



**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

December 18, 2024  
Our File: EB20230195

**Attn: Nancy Marconi, Registrar**

Dear Ms. Marconi:

**Re: EB-2023-0195 – Toronto Hydro 2025-2029 – Cost Claim**

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

Toronto Hydro’s Custom IR application was both significant in size (\$5.4Bn requested revenue requirement over the rate term) and complex in scope. The application proposed significant changes from its previous approved rate framework, and was one of the first electricity distribution applications that sought to address the implications of electrification. The proceeding involved 5 technical conference days, and 10 formal settlement conference days.

SEC organized its work on this matter efficiently, with counsel Mark Rubenstein taking the lead, relying on support from consultant Jane Scott in review of the OM&A, load forecast, cost allocation, and rate design evidence. Counsel Jay Shepherd provided some limited support.

As Toronto Hydro itself recognized during the Settlement Proposal Presentation Hearing<sup>1</sup>, the undersigned, on behalf of SEC, took a leadership role amongst the intervenors during the settlement process. In advance of the Settlement Conference, this included, among other tasks, coordinating discussions with intervenors to ensure a productive and efficient settlement process considering the number of parties and issues, and liaising with OEB Staff. During the Settlement Conference itself, the undersigned acting as the spokesperson amongst intervenors, coordinating, preparing and presenting intervenors offers to Toronto Hydro, assisting the parties with analysis regarding the financial impacts of offers and counter-offers, and liaising with the facilitator.

This involved a considerable amount of work in the lead up to the Settlement Conference, and once it began, both before and after each formal Settlement Conference Day (this time is included under the

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<sup>1</sup> Settlement Agreement Presentation Transcript, October 17, 2024, p.5

'Settlement Conference Preparation' category). Ultimately, a comprehensive settlement was reached on all but one full issue that resulted in considerable savings for customers.

As part of the Settlement Proposal drafting process, the undersigned acted as the point of contact between intervenors and Toronto Hydro, on behalf of SEC took the lead in reviewing the agreement, consolidating the many comments and edits from all intervenors and OEB Staff, and helped to resolve issues as they arose.

In addition, SEC notes the following about its involvement. First, with AMPCO, SEC took the lead in reviewing Toronto Hydro's \$3.93Bn proposed capital plan. Second, SEC was one of only two parties to file a motion regarding interrogatory responses and Technical Conference undertakings. The motion was ultimately settled through discussions and negotiations with Toronto Hydro, however that took time, and preparing for argument had to also take place.

With respect to the categorization of activities:

- As can be seen from our detailed dockets, certain activities are done at the same time and so cannot easily be separated into individual categories. For example, reviewing the evidence and preparing interrogatories are, in most situations, done at the same time. Additionally, considering the limited time between receiving interrogatory responses and the Technical Conference, reviewing interrogatory responses and preparing for the Technical Conference were undertaken at the same time. Similarly, reviewing Technical Conference undertakings and preparing for the Settlement Conference were often done at the same time. For the purposes of the OEB's cost claim categories, if a docket includes two categories of activities, we have generally allocated time equally between the two relevant categories.
- SEC has categorized time attending the Evidence Day Presentation in the in the 'Other Attendance' 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 large, complex, and 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-2023-0195 : 1 : Mark Rubenstein

COST CLAIM NUMBER  
2427

SUBMISSION DEADLINE DATE  
December 19, 2024

CLAIM STATUS  
Approved by Finance

EB#  
EB-2023-0195: Rates: Distribution: Toronto  
Hydro-Electric System Limited

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	133,111.76	406.20	Submitted
No	,	Shepherd, Jay; +1 (416) 804-2767 jay@shepherdubenstein.com	2,200.11	5.90	Submitted
No	,	Scott, Jane ; +1 (647) 271-3174 jane_scott@rogers.com	50,005.91	134.10	Submitted

## ATTACHMENTS

<b>Attachment</b>	<b>Document Type</b>	<b>Import Message</b>
SEC_THESL_CostClaim_Letter.pdf	Cover Letter	
SEC EB-2023-0195 Cost Claim 121820242038.pdf		

TOTAL LEGAL/CONSULTANT/OTHER FEES  
163,998.00

TOTAL DISBURSEMENTS  
0.00

TOTAL HST  
21,319.78

TOTAL CLAIM  
185,317.78

TOTAL AMOUNT AWARDED

TOTAL HOURS CLAIMED  
546.20

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  
December 18, 2024

<b>CASE</b> EB-2023-0195: Rates: Distribution: Toronto Hydro-Electric System Limited	<b>COST CLAIM</b> EB-2023-0195 : 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**

<b>Hearings Hours</b> 406.20	<b>Hearings Subtotal (\$)</b> 117,798.00	<b>Hearings Total Tax (\$)</b> 15,313.76	<b>Hearings Total (\$)</b> 133,111.76
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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	41.05	290	11,904.50	13.00	1,547.59	13,452.09
Preparation of Interrogatories	40.55	290	11,759.50	13.00	1,528.74	13,288.24
Review Interrogatory Responses	23.55	290	6,829.50	13.00	887.84	7,717.34
Technical Conference Preparation	32.25	290	9,352.50	13.00	1,215.83	10,568.33
Technical Conference Attendance	36.50	290	10,585.00	13.00	1,376.05	11,961.05
Technical Conference Follow-up	6.60	290	1,914.00	13.00	248.82	2,162.82
<b>Subtotal of DISCOVERY</b>	<b>180.50</b>		<b>52,345.00</b>		<b>6,804.87</b>	<b>59,149.87</b>
<b>PROCEDURAL</b>						
Preparation of Issues List Submission	0.50	290	145.00	13.00	18.85	163.85
Attendance at Issues List Conference	2.80	290	812.00	13.00	105.56	917.56
Preparation for a Confidentiality Request		290		13.00		
Prepare Submissions on Confidentiality	1.90	290	551.00	13.00	71.63	622.63
Preparation of Motion(s) Materials	3.00	290	870.00	13.00	113.10	983.10
Prepare Submissions on the Motion(s)	4.50	290	1,305.00	13.00	169.65	1,474.65
Attendance at Hearing on Motion(s)		290		13.00		
Review Procedural Documents	3.90	290	1,131.00	13.00	147.03	1,278.03

<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>16.60</b>		<b>4,814.00</b>		<b>625.82</b>	<b>5,439.82</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	95.60	290	27,724.00	13.00	3,604.12	31,328.12
Attendance at Settlement Conference	74.40	290	21,576.00	13.00	2,804.88	24,380.88
Preparation of Settlement Proposal	27.10	290	7,859.00	13.00	1,021.67	8,880.67
Attendance at Presentation to Panel	1.40	290	406.00	13.00	52.78	458.78
<b>Subtotal of SETTLEMENT CONFERENCE</b>	<b>198.50</b>		<b>57,565.00</b>		<b>7,483.45</b>	<b>65,048.45</b>
<b>WRITTEN ARGUMENT</b>						
Written Submissions	6.00	290	1,740.00	13.00	226.20	1,966.20
<b>Subtotal of WRITTEN ARGUMENT</b>	<b>6.00</b>		<b>1,740.00</b>		<b>226.20</b>	<b>1,966.20</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	0.50	290	145.00	13.00	18.85	163.85
Review Rate/Accounting Order	0.60	290	174.00	13.00	22.62	196.62
Prepare Submission on Rate Order		290		13.00		
<b>Subtotal of DECISION</b>	<b>1.10</b>		<b>319.00</b>		<b>41.47</b>	<b>360.47</b>
<b>OTHER</b>						
Other Attendance (e.g., Intervenor Conferences)	3.50	290	1,015.00	13.00	131.95	1,146.95
<b>Subtotal of OTHER</b>	<b>3.50</b>		<b>1,015.00</b>		<b>131.95</b>	<b>1,146.95</b>
<b>TOTAL SERVICE PROVIDER FEES</b>						
<b>Total Service Provider Fees</b>	<b>406.20</b>		<b>117,798.00</b>		<b>15,313.76</b>	<b>133,111.76</b>

## Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
EB-2023-0195 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-2023-0195 Client Fees Listing.pdf	Time Docket	Hearings	

Date	Explanation	Lwyr	Hours
20231124	preliminary review of Application	MR	4.5
20231128	emails	MR	0.1
20231129	Zoom meeting with JS to discuss areas of responsibility	MR	0.3
20231130	review Application	MR	1.5
20231201	email/p. call w. Ted A (re THESL)	MR	0.2
20231204	prepare and send Intervention Form	MR	0.2
20231208	emails	MR	0.1
20231211	Review Application - Exhibits 1A, 3, 4, 7 and 8	JS	3.0
20231219	review Application	MR	2.2
20231229	Client reporting, Impact calculations, Initial review of Application	JCS	3.0
20240108	emails	MR	0.2
20240112	review corr	MR	0.1
20240115	Review PO#1 and scheduling	JCS	0.3
20240116	review PO#1/emails/prepare and sign D&U/p. call w. TE (OEB Staff) re: experts	MR	0.7
20240116	review Application/draft IRs/p. call w. S. Grice	MR	4.2
20240117	review Application/draft IRs/review confidentiality request/emails	MR	5.5
20240118	review Application/draft IRs	MR	4.4
20240118	consider and draft confidentiality submission	MR	1.7
20240119	email/review OEB letter	MR	0.2
20240119	review Application/draft IRs	MR	1.5
20240120	Review Application and prepare interrogatories	JS	2.5
20240121	Review Application and prepare interrogatories	JS	1.5
20240121	review Application/draft IRs	MR	0.7
20240121	prepare for issues conference	MR	0.3
20240122	Review Application and prepare interrogatories	JS	2.6
20240122	attend issues conference	MR	2.8
20240122	review Application/draft IRs/p. call w. S. Grice	MR	3.6
20240123	Review Application and prepare interrogatories	JS	1.5
20240123	review confidential material/emails	MR	0.7
20240123	review draft issues list letter/emails	MR	0.2
20240123	review Application/draft IRs/p. call w. S. Grice to coordinate tables and IRs	MR	6.2
20240124	Review Application and prepare interrogatories	JS	4.0
20240124	finalize and file conf sub	MR	0.2
20240124	review THESL letter re: schedule/review Staff letter re: expert	MR	0.2
20240126	Review Application and prepare interrogatories	JS	2.0
20240126	Review PO#2, Many emails	JCS	0.2
20240126	emails/review PO	MR	0.1
20240129	Review Application and prepare interrogatories	JS	2.5
20240129	Review evidence update, Many emails, Review reply	JCS	0.3
20240129	draft IRs/emails/various research	MR	3.7
20240130	draft IRs/emails	MR	5.3
20240130	review conf reply	MR	0.2
20240131	Review Application and prepare interrogatories	JS	4.0
20240131	emails/prepare IRs/meeting with M. Lowry (PEG)	MR	4.2
20240201	Review Application and prepare interrogatories	JS	3.0
20240201	review evidence/draft IRs/Zoom chat with JS	MR	3.5
20240202	Review Application and prepare interrogatories	JS	3.0
20240202	review evidence/draft IRs/multiple p. calls with S. Grice too coordinate IRs	MR	3.7
20240203	Review Application and prepare interrogatories	JS	3.3

20240205	review evidence/draft IRs	MR	2.5
20240205	review conf decision	MR	0.1
20240206	emails/p. call w. S Grice/review JS draft IRs	MR	3.4
20240206	Review PO#3 and decision, Scheduling	JCS	0.2
20240207	Review Application and prepare interrogatories	JS	2.0
20240207	review evidence and draft IRs/emails/p. call w. S. Grice	MR	1.5
20240208	Review Application and prepare interrogatories	JS	2.0
20240208	draft and edit IRs/review THESL corr/emails	MR	0.5
20240209	emails/draft and edit IRs	MR	3.5
20240210	Finalize IRs	JS	1.0
20240212	finalize and file IRs/review other parties IRs/p. call w. S. Grice	MR	2.2
20240226	emails w TCDSB re: rate impacts	MR	0.3
20240227	emails with TCDSB re: rate impacts	MR	0.1
20240305	Technical Conference preparation	JS	1.0
20240308	Technical Conference preparation	JS	1.0
20240309	Technical Conference preparation	JS	1.8
20240311	review THESL corr	MR	0.1
20240312	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240313	Review Interrogatory Responses and Technical Conference preparation	JS	1.0
20240313	preliminary review of IRR	MR	2.0
20240315	emails	MR	0.1
20240318	review IRR and prepare for TC	MR	4.5
20240319	review IRR and prepare for TC	MR	5.6
20240320	review IRR and prepare for TC/emails	MR	5.0
20240321	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240321	review THESL corr/review OEB corr	MR	0.1
20240322	review IRR/prepare for TC	MR	6.5
20240325	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240325	emails/p. call w. S. Grice	MR	0.4
20240326	Review Interrogatory Responses and Technical Conference preparation	JS	3.0
20240327	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240327	review OEB corr/emails/prepare for TC	MR	2.4
20240328	Review Interrogatory Responses and Technical Conference preparation	JS	1.0
20240328	emails/review TC document sent	MR	0.1
20240329	Review Interrogatory Responses and Technical Conference preparation	JS	1.5
20240330	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240401	Technical Conference preparation - phone call with Mark R.	JS	1.5
20240401	review IRR/prepare for TC/virtual meet with JS/p. call w. S. Grice	MR	2.5
20240402	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240402	draft and finalize TC letter/prepare for TC/emails	MR	4.5
20240403	Review Interrogatory Responses and Technical Conference preparation	JS	3.0
20240403	prepare for TC/review corr	MR	1.1
20240404	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240404	emails	MR	0.1
20240405	Review Interrogatory Responses and Technical Conference preparation	JS	2.0
20240405	emails/prepare for TC/p. call w. S. Grice/p. call w. J. Girvan/p. call w L. Murray (OEB)	MR	5.4
20240407	prepare for TC/p. call w. S Grice	MR	2.5
20240408	attend TC	MR	7.8
20240408	emails/prepare for TC Day 2	MR	1.0



20240409	Technical Conference preparation	JS	2.0
20240409	attend TC/discussion with parties	MR	7.9
20240409	prepare for Day 3/emails/p. call w. S. Grice	MR	2.2
20240410	Technical Conference - Panels 2/3	JS	6.0
20240410	attend TC/discussion with parties	MR	8.0
20240411	Technical Conference - Panel 3	JS	6.4
20240411	attend Technical Conference/discussion with parties	MR	7.8
20240411	prepare for Day 5/expert panel	MR	0.5
20240412	Technical Conference - Panels 3/4	JS	3.5
20240412	attend Technical Conference/disc w. parties	MR	5.0
20240415	Prep for Settlement Conference	JS	1.0
20240415	emails	MR	0.1
20240416	Prep for Settlement Conference	JS	2.0
20240417	Prep for Settlement Conference - phone call with Mark R.	JS	0.5
20240417	meeting with JS re: motion/Settlement Conference/next steps	MR	0.5
20240418	emails	MR	0.1
20240419	p. call from A. Sanasie re: Motion Day scheduling/emails/p. call w. A. Sternberg re: Motion Day	MR	0.3
20240422	emails re: motion/research/p. call w. L. Murray (Staff)	MR	0.5
20240423	review PO	MR	0.1
20240423	preliminary review of UT for motion/begin to draft motion letter	MR	2.3
20240424	draft motion letter/p. call w. S. Grice x2/emails/review AMPCO draft letter	MR	2.5
20240425	finalize and edit motion letter/review AMPCO motion letter	MR	0.5
20240426	prepare for motion/virtual meeting with TH (Sternberg) and AMPCO (Grice)/multiple p. calls TH counsel (A. Sternberg)/multiple calls w. S. Grice/p. call w. C. Kanya-Forestner (OEB Staff)/many emails	MR	3.9
20240428	emails	MR	0.1
20240429	emails with Toronto Hydro re: motion settlement	MR	0.5
20240430	emails/review corr	MR	0.1
20240501	p. call w. SG/review Staff ltr	MR	0.7
20240502	review PO	MR	0.1
20240502	emails/preliminary review of PEG Framework Report	MR	0.3
20240503	review PEG framework report/analysis regarding Kbar construction and review AUC applications for specifics of implementation/emails	MR	3.0
20240503	Construct settlement evaluation model	MR	3.5
20240506	draft and edit PEG framework IRs	MR	2.5
20240506	review UT/prepare for Settlement Conference	MR	3.0
20240507	review PEG benchmarking report and draft IRs	MR	4.1
20240507	p. call w. S. Grice/p. call w. J. Girvan/emails/review corr	MR	0.9
20240508	prepare for Settlement Conference/p. call w. S. Grice	MR	3.6
20240509	finalize and file IRs on expert evidence/review other parties IRs	MR	0.5
20240509	prepare for Settlement Conference/p. call w. TE (OEB Staff)	MR	5.0
20240510	prepare for settlement	MR	2.0
20240510	review OEB corr	MR	0.1
20240512	Prep for Settlement Conference	JS	2.0
20240513	Prep for Settlement Conference	JS	2.0
20240513	emails/disc. w. LG (CCC)	MR	0.6
20240514	Prep for Settlement Conference	JS	3.0
20240514	p. call w. S. Grice	MR	0.2
20240515	Prep for Settlement Conference	JS	5.0

20240515	prepare for Settlement Conference/emails/p. call w. S. Grice/p. call w. J. Grivan	MR	5.5
20240516	Prep for Settlement Conference	JS	2.0
20240516	emails/edit and finalize pre-SC clarification questions/prepare for Settlement Conference/review TH IRs on PEG evidence/p. call w. S. G	MR	6.2
20240517	Prep for Settlement Conference	JS	2.0
20240517	prepare for Settlement Conference/emails/p. call w. S. Grice	MR	5.1
20240517	review of Staff and PEG IR responses/undertake analysis N-SEC-11	MR	2.8
20240519	Prep for Settlement Conference	JS	2.0
20240520	Prep for Settlement Conference	JS	1.5
20240521	Prep for Settlement Conference	JS	2.5
20240521	prepare for Settlement Conference/Zoom meeting with OEB Staff and AMPCO/Zoom meeting with Jane Scott	MR	5.5
20240522	Prep for Settlement Conference, call with other intervenors, Evidence Presentation not included	JS	2.0
20240522	attend evidence hearing/disc. w. parties	MR	3.5
20240522	prepare for Settlement Conference/meeting with CCC and AMPCO/emails	MR	4.0
20240523	Prep for Settlement Conference	JS	2.5
20240523	p. call w. LG (CCC)/emails/prepare for Settlement Conference	MR	6.2
20240523	review PEG M3 IRRs	MR	1.5
20240524	Prep for Settlement Conference, call with other intervenors, review clarifying questions	JS	3.0
20240524	settlement prep/Zoom meeting with consumer groups/p. call w. J. Girvan/p. call w. S. Grice/review answers to clarification questions	MR	9.0
20240524	review ScottMadden reply report and TH letter	MR	0.1
20240525	Prep for Settlement Conference	JS	4.0
20240525	prepare for Settlement Conference/emals	MR	3.5
20240526	prepare for Settlement Conference	MR	4.0
20240527	Settltment Conference + discuss load forecast with other intervenors	JS	7.5
20240527	attend Settlement Conference	MR	8.0
20240527	review CQ responses/prepare for Day 2/start drafting offer/emails	MR	2.7
20240527	review OEB corr re OEB reply evidence	MR	0.1
20240528	prepare for Settlement Conference Day 2 (before day)/emails	MR	0.5
20240528	prepare for Settlement Conference Day 3/p. call w. JS	MR	3.8
20240528	attend Settlement Conference	MR	8.1
20240529	attend Settlement Conference	MR	8.2
20240529	emails/prepare for Day 4	MR	2.2
20240530	attend Settlement Conference	MR	8.5
20240530	prepare for Day 5/p. call w. Facilitator/p. call w. S. Grice/p. call L. Gluck/emails	MR	1.2
20240531	attend Settlement Conference	MR	8.3
20240531	prepare for Day 6/emails/various analysis re next offer	MR	2.8
20240601	Background work for Toronto settlement	JS	1.0
20240601	many emails/prepare for Day 6	MR	2.5
20240602	prepare for Day 6/emails/p. call w. LG (CCC), p. call w. SG (AMPCO)/emails	MR	4.0
20240603	Background work for Toronto settlement	JS	1.0
20240603	attend Settlement Conference	MR	7.7
20240603	p. call w. S. Grice/emails/prepare for Day 7/p. call J. Girvan/consider accounting issues	MR	3.5
20240604	attend Settlement Conference	MR	7.6

20240604	prepare for Day 8/emails/multiple p. calls with parties	MR	2.4
20240605	Background work for Toronto settlement	JS	1.0
20240605	attend Settlement Conference	MR	8.2
20240605	prepare for Day 9/many emails/p. calls w. S. Grice x2/L. Gluck TE (Staff)/J. Girvan	MR	4.4
20240606	prepare for Day 9 (before Settlement Conference begins)	MR	0.8
20240606	attend Settlement Conference	MR	6.1
20240607	p. call w. S. Grice/many emails regarding next steps and outstanding issues/review Staff corr on extension	MR	1.3
20240608	emails	MR	0.4
20240609	prepare for Day 10/review VECC CA/RD application document/emails/p. call w. B. Harper (VECC)	MR	1.5
20240610	attend Settlement Conference	MR	3.7
20240610	review OEB corr	MR	0.1
20240611	review document/emails/p. call w. S. Grice	MR	1.2
20240612	many emails/review draft letter/review update UT response on certain issues/p. call w. Toronto Hydro/p. call w. L. Lauren Murray	MR	0.8
20240613	emails	MR	0.1
20240614	emails	MR	0.1
20240617	emails/p. call. w. J. Girvan/p. call w. TE (Staff)	MR	0.5
20240618	emails	MR	0.2
20240620	emails	MR	0.2
20240621	emails	MR	0.1
20240624	emails	MR	0.1
20240625	p. call w. L. Murray (OEB Staff)/emails	MR	0.2
20240626	emails	MR	0.1
20240627	emails	MR	0.3
20240702	emails	MR	0.1
20240703	emails/Teams meeting with OEB Staff (TE, LW, DL)	MR	0.5
20240704	emails/review corr	MR	0.1
20240705	emails/review DRC corr	MR	0.2
20240708	emails	MR	0.1
20240708	emails/preliminary review of Settlement Proposal and circulate to all other intervenors	MR	0.5
20240709	emails/review and provide comments and edits to SP/p. call w. L. Gluck	MR	4.1
20240710	emails/p. call w. TE (Board Staff)	MR	0.3
20240711	emails re: further information from THESL	MR	0.3
20240712	emails re: settlement	MR	0.3
20240714	emails	MR	0.1
20240715	emails	MR	0.2
20240716	emails	MR	0.1
20240722	emails	MR	0.1
20240724	receive models and attachments/emails w. PWU/p. call w. D. Coban (THI) re: status/emails to group	MR	0.8
20240725	review and consolidate comments and edits on SP/Zoom meeting with TE (Staff) to discuss Staff comment and edits/many emails	MR	4.1
20240726	emails/p. call w. TL (CCMBC/EP)/continue to consolidate SP/p. call w. EE (TH)/p. call w. C. Li (BOMA)	MR	1.7
20240729	emails	MR	0.3
20240730	emails/p. call w. B. Harper (VECC)	MR	0.3

20240731	emails/consolidate model and schedule comments	MR	0.5
20240801	emails/consolidate further model and schedules/p. call w. S. Grice x2	MR	1.6
20240802	finalize consolidated schedule comments/emails/p. call w. EE (TH)/p. call w. LG (CCC)/preliminary review of next draft	MR	0.8
20240806	emails	MR	0.1
20240807	emails/review next draft of settlement proposal and DAO/p. call w. L. Gluck	MR	2.1
20240808	emails	MR	0.1
20240809	consolidate SP comments and edits from Intervenors and Staff/many emails/p. call w. EE (TH)	MR	2.0
20240811	many emails/further work on consolidating latest SP draft	MR	0.8
20240812	many emails/send latest comments on schedule and models/p. call w. EE (TH)	MR	1.0
20240813	review 3rd draft of settlement proposal/emails	MR	0.8
20240814	many emails/revised outstanding issue doc/edits to SP/review edits to DAP/p. call w. EE (TH)	MR	1.2
20240815	emails	MR	0.1
20240826	review PO/email	MR	0.1
20240903	review OEB Staff submission on settlement	MR	0.4
20240907	consider issues/draft Innovation Fund submission	MR	3.1
20240908	draft submissions	MR	0.7
20240916	emails	MR	0.1
20240917	emails/finalize sub	MR	0.3
20240918	emails/review other parties submissions	MR	0.5
20240919	review parties submissions	MR	0.2
20240927	review PO/emails	MR	0.1
20241004	review reply arg	MR	0.5
20241009	p. call. w. TE (Staff)/emails	MR	0.1
20241011	review TH submission	MR	0.2
20241015	review corr	MR	0.3
20241017	attend SP presentation day/disc. w. parties	MR	1.4
20241022	review SP presentation day UT	MR	0.1
20241024	Impact calculations	JCS	0.5
20241025	Recalculate impacts, Many emails	JCS	1.0
20241106	review corr	MR	0.1
20241108	review OEB letter	MR	0.1
20241111	email	MR	0.1
20241112	review decision/emails	MR	0.2
20241202	review DRO	MR	0.4
20241203	review Staff sub	MR	0.1
20241206	review corr	MR	0.1
20241213	email/review decision on Innovation Fund	MR	0.3
20241213	Review Decision	JCS	0.4
			546.2

<b>CASE</b> EB-2023-0195: Rates: Distribution: Toronto Hydro-Electric System Limited	<b>COST CLAIM</b> EB-2023-0195 : 1 : Mark Rubenstein	<b>INTERVENOR NAME</b> Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdubenstein.c om	<b>PARTICIPANT CLAIM STATUS</b> Submitted
<b>FILING PARTICIPANT</b> Shepherd, Jay; +1 (416) 804-2767 jay@shepherdubenstein.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**

<b>Hearings Hours</b> 5.90	<b>Hearings Subtotal (\$)</b> 1,947.00	<b>Hearings Total Tax (\$)</b> 253.11	<b>Hearings Total (\$)</b> 2,200.11
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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	3.30	330	1,089.00	13.00	141.57	1,230.57
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		
<b>Subtotal of DISCOVERY</b>	<b>3.30</b>		<b>1,089.00</b>		<b>141.57</b>	<b>1,230.57</b>
<b>PROCEDURAL</b>						
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	0.70	330	231.00	13.00	30.03	261.03

<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>0.70</b>		<b>231.00</b>		<b>30.03</b>	<b>261.03</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	0.40	330	132.00	13.00	17.16	149.16
Review Rate/Accounting Order	1.50	330	495.00	13.00	64.35	559.35
Prepare Submission on Rate Order		330		13.00		
<b>Subtotal of DECISION</b>	<b>1.90</b>		<b>627.00</b>		<b>81.51</b>	<b>708.51</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>5.90</b>		<b>1,947.00</b>		<b>253.11</b>	<b>2,200.11</b>

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## Attachments

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

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## 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**

<b>CASE</b> EB-2023-0195: Rates: Distribution: Toronto Hydro-Electric System Limited	<b>COST CLAIM</b> EB-2023-0195 : 1 : Mark Rubenstein	<b>INTERVENOR NAME</b> Rubenstein, Mark; +1 (647) 483-0113 mark@shepherdubenstein.c om	<b>PARTICIPANT CLAIM STATUS</b> Submitted
<b>FILING PARTICIPANT</b> Scott, Jane ; +1 (647) 271-3174 jane_scott@rogers.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> Consultant	<b>YEAR CALLED TO BAR*</b>	<b>COMPLETED YEARS PRACTICING/YEARS OF RELEVANT EXPERIENCE*</b> 20	<b>HOURLY RATE</b> 330
<b>HST RATE CHARGED*</b> 13.00	<b>CV STATUS (FOR CONSULTANT/ANALYST)</b> CV Provided within Previous 24 Months	<b>LAST CV DATE</b> August 04, 2023	<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> 134.10	<b>Hearings Subtotal (\$)</b> 44,253.00	<b>Hearings Total Tax (\$)</b> 5,752.91	<b>Hearings Total (\$)</b> 50,005.91
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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	19.95	330	6,583.50	13.00	855.86	7,439.36
Preparation of Interrogatories	17.95	330	5,923.50	13.00	770.06	6,693.56
Review Interrogatory Responses	11.75	330	3,877.50	13.00	504.08	4,381.58
Technical Conference Preparation	21.05	330	6,946.50	13.00	903.05	7,849.55
Technical Conference Attendance	15.90	330	5,247.00	13.00	682.11	5,929.11
Technical Conference Follow-up		330		13.00		
<b>Subtotal of DISCOVERY</b>	<b>86.60</b>		<b>28,578.00</b>		<b>3,715.16</b>	<b>32,293.16</b>
<b>PROCEDURAL</b>						
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>
<b>Subtotal of PROCEDURAL</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>	<b>0.00</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	40.00	330	13,200.00	13.00	1,716.00	14,916.00
Attendance at Settlement Conference	7.50	330	2,475.00	13.00	321.75	2,796.75
Preparation of Settlement Proposal		330		13.00		
Attendance at Presentation to Panel		330		13.00		
<b>Subtotal of SETTLEMENT CONFERENCE</b>	<b>47.50</b>		<b>15,675.00</b>		<b>2,037.75</b>	<b>17,712.75</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>134.10</b>		<b>44,253.00</b>		<b>5,752.91</b>	<b>50,005.91</b>

## Attachments

<u>Attachment</u>	<u>Document Type</u>	<u>Import Message</u>
Docket Notice.pdf	Time Docket	
EB-2023-0195 PJScott Invoices.pdf	Invoice	

**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-2023-0195 PJScott Invoices.pdf	Invoice	Hearings	

**See Participant – Mark Rubenstein**



**By Email**

**INVOICE**

January 10, 2024

Ontario Education Services Corporation

439 University Ave.  
18th Floor  
Toronto, ON M5G 1Y8

ATTN: Diana Hong

**Re: Toronto Hydro 2025-2029 EB-2023-0195**

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

JCS	3.00	hours at \$330.00 per hour	\$990.00
JS	3.00	hours at \$330.00 per hour	\$990.00
MR	2.70	hours at \$290.00 per hour	\$783.00
Total Fees			\$2,763.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$359.19
Total Amount of this Invoice			\$3,122.19

E&OE

Please make cheque payable to: **Shepherd Rubenstein Professional Corp**  
Invoice # 240118



**By Email**

**INVOICE**

February 9, 2024

Ontario Education Services Corporation

439 University Ave.  
18th Floor  
Toronto, ON M5G 1Y8

ATTN: Diana Hong

**Re: Toronto Hydro 2025-2029 EB-2023-0195**

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

JCS	0.80	hours at \$330.00 per hour	\$264.00
JS	20.60	hours at \$330.00 per hour	\$6,798.00
MR	46.90	hours at \$290.00 per hour	\$13,601.00
Total Fees			\$20,663.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$2,686.19
Total Amount of this Invoice			\$23,349.19

E&OE

Please make cheque payable to: **Shepherd Rubenstein Professional Corp**  
Invoice # 240216



**By Email**

**INVOICE**

March 10, 2024

Ontario Education Services Corporation

439 University Ave.  
18th Floor  
Toronto, ON M5G 1Y8

ATTN: Diana Hong

**Re: Toronto Hydro 2025-2029 EB-2023-0195**

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

JCS	0.20	hours at \$330.00 per hour	\$66.00
JS	14.30	hours at \$330.00 per hour	\$4,719.00
MR	21.30	hours at \$290.00 per hour	\$6,177.00
Total Fees			\$10,962.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$1,425.06
Total Amount of this Invoice			\$12,387.06

E&OE

Please make cheque payable to: **Shepherd Rubenstein Professional Corp**  
Invoice # 240318



**By Email**

**INVOICE**

April 10, 2024

Ontario Education Services Corporation

439 University Ave.  
18th Floor  
Toronto, ON M5G 1Y8

ATTN: Diana Hong

**Re: Toronto Hydro 2025-2029 EB-2023-0195**

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

JS	20.30	hours at \$330.00 per hour	\$6,699.00
MR	26.80	hours at \$290.00 per hour	\$7,772.00
			_____
Total Fees			\$14,471.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$1,881.23
			_____
Total Amount of this Invoice			\$16,352.23

E&OE

Please make cheque payable to: **Shepherd Rubenstein Professional Corp**  
Invoice # 240409



**By Email**

**INVOICE**

May 10, 2024

Ontario Education Services Corporation

439 University Ave.

18th Floor

Toronto, ON M5G 1Y8

ATTN: Diana Hong

**Re: Toronto Hydro 2025-2029 EB-2023-0195**

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

JS	31.90	hours at \$330.00 per hour	\$10,527.00
MR	67.80	hours at \$290.00 per hour	\$19,662.00
Total Fees			\$30,189.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$3,924.57
Total Amount of this Invoice			\$34,113.57

E&OE

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

Invoice # 240513





**By Email**

**INVOICE**

June 10, 2024

Ontario Education Services Corporation

439 University Ave.

18th Floor

Toronto, ON M5G 1Y8

ATTN: Diana Hong

**Re: Toronto Hydro 2025-2029 EB-2023-0195**

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

JS	41.00	hours at \$330.00 per hour	\$13,530.00
MR	141.40	hours at \$290.00 per hour	\$41,006.00
Total Fees			\$54,536.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$7,089.68
Total Amount of this Invoice			\$61,625.68

E&OE

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

Invoice # 240610



**By Email**

**INVOICE**

July 10, 2024

Ontario Education Services Corporation

439 University Ave.  
18th Floor  
Toronto, ON M5G 1Y8

ATTN: Diana Hong

**Re: Toronto Hydro 2025-2029 EB-2023-0195**

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

JS	3.00	hours at \$330.00 per hour	\$990.00
MR	58.10	hours at \$290.00 per hour	\$16,849.00
Total Fees			\$17,839.00
Disbursements			\$0.00
HST (Registration #83673 5464 RT0001)			\$2,319.07
Total Amount of this Invoice			\$20,158.07

E&OE

Please make cheque payable to: **Shepherd Rubenstein Professional Corp**  
Invoice # 240711