

Cost Claim OEB-2022-0295 Deadline January 10, 2025

Submitted by Wirtshafter Associates, Inc.

85 Monomessat Way

Chatham, MA 02633

Hours of Robert M Wirtshafter

83.25 @ \$330 Canadian== 27,472.50

EB-2022-0295 : 3 : Robert Wirtshafter

COST CLAIM NUMBER
2451

SUBMISSION DEADLINE DATE
January 10, 2025

CLAIM STATUS
Approved by Finance

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

OTHER EB#S

PHASE #*
3

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

COUNTRY
US

HST NUMBER

LATE SUBMISSION ALLOWED
No

EXTENSION DEADLINE DATE

PARTICIPANTS

			Total (\$)	Total Hours	Participant Claim Status
New	Non-Filing Participant First, Last Name	Filing Participant			
No	,	Wirtshafter, Robert; +1 (215) 884-6495 wirtino@comcast.net	27,472.50	83.25	Submitted

ATTACHMENTS

Attachment	Document Type	Import Message
Robert M Wirtshafter 4-page resume.docx	CV	
Invoice EB 2022-0295 Wirtshafter Associates January 10 2025 .pdf	Invoice	
Wirtshafter Hours EB 2022-0295 1-10-25.xlsx	Time Docket	
Cost Claim OEB.pdf	Cover Letter	
WIRTS EB-2022-0295 Cost Claim 010820251132.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES
27,472.50

TOTAL DISBURSEMENTS
0.00

TOTAL HST
0.00

TOTAL CLAIM
27,472.50

TOTAL AMOUNT AWARDED

TOTAL HOURS CLAIMED
83.25

TOTAL HOURS DISALLOWED

REASON FOR
DISALLOWANCE

REASON FOR
DISALLOWANCE - 2

REASON FOR
DISALLOWANCE - 3

MAKE CHEQUE PAYABLE TO
Wirtshafter Associates, Inc.

SEND PAYMENT TO ADDRESS
85 Monomessat Way
Chatham, MA
02633

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
Robert M Wirtshafter

DATE SUBMITTED
January 08, 2025

CASE EB-2022-0295: Initiatives: Policy Dev, CDM: Ontario Energy Board	COST CLAIM EB-2022-0295 : 3 : Robert Wirtshafter	INTERVENOR NAME Wirtshafter, Robert; +1 (215) 884-6495 wirtino@comcast.net	PARTICIPANT CLAIM STATUS Submitted
FILING PARTICIPANT Wirtshafter, Robert; +1 (215) 884-6495 wirtino@comcast.net	NEW PARTICIPANT No	NON-FILING PARTICIPANT F. NAME	NON-FILING PARTICIPANT L. NAME
SERVICE PROVIDER TYPE* Consultant	YEAR CALLED TO BAR*	COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE* 48	HOURLY RATE 330
HST RATE CHARGED* 0.00	CV STATUS (FOR CONSULTANT/ANALYST) CV Provided within Previous 24 Months	LAST CV DATE July 17, 2024	OVERRIDE HOURLY RATE No
HST NUMBER	HEARINGS No	CONSULTATIONS Yes	DISBURSEMENTS No

Attachments

Attachment

Invoice EB 2022-0295 Wirtshafter Associates
January 10 2025 .pdf
Wirtshafter Hours EB 2022-0295
1-10-25.xlsx

Document Type

Invoice

Time Docket

Import Message

CONSULTATION

Consultation		Consultations		Consultations		Consultations	
Hours		Subtotal (\$)		Total Tax (\$)		Total (\$)	
83.25		27,472.50		0.00		27,472.50	
Description		Maximum Hours	Hours	Hourly Rate	Sub Total	HST Rate	Total
1	SAG Meeting # 22 - April 25, 2024	4.00	2.75	330	907.50	0.00	907.50
2	APS review and discussions, including key inputs and comments on draft potential results May 1, 2024	10.00	0.50	330	165.00	0.00	165.00
3	Review and comment: Preliminary SAG Report draft chapters (May 1-Jul 31)	6.00		330		0.00	
4	SAG Meeting #23 May 9, 2024	4.00	2.75	330	907.50	0.00	907.50
5	SAG Meeting #24 May 16, 2024	3.75	3.00	330	990.00	0.00	990.00
6	Review and comment: APS Comment Respond Round 7 May 23, 2024	2.00		330		0.00	
7	SAG Meeting #25 May 23, 2024	3.75	2.75	330	907.50	0.00	907.50
8	SAG Meeting #26 May 28, 2024	3.75	3.00	330	990.00	0.00	990.00
9	SAG Meeting #27 June 6, 2024	3.75	2.75	330	907.50	0.00	907.50
10	SAG Meeting #28 June 13, 2024	3.75	2.75	330	907.50	0.00	907.50
11	Review and Comment: Final Draft APS Results June 14, 2024	2.00		330		0.00	
12	Review and Comment: Final Measure Characterization Results June 18, 2024	2.00	0.50	330	165.00	0.00	165.00
13	SAG Meeting #29 June 20, 2024	3.75	3.50	330	1,155.00	0.00	1,155.00
14	Review and Comment: SAG Feedback for June Stakeholder Session June 20, 2024	0.50		330		0.00	
15	2026-2030 EGI DSM Pre-Application Meeting June 27, 2024	6.50	4.50	330	1,485.00	0.00	1,485.00
16	SAG Meeting #30 July 11, 2024	3.75	3.50	330	1,155.00	0.00	1,155.00
17	SAG Meeting #31 July 16, 2024	3.75	2.50	330	825.00	0.00	825.00
18	Review and Comment: Custom C&I Proxy NTG Value - Expert Panel July 16, 2024	1.50		330		0.00	
19	SAG Meeting #32 July 30, 2024	3.50	3.00	330	990.00	0.00	990.00
20	SAG Meeting #33 - Joint with EAC August 1, 2024	2.00	2.00	330	660.00	0.00	660.00
21	Review and Comment: Final SAG Report chapters (Aug 1 to Oct 31)	12.00	2.25	330	742.50	0.00	742.50
22	SAG Meeting #34 - Joint with EAC August 14, 2024	2.00	2.00	330	660.00	0.00	660.00
23	DSM Engagement Session - Commercial and Industrial DSM program planning Aug 15, 2024	7.00	3.25	330	1,072.50	0.00	1,072.50
24	DSM Engagement Session - Residential and Income Qualified DSM program planning Aug 22, 2024	7.00	4.00	330	1,320.00	0.00	1,320.00
25	SAG Meeting #35 - Joint with EAC August 28, 2024	2.00	2.00	330	660.00	0.00	660.00
26	SAG Meeting #36 - Joint with EAC September 19, 2024	3.75		330		0.00	
27	Review and Comment: Draft APS Report September 26, 2024	12.00	2.00	330	660.00	0.00	660.00
28	SAG Meeting #37 Joint with EAC September 26, 2024	3.75		330		0.00	
29	SAG Meeting #38 Joint with EAC October 3, 2024	2.00	1.00	330	330.00	0.00	330.00

	<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>
30	DSM Engagement Session - Portfolio Summary View October 3, 2024	2.00	0.75	330	247.50	0.00		247.50
31	Review and Comment: APS Report Comment Follow-up October 17, 2024	1.50	1.50	330	495.00	0.00		495.00
32	EAC Review and Comment: CPSV Batch 3 May 10, 2024	1.00	1.00	330	330.00	0.00		330.00
33	EAC Review and Comment: CPSV Batch 4 May 13, 2024	0.50	0.50	330	165.00	0.00		165.00
34	EAC Meeting #16 May 15, 2024	1.50	1.50	330	495.00	0.00		495.00
35	EAC Review and Comment: Draft Scope of Work-2023 Annual Verification May 20, 2024	1.50		330		0.00		
36	EAC Meeting #17 May 21, 2024	2.00	2.00	330	660.00	0.00		660.00
37	EAC Review and Comment: 2023 Ag Spillover Survey Guide May 23, 2024	1.00		330		0.00		
38	EAC Meeting #18 May 28, 2024	2.00	2.00	330	660.00	0.00		660.00
39	EAC Review and Comment: Draft TRM Work Plan July 4, 2024	1.00	0.50	330	165.00	0.00		165.00
40	EAC Review and Comment: Free Ridership Approach for future studies July 15, 2024	1.00		330		0.00		
41	EAC Review and Comment: Free Ridership Participant Vendor Survey July 3, 2024	1.00		330		0.00		
42	EAC Review and Comment: CPSV Batch 5 July 8, 2024	1.00	1.00	330	330.00	0.00		330.00
43	EAC Review and Comment: Free Ridership Participant Vendor Survey pt 2 July 15, 2024	1.00		330		0.00		
44	EAC Review and Comment: Custom C&I Proxy NTG Value - Expert Panel July 16, 2024	1.50		330		0.00		
45	EAC Review/Comment: CPSV Batch 6 July 22, 2024	1.00	1.00	330	330.00	0.00		330.00
46	EAC Meeting #19 July 23, 2024	2.00	2.00	330	660.00	0.00		660.00
47	SAG Meeting #33 - Joint with EAC August 1, 2024	2.00		330		0.00		
48	EAC Meeting #20 August 6, 2024	1.00	1.00	330	330.00	0.00		330.00
49	EAC Review and Comment: CPSV Batch 7 August 8, 2024	1.00	1.00	330	330.00	0.00		330.00
50	SAG Meeting #34 - Joint with EAC August 14, 2024	2.00		330		0.00		
51	EAC Review and Comment: CPSV Batch 8 August 19, 2024	1.00	1.00	330	330.00	0.00		330.00
52	EAC Meeting #21 August 20, 2024	0.50	0.50	330	165.00	0.00		165.00
53	SAG Meeting #35 - Joint with EAC August 28, 2024	2.00		330		0.00		
54	EAC Review and Comment: Draft 2023 Free Ridership Evaluation Report August 30, 2024	2.00		330		0.00		
55	EAC Review and Comment: CPSV Batch 9 September 4, 2024	0.50	0.50	330	165.00	0.00		165.00
56	EAC Meeting #22 September 5, 2024	1.25	1.25	330	412.50	0.00		412.50
57	EAC Review and Comment: CPSV Batch 9 pt 2, September 10, 2024	0.50	0.50	330	165.00	0.00		165.00
58	EAC Meeting #23 September 17, 2024	2.00		330		0.00		
59	SAG Meeting #36 - Joint with EAC September 19, 2024	3.75		330		0.00		
60	SAG Meeting #37 - Joint with EAC September 26, 2024	3.75		330		0.00		

	<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>
51	SAG Meeting #38 - Joint with EAC October 3, 2024	2.00		330		0.00		
52	EAC Review and Comment: Free Ridership Approach for future studies October 9, 2024	1.00	1.00	330	330.00	0.00		330.00
53	EAC Review and Comment: Draft Ag Spillover Report October 18, 2024	2.50	1.00	330	330.00	0.00		330.00
54	EAC Review and Comment: Draft 2023 CPSV Report, October 28, 2024	2.50	2.50	330	825.00	0.00		825.00
55	EAC Meeting #24 November 1, 2024	2.00	2.00	330	660.00	0.00		660.00
56	EAC Meeting #25 November 19, 2024	1.00	1.00	330	330.00	0.00		330.00
Total Legal/Consultant Fees			83.25		27,472.50		0.00	27,472.50

Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
Invoice EB 2022-0295 Wirtshafter Associates January 10 2025 .pdf	Invoice	Hearings	
Wirtshafter Hours EB 2022-0295 1-10-25.xlsx	Time Docket	Hearings	

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

INVOICE:

January 10, 2025

Josh Wasylyk

Senior Advisor | ☎ 416.440.7723 | OEB.ca

For Services of Robert M Wirtshafter, Ph.D.

Related to OEB Evaluation Advisory Committee

OEB EB 2022-0295 Robert M Wirtshafter April 1, , 2024 to
November 19, 2024

No	Date	Activity	Actual Hours
SAG			
1	25-Apr	2.75 sag MTG 22	
2	1-May	0.50 Review and Comment: SAG Report, Industrial Program	
4	9-May	2.75 SAG mtg 23	
5	16-Sep	3.00 SAG mtg 24	
7	23-May	2.75 SAG mtg 25	
8	28-May	3.00 SAG #26	
9	6-Jun	2.75 SAG #27	
10	13-Jun	2.75 SAG #28	
12	18-Jun	0.50 Review and Comments: Draft Commercial Program	
13	20-Jun	3.50 SAG #29	
15	27-Jun	4.50 2026-2030 EGI DSM Pre-Application Meeting	
16	11-Jul	3.50 SAG #30	
17	16-Jul	2.50 SAG #31	
19	30-Jul	3.00 SAG #32	
20	1-Aug	2.00 SAG Meeting #33 - Joint with EAC	
21	12-Aug	2.25 SAG responses to C&I	
22	14-Aug	2.00 SAG Meeting #34 - Joint with EAC	
23	15-Aug	3.25 DSM Engagement Session - Commercial and Industrial DSM program planning	
24	22-Aug	4.00 DSM Engagement Session - Residential and Income Qualified DSM program planning	
25	28-Aug	2.00 SAG Meeting #35 - Joint with EAC	
27	26-Sep	2.00 Draft APS Report	
29	3-Oct	1.00 SAG Meeting #38 - Joint with EAC	
30	3-Oct	0.75 DSM Engagement Session - Portfolio Summary View	
31	10-Oct	1.50 Review and Comment: SAG Report Final Review	
	26-Oct	nc Review and Comment: SAG Report Final Review	
EAC			
32	1-May	1 CVSP #3	
33	14-May	0.5 CVSP #4	
34	15-May	1.5 EAC Meeting #16	
36	21-May	2 EAC Meeting #17	

38	28-May	2	EAC Meeting #18
39	12-Jun	0.5	Review and Comment: Draft TRM Work Plan
42	23-Jul	1	Review and Comment: CPSV Batch 5
45	23-Jul	1	Review and Comment: CPSV Batch 6
46	23-Jul	2	EAC Meeting #19
48	6-Aug	1	EAC Meeting #20
49	9-Aug	1	Review and Comment: CPSV Batch 7
51	20-Aug	1	Review and Comment: CPSV Batch 8
52	20-Aug	0.5	EAC Meeting #21
56	5-Sep	1.25	EAC Meeting #22
55	6-Sep	0.5	Review and Comment: CPSV Batch 9
57	11-Sep	0.5	Review and Comment: CPSV Batch 9 pt 2
			Review and Comment: Draft 2023 Free Ridership Evaluation
62	5-Oct	1	Report
63	29-Oct	1	Review and Comment: Draft Ag Spillover Report
64	29-Oct	2.5	Review and Comment: Draft 2023 CPSV Report
65	1-Nov	2	EAC Meeting #24
66	19-Nov	1	EAC Meeting #25
		83.25	

84

Total Hrs

83.25

Rate Canadian \$330

Total

\$27,472.50

Payment in US Dollar