

# EB-2015-0245 : 7 : Robert Wirtshafter

COST CLAIM NUMBER 209	SUBMISSION DEADLINE DATE February 18, 2022	CLAIM STATUS Approved by Finance
EB# EB-2015-0245: Initiatives: Policy Dev, CDM: Ontario Energy Board	OTHER EB#S	PHASE #* 7
INTERVENOR Wirtshafter, Robert; +1 (215) 884-6495 wirtino@comcast.net	INTERVENOR COMPANY* Wirtshafter Associates, Inc., Chatham: Corporation	INTERVENOR TYPE Tax Exempt
HST RATE ONTARIO 0.00	EXCHANGE RATE 0.78	COUNTRY US
HST NUMBER	LATE SUBMISSION ALLOWED No	EXTENSION DEADLINE DATE

## PARTICIPANTS

New	Non-Filing Participant First, Last Name	Filing Participant	Participant Total (\$)	Participant Claim Status
No	,	Wirtshafter, Robert; +1 (215) 884-6495 wirtino@comcast.net	4,207.50	Submitted

## ATTACHMENTS

Attachment	Attachment Date	Participant	Document Type	Claim Type	Import Message
Invoice Wirtshafter Associates Inc 2-16-22.pdf			Invoice		
Robert M Wirtshafter 2 pg.pdf			CV		
EB-2015-0245 Robert Wirtshafter Time Docket 8-1-21 to 12-31-21.pdf			Time Docket		
WIRTS EB-2015-0245 Cost Claim 021620221224.pdf					

TOTAL LEGAL/CONSULTANT/OTHER FEES 4,207.50	TOTAL DISBURSEMENTS 0.00	TOTAL HST 0.00
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TOTAL CLAIM 4,207.50	TOTAL AMOUNT AWARDED
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REASON FOR DISALLOWANCE	REASON FOR DISALLOWANCE - 2	REASON FOR DISALLOWANCE - 3
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MAKE CHEQUE PAYABLE TO  
Wirtshafter Associates, Inc.

SEND PAYMENT TO ADDRESS  
85 Monomessat Way  
Chatham, MA  
02633

ATTENTION  
Robert Wirtshafter

### SUBMIT SECTION

I am a representative of the Party. I have examined all of the documentation in support of this cost claim. The costs incurred and time spent are directly related to the Party's participation in the OEB Process referred to above.

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 section 6.05 and 6.09 of the OEB's Practice Direction on Cost Awards.

The information (fees and disbursements) filed in this cost claim is complete and accurate and in accordance with the OEB's Practice Direction for Cost Awards and Appendix A, the Cost Awards Tariff.

SUBMITTED BY  
Robert M Wirtshafter

DATE SUBMITTED  
February 16, 2022

**Robert Wirtshafter**

<b>CASE</b> EB-2015-0245: Initiatives: Policy Dev, CDM: Ontario Energy Board	<b>COST CLAIM</b> EB-2015-0245 : 7 : Robert Wirtshafter	<b>INTERVENOR NAME</b> Wirtshafter, Robert; +1 (215) 884-6495 wirtino@comcast.net	<b>PARTICIPANT CLAIM STATUS</b> Submitted
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<b>FILING PARTICIPANT</b> Wirtshafter, Robert; +1 (215) 884-6495 wirtino@comcast.net	<b>NEW PARTICIPANT</b> No	<b>NON-FILING PARTICIPANT F. NAME</b>	<b>NON-FILING PARTICIPANT L. NAME</b>
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<b>SERVICE PROVIDER TYPE</b> Consultant	<b>YEAR CALLED TO BAR</b>	<b>COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE</b> 45	<b>HOURLY RATE</b> 330
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<b>CV STATUS (FOR CONSULTANT/ANALYST)</b> CV Attached	<b>LAST CV DATE</b> February 16, 2022	<b>HST RATE CHARGED</b> 0.00
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<b>HEARINGS</b> No	<b>CONSULTATIONS</b> Yes	<b>DISBURSEMENTS</b> No
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# CONSULTATION

<u>Description</u>	<u>Maximum</u>	<u>Hours</u>	<u>Hourly</u>	<u>Sub</u>	<u>HST</u>		
	<u>Hours</u>		<u>Rate</u>	<u>Total</u>	<u>Rate</u>	<u>HST</u>	<u>Total</u>
August 11, 2021 - EGI - Commercial Midstream Process Evaluation RFP - comments	1.00	0.50	330	165.00	0.00		165.00
August 25, 2021 - GIS Data Discussion (Wirtshafter-only)	0.50	0.50	330	165.00	0.00		165.00
August 30, 2021 - 2020 AV - Draft Live Calculator - review and comment	2.00	0.50	330	165.00	0.00		165.00
September 3, 2021 - EAC Call - eTools - Preliminary Results	2.00	1.50	330	495.00	0.00		495.00
September 17, 2021 - 2020 AV - 2020 Metrics Achievement PPT - review and comment	1.00	1.00	330	330.00	0.00		330.00
September 21, 2021 - EAC Call - 2020 AV Metric Achievement	1.50	1.50	330	495.00	0.00		495.00
October 6, 2021 - eTools - Stage 1 Draft Report	2.00	2.00	330	660.00	0.00		660.00
October 18, 2021 - 2020 AV - Draft Report	2.50	1.75	330	577.50	0.00		577.50
November 8, 2021 - EAC Call - 2020 AV Report	1.50	1.50	330	495.00	0.00		495.00
November 22, 2021 - EAC Call - eTools - Phase 1 Discussion	1.50	1.50	330	495.00	0.00		495.00
December 21, 2021 - eTools - Updated Stage 1 Draft Report	1.50	0.50	330	165.00	0.00		165.00
Consultation Total							
Total Legal/Consultant Fees				4,207.50	0.00		4,207.50

## Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
Robert M Wirtshafter 2 pg.pdf	CV	
Invoice Wirtshafter Associates Inc 2-16-22.pdf	Invoice	
EB-2015-0245 Robert Wirtshafter Time Docket 8-1-21 to 12-31-21.pdf	Time Docket	

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**Hearings, Consultations, Disbursements Attachments**

<u>Attachment</u>	<u>Related Disbursement Claim</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
Robert M Wirtshafter 2 pg.pdf		CV	Consultations	
Invoice Wirtshafter Associates Inc 2-16-22.pdf		Invoice	Consultations	
EB-2015-0245 Robert Wirtshafter Time Docket 8-1-21 to 12-31-21.pdf		Time Docket	Consultations	

OEB EB2015-0245 Robert M Wirtshafter August 1, 2021 to December 31, 2 hrs

A2	2	16-Aug midstream process	0.5	
A3	3	25-Aug GIS discussion	0.5	
A4	4	2-Sep OEB verification calc	0.5	
A6	6	2-Sep metric Achievement	1	
A5	5	3-Sep etools Preliminary Results call	1.5	
A7	7	21-Sep OEB annual verification call	1.5	
A10	10	11-Oct etools memo	1.25	
A11	11	14-Oct AV Report	1	
A10	10	21-Oct etools response	0.75	
A11	11	26-Oct annual verification report	0.75	
A12	12	8-Nov 2020 AV Report Call	1.5	
A13	13	22-Nov Etools call	1.5	
A14	14	14-Dec etools comments	0.5	
			12.75	330.00 \$
				4,207.50 \$

## **Robert M Wirtshafter, Ph.D.**

### **PRESENT POSITION**

President, Wirtshafter Associates, Inc., 85 Monomessat Way  
Chatham, MA 02633, 215-884-6495, wirtino@comcast.net

### **EDUCATION**

Ph.D. Geography--Clark University 1979; B.A. Geography--Clark University 1975

### **PROFESSIONAL EXPERIENCE**

Dr. Robert Wirtshafter, President of Wirtshafter Associates, Inc., combines his extensive experience in program design and evaluation with insightful policy development. He has been a thought leader in market transformation efforts for more than 40 years. He was the first to tackle difficult issues such as the utility/solar interface, incentives for energy efficiency, hook-up fees, assessment of standard performance contracting, and design of third-party initiatives. Dr. Wirtshafter began his career as a planner at the Tennessee Valley Authority, where he helped design the first utility-sponsored efficiency and renewable market transformation program and where the cost-effectiveness model he developed for TVA has evolved into the Total Resource Cost (TRC) test commonly used to assess cost effectiveness of DSM programs. As a professor at the University of Pennsylvania he developed the first courses in energy efficiency program planning and evaluation. Dr. Wirtshafter is nationally recognized for crafting some of the field's more insightful and innovative evaluations. He produced the definitive work on hookup fees and pioneered the use of GIS in planning and evaluating energy efficiency programs. Dr. Wirtshafter has broad experience doing large scale efficiency assessments and market transformation in the US, Canada, and China. He has a record of re-engaging large programs to move them towards market transformation. In California in 1998, his evaluation of the Residential Standard Performance Program found a program that was inconsistent with the existing home repair marketplace. His recommendations transformed the program into the Residential Contractor Program that built and supported the home service industry. His numerous evaluations of the Statewide Energy Training Centers redirected these centers from centers who counted attendance into institutions that supported market transformation through effective workforce development. Dr. Wirtshafter is increasingly being asked to assist states as a strategic evaluation adviser. He is the residential evaluation advisor to the Massachusetts EEAC, the Connecticut Energy Efficiency Board, the Ontario Energy Board, and the New Hampshire Public Utility Commission. In the past he was the process, marketing and net-to-gross evaluation coordinator for the Master Evaluation Assistance team overseeing all of NYSERDA's evaluation work; and to the Hawaii PUC..

1994 to Present President, Wirtshafter Associates, Inc.

1980 – 1996 Associate Director Center for Energy and the Environment, Research Associate Professor, City and Regional Planning Department, University of Pennsylvania, Research Associate

1979 – 1980 Policy Planner, Solar Applications Branch, Tennessee Valley Authority, Chattanooga, Tennessee.

### **Selected Projects in Utility Planning and Demand-Side Management**

#### **Advisor to the Massachusetts Energy Efficiency Advisory Council (2009-present)**

Dr. Wirtshafter directs all residential retrofit evaluations performed by the program administrators in Massachusetts. In the last three years alone, he had oversight of a portfolio of programs with expenditures topping \$800 million. He directed and managed more than 50 evaluation studies and an evaluation budget of \$20 million. Many of these studies have been presented at the IEPEC, BECC, ACEEE conferences.

#### **Advisor to the Connecticut Energy Efficiency Board (2016-present), Ontario Energy Board (2012-present), Delaware Energy Efficiency Advisory Council (2015-present), and Adviser to New Hampshire Public Utilities Commission (2018-present)**

Dr. Wirtshafter also provides oversight of market transformation and energy efficiency programs in these states and provinces.

#### **NYSERDA (2006-2015)**

Dr. Wirtshafter was the process, marketing and net-to-gross evaluation coordinator for the Master Evaluation Assistance team overseeing all of NYSERDA's evaluation work. This work involved oversight of all NYSERDA process and market characterization studies and net-to-gross studies. He was also a team member on the process and market effects evaluation team. He led the last three major process and market characterizations of the Multifamily Performance Program, and the Low-Income Weatherization Program. Dr. Wirtshafter developed GIS applications for all of these studies.

#### **Evaluation of California Training Center Programs (SCE 2004-05, CPUC 2007-2009)**

Wirtshafter Associates with subcontractor KEMA performed a series of case study evaluations of Center programs. The study also investigated best practice performance at other adult training centers to help guide the CA centers. Wirtshafter Associates also teamed with ASW to measure the energy savings generated from the HVAC courses that are given at the SCE centers. Dr. Wirtshafter was part of the Opinion Dynamics team that conducted the first statewide impact evaluation of the nine utility-sponsored training centers. Dr. Wirtshafter contributed on all aspects of the project including overall design, development of instructor and participant data collection instruments, and analysis approaches.

#### **Study of Hard-to-Reach Residential Customers in California (SCE 2004-05)**

Wirtshafter Associates used a geographic information system to identify the characteristics of all four California investor owner utilities for all residential rebate programs in 2002-03. The distribution of benefits was assessed relative to predefined characteristics that the CaPUC determined made customers hard to reach.

Dr. Wirtshafter has published 2 books and more than 90 refereed articles, including these on market transformation.

- “Reaching the Most Unreachable: Implications of Deeply Understanding the Truly Hardest-to-Reach,” with L. Schauer, et. al., *2020 ACEEE Summer Study on Energy Efficiency in Buildings*; Asilomar, CA 2020.
- “Comprehensive Research for a Full View of Barriers for Residential Hard-to-Reach Customers,” with T. Dyke-Redmond et. al., *2020 ACEEE Summer Study on Energy Efficiency in Buildings*; Asilomar, CA 2020.
- “Pushing the Market: Measuring Market Effects in Residential New Construction,” with Jared Powell et.al, *2019 International Energy Program Evaluation Conference*, Denver, CO 2019.
- “A Case Study of How a Market Transforming Program Claims Spillover and Market Effects,” with J. Fagan and B Tannenbaum, *2013 International Energy Program Evaluation Conference*, Chicago, IL, 2013.
- “The Regulatory Relationship between Free Ridership and Equity for Public Goods Programs,” *2012 ACEEE Summer Study on Energy Efficiency in Buildings*, Asilomar, CA, 2012.
- “Improved Code Enforcement – a Powerful Policy Tool Lessons Learned from New York State” with B. Harper et. al., *2012 ACEEE Summer Study on Energy Efficiency in Buildings*, Asilomar, CA, 2012.
- “Education and Training Programs: An Evaluation of the Energy Benefits”, with Tami Buhr, et. Al., *2009 International Energy Program Evaluation Conference*, Portland, OR, 2009
- “Strategies for Promoting Innovation through PGC-funded Programs,” with R. Bordner, P Landry, and L Baxter, *2003 International Energy Program Evaluation Conference*, Salt Lake City, 2001
- “Moving the New Construction Baseline? A Regional Approach to Assessing the Market Impacts of the Energy Crafted Home Program”, with C. Gondek, et. al., *Energy Program Evaluation: Uses, Methods, and Results, 1995 International Energy Program Evaluation Conference*, Chicago, August 1995.
- “Rethinking Performance Based Measurement: Implications for Market Transformation Programs” *1999 International Energy Program Evaluation Conference*, Denver, August 1999.
- “Proving Causality in DSM Market Transformation Programs: Issues and Alternatives”, with A. Sorrentino, *Proceedings of American Council for an Energy-Efficient Economy Summer Study Session*, ACEEE, Washington DC, 1994.
- Market Research: The First Essential Step in DSM Market Transformation,” with K. Oswald and A. Sorrentino. *Proceedings of American Council for an Energy-Efficient Economy Summer Study Session*, ACEEE, Washington DC, 1994.
- *On the Economics of Solar Energy: The Public Utility Interface*, with S. L. Feldman, Lexington Books, Lexington, MA 1980.

Wirtshafter Associates, Inc.  
85 Monomessat Way  
Chatham, MA 02633 USA

INVOICE:

February 16, 2022

**Josh Wasylyk**

Senior Advisor | [416.440.7723](tel:416.440.7723) | [OEB.ca](http://OEB.ca)

For Services of Robert M Wirtshafter, Ph.D.  
Related to OEB Evaluation Advisory Committee  
From August 1 to December, 31 2021

OEB EB2015-0245 Robert M Wirtshafter August 1, 2021 to December 31, 2021				hrs	
A2	2	16-Aug	midstream process	0.5	
A3	3	25-Aug	GIS discussion	0.5	
A4	4	2-Sep	OEB verification calc	0.5	
A6	6	2-Sep	metric Achievement	1	
A5	5	3-Sep	etools Preliminary Results call	1.5	
A7	7	21-Sep	OEB annual verification call	1.5	
A10	10	11-Oct	etools memo	1.25	
A11	11	14-Oct	AV Report	1	
A10	10	21-Oct	etools response	0.75	
A11	11	26-Oct	annual verification report	0.75	
A12	12	8-Nov	2020 AV Report Call	1.5	
A13	13	22-Nov	Etools call	1.5	
A14	14	14-Dec	etools comments	0.5	
				12.75	330.00 \$
					4,207.50 \$

Payment in US Dollars