



**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

September 9, 2024  
Our File: EB20240063

**Attn: Nancy Marconi, Registrar**

Dear Ms. Marconi:

**Re: EB-2024-0063 – Generic Hearing on Cost of Capital – Interim Cost Claim**

We are counsel to the School Energy Coalition ("SEC"). Attached, please find SEC's interim cost claim using the OEB's cost claim system.

SEC notes that for categorization purposes, since there do not appear to be appropriate categories for the following activities, time spent preparing for the Issues Conference has been included under the 'Preparation of Issues List Submission' category. Similarly, time spent meeting and consulting with other ratepayer groups regarding the potential filing of expert evidence, as well as drafting the joint letter in support of the proposal filed by IGUA/AMPCO, has been included in the 'Review Procedural Documents' category.

While the OEB has indicated that it does not intend to conduct a detailed review of the claims at this time, SEC submits that its participation in this proceeding to date has been appropriate, given the significance of this proceeding, and commensurate with the scope of the issues.

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

Mark Rubenstein

cc: Brian McKay SEC (by email)

## EB-2024-0063 : 1 : Mark Rubenstein

COST CLAIM NUMBER  
2338

SUBMISSION DEADLINE DATE  
September 09, 2024

CLAIM STATUS  
Approved by Finance

EB#  
EB-2024-0063: Rates: Policy-Related: Ontario  
Energy Board

OTHER EB#S

PHASE #\*  
1

INTERVENOR  
Rubenstein, Mark; +1 (647) 483-0113  
mark@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	,	Rubenstein, Mark; +1 (647) 483-0113 mark@shepherd Rubenstein.com	18,711.67	57.10	Submitted
No	,	Shepherd, Jay; +1 (416) 804-2767 jay@shepherd Rubenstein.com	522.06	1.40	Submitted

### ATTACHMENTS

Attachment	Document Type	Import Message
SEC_CoC_InterimCostClaimLtr.pdf	Cover Letter	
SEC EB-2024-0063 Cost Claim 090920241449.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES	TOTAL DISBURSEMENTS	TOTAL HST
17,021.00	0.00	2,212.73
TOTAL CLAIM	TOTAL AMOUNT AWARDED	
19,233.73		
TOTAL HOURS CLAIMED	TOTAL HOURS DISALLOWED	
58.50		
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
2200 Yonge Street	
Suite 1302	
Toronto, ON	
M4S 2C6	

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
Mark Rubenstein	September 09, 2024

<b>CASE</b> EB-2024-0063: Rates: Policy-Related: Ontario Energy Board	<b>COST CLAIM</b> EB-2024-0063 : 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> 12	<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

Hearings Hours	Hearings Subtotal (\$)	Hearings Total Tax (\$)	Hearings Total (\$)			
57.10	16,559.00	2,152.67	18,711.67			
<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	19.60	290	5,684.00	13.00	738.92	6,422.92
Preparation of Interrogatories	7.90	290	2,291.00	13.00	297.83	2,588.83
Review Interrogatory Responses	3.60	290	1,044.00	13.00	135.72	1,179.72
Technical Conference Preparation		290		13.00		
Technical Conference Attendance		290		13.00		
Technical Conference Follow-up		290		13.00		
Subtotal of DISCOVERY	31.10		9,019.00		1,172.47	10,191.47
PROCEDURAL						
Preparation of Issues List Submission	3.30	290	957.00	13.00	124.41	1,081.41
Attendance at Issues List Conference	7.30	290	2,117.00	13.00	275.21	2,392.21
Preparation for a Confidentiality Request		290		13.00		
Prepare Submissions on Confidentiality	0.70	290	203.00	13.00	26.39	229.39
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	8.70	290	2,523.00	13.00	327.99	2,850.99

<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>20.00</b>		<b>5,800.00</b>		<b>754.00</b>	<b>6,554.00</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		290		13.00		
Attendance at Settlement Conference		290		13.00		
Preparation of Settlement Proposal		290		13.00		
Attendance at Presentation to Panel		290		13.00		
<b>Subtotal of SETTLEMENT CONFERENCE</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</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	1.00	290	290.00	13.00	37.70	327.70
Attendance at Oral Hearing	5.00	290	1,450.00	13.00	188.50	1,638.50
Oral Submissions		290		13.00		
Attendance at Oral Submissions		290		13.00		
<b>Subtotal of ORAL ARGUMENT</b>	<b>6.00</b>		<b>1,740.00</b>		<b>226.20</b>	<b>1,966.20</b>
<b>DECISION</b>						
Review Decision		290		13.00		
Review Rate/Accounting Order		290		13.00		
Prepare Submission on Rate Order		290		13.00		
<b>Subtotal of DECISION</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>OTHER</b>						
Other Attendance (e.g., Intervenor Conferences)		290		13.00		
<b>Subtotal of OTHER</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>TOTAL SERVICE PROVIDER FEES</b>						
<b>Total Service Provider Fees</b>	<b>57.10</b>		<b>16,559.00</b>		<b>2,152.67</b>	<b>18,711.67</b>

## Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
EB-2024-0063 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-2024-0063 Client Fees Listing.pdf	Time Docket	Hearings	

Date	Explanation	Lwyr	Hours
20240306	Review OEB materials, Many emails	JCS	0.4
20240306	review Notice/emails	MR	0.4
20240308	complete and file intervenor form	MR	0.3
20240313	emails	MR	0.1
20240314	p. call w. JG	MR	0.1
20240315	emails	MR	0.1
20240318	prepare and attend meeting with customer groups to discuss evidence/emails/p. call w. F. O'Connell (OEB Staff)	MR	1.5
20240319	p. call w. F. O'Connell (OEB Staff)/emails	MR	0.3
20240328	Review Board material, Scheduling, Many emails	JCS	0.3
20240328	review PO/emails	MR	0.4
20240404	emails	MR	0.1
20240405	p. call w. Ian Mondrow	MR	0.2
20240408	review background documents	MR	1
20240416	emails	MR	0.1
20240417	prepare for issues conference/attend meeting with IGUA and VECC	MR	2
20240418	attend issues conference/disc. w. parties	MR	7.3
20240421	review circulated revised issues list/review IGUA comments on issues list/provide proposed edit/emails	MR	0.2
20240422	emails re: issues list/review Bd letter	MR	0.2
20240424	emails/p. call w. S. Grice/p. call w. J. Girvan	MR	0.2
20240426	emails/p. call w. J. Girvan/p. call w. I. Mondrow	MR	0.5
20240427	emails with IGUA/undertake impact analysis of change in CoC change	MR	1.2
20240428	further emails with I. Mondrow regarding impact analysis	MR	0.5
20240429	multiple/p. call w. I. Mondrow/Zoom meeting with consumer groups/review draft letter/p. call w. S. Grice/p. call. w. J. Girvan/review c	MR	2
20240430	emails/review letters from parties on evidence	MR	0.5
20240501	review corr/emails	MR	0.1
20240503	review OEB letter	MR	0.1
20240508	emails/meeting with intervenors	MR	0.6
20240509	draft support letter/emails	MR	0.3
20240510	finalizelatter/view IGUA letter/emails	MR	0.2
20240510	Many emails, Review correspondence	JCS	0.2
20240515	emails	MR	0.1
20240517	review PO	MR	0.1
20240621	emails	MR	0.1
20240621	Initial review of Staff expert evidence	JCS	0.5
20240625	emails	MR	0.1
20240626	preliminary review of reports/emails	MR	2.8
20240627	emails	MR	0.1

20240704	emails/research on reg changes since 2011	MR	2.5
20240705	emails/research/p. call w. S. Grice	MR	1.5
20240707	emails/p. call w. S. Grice	MR	0.3
20240708	emails/p. call w. S. Grice	MR	0.2
20240709	p. call w. S. Grice/p. call w L. Gluck	MR	0.4
20240712	review OEB letter	MR	0.1
20240715	emails	MR	0.1
20240716	review LEI report	MR	3.2
20240717	review LEI report	MR	0.5
20240719	preliminary review of intervenor evidence	MR	0.6
20240727	review expert reports	MR	2.1
20240728	review expert reports	MR	1.5
20240730	emails/review reports/draft IRs	MR	3
20240731	draft IRs/emails/research	MR	3.8
20240801	edit, finalize IRs/emails	MR	0.7
20240802	draft cover letter, finalize and file IRs/review other parties IRs	MR	1.4
20240806	review VECC IRs	MR	0.2
20240807	emails/review PO	MR	0.2
20240809	emails	MR	0.1
20240815	review corr	MR	0.1
20240822	preliminary review of IRR/p. call w. I. Mondrow/emails	MR	0.4
20240823	preliminary review of IRR and emails	MR	1.1
20240826	emails/file D&U/review confidential letters	MR	0.5
20240827	review IRR responses/emails	MR	1.5
20240829	emails	MR	0.1
20240830	emails/p. call w. FO (OEB Staff)	MR	0.3
20240902	draft objection/emails	MR	0.4
20240903	finalize and file objection letter	MR	0.2
20240903	email/p. call. w. L. Gluck	MR	0.3
20240904	prepare for presentation day/review presentations	MR	1
20240905	attend presentation day	MR	5
			58.5

<b>CASE</b> EB-2024-0063: Rates: Policy-Related: Ontario Energy Board	<b>COST CLAIM</b> EB-2024-0063 : 1 : Mark Rubenstein	<b>INTERVENOR NAME</b> Rubenstein, Mark; +1 (647) 483-0113 mark@shepherd rubenstein.c om	<b>PARTICIPANT CLAIM STATUS</b> Submitted
<b>FILING PARTICIPANT</b> Shepherd, Jay; +1 (416) 804-2767 jay@shepherd rubenstein.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> 1980	<b>COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE*</b> 41	<b>HOURLY RATE</b> 330
<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

Hearings Hours	Hearings Subtotal (\$)	Hearings Total Tax (\$)	Hearings Total (\$)
1.40	462.00	60.06	522.06

<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	1.20	330	396.00	13.00	51.48	447.48
Preparation of Interrogatories		330		13.00		
Review Interrogatory Responses		330		13.00		
Technical Conference Preparation		330		13.00		
Technical Conference Attendance		330		13.00		
Technical Conference Follow-up		330		13.00		
Subtotal of DISCOVERY	1.20		396.00		51.48	447.48
PROCEDURAL						
Preparation of Issues List Submission		330		13.00		
Attendance at Issues List Conference		330		13.00		
Preparation for a Confidentiality Request		330		13.00		
Prepare Submissions on Confidentiality		330		13.00		
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		
Review Procedural Documents	0.20	330	66.00	13.00	8.58	74.58



<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>0.20</b>		<b>66.00</b>		<b>8.58</b>	<b>74.58</b>
<b>INTERVENOR EVIDENCE</b>						
Preparation of Intervenor Evidence		330		13.00		
Interrogatory Responses		330		13.00		
Preparation of Witness(es) for Attendance at Hearing		330		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		330		13.00		
Attendance at Settlement Conference		330		13.00		
Preparation of Settlement Proposal		330		13.00		
Attendance at Presentation to Panel		330		13.00		
<b>Subtotal of SETTLEMENT CONFERENCE</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>WRITTEN ARGUMENT</b>						
Written Submissions		330		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		330		13.00		
Attendance at Oral Hearing		330		13.00		
Oral Submissions		330		13.00		
Attendance at Oral Submissions		330		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		330		13.00		
Review Rate/Accounting Order		330		13.00		
Prepare Submission on Rate Order		330		13.00		
<b>Subtotal of DECISION</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>OTHER</b>						
Other Attendance (e.g., Intervenor Conferences)		330		13.00		
<b>Subtotal of OTHER</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</b>
<b>TOTAL SERVICE PROVIDER FEES</b>						
<b>Total Service Provider Fees</b>	<b>1.40</b>		<b>462.00</b>		<b>60.06</b>	<b>522.06</b>

## Attachments

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

## Hearings, Consultations, Disbursements Attachments

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

**See Participant – Mark Rubenstein**