



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

January 17, 2025
Our File: EB20240216

Attn: Nancy Marconi, Registrar

Dear Ms. Marconi:

Re: EB-2024-0216 – Chatham x Lakeshore 2025-2029 – Cost Claim

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

SEC divided up responsibility amongst its consultant Jane Scott and counsel, Mark Rubenstein. Mr. Rubenstein was primarily responsible for the discovery process, and overall strategic direction and oversight. As a result of the scheduling issues with another OEB matter, Ms. Scott handled the settlement process.

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).

SEC submits that its participation in this proceeding was thorough and valuable and was designed to maximize its assistance to the OEB in this matter. SEC therefore requests reimbursement of its reasonably incurred costs as set out in this letter and supported by the attached information, which is commensurate with the scope of the issues.

Yours very truly,
Shepherd Rubenstein P.C.

Mark Rubenstein

cc: Brian McKay, SEC (by email)
Applicant (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-2024-0216 : 1 : Mark Rubenstein

COST CLAIM NUMBER
2471

SUBMISSION DEADLINE DATE
January 21, 2025

CLAIM STATUS
Approved by Finance

EB#
EB-2024-0216: Rates: Transmission: Chatham x
Lakeshore GP Inc., general partner of Chatham x
Lakeshore Limited Partnership

OTHER EB#S

PHASE #*
1

INTERVENOR
Rubenstein, Mark; +1 (647) 483-0113
mark@shepherdrubenstein.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@shepherdrubenstein.com	1,933.45	5.90	Submitted
Yes	Jane , Scott		3,430.68	9.20	Submitted

ATTACHMENTS

Attachment	Document Type	Import Message
Cost Claim Cover Letter.pdf	Cover Letter	
SEC EB-2024-0216 Cost Claim 011720251500.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES
4,747.00

TOTAL DISBURSEMENTS
0.00

TOTAL HST
617.13

TOTAL CLAIM
5,364.13

TOTAL AMOUNT AWARDED

TOTAL HOURS CLAIMED
15.10

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
January 17, 2025

CASE EB-2024-0216: Rates: Transmission: Chatham x Lakeshore GP Inc., general partner of Chatham x Lakeshore Limited Partnership	COST CLAIM EB-2024-0216 : 1 : Mark Rubenstein	INTERVENOR NAME Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdrubenstein.c om	PARTICIPANT CLAIM STATUS Submitted
FILING PARTICIPANT Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdubenstein.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 290
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 (\$)
5.90	1,711.00	222.45	1,933.45

Name	Hours	Hourly Rate	Sub Total	HST Rate	HST	Total
DISCOVERY						
Read and Research Application and Evidence	2.15	290	623.50	13.00	81.06	704.56
Preparation of Interrogatories	1.95	290	565.50	13.00	73.52	639.02
Review Interrogatory Responses	0.25	290	72.50	13.00	9.43	81.93
Technical Conference Preparation		290		13.00		
Technical Conference Attendance		290		13.00		
Technical Conference Follow-up		290		13.00		
Subtotal of DISCOVERY	4.35		1,261.50		164.01	1,425.51
PROCEDURAL						
Preparation of Issues List Submission	0.20	290	58.00	13.00	7.54	65.54
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>
Subtotal of PROCEDURAL	0.80		232.00		30.16	262.16
INTERVENOR EVIDENCE						
Preparation of Intervenor Evidence		290		13.00		
Interrogatory Responses		290		13.00		
Preparation of Witness(es) for Attendance at Hearing		290		13.00		
Subtotal of INTERVENOR EVIDENCE	0.00		0.00		0.00	0.00
SETTLEMENT CONFERENCE						
Preparation for Settlement Conference	0.35	290	101.50	13.00	13.20	114.70
Attendance at Settlement Conference		290		13.00		
Preparation of Settlement Proposal	0.20	290	58.00	13.00	7.54	65.54
Attendance at Presentation to Panel		290		13.00		
Subtotal of SETTLEMENT CONFERENCE	0.55		159.50		20.74	180.24
WRITTEN ARGUMENT						
Written Submissions		290		13.00		
Subtotal of WRITTEN ARGUMENT	0.00		0.00		0.00	0.00
ORAL ARGUMENT						
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		
Subtotal of ORAL ARGUMENT	0.00		0.00		0.00	0.00
DECISION						
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		
Subtotal of DECISION	0.20		58.00		7.54	65.54
OTHER						
Other Attendance (e.g., Intervenor Conferences)		290		13.00		
Subtotal of OTHER	0.00		0.00		0.00	0.00
TOTAL SERVICE PROVIDER FEES						
Total Service Provider Fees	5.90		1,711.00		222.45	1,933.45

Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
EB-20240216 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-20240216 Client Fees Listing.pdf	Time Docket	Hearings	

Date	Explanation	Lwyr	Hours
20240823	review Notice	MR	0.1
20240826	prelim review of Application and file Notice	MR	0.4
20240830	review PO/email	MR	0.1
20240902	Review Application/draft IRs	MR	3.3
20240904	edit and revise IRs	MR	0.1
20240904	email/issues list	MR	0.1
20240905	review issues list/emails	MR	0.1
20240906	finalzie IRs/draft cover letter	MR	0.2
20240909	emails	MR	0.1
20240920	emails	MR	0.1
20240927	emails	MR	0.1
20240930	emails/p. call w. S. Grice	MR	0.1
20241003	review Issues List decision	MR	0.1
20241004	Review interrogatories, Review for settlement, including call with Mark R.	JS	1
20241004	emails/review materials/meeting w. JS to disc. Settlement Conference	MR	0.5
20241006	Review interrogatories and prepare for Settlement Conference	JS	1
20241009	Discussion re settlement with other intervenors	JS	0.5
20241010	Prepare for Settlement Conference	JS	0.5
20241010	emails	MR	0.1
20241011	Attend Settlement Conference	JS	4.2
20241011	emails re: settlement	MR	0.1
20241023	emails	MR	0.1
20241024	Review Settlement	JS	1
20241025	Review Settlement	JS	0.5
20241117	Final review of Chatham x Lakeshore settlement	JS	0.5
20241217	review decision	MR	0.2
			15.1

Jane Scott

CASE EB-2024-0216: Rates: Transmission: Chatham x Lakeshore GP Inc., general partner of Chatham x Lakeshore Limited Partnership	COST CLAIM EB-2024-0216 : 1 : Mark Rubenstein	INTERVENOR NAME Rubenstein, Mark; +1 (647) 483-0113 mark@shepherd Rubenstein.c om	PARTICIPANT CLAIM STATUS Submitted
FILING PARTICIPANT	NEW PARTICIPANT Yes	NON-FILING PARTICIPANT F. NAME Jane	NON-FILING PARTICIPANT L. NAME Scott
SERVICE PROVIDER TYPE* Consultant	YEAR CALLED TO BAR*	COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE* 20	HOURLY RATE 330
HST RATE CHARGED* 13.00	CV STATUS (FOR CONSULTANT/ANALYST) CV Attached	LAST CV DATE January 17, 2025	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 (\$)			
9.20	3,036.00	394.68	3,430.68			
<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		330		13.00		
Preparation of Interrogatories		330		13.00		
Review Interrogatory Responses	1.00	330	330.00	13.00	42.90	372.90
Technical Conference Preparation		330		13.00		
Technical Conference Attendance		330		13.00		
Technical Conference Follow-up		330		13.00		
Subtotal of DISCOVERY	1.00		330.00		42.90	372.90
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		330		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		0.00		0.00	0.00
INTERVENOR EVIDENCE						
Preparation of Intervenor Evidence		330		13.00		
Interrogatory Responses		330		13.00		
Preparation of Witness(es) for Attendance at Hearing		330		13.00		
Subtotal of INTERVENOR EVIDENCE	0.00		0.00		0.00	0.00
SETTLEMENT CONFERENCE						
Preparation for Settlement Conference	2.00	330	660.00	13.00	85.80	745.80
Attendance at Settlement Conference	4.20	330	1,386.00	13.00	180.18	1,566.18
Preparation of Settlement Proposal	2.00	330	660.00	13.00	85.80	745.80
Attendance at Presentation to Panel		330		13.00		
Subtotal of SETTLEMENT CONFERENCE	8.20		2,706.00		351.78	3,057.78
WRITTEN ARGUMENT						
Written Submissions		330		13.00		
Subtotal of WRITTEN ARGUMENT	0.00		0.00		0.00	0.00
ORAL ARGUMENT						
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		
Subtotal of ORAL ARGUMENT	0.00		0.00		0.00	0.00
DECISION						
Review Decision		330		13.00		
Review Rate/Accounting Order		330		13.00		
Prepare Submission on Rate Order		330		13.00		
Subtotal of DECISION	0.00		0.00		0.00	0.00
OTHER						
Other Attendance (e.g., Intervenor Conferences)		330		13.00		
Subtotal of OTHER	0.00		0.00		0.00	0.00
TOTAL SERVICE PROVIDER FEES						
Total Service Provider Fees	9.20		3,036.00		394.68	3,430.68

Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
Docket Notice.pdf	Time Docket	
EB-2024-0216 PJScott Invoices.pdf	Invoice	
CV for PJScott.pdf	CV	

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	
EB-2024-0216 PJScott Invoices.pdf	Invoice	Hearings	
CV for PJScott.pdf	CV	Hearings	

See Participant – Mark Rubenstein



By Email

INVOICE

November 8, 2024

Ontario Education Services Corporation

439 University Ave.

18th Floor

Toronto, ON M5G 1Y8

ATTN: Diana Hong

Re: HONI Chatham x Lakeshore EB-2024-0216

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

JS	8.70	hours at \$330.00 per hour	\$2,871.00
MR	0.90	hours at \$290.00 per hour	\$261.00
Total Fees			\$3,132.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$407.16
Total Amount of this Invoice			\$3,539.16

E&OE

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

Invoice # 241124



By Email

INVOICE

December 10, 2024

Ontario Education Services Corporation

439 University Ave.

18th Floor

Toronto, ON M5G 1Y8

ATTN: Diana Hong

Re: HONI Chatham x Lakeshore EB-2024-0216

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

JS	0.50	hours at \$330.00 per hour	\$165.00
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Total Fees	\$165.00
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Disbursements	\$0.00
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HST (Registration #83673 5464 RT0001)	\$21.45
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Total Amount of this Invoice	\$186.45
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E&OE

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

Invoice # 241229

Curriculum Vitae

Patricia Jane Scott, P.Eng. MBA, LLM

48 Fentiman Ave.

Ottawa, Ontario

K1S 0T6

Jane_scott@rogers.com

647-271-3174

Work Experience

Ontario Energy Board 2015 to 2021

- Manager of Major Applications
- Project Advisor

Hydro Ottawa Limited 2000 to 2001, 2005 to 2014

- Acting Director, Regulatory Affairs
- Manager, Rates and Revenue
- Manager of Regulatory Affairs

City of Ottawa 2002 to 2004

- Program Manager, Water Environment Protection

Ottawa Hydro 1990 to 1999

- Planning Engineer

Education

- Solar Photovoltaic Design and Installation Workshop, Canadian Solar Institute, December 8-12, 2014
- Osgoode Hall Law School, York University, Master of Law in Energy and Infrastructure (LLM), 2014
- Schulich School of Business, York University, Masters Certificate in Energy Sector Leadership, 2011
- University of Toronto, Master of Business Administration (MBA), 1986
- Queen's University, B.Sc. (Honours), Electrical Engineering, 1979