



By EMAIL and Pivotal

Jay Shepherd
jay@shepherdrubenstein.com
Dir. 416-804-2767

December 12, 2023
Our File: 2022-0295

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

Attn: Nancy Marconi, Registrar

Dear Ms. Marconi:

Re: EB-2022-0295 – DSM Stakeholder Advisory Group – SEC Cost Claim

Pursuant to the OEB's letter of November 28, 2023, we enclose the cost claim for the participation by SEC counsel Jay Shepherd on the DSM Stakeholder Advisory Group.

The participation involved twelve meetings from April to October, 2023 inclusive. Mr. Shepherd was not on the subcommittees, and is no longer a member of the EAC. There was some additional work outside of the SAG meetings for review and comment on specific items, which has been claimed in those categories. We have included all dockets for completeness, although not all time has been claimed because of the caps on claimable time.

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: Brian McKay, SEC (by email)
Interested Parties (by email)

EB-2022-0295 : 1 : Glenda Masters

COST CLAIM NUMBER
1793

SUBMISSION DEADLINE DATE
December 12, 2023

CLAIM STATUS
Approved by Finance

EB#
EB-2022-0295: Initiatives: Policy Dev, CDM:
Ontario Energy Board

OTHER EB#S

PHASE #*
1

INTERVENOR
Masters, Glenda; +1 (416) 483-3300
Glenda@shepherdrubenstein.com

INTERVENOR COMPANY*
School Energy Coalition, Toronto:
Corporation

INTERVENOR TYPE
Full Registrant

HST RATE ONTARIO
13.00

EXCHANGE RATE

COUNTRY

HST NUMBER
83673 5464 RT0001

LATE SUBMISSION ALLOWED
Yes

EXTENSION DEADLINE DATE
December 15, 2023

PARTICIPANTS

| <u>New</u> | <u>Non-Filing Participant First, Last Name</u> | <u>Filing Participant</u> | <u>Total (\$)</u> | <u>Total Hours</u> | <u>Participant Claim Status</u> |
|------------|--|---|-------------------|--------------------|---------------------------------|
| No | , | Shepherd, Jay; +1 (416) 804-2767 jay@shepherdrubenstein.co m | 19,193.20 | 51.47 | Submitted |

ATTACHMENTS

| <u>Attachment</u> | <u>Document Type</u> | <u>Import Message</u> |
|--|----------------------|-----------------------|
| SEC EB-2022-0295 Cost Claim 121520231515.pdf | | |
| SEC_CoverLtr_DSM_SAG_20231212.pdf | Cover Letter | |

TOTAL LEGAL/CONSULTANT/OTHER FEES
16,985.10

TOTAL DISBURSEMENTS
0.00

TOTAL HST
2,208.10

TOTAL CLAIM
19,193.20

TOTAL AMOUNT AWARDED

TOTAL HOURS CLAIMED
51.47

TOTAL HOURS DISALLOWED

REASON FOR
DISALLOWANCE

REASON FOR
DISALLOWANCE - 2

REASON FOR
DISALLOWANCE - 3

MAKE CHEQUE PAYABLE TO
Shepherd Rubenstein Professional Corporation, in Trust

SEND PAYMENT TO ADDRESS

ATTENTION

2200 Yonge Street
Suite 1302
Toronto, ON
M4S 2C6

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
Glenda Masters

DATE SUBMITTED
December 15, 2023

| | | | |
|---|--|--|--|
| CASE EB-2022-0295: Initiatives: Policy Dev, CDM: Ontario Energy Board | COST CLAIM EB-2022-0295 : 1 : Glenda Masters | INTERVENOR NAME Masters, Glenda; +1 (416) 483-3300 Glenda@shepherdrubenstein .com | PARTICIPANT CLAIM STATUS Submitted |
| FILING PARTICIPANT Shepherd, Jay; +1 (416) 804-2767 jay@shepherdrubenstein.com | NEW PARTICIPANT No | NON-FILING PARTICIPANT F. NAME | NON-FILING PARTICIPANT L. NAME |
| SERVICE PROVIDER TYPE* Legal Counsel | YEAR CALLED TO BAR* 1980 | COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE* 41 | HOURLY RATE 330 |
| HST RATE CHARGED* 13.00 | CV STATUS (FOR CONSULTANT/ANALYST) CV Required | LAST CV DATE | OVERRIDE HOURLY RATE No |
| HST NUMBER 83673 5464 RT0001 | HEARINGS No | CONSULTATIONS Yes | DISBURSEMENTS No |

CONSULTATION

**Consultation
Hours**
51.47

**Consultations
Subtotal (\$)**
16,985.10

**Consultations
Total Tax (\$)**
2,208.10

**Consultations
Total (\$)**
19,193.20

| <u>Description</u> | <u>Maximum Hours</u> | <u>Hours</u> | <u>Hourly Rate</u> | <u>Sub Total</u> | <u>HST Rate</u> | <u>HST</u> | <u>Total</u> |
|---|--------------------------|--------------|------------------------|------------------|-----------------|------------|--------------|
| 1 April 11/23 - SAG Meeting #1 | 5.00 | 5.00 | 330 | 1,650.00 | 13.00 | 214.50 | 1,864.50 |
| 2 April 26/23 - SAG Meeting #2 | 5.00 | 4.30 | 330 | 1,419.00 | 13.00 | 184.47 | 1,603.47 |
| 3 May 12/23 - SAG Meeting #3 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |
| 4 May 19/23 - SAG Sub-Committee Meeting: Industrial Measure Characterization #1 | 1.50 | | 330 | | 13.00 | | |
| 5 May 19/23 - SAG Sub-Committee Meeting: Residential Measure Characterization #1 | 2.25 | | 330 | | 13.00 | | |
| 6 May 23/23 - Review and Comment: Residential Sub-Committee - Preliminary | 1.00 | | 330 | | 13.00 | | |
| 7 May 24/23 - SAG Meeting #4 | 4.13 | 4.12 | 330 | 1,359.60 | 13.00 | 176.75 | 1,536.35 |
| 8 May 26/23 - SAG Sub-Committee Meeting: Commercial Measure Characterization | 1.50 | | 330 | | 13.00 | | |
| 9 May 26/23 - Review and Comment: Commercial Sub-Committee - Measure List | 1.00 | | 330 | | 13.00 | | |
| 10 May 26/23 - Review and Comment: Industrial Sub-Committee - Measure List and Definitions (1st Round) | 1.00 | | 330 | | 13.00 | | |
| 11 June 2/23 - SAG Sub-Committee Meeting: Residential Measure Characterization #2 | 1.50 | | 330 | | 13.00 | | |
| 12 June 2/23 - SAG Sub-Committee Meeting: Industrial Measure Characterization #2 | 1.50 | | 330 | | 13.00 | | |
| 13 June 7/23 - Review and Comment: Residential Sub-Committee - Measure List and Definitions (1st Round) | 1.00 | | 330 | | 13.00 | | |
| 14 June 8/23 - SAG Meeting #5 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |
| 15 June 9/23 - SAG Sub-Committee Meeting: Commercial Measure Characterization #2 | 1.50 | | 330 | | 13.00 | | |
| 16 June 13/23 - Review and Comment: Commercial Sub-Committee - Measure List and Definitions (2nd Round) | 0.50 | 0.50 | 330 | 165.00 | 13.00 | 21.45 | 186.45 |
| 17 June 13/23 - Review and Comment: Industrial Sub-Committee - Measure List and Definitions (2nd Round) | 0.50 | | 330 | | 13.00 | | |
| 18 June 16/23 - SAG Sub-Committee Meeting: Residential Measure Characterization #3 | 1.50 | | 330 | | 13.00 | | |
| 19 June 16/23 - SAG Sub-Committee Meeting: Industrial Measure Characterization #3 | 1.50 | | 330 | | 13.00 | | |
| 20 June 22/23 - SAG Meeting #6 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |
| 21 June 22/23 - Review and Comment: Commercial Sub-Committee - Measure List and Definitions (3rd Round) | 0.50 | | 330 | | 13.00 | | |
| 22 June 23/23 - SAG Sub-Committee Meeting: Commercial Measure Characterization #3 | 1.50 | | 330 | | 13.00 | | |

| | <u>Description</u> | <u>Maximum Hours</u> | <u>Hours</u> | <u>Hourly Rate</u> | <u>Sub Total</u> | <u>HST Rate</u> | <u>HST</u> | <u>Total</u> |
|----|---|--------------------------|--------------|------------------------|------------------|-----------------|------------|--------------|
| 23 | Jul 6/23 - Review and Comment: Residential Sub-Committee - Measure List and Definitions (2nd Round) | 1.00 | | 330 | | 13.00 | | |
| 24 | Jul 6/23 - Review and Comment: Commercial Sub-Committee - Measure List and Definitions (4th Round) | 0.50 | | 330 | | 13.00 | | |
| 25 | Jul 7/23 - Review/Comment: Industrial Sub-Committee - Measure Savings and Costs Batch #1 (1st Round) | 1.00 | | 330 | | 13.00 | | |
| 26 | Jul 14/23 - SAG Sub-Committee Meeting: Industrial Savings Example | 0.50 | | 330 | | 13.00 | | |
| 27 | Jul 19/23 - Review and Comment: Industrial Sub-Committee - Measure Savings Example | 0.50 | | 330 | | 13.00 | | |
| 28 | Jul 24/23 - Review/Comment: Residential Sub-Committee - Measure Savings & Costs Batch #1 (1st Round) | 1.00 | | 330 | | 13.00 | | |
| 29 | Jul 26/23 - SAG Meeting #7 | 3.00 | 3.00 | 330 | 990.00 | 13.00 | 128.70 | 1,118.70 |
| 30 | Aug 1/23 - Review/Comment: Residential Sub-Committee - Measure Savings & Costs Batch #2 (1st Round) | 1.00 | | 330 | | 13.00 | | |
| 31 | Aug 2/23 - Reviw/Comment: Commercial Sub-Committee - Measure List & Definitions (5th Round) | 1.00 | 0.80 | 330 | 264.00 | 13.00 | 34.32 | 298.32 |
| 32 | Aug 14/23 - Review/Comment: Commercial Sub-Committee - Measure Savings & Costs Batch #1 (1st Round) | 1.00 | | 330 | | 13.00 | | |
| 33 | Aug 15/23 - Review and Comment: APS Incentive Approach | 1.00 | | 330 | | 13.00 | | |
| 34 | Aug 17/23 - SAG Meeting #8 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |
| 35 | Aug 23/23 - Review and Comment: APS Base Year Disaggregation & Reference Forecast | 1.00 | | 330 | | 13.00 | | |
| 36 | Aug 23/23: Review/Comment: Industrial Sub-Committee - Measure Savings & Costs Batch #1 (2nd Round) | 0.50 | 0.50 | 330 | 165.00 | 13.00 | 21.45 | 186.45 |
| 37 | Aug 29/23: Review/Comment: Commercial Sub-Committee - Measure Savings and Costs Batch #1 (2nd Round) | 1.00 | 1.00 | 330 | 330.00 | 13.00 | 42.90 | 372.90 |
| 38 | Sept 5/23: Review and Comment: Industrial Sub-Committee - Measure Savings & Costs Batch #2 | 1.00 | | 330 | | 13.00 | | |
| 39 | Sept 9/23: Review and Comment: APS Avoided Costs | 1.00 | | 330 | | 13.00 | | |
| 40 | Sept 14/23: SAG Meeting #9 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |
| 41 | Sept 21/23: Review/Comment: Residential Sub-Committee - Measure Savings & Costs Batch #2 (2nd Round) | 1.50 | | 330 | | 13.00 | | |
| 42 | Sept 28/23: SAG Meeting #10 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |
| 43 | Oct 12/23: SAG Meeting #11 | 1.50 | 1.50 | 330 | 495.00 | 13.00 | 64.35 | 559.35 |
| 44 | Oct 18/23: Review and Comment: DSM Framework Considerations | 1.50 | 1.50 | 330 | 495.00 | 13.00 | 64.35 | 559.35 |
| 45 | Oct 23/23: Review/Comment:SAG Sub-Committee: Industrial:Savings,Applicability,Tech & Econ Potential | 2.50 | 1.50 | 330 | 495.00 | 13.00 | 64.35 | 559.35 |
| 46 | Oct 25/23: SAG Sub-Committee Meeting: Measure Characterization Applicability Tutorial | 2.25 | | 330 | | 13.00 | | |
| 47 | Oct 26/23: SAG Meeting #12 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |

| | <u>Description</u> | <u>Maximum Hours</u> | <u>Hours</u> | <u>Hourly Rate</u> | <u>Sub Total</u> | <u>HST Rate</u> | <u>HST</u> | <u>Total</u> |
|----|--|--------------------------|--------------|------------------------|------------------|-----------------|----------------|------------------|
| 48 | Oct 27/23: Review and Comment: DSM Framework Considerations | 1.50 | 1.50 | 330 | 495.00 | 13.00 | 64.35 | 559.35 |
| 49 | Appendix B: Jul 10/23: EAC Meeting #1 | 1.50 | | 330 | | 13.00 | | |
| 50 | Appendix B: Jun 12/23: Review and Comment - EGI Industrial Process Evaluation Report | 1.50 | | 330 | | 13.00 | | |
| 51 | Appendix B: Jun 20/23: Review and Comment - 2022 Annual Verification Work Plan | 1.00 | | 330 | | 13.00 | | |
| 52 | Appendix B: Aug 3/23: EAC Meeting #2 | 1.50 | | 330 | | 13.00 | | |
| 53 | Appendix B: Aug 4/23: Review and Comment - FR Scope of Work #1 | 2.00 | | 330 | | 13.00 | | |
| 54 | Appendix B: Aug 25/23: Review and Comment - 2023-2025 EMV Plan | 2.00 | | 330 | | 13.00 | | |
| 55 | Appendix B: Sept 13/23: EAC Meeting #3 | 2.25 | | 330 | | 13.00 | | |
| 56 | Appendix B: Sept 22/23: EAC Meeting #4 | 3.00 | | 330 | | 13.00 | | |
| 57 | Appendix B: Sept 27/23: Review and Comment - TRM Workplan | 1.00 | | 330 | | 13.00 | | |
| 58 | Appendix B: Sept 29/23: Review and Comment - CPSV Scope of Work | 1.50 | | 330 | | 13.00 | | |
| 59 | Appendix B: Oct 11/23: Review and Comment - Interview Guides, FR Scope of Work #2 | 2.00 | | 330 | | 13.00 | | |
| 60 | Appendix B: Oct 13/23: Review and Comment - FR Sample Design, Advance Letter | 1.00 | | 330 | | 13.00 | | |
| 61 | Appendix B: Oct 24/23: EAC Meeting #5 | 2.25 | | 330 | | 13.00 | | |
| | Total Legal/Consultant Fees | | 51.47 | | 16,985.10 | | .208.10 | 19,193.20 |

Attachments

Attachment

SEC_Dockets_DSM_SAG_20231212
Revised.pdf

Document Type

Time Docket

Import Message

Hearings, Consultations, Disbursements Attachments

Attachment

SEC_Dockets_DSM_SAG_20231212
Revised.pdf

Document Type

Time Docket

Claim Type

Consultations

Import Message

| Date | Explanation | Lwyr | Hours |
|----------|--|------|-------|
| 20221208 | Review OEB letter, Many emails from others | JCS | 0.3 |
| 20221210 | Many emails | JCS | 0.2 |
| 20230109 | Letter, Review and edit information, Many emails | JCS | 1.2 |
| 20230110 | Review nominations | JCS | 0.5 |
| 20230301 | Review OEB letter, Many emails | JCS | 0.2 |
| 20230309 | Scheduling, Many emails | JCS | 0.1 |
| 20230315 | Many emails with other SAG memebbers | JCS | 0.2 |
| 20230317 | Various emails | JCS | 0.1 |
| 20230322 | Meet with OEB Staff | JCS | 0.5 |
| 20230328 | Many emails, Review meeting materials | JCS | 0.2 |
| 20230329 | Many emails, Comments on Declaration and Undertaking | JCS | 0.5 |
| 20230406 | Review meeting materials, Various emails | JCS | 0.5 |
| 20230410 | Client reporting | JCS | 0.3 |
| 20230411 | Attend at meeting, Prep, Many emails, Review materials from Ted | JCS | 3.5 |
| 20230412 | Many emails | JCS | 0.1 |
| 20230414 | Many emails | JCS | 0.1 |
| 20230420 | Review meeting materials, Many emails | JCS | 0.5 |
| 20230421 | Telephone conversation with Josh, Many emails | JCS | 0.4 |
| 20230426 | Attend at meeting, Prep, Many emails | JCS | 2.2 |
| 20230427 | Various emails and scheduling | JCS | 0.1 |
| 20230501 | Many emails and scheduling | JCS | 0.3 |
| 20230508 | Review comment matrix, Final study plan | JCS | 0.7 |
| 20230509 | Many emails, Initial review of meeting materials | JCS | 0.6 |
| 20230511 | Prep for meeting | JCS | 1.1 |
| 20230512 | Attend at meeting, Many emails, Written comments on ToR, Call with Josh | JCS | 3.6 |
| 20230516 | Many emails | JCS | 0.1 |
| 20230518 | Many emails | JCS | 0.1 |
| 20230519 | Review agenda and minutes | JCS | 0.1 |
| 20230522 | Various emails | JCS | 0.1 |
| 20230523 | Prep for meeting, Review materials, Many emails | JCS | 1.2 |
| 20230524 | Attend meeting, Many emails | JCS | 2.6 |
| 20230525 | Various emails | JCS | 0.1 |
| 20230602 | Review meeting notes, Detailed comments, Scheduling | JCS | 0.6 |
| 20230607 | Prep for meeting, Review references | JCS | 0.8 |
| 20230608 | Attend meeting, Prep | JCS | 2.8 |
| 20230609 | Review Bob's analysis, Various emails | JCS | 0.3 |
| 20230619 | Prep for meeting, Review progress reports, Various emails | JCS | 1 |
| 20230620 | Various emails, Review CER document from Ted | JCS | 1 |
| 20230621 | Many emails, Review Wyatt, Neme and Weaver materials, Prep for meeting | JCS | 1.5 |
| 20230622 | Attend meeting, Many emails, Prep, Review Guidehouse responses | JCS | 2.8 |
| 20230623 | Review heat pump study, Many emails, Input on R&D plan, Telephone call with Josh | JCS | 2.5 |
| 20230626 | Review Ted's comments, Review final TOR | JCS | 0.6 |

| | | | |
|----------|---|-----|------|
| 20230628 | Reveiw meeting notes, Various emails | JCS | 0.4 |
| 20230704 | Review comments from Erica | JCS | 0.2 |
| 20230717 | Many emails | JCS | 0.2 |
| 20230718 | Many emails and rescheduling | JCS | 0.1 |
| 20230726 | Attend at meeting, Prep, Many emails | JCS | 2.5 |
| 20230727 | Many emails, Review response matrix | JCS | 0.8 |
| 20230801 | Many emails, Review commercial response matrix | JCS | 0.8 |
| 20230802 | Many emails | JCS | 0.2 |
| 20230803 | Many emails | JCS | 0.2 |
| 20230809 | Initial review of package, Various emails | JCS | 0.1 |
| 20230810 | Review draft minutes | JCS | 0.5 |
| 20230815 | Review slide deck, Various emails | JCS | 0.5 |
| 20230816 | Many emails | JCS | 0.4 |
| 20230817 | Meeting, Many emails | JCS | 2 |
| 20230818 | Many emails | JCS | 0.1 |
| 20230821 | Review response matrix, Various emails | JCS | 0.8 |
| 20230829 | Review new materials | JCS | 0.5 |
| 20230830 | Review response matrix | JCS | 1 |
| 20230906 | Many emails | JCS | 0.2 |
| 20230907 | Many emails | JCS | 0.2 |
| 20230909 | Review agenda and materials | JCS | 0.4 |
| 20230912 | Various emails | JCS | 0.1 |
| 20230914 | Prep for meeting, Attend meeting, Many emails | JCS | 3 |
| 20230921 | Many emails | JCS | 0.4 |
| 20230926 | Many emails, Review meeting notes and responses | JCS | 0.5 |
| 20230927 | Many emails | JCS | 0.2 |
| 20230928 | Attend meeting, Prep, Many emails | JCS | 3.3 |
| 20230929 | Many emails | JCS | 0.1 |
| 20231003 | Meet with Chris Humphries re SAG scope | JCS | 0.5 |
| 20231006 | Review meeting notes | JCS | 0.3 |
| 20231011 | Initial review of meeting materials | JCS | 0.1 |
| 20231012 | Prep for meeting, Attend meeting, Many emails | JCS | 4.2 |
| 20231013 | Many emails | JCS | 0.1 |
| 20231015 | Various emails | JCS | 0.1 |
| 20231016 | Various emails | JCS | 0.1 |
| 20231018 | Review Framework | JCS | 0.5 |
| 20231019 | Review Framework and Staff comments, Review prior annual reports and EMV reports, Start spreadsheet, Various emails, Review meeting notes | JCS | 2 |
| 20231020 | Draft Framework comments, Revise and send | JCS | 2 |
| 20231023 | Review Ted's comments | JCS | 0.2 |
| 20231024 | Review comments from other memebbers, Many emails | JCS | 0.6 |
| 20231025 | Review comments from other memebbers, Many emails | JCS | 1.1 |
| 20231026 | Attend meeting, Many emails, Review Enbridge comments | JCS | 2.7 |
| | | | 70.4 |