

EB-2022-0295 : 2 : Glenda Masters

COST CLAIM NUMBER
2261

SUBMISSION DEADLINE DATE
July 22, 2024

CLAIM STATUS
Approved by Finance

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

OTHER EB#S

PHASE #*
2

INTERVENOR
Masters, Glenda; +1 (416) 483-3300
Glenda@shepherd rubenstein.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
No

EXTENSION DEADLINE DATE

PARTICIPANTS

| | | | Total (\$) | Total Hours | Participant Claim Status |
|-----|---|---|------------|-------------|--------------------------|
| New | Non-Filing Participant First, Last Name | Filing Participant | | | |
| No | , | Shepherd, Jay; +1 (416) 804-2767 jay@shepherd rubenstein.com | 13,312.55 | 35.70 | Submitted |

ATTACHMENTS

| Attachment | Document Type | Import Message |
|--|---------------|----------------|
| SEC EB-2022-0295 Cost Claim 072220241718.pdf | | |

TOTAL LEGAL/CONSULTANT/OTHER FEES
11,781.00

TOTAL DISBURSEMENTS
0.00

TOTAL HST
1,531.55

TOTAL CLAIM
13,312.55

TOTAL AMOUNT AWARDED

TOTAL HOURS CLAIMED
35.70

TOTAL HOURS DISALLOWED

REASON FOR
DISALLOWANCE

REASON FOR
DISALLOWANCE - 2

REASON FOR
DISALLOWANCE - 3

MAKE CHEQUE PAYABLE TO
Shepherd Rubenstein Professional Corporation, inTrust

SEND PAYMENT TO ADDRESS
2200 Yonge Street
Suite 1302
Toronto, ON
M4S 2C6

ATTENTION

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
July 22, 2024

| | | | |
|---|--|--|--|
| CASE EB-2022-0295: Initiatives: Policy Dev, CDM: Ontario Energy Board | COST CLAIM EB-2022-0295 : 2 : 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 | | Consultations | | Consultations | | Consultations | |
|--------------|--|---------------|--|----------------|--|---------------|--|
| Hours | | Subtotal (\$) | | Total Tax (\$) | | Total (\$) | |
| 35.70 | | 11,781.00 | | 1,531.55 | | 13,312.55 | |

| Description | Maximum Hours | Hours | Hourly Rate | Sub Total | HST Rate | HST | Total |
|---|------------------|-------|----------------|-----------|----------|--------|----------|
| 1 SAG Meeting #13 - November 9, 2023 | 3.75 | 3.75 | 330 | 1,237.50 | 13.00 | 160.88 | 1,398.38 |
| 2 Meeting with OEB Staff and Guidehouse on Achievable Potential Study (APS) scenarios - Nov 13 2023 | 0.75 | | 330 | | 13.00 | | |
| 3 APS Sub Committee Meeting OEB APS - Residential Measure Characterization Sub-Committee - Nov 16 2023 | 3.00 | | 330 | | 13.00 | | |
| 4 APS Sub Committee Meeting: OEB APS - Industrial Measure Characterization Sub-Committee - Nov 16 2023 | 4.50 | | 330 | | 13.00 | | |
| 5 APS Sub Committee Meeting OEB APS - Residential Measure Characterization Sub-Committee - Nov 17 2023 | 4.50 | | 330 | | 13.00 | | |
| 6 APS Sub Committee Meeting: Commercial Measure Characterization Tutorial - November 17, 2023 | 0.75 | | 330 | | 13.00 | | |
| 7 Review and Comment: OEB APS - Incentive Application Memo - November 17, 2023 | 0.50 | 0.50 | 330 | 165.00 | 13.00 | 21.45 | 186.45 |
| 8 SAG Meeting #14 - November 28, 2023 | 2.25 | 2.25 | 330 | 742.50 | 13.00 | 96.53 | 839.03 |
| 9 Review and Comment: OEB APS Commercial Measure Characterization: Applicability Factors - Dec 1 2023 | 4.50 | | 330 | | 13.00 | | |
| 10 APS Sub Committee Meeting: Scenario Finalization - December 4, 2023 | 1.50 | | 330 | | 13.00 | | |
| 11 Review and Comment: SAG call with Guidehouse on APS Technical/Economic potentials - Dec 5 2023 | 1.50 | | 330 | | 13.00 | | |
| 12 SAG Meeting #15 - December 7, 2023 | 4.50 | 4.20 | 330 | 1,386.00 | 13.00 | 180.18 | 1,566.18 |
| 13 Touch Point Call: APS call with OEB Staff - December 14, 2023 | 0.75 | | 330 | | 13.00 | | |
| 14 APS Sub Committee Meeting: Technical/Economic Potential Review Meeting #1 - December 19, 2023 | 4.00 | 3.00 | 330 | 990.00 | 13.00 | 128.70 | 1,118.70 |
| 15 SAG Meeting #16 - December 21, 2023 | 5.25 | 5.25 | 330 | 1,732.50 | 13.00 | 225.23 | 1,957.73 |
| 16 Review/Comment Responding to Guidehouse heat pump characterizations & follow-up meeting -Dec 22 2023 | 0.75 | 0.75 | 330 | 247.50 | 13.00 | 32.18 | 279.68 |
| 17 APS Sub Committee Meeting: Technical/Economic Potential Review Meeting #2 - January 12, 2024 | 6.00 | | 330 | | 13.00 | | |
| 18 Review and Comment: OEB APS - Technical/Economic Potential Discussion Follow-Up - January 17, 2024 | 2.00 | | 330 | | 13.00 | | |
| 19 SAG Meeting #17 - January 18, 2024 | 4.50 | 4.50 | 330 | 1,485.00 | 13.00 | 193.05 | 1,678.05 |

| | <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> |
|----|--|--------------------------|--------------|------------------------|------------------|-----------------|------------|--------------|
| 20 | Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 1 - Jan 19 2024 | 4.00 | | 330 | | 13.00 | | |
| 21 | Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 2 - Jan 23 2024 | 4.00 | | 330 | | 13.00 | | |
| 22 | Review and Comment: OEB APS - Draft Industrial Achievable Potential Results - January 24, 2024 | 6.00 | | 330 | | 13.00 | | |
| 23 | APS Sub Committee Meeting: Industrial Achievable Roll-Out - January 26, 2024 | 1.00 | | 330 | | 13.00 | | |
| 24 | Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 3 - Jan 28 2023 | 4.00 | | 330 | | 13.00 | | |
| 25 | SAG Meeting #18 - February 1, 2024 | 1.50 | 1.50 | 330 | 495.00 | 13.00 | 64.35 | 559.35 |
| 26 | APS Sub Committee Meeting: Technical/Economic Potential Review Meeting #3 - February 7, 2024 | 4.00 | | 330 | | 13.00 | | |
| 27 | APS Sub Committee Meeting: Sensitivity Analysis Planning - February 7, 2024 | 1.50 | | 330 | | 13.00 | | |
| 28 | APS Sub Committee Meeting: Commercial Coefficient of Performance - February 9, 2024 | 1.50 | | 330 | | 13.00 | | |
| 29 | Touch Point Call with OEB Staff and Enbridge Gas, Inc. on sensitivity scenarios - February 9, 2024 | 0.75 | | 330 | | 13.00 | | |
| 30 | Review/Comment: Residential & Commercial Technical/Economic Comment Response Round 4 - Feb 13 2024 | 3.00 | | 330 | | 13.00 | | |
| 31 | Review and Comment: APS - Technical Suitability of Commercial Heat Pumps - Feb 28 2024 | 3.00 | | 330 | | 13.00 | | |
| 32 | APS Sub-Committee Meeting: Residential Achievable Roll-Out - March 1, 2024 | 0.50 | | 330 | | 13.00 | | |
| 33 | Review and Comment: OEB APS - Sensitivity Analysis Proposal - March 4, 2024 | 0.50 | | 330 | | 13.00 | | |
| 34 | Meeting: On Sensitivity Scenarios - March 12, 2024 | 1.50 | | 330 | | 13.00 | | |
| 35 | SAG Meeting #19 - March 14, 2024 | 1.50 | 1.50 | 330 | 495.00 | 13.00 | 64.35 | 559.35 |
| 36 | Review and Comment: APS Data Walkthrough - March 14, 2024 | 1.00 | 1.00 | 330 | 330.00 | 13.00 | 42.90 | 372.90 |
| 37 | Review and Comment: OEB APS - First Draft Residential Achievable Results - March 14, 2024 | 6.00 | | 330 | | 13.00 | | |
| 38 | Review: OEB APS - Payback Acceptance Curves - March 18, 2024 | 0.50 | | 330 | | 13.00 | | |
| 39 | Meeting: Enbridge Gas, Inc Intervenor Session - March 26, 2024 | 3.00 | 3.00 | 330 | 990.00 | 13.00 | 128.70 | 1,118.70 |
| 40 | SAG Meeting #20 - March 28, 2024 | 4.50 | 4.50 | 330 | 1,485.00 | 13.00 | 193.05 | 1,678.05 |
| 41 | Review and Comment: OEB APS - Residential Achievable Comment Disposition - March 28, 2024 | 3.00 | | 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> |
|----|--|--------------------------|--------------|------------------------|------------------|-----------------|------------|--------------|
| 42 | Review and Comment: OEB APS - Draft Commercial Achievable Potential Results - March 28, 2024 | 6.00 | | 330 | | 13.00 | | |
| 43 | Review and Comment: OEB APS - Commercial Achievable Potential Intro - April 5, 2024 | 1.00 | | 330 | | 13.00 | | |
| 44 | Review and Comment: OEB APS - Commercial Hybrid Air Sourced Heat Pumps - April 11, 2024 | 1.50 | | 330 | | 13.00 | | |
| 45 | Review/Comment: OEB APS - Second Draft Residential Achievable Results for Review - April 16, 2024 | 3.00 | | 330 | | 13.00 | | |
| 46 | SAG Meeting #21 - April 18, 2024 | 3.75 | | 330 | | 13.00 | | |
| 47 | Review and Comment: OEB APS - Commercial Achievable Potential - April 18, 2024 | 4.00 | | 330 | | 13.00 | | |
| 48 | EAC Meeting #7 - November 6, 2023 | 2.25 | | 330 | | 13.00 | | |
| 49 | EAC Meeting #8 - November 14, 2023 | 3.50 | | 330 | | 13.00 | | |
| 50 | Review and Comment: Custom Sample Design Memos - November 22, 2023 | 1.50 | | 330 | | 13.00 | | |
| 51 | Review and Comment: Draft Technical Resource Manual (TRM) measures 1st Round - November 30, 2023 | 1.00 | | 330 | | 13.00 | | |
| 52 | Review and Comment: Draft TRM measures, 1st Round continued - December 6, 2023 | 1.00 | | 330 | | 13.00 | | |
| 53 | EAC Meeting #9 - December 12, 2023 | 2.50 | | 330 | | 13.00 | | |
| 54 | Review and Comment: 2022 Annual Verification Draft Report - Portion 1 - December 18, 2023 | 2.00 | | 330 | | 13.00 | | |
| 55 | Review and Comment: Residential Adaptive Thermostat Process Evaluation proposal - December 21, 2023 | 2.00 | | 330 | | 13.00 | | |
| 56 | EAC Meeting #10 - January 16, 2024 | 2.50 | | 330 | | 13.00 | | |
| 57 | Review and Comment: eTools Adjustment Factor - Draft Memo - January 31, 2024 | 1.50 | | 330 | | 13.00 | | |
| 58 | Review and Comment: TRM Review 2nd Round - February 1, 2024 | 1.00 | | 330 | | 13.00 | | |
| 59 | Review/Comment: 2022 Annual Verification Draft Report - Complete Draft (Post eTools) - Feb 14 2024 | 1.00 | | 330 | | 13.00 | | |
| 60 | Review and Comment: Spillover Scope of Work Draft - February 14, 2024 | 4.00 | | 330 | | 13.00 | | |
| 61 | Review and Comment: EAC Delphi panel proposal - February 15, 2024 | 1.50 | | 330 | | 13.00 | | |
| 62 | EAC Meeting #11 - February 27, 2024 | 2.25 | | 330 | | 13.00 | | |
| 63 | Review and Comment: Process evaluation reports - March 6, 2024 | 12.00 | | 330 | | 13.00 | | |
| 64 | Review and Comment: Custom Sample Design Memos - March 8, 2024 | 2.50 | | 330 | | 13.00 | | |
| 65 | EAC Meeting #12 - March 19, 2024 | 1.00 | | 330 | | 13.00 | | |
| 66 | Review/Comment: Spillover examples, data request, meeting slides & sample design plans - Mar 20 2024 | 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> |
|------------------------------------|--|--------------------------|--------------|------------------------|------------------|-----------------|----------------|------------------|
| 67 | Review/Comment: Custom project savings verification (CPSV) Batch 1 Site Report - Mar 12 2024 | 0.50 | | 330 | | 13.00 | | |
| 68 | EAC Meeting #13 - April 2, 2024 | 2.25 | | 330 | | 13.00 | | |
| 69 | Review and Comment: TRM Review 3rd Round - April 4, 2024 | 1.00 | | 330 | | 13.00 | | |
| 70 | Review and Comment: CPSV Batch 2 site reports - April 15, 2024 | 1.50 | | 330 | | 13.00 | | |
| 71 | EAC Meeting #14 - April 16, 2024 | 1.00 | | 330 | | 13.00 | | |
| 72 | EAC Meeting #15 - April 30, 2024 | 2.25 | | 330 | | 13.00 | | |
| Total Legal/Consultant Fees | | | 35.70 | | 11,781.00 | | ,531.55 | 13,312.55 |

Attachments

| <u>Attachment</u> | <u>Document Type</u> | <u>Import Message</u> |
|------------------------------|----------------------|-----------------------|
| SEC_Dockets_SAG_20240722.pdf | Time Docket | |

Hearings, Consultations, Disbursements Attachments

| <u>Attachment</u> | <u>Document Type</u> | <u>Claim Type</u> | <u>Import Message</u> |
|------------------------------|----------------------|-------------------|-----------------------|
| SEC_Dockets_SAG_20240722.pdf | Time Docket | Consultations | |

| Date | Explanation | Lwyr | Hours |
|----------|--|------|-------|
| 20231103 | Various emails | JCS | 0.2 |
| 20231105 | Many emails, Review framework comments | JCS | 0.3 |
| 20231106 | Many emails, Review framework comments | JCS | 0.6 |
| 20231107 | Review materials and agenda, Various emails, Review 0002 record | JCS | 0.8 |
| 20231109 | Attend at meeting, Many emails | JCS | 2.7 |
| 20231110 | Many emails | JCS | 0.1 |
| 20231111 | Various emails | JCS | 0.1 |
| 20231113 | Various emails | JCS | 0.2 |
| 20231115 | Review comments from others | JCS | 0.2 |
| 20231116 | Review meeting notes, Review Josh's issues list, Many emails, Analysis of impact of Greener Homes, Scheduling issues | JCS | 0.8 |
| 20231124 | Review materials for meeting | JCS | 0.5 |
| 20231128 | Meeting prep, Attend meeting, Many emails | JCS | 2.1 |
| 20231201 | Review mandate letter, Many emails, Scheduling | JCS | 0.4 |
| 20231207 | Many emails, Review materials, Attend meeting | JCS | 3.8 |
| 20231212 | Many emails | JCS | 0.2 |
| 20231213 | Preliminary comments on EGI questions, Many emails, Review comments from Bob and Erika, Review materials from Josh | JCS | 3 |
| 20231214 | Many emails, Review proposals of others | JCS | 1 |
| 20231215 | Many emails | JCS | 0.5 |
| 20231220 | Prep for meeting, Review meeting materials, Many emails | JCS | 2 |
| 20231221 | Attend meeting, Many emails, Proposals re committed carbon, Scheduling | JCS | 4.5 |
| 20231222 | Many emails re upcoming plan and government response, Rebasing implications, New ideas, Review email from Josh re feedback structure | JCS | 1.3 |
| 20231231 | Review Enbridge questions and initial draft of responses, External research and analysis | JCS | 3 |
| 20240101 | Many emails, Responses to Enbridge questions, Detailed commentary to Josh | JCS | 2.2 |
| 20240103 | Many emails, Circulate price comparison chart | JCS | 0.4 |
| 20240104 | Andrew Pride Zoom meeting, Many emails | JCS | 1.3 |
| 20240105 | Various emails re committed carbon, etc. | JCS | 0.2 |
| 20240112 | Review several comments | JCS | 0.5 |
| 20240113 | Review comments | JCS | 0.2 |
| 20240114 | Review comments | JCS | 0.2 |
| 20240115 | Various emails, Review final comment | JCS | 0.1 |
| 20240117 | Prep for meeting, Many emails | JCS | 0.8 |
| 20240118 | Prep for meeting, Attend meeting, Many emails, Review previous meeting notes | JCS | 3.3 |
| 20240125 | Various emails | JCS | 0.1 |

| | | | |
|----------|---|-----|------|
| 20240126 | Many emails and scheduling, Review agenda | JCS | 0.3 |
| 20240130 | Review of meeting notes and email with overall commentary | JCS | 0.7 |
| 20240131 | Many emails | JCS | 0.1 |
| 20240201 | Prep for meeting, Attend meeting, Follow-up emails | JCS | 1.4 |
| 20240202 | Various emails | JCS | 0.2 |
| 20240209 | Various emails | JCS | 0.1 |
| 20240213 | Many emails | JCS | 0.1 |
| 20240215 | Many emails | JCS | 0.1 |
| 20240220 | Many emails | JCS | 0.1 |
| 20240306 | Many emails, Report to Josh, Review agenda for mtg | JCS | 0.5 |
| 20240309 | Many emails with Enbridge | JCS | 0.1 |
| 20240311 | Meeting with Malini Giridhar, Many emails | JCS | 0.5 |
| 20240314 | Attend at meeting, Prep, Many emails | JCS | 1 |
| 20240315 | Many emails, Review meeting notes | JCS | 0.2 |
| 20240318 | Various emails | JCS | 0.1 |
| 20240319 | Many emails | JCS | 0.2 |
| 20240320 | Meeting with Josh, Prep | JCS | 0.5 |
| 20240322 | Many emails, Initial review of agenda and materials | JCS | 0.7 |
| 20240326 | Attend stakeholder meeting, Many emails | JCS | 4.2 |
| 20240327 | Prep for meeting, Analysis of existing industrial programs and deck, Many emails, Review follow-up materials from Stakeholder meeting | JCS | 3.1 |
| 20240328 | Attend at meeting, Many emails, Resignation letter and analysis | JCS | 6.1 |
| 20240331 | Email to Josh | JCS | 0.1 |
| 20240402 | Conf call with Cara-Lynne and Malini, Many emails, Analysis and prep | JCS | 0.6 |
| 20240404 | Meeting with Josh | JCS | 0.5 |
| | | | 59.1 |