



By EMAIL and Pivotal

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

July 9, 2026
Our File: 20250014

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

Attn: Ritchie Murray, Acting Registrar

Dear Mr. Murray:

Re: EB-2025-0014 – Oshawa PUC Networks 2026 – SEC Cost Claim

We are counsel to the School Energy Coalition ("SEC"). Attached, please find SEC's cost claim in this matter using the OEB's cost claim system, per the Decision and Order May 28, 2026, with accompanying detailed dockets.

This was a highly contentious proceeding, made more difficult by an incomplete initial filing that excluded the largest capital project, numerous requests for confidential treatment of documents, refusals to provide certain information (requiring a motion to compel and related oral hearing, which motion was partially successful), a partial settlement that did not include the major issues, and an oral hearing followed by extensive written arguments. The parties could not even agree on the form of hearing for the unsettled issues, requiring submissions on that question, and discussion of the order of cross-examination.

This case also included an interrogatory collaboration process, which added a small amount of time to the interrogatories process, but less so for SEC because SEC's interrogatories were circulated very early.

The case was made especially difficult by the lack of information on the \$61 million head office campus, slated for consideration in a future application later this year. This necessitated trying to understand the capital plan without this investment, then pursuing further information (in multiple steps) against stiff resistance, then a further review of the capital plan in light of that investment. SEC has been vocal in saying that it believes most of this work could have been avoided if the Applicant had approached the case differently.

The end result is a Decision with Reasons on the major issues, which has now been implemented. The other result is that the amount of time spent by intervenors was more than SEC expected when we went into this case. SEC was particularly affected, because SEC took the lead on the disclosure

Shepherd Rubenstein Professional Corporation | Regulatory Law
120 Eglinton Avenue E., Suite 1000 T. (416) 483-3300
Toronto, ON M4S 2C6 shepherdrubenstein.com



disputes on behalf of other supporting parties, and because SEC took a co-ordinating role in the settlement discussions.

The bulk of the work on this case was done by senior counsel Jay Shepherd. Co-counsel Mark Rubenstein assisted in the early review of the Application, and on the motion to compel. SEC also brought in a third party (JD Shepherd, brother of lead counsel) to review the IT Plan at a relatively low additional cost, since it played such a pivotal role in the utility's plans. This is the first time SEC has used the services of Mr. Shepherd, who recently retired after many years as a senior IT manager at Amex.

Negotiation and reporting to the Commissioners of the partial resolution of the disclosure motion has been added to time spent in the ADR process (attendance and drafting), as it is a similar activity. Review of the Application includes subsequent new evidence filed at various times throughout the proceeding.

SEC submits that the resulting hours spent and cost claim presented represent an efficient and effective approach to responding to the utility's proposals, and requests that the OEB order reimbursement of these costs.

All of which is respectfully submitted.

Yours very truly,
Shepherd Rubenstein Professional Corporation

A handwritten signature in dark ink, appearing to read 'Jay Shepherd', written over a light gray rectangular background.

Jay Shepherd

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

EB-2025-0014 : 1 : Glenda Masters

COST CLAIM NUMBER
3305

SUBMISSION DEADLINE DATE
July 09, 2026

CLAIM STATUS
Approved by Finance

EB#
EB-2025-0014: Rates: Distribution: Oshawa PUC
Networks Inc.

OTHER EB#S

PHASE #*
1

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

New	Non-Filing Participant First, Last Name	Filing Participant	Total (\$)	Total Hours	Participant Claim Status
No	,	Shepherd, Jay; +1 (416) 804-2767 jay@shepherdhubenstein.com	84,622.78	208.60	Submitted
No	,	Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdhubenstein.com	1,335.32	3.90	Submitted
No	,	Shepherd, John; +1 (416) 833-5673 jd_shepherd@Yahoo.com	2,591.32	11.70	Submitted

ATTACHMENTS

Attachment	Document Type	Import Message
SEC_CovertLtr_OPUCN_20260709.pdf	Cover Letter	
SEC EB-2025-0014 Cost Claim 070920261543.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES	TOTAL DISBURSEMENTS	TOTAL HST
78,362.30	0.00	10,187.12
TOTAL CLAIM	TOTAL AMOUNT AWARDED	
88,549.42		
TOTAL HOURS CLAIMED	TOTAL HOURS DISALLOWED	
224.20		
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
120 Eglinton Avenue E.	
Suite 1000	
Toronto, ON	
M4P 1E2	

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	DATE SUBMITTED
Glenda Masters	July 09, 2026

CASE EB-2025-0014: Rates: Distribution: Oshawa PUC Networks Inc.	COST CLAIM EB-2025-0014 : 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 359
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 Yes	CONSULTATIONS No	DISBURSEMENTS No

HEARINGS

Hearings Hours	Hearings Subtotal (\$)	Hearings Total Tax (\$)	Hearings Total (\$)			
208.60	74,887.40	9,735.38	84,622.78			
<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
DISCOVERY						
Read and Research Application and Evidence	34.90	359	12,529.10	13.00	1,628.78	14,157.88
Preparation of Interrogatories	9.30	359	3,338.70	13.00	434.03	3,772.73
Review Interrogatory Responses	13.30	359	4,774.70	13.00	620.71	5,395.41
Technical Conference Preparation		359		13.00		
Technical Conference Attendance		359		13.00		
Technical Conference Follow-up		359		13.00		
Subtotal of DISCOVERY	57.50		20,642.50		2,683.52	23,326.02
PROCEDURAL						
Preparation of Issues List Submission	1.40	359	502.60	13.00	65.34	567.94
Attendance at Issues List Conference		359		13.00		
Preparation for a Confidentiality Request		359		13.00		
Prepare Submissions on Confidentiality	2.00	359	718.00	13.00	93.34	811.34
Preparation of Motion(s) Materials	3.50	359	1,256.50	13.00	163.35	1,419.85
Prepare Submissions on the Motion(s)	6.00	359	2,154.00	13.00	280.02	2,434.02
Attendance at Hearing on Motion(s)	4.00	359	1,436.00	13.00	186.68	1,622.68
Review Procedural Documents	2.00	359	718.00	13.00	93.34	811.34

<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
Subtotal of PROCEDURAL	18.90		6,785.10		882.07	7,667.17
INTERVENOR EVIDENCE						
Preparation of Intervenor Evidence		359		13.00		
Interrogatory Responses		359		13.00		
Preparation of Witness(es) for Attendance at Hearing		359		13.00		
Subtotal of INTERVENOR EVIDENCE	0.00		0.00		0.00	0.00
SETTLEMENT CONFERENCE						
Preparation for Settlement Conference	5.40	359	1,938.60	13.00	252.02	2,190.62
Attendance at Settlement Conference	3.00	359	1,077.00	13.00	140.01	1,217.01
Preparation of Settlement Proposal	11.80	359	4,236.20	13.00	550.71	4,786.91
Attendance at Presentation to Panel		359		13.00		
Subtotal of SETTLEMENT CONFERENCE	20.20		7,251.80		942.74	8,194.54
WRITTEN ARGUMENT						
Written Submissions	54.40	359	19,529.60	13.00	2,538.85	22,068.45
Subtotal of WRITTEN ARGUMENT	54.40		19,529.60		2,538.85	22,068.45
ORAL ARGUMENT						
Preparation for Oral Hearing	33.50	359	12,026.50	13.00	1,563.45	13,589.95
Attendance at Oral Hearing	19.00	359	6,821.00	13.00	886.73	7,707.73
Oral Submissions		359		13.00		
Attendance at Oral Submissions		359		13.00		
Subtotal of ORAL ARGUMENT	52.50		18,847.50		2,450.18	21,297.68
DECISION						
Review Decision	2.00	359	718.00	13.00	93.34	811.34
Review Rate/Accounting Order	2.80	359	1,005.20	13.00	130.68	1,135.88
Prepare Submission on Rate Order	0.30	359	107.70	13.00	14.00	121.70
Subtotal of DECISION	5.10		1,830.90		238.02	2,068.92
OTHER						
Other Attendance (e.g., Intervenor Conferences)		359		13.00		
Subtotal of OTHER	0.00		0.00		0.00	0.00
TOTAL SERVICE PROVIDER FEES						
Total Service Provider Fees	208.60		74,887.40		9,735.38	84,622.78

Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
SEC_Dockets_OPUCN_20260709.pdf	Time Docket	

Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
SEC_Dockets_OPUCN_20260709.pdf	Time Docket	Hearings	

Date	Explanation	Lwyr	Hours
20250328	prepare for pre-filing meeting	MR	0.5
20250328	attend pre-filing meeting	MR	1
20250520	review Notice/preliminary review of Application	MR	1.5
20250521	disc. w. JS	MR	0.1
20250522	Initial review of Application, Many emails	JCS	2
20250522	complete intervenor form/emails	MR	0.2
20250609	Prepare and circulate rate comparison	JCS	3
20250613	Review PO#1 and scheduling	JCS	0.3
20250616	Review evidence and background information, Various emails and scheduling	JCS	1.2
20250617	Reviewing evidence, Review issues list and propose additional issue, Many emails, Email Client	JCS	6.5
20250618	Complete evidence review, Many emails	JCS	4.4
20250619	Attend OEB meeting re IR collaboration pilot, Many emails, Review slides, Issues list debate	JCS	1.6
20250620	Many emails re: issues list	JCS	0.4
20250622	Prep re: interrogatories	JCS	1
20250623	Drafting and sharing interrogatories, Various emails	JCS	5.6
20250624	Review issues list decision, Various emails	JCS	0.2
20250625	Many emails	JCS	0.2
20250630	Review PO#2 and scheduling	JCS	0.3
20250708	Many emails	JCS	0.1
20250709	Many emails, Review Motion, Analysis and research, Review IRs and respond to comments	JCS	1.2
20250710	Many emails	JCS	0.1
20250715	Review Decision on Motion	JCS	0.4
20250801	Many emails. Scheduling	JCS	0.1
20250808	Many emails	JCS	0.1
20250810	Prepare and file Declaration and Undertaking	JCS	0.3
20250811	Initial review of confidential documents, Many emails	JCS	1
20250813	Review CCC questions	JCS	0.1
20250815	Many emails	JCS	0.2
20250816	Review of evidence and IRR, Prepare motion for further responses, Many emails with other parties re: settlement	JCS	5.6
20250817	Prep for ADR, Review new 2K	JCS	2
20250818	Attend at ADR, Prep, Many emails, Finalize, file and circulate Motion, Review responses to pre-settlement questions	JCS	7.1
20250819	Attend at ADR, Prep, Many emails	JCS	4
20250820	Attend at ADR, Prep, Many emails	JCS	5.3
20250821	Many emails	JCS	0.2
20250822	Review 48hr letter, Many emails	JCS	0.1
20250825	Telephone conversation with Vellone, Many emails	JCS	0.3
20250827	Many emails	JCS	0.2

20250828	Many emails, Analysis of motion timing	JCS	0.3
20250904	Review Settlement Agreement, Many emails	JCS	2.6
20250908	Many emails, Review OEB Staff edits	JCS	0.4
20250909	Many emails	JCS	0.2
20250910	Many emails	JCS	0.2
20250911	Review extension letter, Many emails	JCS	0.1
20250913	Many emails, Analysis of wording	JCS	0.6
20250914	Many emails	JCS	0.2
20250915	Many emails, Review models	JCS	1.3
20250916	Review Settlement Agreement, Many emails, Review input from others, Motion scheduling	JCS	1.6
20250917	Consolidate comments on Settlement Agreement, Many emails	JCS	1
20250918	Many emails, Review models, Review PO#3 and scheduling	JCS	1.1
20250919	Many emails, Review extension letter, Clean up agreement and consolidate comments	JCS	1.5
20250922	Many emails	JCS	0.3
20250923	Time estimate, Final signoff on agreement, Many emails	JCS	0.8
20250923	emails re: motion	MR	0.1
20250924	Prep	JCS	0.2
20250924	research support re: motion	MR	0.5
20250925	Many emails, Research re: affiliates	JCS	1
20250926	Review updated interrogatory response and analysis, Many emails, Review hearing schedule, Review OEB Staff submission, Review AMPCO cor	JCS	2.4
20250928	Prep for motion	JCS	2.3
20250929	Prep for motion, Attend at motion, Many emails, Email Vellone re: disclosure	JCS	6.3
20250930	Submissions on hearing, Many emails, Email Vellone re: disclosure (2), Telephone conversation with Vellone, List of disclosure items	JCS	2.8
20251001	Revise and file hearing submissions, Draft and send out disclosure letter, Discussions with John Vellone re: resolution, Many emails, R	JCS	2.3
20251002	Revise and file Motions Disclosure report, Many emails	JCS	0.8
20251011	Review Applicant's letter, risk register, and cost allocation model, Attempt to calculate impacts, Various emails	JCS	2.1
20251014	Many emails, Telephone conversation with John Vellone, Draft and file letter	JCS	1.7
20251015	Instructions to consultant re: IT plan, Many emails re: scheduling	JCS	0.6
20251016	Many emails, Scheduling	JCS	0.3
20251017	Various emails, Review correspondence	JCS	0.3
20251019	Prep for hearing	JCS	1
20251019	Review of Distribution Plan, IT Strategy and attachments	JD S	1.6
20251019	In-depth review of attachments and answers to specific concerns	JD S	2.3
20251020	Review Decision and PO#5, Scheduling, Many emails	JCS	0.9

20251020	Research software, hardware and costs based on highlighted areas and open questions	JD S	1.3
20251020	Preliminary feedback and lists of questions	JD S	2
20251020	Additional research on specific software and costs based on preliminary questions	JD S	1.2
20251021	Hearing prep, Many emails, Review IT report	JCS	4
20251021	Feedback and list of preliminary questions	JD S	2
20251021	Review and revise initial feedback and list of questions before sending	JD S	1.3
20251022	Meeting with Lawrie Gluck, Many emails, Review new filing from Applicant, Review witness panels	JCS	5
20251023	Many emails, Drafting and circulating letters, Time Estimates, Drafting submissions, Telephone conversation with Colm Boyle, Review add	JCS	4.4
20251025	Review summary of opening remarks, Many emails, Prep	JCS	0.5
20251026	Prep for hearing, Review CCC compendium	JCS	2.8
20251027	Prep for hearing, Many emails, Review new filing and respond, Review Decision and Order	JCS	9.7
20251028	Attend at hearing, Prep, Finalize compendium, Many emails, Review evidence updates and correspondence	JCS	11.5
20251029	Attend at hearing, Prep, Finalize volume 2, Many emails	JCS	9
20251030	Attend at hearing, Many emails, Outline of notes, Review transcripts	JCS	5.6
20251031	Schedule for argument, Various emails	JCS	0.4
20251102	Draft section of final argument, Email Lawrie	JCS	1
20251103	Various emails	JCS	0.1
20251104	Review transcripts	JCS	2
20251105	Review undertaking responses	JCS	1.5
20251107	Many emails	JCS	0.2
20251108	Various emails	JCS	0.1
20251109	Review transcripts	JCS	2
20251111	Review transcripts and argument notes	JCS	2
20251112	Review Decision on Confidentiality and PO6, Various emails	JCS	0.4
20251117	Various emails, Scheduling intervenor meeting	JCS	0.3
20251119	Review Argument-in-Chief, Review answers to questions, Many emails	JCS	2.7
20251120	Intervenor meeting, Drafting argument	JCS	2.2
20251121	Drafting argument, Many emails	JCS	4
20251122	Drafting argument	JCS	1
20251123	Drafting argument, Various emails	JCS	3.5
20251124	Drafting argument, Various emails	JCS	3
20251125	Drafting argument, Many emails, Review corrected materials	JCS	6.3
20251126	Drafting argument, Review drafts from others	JCS	4
20251127	Drafting argument, Many emails, Circulate drafts	JCS	8.2

20251128	Drafting and finalizing argument, Citations, Filing, Many emails	JCS	7.5
20251129	Review final arguments of all parties	JCS	2
20251209	Review interim Order	JCS	0.1
20251219	Review extension letter and request	JCS	0.1
20251224	Review reply argument, Many emails	JCS	3
20260526	Various emails	JCS	0.1
20260527	Review Decision, Many emails, Client impacts calculation	JCS	2
20260618	Initial review of DRO	JCS	1
20260620	Review draft rate order	JCS	1.6
20260624	Review Staff submissions, Draft brief letter	JCS	0.5
20260626	Review update, Client reporting	JCS	1
			224.2

CASE EB-2025-0014: Rates: Distribution: Oshawa PUC Networks Inc.	COST CLAIM EB-2025-0014 : 1 : Glenda Masters	INTERVENOR NAME Masters, Glenda; +1 (416) 483-3300 Glenda@shepherdrubenstein .com	PARTICIPANT CLAIM STATUS Submitted
FILING PARTICIPANT Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdrubenstein.com	NEW PARTICIPANT No	NON-FILING PARTICIPANT F. NAME	NON-FILING PARTICIPANT L. NAME
SERVICE PROVIDER TYPE* Legal Counsel	YEAR CALLED TO BAR* 2011	COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE* 12	HOURLY RATE 303
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 Yes	CONSULTATIONS No	DISBURSEMENTS No

HEARINGS

Hearings Hours	Hearings Subtotal (\$)	Hearings Total Tax (\$)	Hearings Total (\$)
3.90	1,181.70	153.62	1,335.32

<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
DISCOVERY						
Read and Research Application and Evidence	3.30	303	999.90	13.00	129.99	1,129.89
Preparation of Interrogatories		303		13.00		
Review Interrogatory Responses		303		13.00		
Technical Conference Preparation		303		13.00		
Technical Conference Attendance		303		13.00		
Technical Conference Follow-up		303		13.00		
Subtotal of DISCOVERY	3.30		999.90		129.99	1,129.89
PROCEDURAL						
Preparation of Issues List Submission		303		13.00		
Attendance at Issues List Conference		303		13.00		
Preparation for a Confidentiality Request		303		13.00		
Prepare Submissions on Confidentiality		303		13.00		
Preparation of Motion(s) Materials	0.60	303	181.80	13.00	23.63	205.43
Prepare Submissions on the Motion(s)		303		13.00		
Attendance at Hearing on Motion(s)		303		13.00		
Review Procedural Documents		303		13.00		

<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
Subtotal of PROCEDURAL	0.60		181.80		23.63	205.43
INTERVENOR EVIDENCE						
Preparation of Intervenor Evidence		303		13.00		
Interrogatory Responses		303		13.00		
Preparation of Witness(es) for Attendance at Hearing		303		13.00		
Subtotal of INTERVENOR EVIDENCE	0.00		0.00		0.00	0.00
SETTLEMENT CONFERENCE						
Preparation for Settlement Conference		303		13.00		
Attendance at Settlement Conference		303		13.00		
Preparation of Settlement Proposal		303		13.00		
Attendance at Presentation to Panel		303		13.00		
Subtotal of SETTLEMENT CONFERENCE	0.00		0.00		0.00	0.00
WRITTEN ARGUMENT						
Written Submissions		303		13.00		
Subtotal of WRITTEN ARGUMENT	0.00		0.00		0.00	0.00
ORAL ARGUMENT						
Preparation for Oral Hearing		303		13.00		
Attendance at Oral Hearing		303		13.00		
Oral Submissions		303		13.00		
Attendance at Oral Submissions		303		13.00		
Subtotal of ORAL ARGUMENT	0.00		0.00		0.00	0.00
DECISION						
Review Decision		303		13.00		
Review Rate/Accounting Order		303		13.00		
Prepare Submission on Rate Order		303		13.00		
Subtotal of DECISION	0.00		0.00		0.00	0.00
OTHER						
Other Attendance (e.g., Intervenor Conferences)		303		13.00		
Subtotal of OTHER	0.00		0.00		0.00	0.00
TOTAL SERVICE PROVIDER FEES						
Total Service Provider Fees	3.90		1,181.70		153.62	1,335.32

Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
SEC_CombinedDcktLtr.pdf	Time Docket	

Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
SEC_CombinedDcktLtr.pdf	Time Docket	Hearings	

Combined detailed dockets attached to Participant – Jay Shepherd

CASE EB-2025-0014: Rates: Distribution: Oshawa PUC Networks Inc.	COST CLAIM EB-2025-0014 : 1 : Glenda Masters	INTERVENOR NAME Masters, Glenda; +1 (416) 483-3300 Glenda@shepherdrubenstein .com	PARTICIPANT CLAIM STATUS Submitted
FILING PARTICIPANT Shepherd, John; +1 (416) 833-5673 jd_shepherd@Yahoo.com	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* 5	HOURLY RATE 196
HST RATE CHARGED* 13.00	CV STATUS (FOR CONSULTANT/ANALYST) CV Attached	LAST CV DATE July 09, 2026	OVERRIDE HOURLY RATE No
HST NUMBER 83673 5464 RT0001	HEARINGS Yes	CONSULTATIONS No	DISBURSEMENTS No

HEARINGS

Hearings Hours	Hearings Subtotal (\$)	Hearings Total Tax (\$)	Hearings Total (\$)			
11.70	2,293.20	298.12	2,591.32			
<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
DISCOVERY						
Read and Research Application and Evidence		196		13.00		
Preparation of Interrogatories		196		13.00		
Review Interrogatory Responses		196		13.00		
Technical Conference Preparation		196		13.00		
Technical Conference Attendance		196		13.00		
Technical Conference Follow-up		196		13.00		
Subtotal of DISCOVERY	0.00	196	0.00		0.00	0.00
PROCEDURAL						
Preparation of Issues List Submission		196		13.00		
Attendance at Issues List Conference		196		13.00		
Preparation for a Confidentiality Request		196		13.00		
Prepare Submissions on Confidentiality		196		13.00		
Preparation of Motion(s) Materials		196		13.00		
Prepare Submissions on the Motion(s)		196		13.00		
Attendance at Hearing on Motion(s)		196		13.00		
Review Procedural Documents		196		13.00		

<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
Subtotal of PROCEDURAL	0.00	196	0.00		0.00	0.00
INTERVENOR EVIDENCE						
Preparation of Intervenor Evidence		196		13.00		
Interrogatory Responses		196		13.00		
Preparation of Witness(es) for Attendance at Hearing		196		13.00		
Subtotal of INTERVENOR EVIDENCE	0.00	196	0.00		0.00	0.00
SETTLEMENT CONFERENCE						
Preparation for Settlement Conference		196		13.00		
Attendance at Settlement Conference		196		13.00		
Preparation of Settlement Proposal		196		13.00		
Attendance at Presentation to Panel		196		13.00		
Subtotal of SETTLEMENT CONFERENCE	0.00	196	0.00		0.00	0.00
WRITTEN ARGUMENT						
Written Submissions		196		13.00		
Subtotal of WRITTEN ARGUMENT	0.00	196	0.00		0.00	0.00
ORAL ARGUMENT						
Preparation for Oral Hearing	11.70	196	2,293.20	13.00	298.12	2,591.32
Attendance at Oral Hearing		196		13.00		
Oral Submissions		196		13.00		
Attendance at Oral Submissions		196		13.00		
Subtotal of ORAL ARGUMENT	11.70	196	2,293.20		298.12	2,591.32
DECISION						
Review Decision		196		13.00		
Review Rate/Accounting Order		196		13.00		
Prepare Submission on Rate Order		196		13.00		
Subtotal of DECISION	0.00	196	0.00		0.00	0.00
OTHER						
Other Attendance (e.g., Intervenor Conferences)		196		13.00		
Subtotal of OTHER	0.00	196	0.00		0.00	0.00
TOTAL SERVICE PROVIDER FEES						
Total Service Provider Fees	11.70		2,293.20		298.12	2,591.32

Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
SEC_CombinedDcktLtr.pdf	Time Docket	
CV for John Shepherd.pdf	CV	
JD Shepherd Invoice.pdf	Invoice	

Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
SEC_CombinedDcktLtr.pdf	Time Docket	Hearings	
CV for John Shepherd.pdf	CV	Hearings	
JD Shepherd Invoice.pdf	Invoice	Hearings	

Combined detailed dockets attached to Participant – Jay Shepherd

John Shepherd

Senior Software Technology Manager

Professional Profile

- 25+ years' developing software solutions, managing milestones, resourcing teams of developers and supervising 3rd party vendors & partners for the Financial, Banking, Insurance and Energy industries
- Product Owner of a core suite of integrated insurance systems supporting \$180m+ in Annual revenue and 52m+ enrollees
- Managed the day-to-day technology operations of a 24/7 Mutual Fund Dealer with \$2 billion in assets under management, 125,000+ clients and 1,200+ online users
- Taught Software Development to 100+ students who went on to work in the field. Interviewed, Hired or Recommended for Hire 150+ engineers. Mentored 20+ new Canadians entering the technology workforce.
- Early adopter of Machine Learning & AI, developing an Inference Engine in Prolog in 1997/1998 for Ontario Hydro
- Developed service level monitoring tools for both maintenance and reactor systems at Ontario Hydro's Bruce Nuclear station and Heavy Water plant.

Experience

2025 – Now – Consultant providing, Python Game Developer

2011 – 2024 – Amex Bank of Canada – (American Express Canada)

2022 – 2024 – Senior Product Manager – Premium Benefits & US Insurance

2019 – Senior Product Manager – US Insurance

2017 – Software Product Manager – US Benefits & Insurance

2014 – Lead Business Architect – US Card Services & Insurance

2011 – Senior Business Architect – US Card Services & Insurance

2007 – 2010 – Amex Bank of Canada – Contractor

2010 – Senior BSA, US Card Services

2009 – Senior BSA, GNA (Global New Accounts)

2008 – BSA, Amex Canadian Business Travel

2007 – Test Manager

Highlights

- Product Owner of Amex's US Insurance Enrollment, Servicing, Claims & Communications systems. This included supporting a suite of 2 dozen+ Per-Trip, Subscription & Targeted Subscription Travel insurance & Premium Benefits.
- Worked hand in hand with Business, Compliance and Regulatory partners to identify business needs and define technology roadmaps to accomplish their goals.
- Prioritized Support requests in real-time to minimize customer impact. First Point of Contact for partner technical inquiries and requests.
- Created Capability, Feature & User Story backlogs for 2+ scrum teams (18 engineers) in multiple time zones
- Organized teams using SAFe and Kanban approaches. Acted as Scrum Master alongside my Product Owner duties when required.
- Developed Functional and Technical KPIs and CBAs for potential Servicing & Sales partners.
- Architected Integrations with 3rd party Sales and Servicing partners for Eligibility, Pricing, Enrollment, Payment & Enrollment. Wrote API guides for partner engineers, including API specs, Acceptance Criteria & Architectural flows.

2006 – Payroll Analyst – Statistics Canada

2004 / 2005 – Assistant Automation Coordinator – Elections Canada

2000 to 2003 – IT Manager – W.H. Stuart Mutuals

1997 – 2000 – Software Developer/Trainer/Network Analyst – Manulife Financial, Moore Business Forms, OSI, Credit Unions Ontario

1990 to 1997 – Software Developer – Ontario Hydro / Computer Programming Teacher – TSB / Durham College

Software Skills

- Python, SQL, Java, VS Code, IDLE
- Rally, JIRA, Confluence, Slack
- Excel, Word, PowerPoint, Outlook, Visio

Education & Certifications

- Introduction to Python Programming – Udemy –2025
- Amex Certificate in Leadership Excellence – Harvard Continuing Ed – 2018
- SAFe Scrum Master / Product Owner Certificate – Scrum Alliance – 2017
- Honours Diploma – Computer Programming – Seneca College



By Email

INVOICE

July 9, 2026

Ontario Education Services Corporation

439 University Ave.

18th Floor

Toronto, ON M5G 1Y8

ATTN: Diana Hong

Re: Oshawa PUC Networks 2026 EB-2025-0014

FOR: Work done and professional services rendered as per detailed dockets attached:

JCS	4.10	hours at	\$359.00 per hour	\$1,471.90
JD S	11.70	hours at	\$196.00 per hour	\$2,293.20
Total Fees				\$3,765.10
Disbursements				\$0.00
HST (Registration #83673 5464 RT0001)				\$489.46
Total Amount of this Invoice				\$4,254.56

E&OE

Please make cheque payable to: **Shepherd Rubenstein Professional Corp**

Invoice # 260701