



**BY EMAIL and RESS**

**Mark Rubenstein**  
mark@shepherdrubenstein.com  
Dir. 647-483-0113

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

April 2, 2024  
Our File: EB20230052

**Attn: Nancy Marconi, Registrar**

Dear Ms. Marconi:

**Re: EB-2023-0052 – Synergy North 2024 Rates – Cost Claim**

We are counsel to the School Energy Coalition (“SEC”). Attached, please find SEC’s cost claim using the OEB’s cost claim system.

For purposes of cost claim categorization, where dockets include both reviewing evidence and preparing interrogatories, or reviewing interrogatory responses and preparing for the Settlement Conference, we have allocated 50% to each specific category activity. As a practical matter, each set of activities are done at the same time and so cannot be readily extricable (e.g. we are preparing IRs as we review the evidence). We have also included time under the ‘Other Attendance’ category for activities related to preparation and attendance at the pre-filing meeting. Time spent regarding the numerous discussions amongst parties and OEB Staff related to the revised Settlement Proposal have been included under Preparation of Settlement Proposal category.

SEC submits that its participation in this proceeding was thorough and valuable and was designed to maximize its assistance to the OEB in this challenging matter. SEC therefore requests reimbursement of its reasonably incurred costs as set forth in the attached cost claim, which is commensurate with the scope of the issues, and the role that it took in this proceeding.

Yours very truly,  
**Shepherd Rubenstein P.C.**

Mark Rubenstein

cc: Brian McKay, SEC (by email)  
Applicant (by email)

# EB-2023-0052 : 1 : Mark Rubenstein

COST CLAIM NUMBER  
1987

SUBMISSION DEADLINE DATE  
April 05, 2024

CLAIM STATUS  
Approved by Finance

EB#  
EB-2023-0052: Rates: Distribution: Synergy North Corporation

OTHER EB#S

PHASE #\*  
1

INTERVENOR  
Rubenstein, Mark; +1 (647) 483-0113  
mark@shepherdubenstein.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

<b>New</b>	<b>Non-Filing Participant First, Last Name</b>	<b>Filing Participant</b>	<b>Total (\$)</b>	<b>Total Hours</b>	<b>Participant Claim Status</b>
No	,	Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdubenstein.com	20,317.40	62.00	Submitted

## ATTACHMENTS

<b>Attachment</b>	<b>Document Type</b>	<b>Import Message</b>
EB-2023-0052 Cover Letter.pdf	Cover Letter	
SEC EB-2023-0052 Cost Claim 040220241431.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES  
17,980.00

TOTAL DISBURSEMENTS  
0.00

TOTAL HST  
2,337.40

TOTAL CLAIM  
20,317.40

TOTAL AMOUNT AWARDED

TOTAL HOURS CLAIMED  
62.00

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  
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  
Mark Rubenstein

DATE SUBMITTED  
April 02, 2024

<b>CASE</b> EB-2023-0052: Rates: Distribution: Synergy North Corporation	<b>COST CLAIM</b> EB-2023-0052 : 1 : Mark Rubenstein	<b>INTERVENOR NAME</b> Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdrubenstein.c om	<b>PARTICIPANT CLAIM STATUS</b> Submitted
<b>FILING PARTICIPANT</b> Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdrubenstein.com	<b>NEW PARTICIPANT</b> No	<b>NON-FILING PARTICIPANT F. NAME</b>	<b>NON-FILING PARTICIPANT L. NAME</b>
<b>SERVICE PROVIDER TYPE*</b> Legal Counsel	<b>YEAR CALLED TO BAR*</b> 2011	<b>COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE*</b> 11	<b>HOURLY RATE</b> 290
<b>HST RATE CHARGED*</b> 13.00	<b>CV STATUS (FOR CONSULTANT/ANALYST)</b> CV Required	<b>LAST CV DATE</b>	<b>OVERRIDE HOURLY RATE</b> No
<b>HST NUMBER</b> 83673 5464 RT0001	<b>HEARINGS</b> Yes	<b>CONSULTATIONS</b> No	<b>DISBURSEMENTS</b> No

**HEARINGS**

<b>Hearings Hours</b> 62.00	<b>Hearings Subtotal (\$)</b> 17,980.00	<b>Hearings Total Tax (\$)</b> 2,337.40	<b>Hearings Total (\$)</b> 20,317.40
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<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
<b>DISCOVERY</b>						
Read and Research Application and Evidence	7.80	290	2,262.00	13.00	294.06	2,556.06
Preparation of Interrogatories	7.80	290	2,262.00	13.00	294.06	2,556.06
Review Interrogatory Responses	9.00	290	2,610.00	13.00	339.30	2,949.30
Technical Conference Preparation		290		13.00		
Technical Conference Attendance		290		13.00		
Technical Conference Follow-up		290		13.00		
<b>Subtotal of DISCOVERY</b>	<b>24.60</b>		<b>7,134.00</b>		<b>927.42</b>	<b>8,061.42</b>
<b>PROCEDURAL</b>						
Preparation of Issues List Submission	0.40	290	116.00	13.00	15.08	131.08
Attendance at Issues List Conference		290		13.00		
Preparation for a Confidentiality Request		290		13.00		
Prepare Submissions on Confidentiality		290		13.00		
Preparation of Motion(s) Materials		290		13.00		
Prepare Submissions on the Motion(s)		290		13.00		
Attendance at Hearing on Motion(s)		290		13.00		
Review Procedural Documents	0.60	290	174.00	13.00	22.62	196.62

<u>Name</u>	<u>Hours</u>	<u>Hourly Rate</u>	<u>Sub Total</u>	<u>HST Rate</u>	<u>HST</u>	<u>Total</u>
<b>Subtotal of PROCEDURAL</b>	<b>1.00</b>		<b>290.00</b>		<b>37.70</b>	<b>327.70</b>
<b>INTERVENOR EVIDENCE</b>						
Preparation of Intervenor Evidence		290		13.00		
Interrogatory Responses		290		13.00		
Preparation of Witness(es) for Attendance at Hearing		290		13.00		
<b>Subtotal of INTERVENOR EVIDENCE</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>SETTLEMENT CONFERENCE</b>						
Preparation for Settlement Conference	9.70	290	2,813.00	13.00	365.69	3,178.69
Attendance at Settlement Conference	13.20	290	3,828.00	13.00	497.64	4,325.64
Preparation of Settlement Proposal	11.70	290	3,393.00	13.00	441.09	3,834.09
Attendance at Presentation to Panel		290		13.00		
<b>Subtotal of SETTLEMENT CONFERENCE</b>	<b>34.60</b>		<b>10,034.00</b>		<b>1,304.42</b>	<b>11,338.42</b>
<b>WRITTEN ARGUMENT</b>						
Written Submissions		290		13.00		
<b>Subtotal of WRITTEN ARGUMENT</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>ORAL ARGUMENT</b>						
Preparation for Oral Hearing		290		13.00		
Attendance at Oral Hearing		290		13.00		
Oral Submissions		290		13.00		
Attendance at Oral Submissions		290		13.00		
<b>Subtotal of ORAL ARGUMENT</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>DECISION</b>						
Review Decision	0.20	290	58.00	13.00	7.54	65.54
Review Rate/Accounting Order		290		13.00		
Prepare Submission on Rate Order		290		13.00		
<b>Subtotal of DECISION</b>	<b>0.20</b>		<b>58.00</b>		<b>7.54</b>	<b>65.54</b>
<b>OTHER</b>						
Other Attendance (e.g., Intervenor Conferences)	1.60	290	464.00	13.00	60.32	524.32
<b>Subtotal of OTHER</b>	<b>1.60</b>		<b>464.00</b>		<b>60.32</b>	<b>524.32</b>
<b>TOTAL SERVICE PROVIDER FEES</b>						
<b>Total Service Provider Fees</b>	<b>62.00</b>		<b>17,980.00</b>		<b>2,337.40</b>	<b>20,317.40</b>

## Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
EB-2023-0052 Client Fees Listing.pdf	Time Docket	

## Hearings, Consultations, Disbursements Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Claim Type</u>	<u>Import Message</u>
EB-2023-0052 Client Fees Listing.pdf	Time Docket	Hearings	

Date	Explanation	Lwyr	Hours
20230726	emails re: pre-application meeting	MR	0.1
20230804	prepare and attend pre-application meeting	MR	1.5
20230920	preliminary review of Application/complete intervenor form	MR	1
20230927	review PO	MR	0.2
20230928	email	MR	0.1
20231002	emails	MR	0.1
20231003	emails	MR	0.1
20231004	review Staff corr	MR	0.1
20231010	review Application and draft IR	MR	5.5
20231011	review Application and draft IR	MR	2.7
20231014	review Application and draft IR	MR	3.5
20231017	review Application and draft IR	MR	1.9
20231019	p. call w. J. Girvan/emails/finalize IRs	MR	0.6
20231020	review other parties IRs	MR	0.3
20231103	emails	MR	0.1
20231114	emails	MR	0.1
20231115	review IRR	MR	3.7
20231116	review IRR and prepare for SC	MR	2.6
20231117	p. call w. S. Grice/review IRR/prepare for SC	MR	7.8
20231119	review CQ responses/prepare for SC	MR	3.5
20231120	prepare before start of day 1	MR	0.5
20231120	attend Settlement Conference	MR	6.7
20231120	prepare for day 2	MR	0.5
20231121	attend Settlement Conference	MR	6.5
20231122	emails	MR	0.1
20231205	emails	MR	0.1
20231206	prelim review of Settlement Proposal/emails	MR	0.4
20231208	emails	MR	0.1
20231210	emails	MR	0.1
20231211	review Settlement Proposal and provide proposed edits and comments/emails/p. call w. Bill Harper	MR	2.2
20231212	review consolidated version/emails	MR	0.2
20231213	p. call w. C. Boyle/emails	MR	0.2
20231214	emails	MR	0.1
20231215	emails/review extension letter and reply/prelim review of second draft of settlement	MR	0.3
20231216	emails	MR	0.1
20231218	review other parties comments/provide edits and comments on second draft/emails	MR	1
20231219	emails	MR	0.1
20231220	review other parties comments and edits/consolidate comments and edits/emails	MR	0.9
20231221	review final version of Settlement Proposal and models/emails	MR	0.5

20231222	emails	MR	0.2
20240115	review Staff submission on settlement	MR	0.3
20240125	preliminary review of emails and models/p. call w. S. Grice	MR	0.3
20240126	review corrections analysis	MR	0.2
20240129	emails/p. call w. S. Grice	MR	0.2
20240130	emails/p. call w. S. Grice	MR	0.2
20240131	emails/review update models/p. call w. S. Grice	MR	0.5
20240201	meeting with intervenors/meeting with SG/emails/p. call w. Colm Boyl	MR	1.5
20240202	emails/review further revised bill impact models	MR	0.3
20240203	emails	MR	0.1
20240203	many emails/p. call w. A. Price (Facilitator)	MR	0.5
20240208	emails	MR	0.1
20240209	review draft letter and updated settlement/emails	MR	0.3
20240212	emails	MR	0.1
20240213	emails/discussion with intervenors/p. call w. J. Vellone	MR	0.4
20240214	p. call w. Ted A. (Staff)	MR	0.2
20240215	emails	MR	0.2
20240301	review Staff letter	MR	0.1
20240328	review decision/emails	MR	0.2
			62