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PUBLIC UTILITY COMMISSION
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APPLICATION OF MONARCH
UTILITIES I L.P. FOR AUTHORITY
TO CHANGE RATES

§
§
§

BEFORE THE STATE OFFICE OF
ADMINISTRATIVE HEARINGS

SECOND SUPPLEMENTAL DIRECT TESTIMONY

OF

LAMBETH TOWNSEND

ON BEHALF OF

MONARCH UTILITIES I L.P.

DECEMBER 4, 2020

602

**SECOND SUPPLEMENTAL DIRECT TESTIMONY OF
LAMBETH TOWNSEND**

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SECOND SUPPLEMENTAL ATTACHMENTS

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Second Supplemental Attachment RLT-2	Lloyd Gosselink Rochelle & Townsend, P.C. Invoices
Second Supplemental Attachment RLT-3	Alliance Consulting Group Invoices
Second Supplemental Attachment RLT-4	FINCAP, Inc. Invoice
Second Supplemental Attachment RLT-5	Bloom Strategic Consulting, Inc. Invoice

1 supplemental filing on November 12, 2020, which included expenses as of October
2 31, 2020.

3 Reimbursable rate case expenses have been incurred by Monarch since
4 October 31, 2020 relating to the Rate Application proceeding. Monarch is requesting
5 reimbursement of all reasonable rate case expenses. My direct testimony supports the
6 reasonableness of the legal and consultant expenses Monarch incurred as of May 31,
7 2020. My first supplemental testimony supports the reasonableness of the legal and
8 consultant expenses incurred by Monarch since May 31, 2020. My second
9 supplemental testimony supports the reasonableness of the legal and consultant
10 expenses incurred by Monarch since October 31, 2020.

11 **Q. ARE YOU SPONSORING ANY SCHEDULES?**

12 A. No.

13 **III. RECOMMENDATIONS**

14 **Q. WHAT ARE YOUR RECOMMENDATIONS?**

15 A. Based upon my review, I recommend that Monarch be allowed to recover the
16 reasonable and necessary legal and consultant rate case expenses of \$430,491.23 as of
17 November 30, 2020.

18 **Q. PLEASE DESCRIBE THE PROCESS YOU UNDERTOOK TO REACH
19 YOUR CONCLUSION.**

20 A. Based on my experience and education, and following a thorough and critical review
21 of all of the relevant information, I concluded that the reasonable and necessary
22 Monarch rate case expenses for legal and consultant services as of November 30,
23 2020, is \$430,491.23. A rate case expense summary sheet detailing each expense by

1 attorney and consultant is attached to my second supplemental testimony as Second
2 Supplemental Attachment RLT-1. I recommend that the Commission find this
3 amount to be the reasonable and necessary reimbursable legal and consultant rate case
4 expenses for Monarch in this proceeding. I also recommend that the Commission
5 allow Monarch to recover its non-legal and non-consultant rate case expenses
6 described in the Direct Testimony of Brian Bahr, pursuant to Texas Water Code Ann.
7 §§ 13.183, 13.185(c), and 13.187, and 16 Texas Administrative Code (“TAC”) §
8 24.33.

9 Monarch engaged the services of Lloyd Gosselink in April 2019. I have
10 directed the work performed by Lloyd Gosselink employees on behalf of Monarch
11 since that time. I have reviewed the billings of Lloyd Gosselink submitted to
12 Monarch for legal services from April 16, 2019, through November 30, 2020, in
13 connection with Monarch’s proposed rate increase. I affirm that those billings
14 accurately reflect the time spent and expenditures incurred by Lloyd Gosselink on
15 Monarch’s behalf. Those billings were accurately calculated before they were
16 tendered and did not include any double billing. None of the charges billed to
17 Monarch have been recovered through reimbursement for other expenses. The
18 expenses charged were associated with the review and prosecution of Monarch’s rate
19 application and were necessary to advise Monarch and to accomplish tasks in the rate
20 proceeding.

21 For the period of April 16, 2019, through November 30, 2020, Lloyd
22 Gosselink billed \$345,097.98 for legal services in connection with Monarch’s
23 proposed rate increase. This figure includes legal fees and expenses. The fees and
24 expenses were necessary and for the legal representation of Monarch. The legal work

1 included advising Monarch on rates, review of the application, preparation of
2 pleadings, review and preparation of evidentiary exhibits, preparation of testimony,
3 and responding to discovery.

4 The hourly rates for attorneys of \$250–\$435 and for the paralegal of \$135,
5 upon which the billings are based, are the same hourly rates charged other clients for
6 comparable services during the same time frame. Our firm’s hourly rates are at the
7 lower end of the range compared to the rates charged by other lawyers with similar
8 experience providing similar services. To minimize expenses, I used associates and
9 paralegals where possible because of their lower billing rates. In assigning the tasks
10 to attorneys, I ensured that the attorneys did not duplicate the work of one another.
11 The hours spent to perform the tasks assigned to Lloyd Gosselink were necessary to
12 complete those tasks in a professional manner and on a timely basis. My many years
13 of experience participating in utility rate cases aid in our efforts to keep rate case
14 expenses reasonable.

15 The invoices submitted by Lloyd Gosselink include a description of services
16 performed and time expended on each activity. The invoice dated December 3, 2020,
17 for this proceeding is attached to my second supplemental testimony as Second
18 Supplemental Attachment RLT-2. Lloyd Gosselink has documented all charges with
19 time sheets, invoices, and records.

20 Neither Lloyd Gosselink nor any consultants for Monarch have charged for
21 luxury items, including first-class airfare, limousine service, entertainment, or
22 alcoholic beverages. No meals were charged in excess of \$25 per person, and no
23 individual billed for more than 12 hours per day. The documentation in this case is
24 similar to that provided in many previous rate cases before the Commission.

1 The current amount requested for legal expenses of \$345,097.98 is reasonable
2 given the complexity of this case. Monarch anticipates that it will incur additional
3 attorney fees associated with this proceeding, including the preparation of rebuttal
4 testimony and preparing for hearing and reserves the right to request recovery of
5 additional incurred rate case expenses at the hearing.

6 **Q. DOES MONARCH’S RATE APPLICATION INCLUDE ANY NOVEL OR**
7 **DIFFICULT ISSUES THAT A TYPICAL WATER UTILITY APPLICATION**
8 **DOES NOT INCLUDE?**

9 A. Yes. In my direct testimony, I discuss the variety of novel, difficult, and complex
10 issues.

11 **Q. ARE THE LEGAL EXPENSES THAT MONARCH IS SEEKING TO**
12 **RECOVER JUST, REASONABLE, NECESSARY, AND IN THE PUBLIC**
13 **INTEREST? PLEASE EXPLAIN.**

14 A. Yes. The legal expenses that Monarch seeks to recover are just, reasonable,
15 necessary, and in the public interest. An investor-owned utility, such as Monarch,
16 cannot change its rates to allow it to recover its reasonable expenses and earn a
17 reasonable return on its investment unless a rate change application is prepared.
18 Recovery of reasonable and necessary legal expenses associated with preparation of a
19 rate application and the associated proceeding have long been recoverable, is allowed
20 by Commission rule, and is authorized by Texas Water Code Ann. § 13.185(g). For
21 the reasons I mentioned above, it was reasonable and necessary for Monarch to seek
22 legal advice and assistance in the prosecution of Monarch’s Rate Application, the
23 time spent was reasonable and necessary, and the hourly rates charges are reasonable.

1 **Q. WAS IT REASONABLE AND NECESSARY FOR MONARCH TO INCUR**
2 **LEGAL EXPENSES TO PREPARE PREFILED DIRECT TESTIMONY?**

3 A. Yes. The Commission's rules at 16 TAC § 24.27 recognize the complexities that may
4 be involved in the preparation and prosecution of a rate application for Class A
5 utilities such as Monarch.

6 **Q. DID MONARCH INCUR ANY CONSULTANT EXPENSES IN THIS RATE**
7 **CASE?**

8 A. Yes. Monarch incurred the expenses associated with the following experts:
9 Alliance Consulting Group ("Alliance"), FINCAP, Inc. ("FINCAP"), and Bloom
10 Strategic Consulting, Inc. ("Bloom").

11 **Q. ARE THE CONSULTANT EXPENSES FOR ALLIANCE INCURRED IN**
12 **THIS RATE CASE REASONABLE AND NECESSARY?**

13 A. Yes. For the period of May 1, 2020, through November 30, 2020, the expenses for
14 Alliance are \$48,068.25. Based on my years of experience working with utility
15 consultants, Mr. Watson's hourly rate of \$270 and hourly rates of his associates, upon
16 which the billings are based, is comparable to rates charged by consultants with
17 similar levels of expertise and experience as Mr. Watson. I have also reviewed the
18 number of hours Mr. Watson and his associates have spent on the review, analysis,
19 and testimony regarding depreciation in this proceeding and on responding to
20 discovery. In my opinion, the amount of time spent is appropriate given the level of
21 complexity of this case. The Alliance invoice for services dated from November 1,
22 2020, through November 30, 2020, for this proceeding is attached to my second
23 supplemental testimony as Second Supplemental Attachment RLT-3. The amount

1 requested for Alliance's expenses of \$48,068.25, as of the date of filing, is
2 reasonable.

3 **Q. ARE THE CONSULTANT EXPENSES FOR FINCAP INCURRED IN THIS**
4 **RATE CASE REASONABLE AND NECESSARY?**

5 A. Yes. For the period of May 1, 2020, through November 30, 2020, the expenses for
6 FINCAP are \$26,325.00. Based on my years of experience working with utility
7 consultants, Mr. Fairchild's hourly rate of \$450, upon which the billings are based, is
8 comparable to rates charged by consultants with similar levels of expertise and
9 experience as Mr. Fairchild. I have also reviewed the number of hours Mr. Fairchild
10 and his associates have spent on their review, analysis, responding to discovery, and
11 testimony in this proceeding. In my opinion, the amount of time spent is appropriate
12 given the level of complexity of this case. The amount requested for FINCAP's
13 expenses of \$26,325.00 is reasonable. The invoices submitted by FINCAP include a
14 description of services performed and time expended on each activity. The FINCAP
15 invoice for services dated from November 1, 2020, through November 30, 2020, for
16 this proceeding is attached to my second supplemental testimony as Second
17 Supplemental Attachment RLT-4.

18 **Q. ARE THE CONSULTANT EXPENSES FOR BLOOM INCURRED IN THIS**
19 **RATE CASE REASONABLE AND NECESSARY?**

20 A. Yes. Jason Bloom, with Bloom Strategic Consulting, Inc., was engaged to assist in
21 preparing Monarch's witnesses for testifying during the hearing. For the period of
22 November 1, 2020, through November 30, 2020, the expenses for Bloom are
23 \$11,000.00. Based on my years of experience working with consultants, Mr.
24 Bloom's flat rate of \$3,500 for one group tutorial, and \$1,500 for each witness's

1 individual session of approximately three hours, upon which the billings are based, is
2 comparable to rates charged by consultants with similar levels of expertise and
3 experience as Mr. Bloom. In other words, Mr. Bloom charges a set fee for the group
4 tutorial and \$500 an hour for his time with individual witnesses. I have also reviewed
5 the actual number of hours Mr. Bloom and his associates have spent on their review,
6 analysis, responding to discovery, and testimony in this proceeding. In my opinion,
7 the amount of time spent is appropriate for the task he performed. The amount
8 requested for Bloom's expenses of \$11,000.00 is reasonable. The invoice submitted
9 by Bloom includes a description of services performed and the charge associated with
10 each activity. However, the "Hours" column does not reflect the actual hours spent,
11 instead his invoice has just the number "1" in that column. Except for the group
12 tutorial, the charge is for the actual number of hour spent with a charge of \$500 per
13 hour. The Bloom invoice for services dated from November 1, 2020, through
14 November 30, 2020, for this proceeding is attached to my second supplemental
15 testimony as Second Supplemental Attachment RLT-5.

16 **Q. DOES MONARCH INTEND TO RECOVER ITS RATE CASE EXPENSES?**

17 A. Yes, as I have explained in my direct testimony.

18 **IV. CONCLUSION**

19 **Q. DOES THIS CONCLUDE YOUR SECOND SUPPLEMENTAL DIRECT**
20 **TESTIMONY AT THIS TIME?**

21 A. Yes, it does. I reserve the right to supplement the expenses, make corrections,
22 revisions, or deletions at the time of a hearing on the merits.

D#50944 / Monarch
Rate Case Expenses

	Date	LGRT Inv. #	LGRT Fees	Non-Consultant Disbursements	LGRT Fees + Non-Consultant Disbursements	LGRT INVOICE ACTUAL TOTAL	NOTES	
LGRT	5/16/2019	97500501	\$ 1,645.50		\$ 1,645.50	\$ 1,645.50	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	6/19/2019	97501557	\$ 3,039.00	\$ 52.57	\$ 3,091.57	\$ 3,091.57	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	7/9/2019	97502290	\$ 1,157.00		\$ 1,157.00	\$ 1,157.00	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	8/14/2019	97503015	\$ 169.00		\$ 169.00	\$ 169.00	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	11/13/2019	97505352	\$ 2,013.50		\$ 2,013.50	\$ 2,013.50	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	12/17/2019	97505708	\$ 96.00		\$ 96.00	\$ 96.00	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	1/17/2020	97506453	\$ 13.00		\$ 13.00	\$ 13.00	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	2/24/2020	97507625	\$ 2,305.50	\$ 5.41	\$ 2,310.91	\$ 2,310.91	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	3/16/2020	97508202	\$ 1,010.50		\$ 1,010.50	\$ 1,010.50	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	4/21/2020	97509660	\$ 386.00		\$ 386.00	\$ 386.00	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	5/15/2020	97510513	\$ 6,192.50		\$ 6,192.50	\$ 6,192.50	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	6/11/2020	97511160	\$ 5,758.50		\$ 5,758.50	\$ 5,758.50	Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	7/15/2020	97512201	\$ 86,472.00	\$ 212.50	\$ 86,684.50	\$ 86,684.50	Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	8/25/2020	97513785	\$ 90,047.50	\$ 1,159.30	\$ 91,206.80	\$ 91,206.80	Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	9/24/2020	97514671	\$ 12,124.00		\$ 12,124.00	\$ 12,124.00	Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	10/27/2020	97515328	\$ 26,496.50	\$ 101.70	\$ 26,598.20	\$ 26,598.20	Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	11/9/2020	97516371	\$ 48,890.50	\$ 1,182.60	\$ 50,073.10	\$ 55,443.10	Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	12/3/2020	97518707	\$ 53,917.00	\$ 650.40	\$ 54,567.40	\$ 83,094.90	Provided in Second Supplemental Direct Testimony of Lambeth Townsmd, 12/4/2020	
	Totals			\$ 341,733.50	\$ 1,429.78		\$ 378,995.48	
						LGRT TOTAL	\$ 345,097.98	
Alliance Consulting Group	Date	ACG Inv. #	ACG Fees	Disbursements	ACG Invoice Total			
	5/31/2020	20-0514	\$ 7,332.50		\$ 7,332.50		Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	6/30/2020	20-0615	\$ 27,435.00		\$ 27,435.00		Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	7/31/2020	20-0715	\$ 2,328.75		\$ 2,328.75		Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	9/30/2020	20-0910	\$ 532.00		\$ 532.00		Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	10/31/2020	20-1013	\$ 2,362.50		\$ 2,362.50		Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	11/30/2020	20-1101	\$ 8,077.50		\$ 8,077.50		Provided in Second Supplemental Direct Testimony of Lambeth Townsmd, 12/4/2020	
Totals								
					ACG TOTAL	\$ 48,068.25		
FINCAP, Inc.	Date	FINCAP Inv. #	FINCAP Fees	Disbursements	FINCAP Invoice Total			
	6/25/2020	02110	\$ 14,400.00		\$ 14,400.00		Provided in Direct Testimony of Lambeth Townsmd, 7/15/2020	
	10/30/2020	02110	\$ 2,475.00		\$ 2,475.00		Provided in First Supplemental Direct Testimony of Lambeth Townsmd, 11/12/2020	
	11/30/2020	02110	\$ 9,450.00		\$ 9,450.00		Provided in Second Supplemental Direct Testimony of Lambeth Townsmd, 12/4/2020	
Totals								
					FINCAP TOTAL	\$ 26,325.00		
Bloom Strategic Consulting	Date	BSC Inv. #	BSC Fees	Disbursements	BSC Invoice Total			
	11/17/2020	1514	\$ 11,000.00		\$ 11,000.00		Provided in Second Supplemental Direct Testimony of Lambeth Townsmd, 12/4/2020	
Totals								
					BSC TOTAL	\$ 11,000.00		
TOTAL RATE CASE EXPENSES					\$	430,491.23		



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December 3, 2020

Monarch Utilities I LP
 Attn William "Ken" Dix
 1325 North Grand Avenue Suite 100
 Covina, CA USA 91724

Invoice: 97518707
 Client: 3176
 Matter: 24
 Billing Attorney: WAF
 Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through November 30, 2020:

RE: 2020 Rate Case

Professional Services	\$ 53,917.00
Total Disbursements	<u>\$ 29,177.90</u>
TOTAL THIS INVOICE	\$ 83,094.90

Lloyd Gosselink Rochelle & Townsend, P.C.

Monarch Utilities I LP
2020 Rate Case
I.D.3176-24-WAF

December 3, 2020
Invoice: 97518707

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
11/02/20	RLT	Review correspondence; review Staff testimony; conference with B. Bahr, D. Watson, and C. Faulk (Preparation of Rebuttal).	1.70
11/02/20	RLT	Prepare supplemental direct testimony (Preparation of Testimony).	.90
11/02/20	WAF	Work on testimony issues; attention to rate case issues; teleconference with rate case team regarding Staff analysis. (Administration).	3.10
11/02/20	JRB	Review testimony and work on preparing rebuttal; conference with legal team. (Preparation of Rebuttal)	3.30
11/02/20	HEC	Review correspondence; case management; update testimony; draft protective order certifications; e-file protective order certifications; email correspondences (Administration/Case Management).	1.60
11/03/20	RLT	Review correspondence; review Staff testimony (Preparation of Rebuttal).	.40
11/03/20	WAF	Work on hearing preparation and settlement issues; review and draft correspondence. (Preparation for Hearing),	.40
11/03/20	JRB	Review and analyze direct testimony; work on preparing rebuttal. (Preparation of Rebuttal)	3.80
11/03/20	HEC	Review order; case management; email correspondence; calendar deadlines (Administration/Case Management).	.20
11/04/20	RLT	Review Staff's testimony; conference with rate case team; conference with B. Bahr, C. Faulk, and B. Fairchild (Preparation of Rebuttal).	3.30
11/04/20	WAF	Review and draft correspondence; work on Bulverde settlement; review confidential testimony; teleconference with L. Townsend, B. Bahr, and B. Fairchild regarding rebuttal; address Bulverde issues; teleconference with J. Rammel regarding Bulverde issues. (Administration).	4.70
11/04/20	JLM	Participate in weekly call regarding discovery and settlement conference; review discovery and draft filings (Administration).	1.70
11/04/20	JRB	Review correspondence and intervenor testimony; conference with rate case team. (Preparation of Rebuttal)	2.60
11/04/20	HEC	Case management; discuss upcoming deadlines and assignments with project team; draft discovery request; prepare discovery request for filing with the PUC; e-file discovery request; email correspondences; calendar deadlines; draft amended discovery response (Administration/Case Management - 1.7 / Discovery - 0.6).	2.30
11/05/20	RLT	Review correspondence (Administration).	.80
11/05/20	WAF	Review and draft correspondence; work on settlement preparations; work on Bulverde issues; attend pre-settlement conference call with client group; attend settlement conference. (Administration).	6.70
11/05/20	JRB	Review intervenor testimony and discovery responses; draft correspondence; conference with legal team. (Settlement)	2.60
11/05/20	HEC	Revise discovery response; case management; prepare discovery response and confidential materials for filing with the PUC; e-file discovery response; email	.80

Lloyd Gosselink Rochelle & Townsend, P.C.

Monarch Utilities I LP
2020 Rate Case
I.D.3176-24-WAF

December 3, 2020
Invoice: 97518707

Date	Atty	Description Of Services Rendered	Hours
		correspondence (Discovery).	
11/06/20	JRB	Work on drafting post-hearing briefing schedule; conference with legal team, OPUC, and Commission Staff. (Administration)	.80
11/06/20	HEC	Review correspondence; case management; draft proposed briefing schedule (Discovery - 0.1 / Administration - 0.2).	.30
11/09/20	HEC	Review correspondence; case management; revise testimony (Administration/Case Management).	.20
11/10/20	RLT	Conference with legal team regarding preparation for hearing (Preparation for Hearing).	.70
11/10/20	RLT	Prepare first supplemental direct testimony (Administration).	1.00
11/10/20	WAF	Teleconference with internal legal team to discuss hearing preparations; review and draft correspondence; teleconference with B. Bahr regarding errata to application. (Administration).	2.40
11/10/20	JLM	Witness training prep zoom with litigation team; review OPUC testimony and begin drafting practice cross examination for witness training (Administration).	3.70
11/10/20	JRB	Review and revise proposed briefing schedule; correspondence with legal team and Commission Staff. (Administration)	1.20
11/10/20	HEC	Proofread and revise testimony; case management; email correspondences; research support for C. Faulk (Administration/Case Management).	1.40
11/11/20	RLT	Prepare supplemental direct testimony; correspondence; review correspondence (Administration).	.50
11/11/20	RLT	Conference with rate case team regarding rebuttal testimony (Preparation of Rebuttal).	1.00
11/11/20	WAF	Review and draft correspondence; work on rebuttal testimony; work on testimony preparation issues; work on hearing issues; weekly teleconference with Rate Case team regarding hearing preparation. (Preparation of Rebuttal).	4.40
11/11/20	JLM	Participate in weekly strategy call; continue preparing cross-examination for witness training (Administration).	3.40
11/11/20	JRB	Conference with rate case team; work on rebuttal testimony. (Preparation of Rebuttal)	2.10
11/11/20	JRB	Conference with rate case team; work on preparing for hearing. (Preparation for Hearing)	2.00
11/11/20	HEC	Prepare Joint Proposed Briefing Schedule for filing with the PUC; e-file schedule; prepare testimony for filing with the PUC; case management; email correspondences; discuss testimony with project team; e-file testimony (Administration/Case Management).	1.50
11/12/20	WAF	Work on preparing rebuttal testimony and preparing for hearing; review and draft correspondence. (Administration).	8.00
11/12/20	JLM	Attend witness preparation and training; prepare for mock cross-examination (Administration).	10.50
11/12/20	JRB	Conference with rate case team to prepare for hearing. (Preparation for Hearing)	8.90
11/12/20	HEC	Case management; email correspondences (Administration/Case Management).	.20

Lloyd Gosselink Rochelle & Townsend, P.C.

Monarch Utilities I LP
2020 Rate Case
I.D.3176-24-WAF

December 3, 2020
Invoice: 97518707

Date	Atty	Description Of Services Rendered	Hours
11/13/20	WAF	Work on preparing rebuttal testimony and preparing for hearing; review and draft correspondence. (Administration).	7.50
11/13/20	JLM	Attend witness training and prep (Administration).	7.00
11/13/20	JRB	Conference with rate case team to work on preparing for the hearing. (Preparation for Hearing)	7.00
11/13/20	HEC	Research support for R. Barnes; case management (Administration/Case Management).	.20
11/16/20	WAF	Work on rebuttal testimony; review and draft correspondence. (Preparation of rebuttal).	2.10
11/16/20	JLM	Review drafts of rebuttal testimony (Administration).	3.80
11/16/20	JRB	Work on preparing rebuttal testimony. (Preparation of Rebuttal)	2.50
11/16/20	HEC	Review correspondence; case management (Administration/Case Management).	.10
11/17/20	WAF	Work on rebuttal testimony. (Preparation of Rebuttal).	4.40
11/17/20	JLM	Continue reviewing drafts of rebuttal testimony (Administration).	4.00
11/17/20	JRB	Correspondence with rate case team; work on preparing rebuttal testimony. (Preparation of Rebuttal)	5.10
11/17/20	HEC	Review correspondence; case management; email correspondences; rebuttal testimony preparation (Administration/Case Management).	4.90
11/18/20	RLT	Review and revise drafts of rebuttal testimony; review correspondence; correspondence (Preparation of Rebuttal).	3.80
11/18/20	WAF	Review and revise draft rebuttal testimony; review and draft correspondence. (Preparation of Rebuttal).	7.40
11/18/20	JLM	Continue reviewing drafts of rebuttal testimony; correspondence regarding same (Administration).	4.40
11/18/20	JRB	Work on preparing rebuttal testimony; correspondence with rate case team. (Preparation of Rebuttal)	4.70
11/18/20	HEC	Rebuttal testimony preparation; review correspondence; case management; email correspondences; prepare rebuttal testimony for filing with the PUC; e-file rebuttal testimony (Administration/Case Management).	10.20
11/19/20	RLT	Review correspondence; correspondence; review rebuttal testimony (Administration).	.60
11/19/20	WAF	Review and draft correspondence; review issues related to rebuttal testimony; oversee filing of same. (Preparation of Rebuttal).	.60
11/19/20	JRB	Work on finalizing rebuttal testimony; call and correspondence with legal team. (Preparation of Rebuttal)	.50
11/19/20	HEC	Rebuttal testimony preparation; case management; email correspondences (Administration/Case Management).	3.20
11/20/20	JRB	Research witness preparation issues; call with legal team. (Preparation for Hearing)	1.30
11/22/20	JRB	Research witness preparation issues. (Preparation for Hearing)	1.50
11/23/20	WAF	Teleconference with PUC staff; review and draft correspondence; review Staff's 9th RFI Set; teleconference with B. Bahr and J. McIntyre regarding settlement discussions. (Administration).	1.60

Lloyd Gosselink Rochelle & Townsend, P.C.

Monarch Utilities I LP
2020 Rate Case
I.D.3176-24-WAF

December 3, 2020
Invoice: 97518707

Date	Atty	Description Of Services Rendered	Hours
11/23/20	JRB	Research witness preparation issues. (Preparation for Hearing)	.20
11/23/20	JRB	Review discovery requests from Staff. (Discovery)	.20
11/23/20	HEC	Review discovery request; case management; email correspondence; calendar deadlines (Discovery).	.50
11/24/20	WAF	Preparation for hearing; review testimony. (Preparation for Hearing).	1.40
11/24/20	JRB	Review discovery requests and related correspondence. (Discovery)	.30
11/24/20	HEC	Review correspondence; case management; review discovery request; proofread response shell; email correspondence; calendar deadline (Administration/Case Management - 0.1 / Discovery - 0.2).	.30
11/29/20	WAF	Review and draft correspondence; review discovery requests from PUC Staff. (Discovery).	.20
11/30/20	RLT	Conference with litigation team (Preparation for Hearing).	.50
11/30/20	WAF	Internal litigation team discussion regarding hearing preparation; teleconference with R. Asher regarding Staff testimony; teleconference with B. Bahr regarding hearing preparation; prepare for hearing. (Preparation for Hearing).	4.70
11/30/20	WAF	Review and revise draft discovery responses; teleconference with B. Bahr regarding discovery responses; review and draft correspondence. (Discovery).	.60
11/30/20	JLM	Meeting with internal team to discuss hearing preparation; read B. Fairchild testimony and E. Sears testimony for hearing preparation (Administration).	4.60
11/30/20	JRB	Conference with legal team and review testimony. (Preparation for Hearing)	1.30
11/30/20	JRB	Review and work on responses to discovery requests. (Discovery)	.50
11/30/20	HEC	Review orders; case management; hearing preparation with project team; prepare testimony materials for provision to SOAH; prepare supplemental testimony; email correspondences; draft exhibit list; review and prepare discovery response for filing with the PUC (Administration/Case Management - 2.0 / Discovery - 0.3).	2.30

TOTAL PROFESSIONAL SERVICES

\$ 53,917.00

SUMMARY OF PROFESSIONAL SERVICES

Name	Staff Level	Hours	Rate	Total
R Lambeth Townsend	Principal	15.20	435.00	6,612.00
William A Faulk III	Principal	60.20	300.00	18,060.00
Jamie L Mauldin	Principal	43.10	280.00	12,068.00
J Reid Barnes	Associate	52.40	250.00	13,100.00
Hanna E Campbell	Paralegal	30.20	135.00	4,077.00
TOTALS		201.10		\$ 53,917.00

DISBURSEMENTS

Lloyd Gosselink Rochelle & Townsend, P.C.

Monarch Utilities I LP
 2020 Rate Case
 I.D.3176-24-WAF

December 3, 2020
 Invoice: 97518707

Date	Description	Amount
10/27/20	Corporate Couriers Check # - 000010790 Corporate Couriers, Courier services, 10/31/2020	41.00
10/31/20	Bloom Strategic Cons Voucher # - 000106687 Bloom Strategic Consulting, Inc., Consultant Services, Professional services for November 2020 regarding Monarch Rate Case, Docket 50944, 11/17/2020	11,000.00
11/05/20	Corporate Couriers Check # - 000010821 Corporate Couriers, Courier services, 11/15/2020	12.00
11/12/20	Corporate Couriers Check # - 000010821 Corporate Couriers, Courier services, 11/15/2020	37.00
	Photocopying	560.40
11/30/20	Financial Concepts a Voucher # - 000106845 Financial Concepts and Applications Inc, Consultant Services, Professional services through November 2020 for Research, Analysis, and Preparation of Testimony regarding Rate of Return for Monarch Utilities before the PUC of Texas, 11/30/2020	9,450.00
11/30/20	Alliance Consulting Voucher # - 000106847 Alliance Consulting Group, Consultant Services, Professional services for November 2020 regarding Monarch Utilities 2020 Rate Case, 11/30/2020	8,077.50
TOTAL DISBURSEMENTS		\$ 29,177.90
TOTAL THIS INVOICE		\$ 83,094.90

INVOICE

CORPORATE COURIERS AND LOGISTICS
2535 KRAMER LANE, SUITE F
AUSTIN, TX 78758

Invoice No.	Customer No.
61481	1291
INVC DATE	TOTAL DUE
10/31/20	509.20

LLOYD GOSSELINK ATTORNEYS AT LAW
816 CONGRESS AVE
SUITE 1900
AUSTIN, TX 78701

ON-DEMAND DELIVERIES 24/7
ASK ABOUT OUR WAREHOUSE
THANKS FOR YOUR BUSINESS
(512) 479-4007

			Customer No.	Invoice No.	Period Ending	Amount Due	Pg		
			1291	61481	10/31/20	509.20	3		
Date	OrdNo.	Svc	Service Detail					Charges	Total
10/26/20	993052	EXK	ROSIE REYNA 1701 N. CONGRESS AVE. AUSTIN TX 78701 Caller: RICOH OFFICE SER Time: 15:13 Signed: R. ROBERTS	LLOYD GOSSELINK ATTORNEYS AT LAW 816 CONGRESS AVE AUSTIN TX 78701	Base	17.00		17.00	
10/21/20	993297	EXK	ROSIE REYNA OPUC 1701 N. CONGRESS AVE. AUSTIN TX 78701 Caller: RICOH OFFICE SER Time: 13:01 Signed: R. ROBERTS	LLOYD GOSSELINK ATTORNEYS AT LAW 816 CONGRESS AVE AUSTIN TX 78701	Base	12.00		12.00	
10/27/20	994572	EXK	RICOH/ LLOYD GOSSELINK 816 CONGRESS AVE AUSTIN TX 78701 Caller: RICOH OFFICE SER Time: 11:09 Signed: F CASTELLANOS	FUC TEXAS - CENTRAL RECORDS 1701 N. CONGRESS AVE. AUSTIN TX 78701	Base	12.00		12.00	
Total Charges for Ref. - RLT/WAF/JRB 3176-24:							41.00		

INVOICE

CORPORATE COURIERS AND
LOGISTICS
2335 KRAMER LANE, SUITE F
AUSTIN, TX 78758

Lloyd Gosselink

Invoice No.	Customer No.
61660	1201
Inv Date	Total Due
11/15/20	418.30

LLOYD GOSSELINK ATTORNEYS AT LAW
816 CONGRESS AVE
SUITE 1900
AUSTIN, TX 78701

11402

ON-DEMAND DELIVERIES 24/7
ASK ABOUT OUR WAREHOUSE
THANKS FOR YOUR BUSINESS
(512) 479-4007

Date	Ord No.	Svc	Customer No.	Invoice No.	Period Ending	Amount Due	Pg	Charges	Total	
			1201	61660	11/15/20	418.30	1			
				Service Detail						
11/05/20	994837	1BK	RICOH/ LLOYD GOSSELINK 816 CONGRESS AVE AUSTIN TX 78701 Caller: RICOH OFFICE SER Time: 10:39 Signed: F CASTELLANOS	PUC TEXAS - CENTRAL RECORDS 1701 N. CONGRESS AVE AUSTIN TX 78701 Wght: 1 Lbs		Base	12.00	12.00		
			Total Charges for Ref. - REC 3176-24: 12.00							
11/13/20	998194	1BK	RICOH/ LLOYD GOSSELINK 816 CONGRESS AVE AUSTIN TX 78701 Caller: RICOH OFFICE SER Time: 13:42 Signed: J KIRKLAND	PUC TEXAS - CENTRAL RECORDS 1701 N. CONGRESS AVE AUSTIN TX 78701 Wght: 5 Lbs		Base	12.00	12.00		
			Total Charges for Ref. - RLT/RDE/JLM/JRB 3176-24: 37.00							

NOVEMBER 2020 Pcounter					
User	Copier	Date	Client	Matter	COPIES
ricoh	Alysheba	11/5/2020	3176	24	4
ricoh	Alysheba	11/5/2020	3176	24	28
ricoh	Alysheba	11/5/2020	3176	24	2
ricoh	Alysheba	11/6/2020	3176	24	8
ricoh	Alysheba	11/6/2020	3176	24	3
ricoh	Alysheba	11/11/2020	3176	24	1
ricoh	Alysheba	11/11/2020	3176	24	1014
ricoh	Alysheba	11/11/2020	3176	24	78
ricoh	Alysheba	11/11/2020	3176	24	26
ricoh	Alysheba	11/11/2020	3176	24	26
ricoh	Alysheba	11/11/2020	3176	24	26
ricoh	Alysheba	11/11/2020	3176	24	26
ricoh	Alysheba	11/11/2020	3176	24	4
ricoh	Alysheba	11/11/2020	3176	24	1
ricoh	Alysheba	11/18/2020	3176	24	4
ricoh	Alysheba	11/18/2020	3176	24	7
ricoh	Alysheba	11/18/2020	3176	24	1
ricoh	Alysheba	11/18/2020	3176	24	117
ricoh	Alysheba	11/18/2020	3176	24	9
hec	Alysheba	11/19/2020	3176	24	126
hec	Alysheba	11/19/2020	3176	24	116
hec	Alysheba	11/19/2020	3176	24	1508
ricoh	Alysheba	11/19/2020	3176	24	2
ricoh	Alysheba	11/19/2020	3176	24	1
ricoh	Deepblue	11/6/2020	3176	24	1
ricoh	Deepblue	11/19/2020	3176	24	1
hkj	Secretariat	11/19/2020	3176	24	50
hec	Secretariat	11/19/2020	3176	24	126
hkj	Secretariat	11/19/2020	3176	24	650
hec	Secretariat	11/19/2020	3176	24	1638

5604 copies x .10/page = **\$ 560.40**



101 E. Park Blvd., Suite 220
Plano, TX 75074

Invoice

Date	Invoice #
11/30/2020	20-1101

Bill To:
Lambeth Townsend Lloyd Gosslink Attorneys at Law ltownsend@lglawfirm.com

Billing Period: 11-1-20 through 11-30-20			
	Terms	MON2020	
	Net 30 Days	Monarch Utilities 2020 Rate Case	
Hours	Description	US Rate	US Amount
18.00	Dane Watson	\$ 270.00	\$ 4,860.00
16.50	Karen Ponder	\$ 195.00	\$ 3,217.50
			\$ -
			\$ -
	Subtotal - All Professional Services		\$ 8,077.50
Total			\$ 8,077.50

ALLIANCE CONSULTING GROUP

Professional Services

Nov-20

Dane Watson

Monarch Utilities

<u>Date</u>	<u>Time: Hours</u>	<u>Activity</u>
01-Nov		
02-Nov	2.00	Review corrected Staff calculations, communicate & call with Company
03-Nov		
04-Nov	1.50	Call on Settlement with Company
05-Nov	1.25	Prep & attend Settlement Conference
06-Nov		
07-Nov		
08-Nov		
09-Nov	0.75	Prep & call on rebuttal
10-Nov		
11-Nov	1.50	Rebuttal work
12-Nov	3.00	Video call on hearing
13-Nov	3.00	Rebuttal work
14-Nov		
15-Nov		
16-Nov	5.00	Finished review/edit of rebuttal
17-Nov		
18-Nov		
19-Nov		
20-Nov		
21-Nov		
22-Nov		
23-Nov		
24-Nov		
25-Nov		
26-Nov		
27-Nov		
28-Nov		
29-Nov		
30-Nov		
Total	<u>18.00</u>	

ALLIANCE CONSULTING GROUP

Professional Services

Nov-20

Karen Ponder

Monarch Utilities

<u>Date</u>	<u>Time: Hours</u>	<u>Activity</u>
01-Nov		
02-Nov	2.00	Determine impact of Staff calculation error
03-Nov		
04-Nov		
05-Nov		
06-Nov		
07-Nov		
08-Nov		
09-Nov	3.50	Conference call - Start rebuttal
10-Nov	7.50	Rebuttal
11-Nov		
12-Nov		
13-Nov	3.00	Rebuttal
14-Nov		
15-Nov		
16-Nov		
17-Nov	0.50	Send Rebuttal
18-Nov		
19-Nov		
20-Nov		
21-Nov		
22-Nov		
23-Nov		
24-Nov		
25-Nov		
26-Nov		
27-Nov		
28-Nov		
29-Nov		
30-Nov		
Total	<u>16.50</u>	

FINANCIAL CONCEPTS AND APPLICATIONS, INC.
3907 RED RIVER
AUSTIN, TEXAS 78751

(512) 458-4644

fincap2@texas.net
Fax (512) 458-4768

November 30, 2020

Mr. Lambeth Townsend
Lloyd Gosselink
816 Congress Avenue
Suite 1900
Austin, Texas 78701

consultants@lglawfirm.com

Reference No.: 02110
Taxpayer ID No.: 74-2058652

Consulting Services:

Research, Analysis, and Preparation of
Testimony re: Rate of Return for Monarch
Utilities before the Public Utility Commission of
Texas.

For the Period.
November 1 through November 30, 2020

Professional Time:

Bruce H. Fairchild
21.0 hours @ \$ 450 \$ 9,450

Total

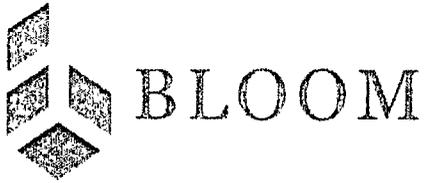
\$ 9,450



Bruce H. Fairchild

BRUCE H. FAIRCHILD
FINCAP, INC.
TIME LOG FOR MONARCH

<u>Month</u>	<u>Date</u>	<u>Description</u>	<u>Time</u>
2020			
November	1	Review of Staff testimony and research	0.5
	4	Review of Staff testimony and research	0.5
	12	Draft rebuttal testimony	1.5
	15	Draft rebuttal testimony	3.0
	16	Draft rebuttal testimony	6.0
	17	Draft rebuttal testimony	6.5
	18	Finalize rebuttal testimony	3.0
		Total	<u>21.0</u>



Bloom Strategic Consulting

5960 Berkshire Lane
Dallas, TX 75225

INVOICE

BILL TO
Lambeth Townsend
Lloyd Gosselink Rochelle & Townsend, P.C.
816 Congress Avenue
Suite 1900
Austin, TX 78701

INVOICE 1514
DATE 11/17/2020
TERMS Net 30

IN REFERENCE TO
Monarch Rate Case Docket 50944

DATE	DESCRIPTION	HOURS	RATE	AMOUNT
11/12/2020	Mr. Bloom conducted witness communications training tutorial.	1:00	3,500.00	3,500.00
11/12/2020	Mr. Bloom conducted 2 witness communications training individual sessions.	1:00	3,000.00	3,000.00
11/13/2020	Mr. Bloom conducted 3 witness communications training individual sessions.	1:00	4,500.00	4,500.00

TOTAL

BALANCE DUE

\$11,000.00