



By EMAIL and RESS

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

November 23, 2021
Our File: EB20210039

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

Attn: Christine Long, Registrar

Dear Ms. Long:

Re: EB-2021-0039 – Lakefront 2022 Rates – SEC Cost Claim

We are counsel to the School Energy Coalition ("SEC"). Enclosed please find SEC's cost claim in this matter on the Board's form with accompanying detailed dockets.

This was a rebasing application for a fairly small utility that is not experiencing significant problems. It was settled in full after a fairly short ADR. Preparation of the Settlement Agreement was a little longer than normal due to some technical issues that needed to be addressed during the process.

Senior counsel Jay Shepherd took the lead on this matter. This was one of the first cases in which new lawyer Fred Zheng was involved. SEC has reviewed his 72.1 hours docketed, and determined that only 14.0 hours were incremental and of value to the process. The rest have been treated as learning time. In addition, SEC has reduced Jay Shepherd's hours by 5.7, from 52.1 to 45.4 hours, reflecting time spent on teaching activities that should not be recoverable from the Applicant.

All of which is respectfully submitted.

Yours very truly,
Shepherd Rubenstein Professional Corporation

A handwritten signature in dark ink, appearing to read "Jay Shepherd", is written over a horizontal line.

Jay Shepherd
cc: Ted Doherty, SEC (by email)
Interested Parties (by email)

Shepherd Rubenstein Professional Corporation | Regulatory Law
2200 Yonge Street, Suite 1302 T. (416) 483-3300 F. (416) 483-3305
Toronto, ON M4S 2C6 shepherdrubenstein.com

EB-2021-0039 : 1 : Glenda Masters

COST CLAIM NUMBER	SUBMISSION DEADLINE DATE	CLAIM STATUS
18	November 25, 2021	Submitted
EB#	OTHER EB#S	PHASE #*
EB-2021-0039: Rates: Distribution: Lakefront Utilities Inc.		1
INTERVENOR	INTERVENOR COMPANY*	INTERVENOR TYPE
Masters, Glenda; +1 (416) 483-3300 Glenda@shepherdrubenstein.com	School Energy Coalition, Toronto: Corporation	Full Registrant
HST RATE ONTARIO	EXCHANGE RATE	COUNTRY
13.00		Canada
HST NUMBER	LATE SUBMISSION ALLOWED	EXTENSION DEADLINE DATE
83673 5464 RT0001	No	

PARTICIPANTS

New	Non-Filing Participant First, Last Name	Filing Participant	Participant Total (\$)	Claim Status
No	,	Shepherd, Jay; +1 (416) 804-2767 jay@shepherdrubenstein.com	16,929.66	Submitted
No	,	Zheng, Fred; +1 (416) 483-0114 fred@shepherdrubenstein.com	2,689.40	Submitted

ATTACHMENTS

Attachment	Attachment Date	Participant	Document Type	Claim Type	Import Message
SEC_CoverLtr_Lakefront.pdf			Cover Letter		

TOTAL LEGAL/CONSULTANT/OTHER FEES	TOTAL DISBURSEMENTS	TOTAL HST
17,362.00	0.00	2,257.06
TOTAL CLAIM	TOTAL AMOUNT AWARDED	
19,619.06		
REASON FOR DISALLOWANCE	REASON FOR DISALLOWANCE - 2	REASON FOR DISALLOWANCE - 3

MAKE CHEQUE PAYABLE TO Shepherd Rubenstein Profi	
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 November 23, 2021

Jay Shepherd

CASE	COST CLAIM	INTERVENOR NAME	PARTICIPANT CLAIM STATUS
EB-2021-0039: Rates:	EB-2021-0039 : 1 : Glenda	Masters, Glenda; +1 (416)	Submitted
Distribution: Lakefront Utilities Inc.	Masters	483-3300	
		Glenda@shepherdrubenstein.com	

FILING PARTICIPANT	NEW PARTICIPANT	NON-FILING PARTICIPANT F. NAME	NON-FILING PARTICIPANT L. NAME
Shepherd, Jay; +1 (416) 804-2767 jay@shepherdrubenstein.com	No		

SERVICE PROVIDER TYPE	YEAR CALLED TO BAR	COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE	HOURLY RATE
Legal Counsel	1980	41	330

CV STATUS (FOR CONSULTANT/ANALYST)	LAST CV DATE	HST RATE CHARGED
CV Required		13.00

HEARINGS	CONSULTATIONS	DISBURSEMENTS
Yes	No	No

HEARINGS

<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
Review Application and Evidence						
Review Application and Evidence	12.10	330	3,993.00	13.00	519.09	4,512.09
Discovery						
Preparation of Interrogatories	8.00	330	2,640.00	13.00	343.20	2,983.20
Review Interrogatory Responses	4.60	330	1,518.00	13.00	197.34	1,715.34
Technical Conference Preparation		330		13.00		
Technical Conference Attendance		330		13.00		
Technical Conference Follow Up		330		13.00		
Issues List						
Preparation	0.30	330	99.00	13.00	12.87	111.87
Attendance at Issues Conference		330		13.00		
Intervenor Evidence						
Preparation		330		13.00		
Interrogatory Responses		330		13.00		
Preparation of Witness(es) for Attendance at Hearing		330		13.00		
Settlement Conference / ADR						
Preparation	6.00	330	1,980.00	13.00	257.40	2,237.40
Attendance	8.00	330	2,640.00	13.00	343.20	2,983.20
Preparation of Settlement Proposal	6.00	330	1,980.00	13.00	257.40	2,237.40
Attendance at Presentation to Panel		330		13.00		
Oral Hearing						
Preparation		330		13.00		
Attendance at Oral Hearing		330		13.00		
Submissions						
Written Submissions		330		13.00		
Oral Submissions		330		13.00		
Attendance at Oral Submissions		330		13.00		
Other Attendance						
Other Attendance		330		13.00		
Communication						
With Client		330		13.00		
With Other Parties		330		13.00		
Motions						
Preparation of Motion(s) Materials		330		13.00		
Prepare Submissions on the Motion(s)		330		13.00		
Attendance at Hearing on Motion(s)		330		13.00		
Confidentiality						

Preparation of Application for Confidentiality		330		13.00		
Prepare Submissions on Confidentiality		330		13.00		
Attendance at Hearing on Confidentiality		330		13.00		
Decision						
Review	0.40	330	132.00	13.00	17.16	149.16
Rate Order						
Review		330		13.00		
Prepare Submission on Rate Order		330		13.00		
Total Service Provider Fees						
Total Service Provider Fees:			14,982.00		1,947.66	16,929.66

Attachments

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

Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Related Disbursement Claim</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
SEC_JCS_Dockets_Lakefront.pdf		Time Docket	Hearings	

Date	Explanation	Lwyr	Hours
20210519	Edit NOI, Various emails	JCS	0.4
20210522	Review of evidence	JCS	0.7
20210526	Various emails	JCS	0.1
20210527	Get Exhibit 2 and commence review	JCS	0.4
20210531	Review evidence	JCS	1
20210601	Review evidence, Research	JCS	2
20210602	Review evidence, Meet with Fred	JCS	1.2
20210618	Review PO #1 and scheduling	JCS	0.3
20210619	Many emails	JCS	0.1
20210621	Various emails	JCS	0.1
20210622	Many emails, Submissions on issues	JCS	0.3
20210623	Many emails re procedure, Reviewing evidence	JCS	1.2
20210625	Many emails	JCS	0.1
20210626	Review evidence	JCS	2.5
20210628	Many emails, Scheduling	JCS	0.2
20210629	Telephone conversation with Mark R, Many emails, Review evidence	JCS	1.8
20210630	Review evidence, Drafting interrogatories, Review issues list decision, Many emails, Review Board letter and scheduling	JCS	3.3
20210701	Review Fred's interrogatories, Many emails, Revising interrogatories and comments, Revise comparison spreadsheet and update parameters	JCS	6
20210702	Various emails, Review Staff interrogatories	JCS	0.3
20210705	Review final IRs, Review interrogatories of others, Many emails	JCS	0.4
20210723	Review letter from company, Various emails	JCS	0.1
20210726	Review Board letter and scheduling	JCS	0.1
20210728	Many emails, ADR Guidelines for Fred	JCS	0.3
20210730	Initial review of interrogatory responses	JCS	0.6
20210802	Review interrogatory responses	JCS	1
20210804	Review interrogatory responses, Review VECC questions, Review Fred's analysis	JCS	2.5
20210805	Many emails	JCS	0.1
20210806	Many emails, Review Staff questions	JCS	0.3
20210808	Prep for ADR, Various emails	JCS	2.5
20210809	Meet with Fred, Prep for ADR	JCS	4.1
20210810	Attend at ADR, Many emails, Prep	JCS	6.5
20210811	Attend at ADR, Many emails, Prep	JCS	4.3
20210812	Many emails	JCS	0.1
20210813	Many emails, Review letter	JCS	0.3
20210820	Many emails	JCS	0.1
20210826	Many emails	JCS	0.1
20210827	Many emails	JCS	0.1
20210830	Many emails	JCS	0.1
20210831	Many emails	JCS	0.1
20210901	Review agreement and provide comments	JCS	1.5
20210902	Many emails and comments from others	JCS	0.2
20210903	Review comments of others, Many emails	JCS	0.6
20210907	Review letter, Many emails	JCS	0.1
20210909	Review PO#2 and scheduling	JCS	0.1
20210910	Various emails	JCS	0.1
20210913	Many emails, Review new material	JCS	0.3
20210914	Review new draft and models, Many emails	JCS	2.1
20210916	Various emails	JCS	0.1
20210924	Review Board letter, Review Staff submission, Many emails	JCS	0.2
20211012	Many emails, Review revised settlement proposal, Client reporting	JCS	0.4
20211020	Many emails	JCS	0.1
20211021	Many emails	JCS	0.1
20211025	Review Staff letter	JCS	0.1
20211028	Review decision and scheduling, Various emails	JCS	0.4
			52.1

17193
2235.09
19428.09

Fred Zheng

CASE	COST CLAIM	INTERVENOR NAME	PARTICIPANT CLAIM STATUS
EB-2021-0039: Rates: Distribution: Lakefront Utilities Inc.	EB-2021-0039 : 1 : Glenda Masters	Masters, Glenda; +1 (416) 483-3300 Glenda@shepherdruenstein.com	Submitted

FILING PARTICIPANT	NEW PARTICIPANT	NON-FILING PARTICIPANT F. NAME	NON-FILING PARTICIPANT L. NAME
Zheng, Fred; +1 (416) 483-0114 fred@shepherdruenstein.com	No		

SERVICE PROVIDER TYPE	YEAR CALLED TO BAR	COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE	HOURLY RATE
Legal Counsel	2020	1	170

CV STATUS (FOR CONSULTANT/ANALYST)	LAST CV DATE	HST RATE CHARGED
CV Required		13.00

HEARINGS	CONSULTATIONS	DISBURSEMENTS
Yes	No	No

HEARINGS

<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
Review Application and Evidence						
Review Application and Evidence		170		13.00		
Discovery						
Preparation of Interrogatories	5.00	170	850.00	13.00	110.50	960.50
Review Interrogatory Responses	5.00	170	850.00	13.00	110.50	960.50
Technical Conference Preparation		170		13.00		
Technical Conference Attendance		170		13.00		
Technical Conference Follow Up		170		13.00		
Issues List						
Preparation		170		13.00		
Attendance at Issues Conference		170		13.00		
Intervenor Evidence						
Preparation		170		13.00		
Interrogatory Responses		170		13.00		
Preparation of Witness(es) for Attendance at Hearing		170		13.00		
Settlement Conference / ADR						
Preparation	3.00	170	510.00	13.00	66.30	576.30
Attendance		170		13.00		
Preparation of Settlement Proposal	1.00	170	170.00	13.00	22.10	192.10
Attendance at Presentation to Panel		170		13.00		
Oral Hearing						
Preparation		170		13.00		
Attendance at Oral Hearing		170		13.00		
Submissions						
Written Submissions		170		13.00		
Oral Submissions		170		13.00		
Attendance at Oral Submissions		170		13.00		
Other Attendance						
Other Attendance		170		13.00		
Communication						
With Client		170		13.00		
With Other Parties		170		13.00		
Motions						
Preparation of Motion(s) Materials		170		13.00		
Prepare Submissions on the Motion(s)		170		13.00		
Attendance at Hearing on Motion(s)		170		13.00		
Confidentiality						

Preparation of Application for Confidentiality	170	13.00		
Prepare Submissions on Confidentiality	170	13.00		
Attendance at Hearing on Confidentiality	170	13.00		
Decision				
Review	170	13.00		
Rate Order				
Review	170	13.00		
Prepare Submission on Rate Order	170	13.00		
Total Service Provider Fees				
Total Service Provider Fees:	2,380.00	309.40	2,689.40	

Attachments

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

Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Related Disbursement Claim</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
SEC_FZ_Dockets_Lakefront.pdf		Time Docket	Hearings	

Date	Explanation	Lwyr	Hours
20210519	Review NOI, Review email instruction	FZ	0.3
20210602	Discuss with Jay regarding Exhibit 1	FZ	1
20210604	Analyze Exhibit 1 and consult Handbook on Utilities Rate Application	FZ	1.5
20210611	Review Exhibit 1 and notes from discussion with Jay	FZ	0.8
20210614	Analyze Exhibit 1 and provide comments	FZ	0.8
20210615	Review Exhibit 1, Analyze and calculate increase in OM&A and Retrun of Capital	FZ	4.1
20210616	Zoom w. Jay re: LUI evidence review instructions, Review Exhibit 1, 2 and 4	FZ	2.4
20210618	Review Exhibit 1 and 2, Research financial statement of LUI, Review email	FZ	2.1
20210621	Discussion w Jay re interrogatories, issue list and PO#1, Review OEB issues list	FZ	0.6
20210622	Review emails on issues list	FZ	0.1
20210623	Review emails, Staff draft issues list and Exhibit 1	FZ	2.7
20210624	Draft IR questions for Exhibit 1, Consult outside sources such as Handbook on Utility Rate Applications	FZ	2
20210625	Draft IR for Exhibit 1 and draft IR for Exhibit 2, Review emails and the Issues List	FZ	4.7
20210628	Consult Rate Application Handbook, Analyze Exhibit 2, Draft IR, Review email	FZ	2.1
20210629	Analyze Exhibit 2, 4 and 5, Draft IR	FZ	7.2
20210630	Analyze Exhibit 4,5,7,8 and 9, Draft IR, Email w. Jay, Review OEB email	FZ	10.3
20210701	Draft and edit interrogatories	FZ	2.4
20210702	Edit interrogatories, communication with Jay	FZ	0.3
20210705	Preliminary review of VECC, NHH, CTA and Energy Probe interrogatories	FZ	0.4
20210723	Many emails	FZ	0.2
20210728	Review assignment instruction from Jay	FZ	0.1
20210730	Analyze LUI interrogatories response	FZ	3.1
20210803	Review interrogatory responses and other evidence, ADR preparation	FZ	7.7
20210804	Review clarification questions of VECC	FZ	0.2
20210809	Meeting with Jay, preparation for ADR	FZ	1.5
20210810	Preparation and Attending Hearing	FZ	6.5
20210811	Attend Hearing	FZ	4.5
20210903	Many emails	FZ	0.3
20210913	Many emails	FZ	0.5
20210914	Review emails	FZ	0.2
20210923	Review settlement proposal	FZ	0.2
20210924	Review email and settlement proposal	FZ	0.5
20210929	Many emails	FZ	0.2
20211021	Many emails	FZ	0.2
20211025	Review revised Settlement Proposal	FZ	0.2
			71.9

12223
1588.99
13811.99