.0
-
2.0
2.5
2.0
1.5



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COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed

0.5
0.5
2.0
2.3
1.0
2.5
3.0
2.0
3.0
2.5
0.2
1.3
1.5
-
2.0
-
3.0
4.0
\$25,245.00
\$3,281.85
\$28,526.85

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



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



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COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



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COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



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Statement of Fees Being Claimed



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COST CLAIM FOR CONSULTATIONS
Statement of Fees Being Claimed



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



File # EB-	2015-0245	Process:	Evaluation Advisory Committee
Party:	School Energy Coalition		

Name of individual whose disbursements are being claimed:

HST Rate Ontario: 13.0%

	Net Cost	HST	Total
Scanning/Photocopy		\$0.00	\$0.00
Printing		\$0.00	\$0.00
Courier		\$0.00	\$0.00
Telephone/Fax		\$0.00	\$0.00
Transcripts		\$0.00	\$0.00
Travel: Air		\$0.00	\$0.00
Travel: Car		\$0.00	\$0.00
Travel: Rail		\$0.00	\$0.00
Travel (Other):		\$0.00	\$0.00
Parking		\$0.00	\$0.00
Taxi		\$0.00	\$0.00
Accommodation		\$0.00	\$0.00
Meals		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
TOTAL DISBURSEMENTS:	\$0.00	\$0.00	\$0.00

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



File # EB-	2015-0245	Process:	Evaluation Advisory Committee
Party:	School Energy Coalition		

Name of individual whose disbursements are being claimed: 0

HST Rate Ontario: 13.0%

	Net Cost	HST	Total
Scanning/Photocopy		\$0.00	\$0.00
Printing		\$0.00	\$0.00
Courier		\$0.00	\$0.00
Telephone/Fax		\$0.00	\$0.00
Transcripts		\$0.00	\$0.00
Travel: Air		\$0.00	\$0.00
Travel: Car		\$0.00	\$0.00
Travel: Rail		\$0.00	\$0.00
Travel (Other):		\$0.00	\$0.00
Parking		\$0.00	\$0.00
Taxi		\$0.00	\$0.00
Accommodation		\$0.00	\$0.00
Meals		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
TOTAL DISBURSEMENTS:	\$0.00	\$0.00	\$0.00

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



File # EB- <u>2015-0245</u>	Process: <u>Evaluation Advisory Committee</u>
Party: <u>School Energy Coalition</u>	

Name of individual whose disbursements are being claimed:

HST Rate Ontario: 13.0%

	Net Cost	HST	Total
Scanning/Photocopy		\$0.00	\$0.00
Printing		\$0.00	\$0.00
Courier		\$0.00	\$0.00
Telephone/Fax		\$0.00	\$0.00
Transcripts		\$0.00	\$0.00
Travel: Air		\$0.00	\$0.00
Travel: Car		\$0.00	\$0.00
Travel: Rail		\$0.00	\$0.00
Travel (Other):		\$0.00	\$0.00
Parking		\$0.00	\$0.00
Taxi		\$0.00	\$0.00
Accommodation		\$0.00	\$0.00
Meals		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
TOTAL DISBURSEMENTS:			
	\$0.00	\$0.00	\$0.00

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Statement of Disbursements Being Claimed



File # EB- <u>2015-0245</u>	Process: <u>Evaluation Advisory Committee</u>
Party: <u>School Energy Coalition</u>	

Name of individual whose disbursements are being claimed:

HST Rate Ontario: 13.0%

	Net Cost	HST	Total
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Printing		\$0.00	\$0.00
Courier		\$0.00	\$0.00
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Taxi		\$0.00	\$0.00
Accommodation		\$0.00	\$0.00
Meals		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
TOTAL DISBURSEMENTS:			
	\$0.00	\$0.00	\$0.00

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File # EB- <u>2015-0245</u>	Process: <u>Evaluation Advisory Committee</u>
Party: <u>School Energy Coalition</u>	

Name of individual whose disbursements are being claimed:

HST Rate Ontario: 13.0%

	Net Cost	HST	Total
Scanning/Photocopy		\$0.00	\$0.00
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Travel (Other):		\$0.00	\$0.00
Parking		\$0.00	\$0.00
Taxi		\$0.00	\$0.00
Accommodation		\$0.00	\$0.00
Meals		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
Other:		\$0.00	\$0.00
TOTAL DISBURSEMENTS:			
	\$0.00	\$0.00	\$0.00

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