

VOTE SHEET

March 2, 2010

Docket No. 080295-WS -- Request by Sun Communities Finance, LLC d/b/a Water Oak Utility for a revenue-neutral rate restructuring to implement conservation rates in Lake County.

Issue 1: What is the appropriate amount of rate case expense?

Recommendation: The appropriate amount of rate case expense is \$0.

APPROVED

Issue 2: What are the appropriate rate structures for this utility?

Recommendation: The appropriate rate structure for the Utility's residential customers is a two-tiered inclining block rate structure. The appropriate usage blocks should be set for monthly consumption levels: (1) of 0-6,000 gallons (6 kgals); and (2) for usage in excess of 6 kgals. The usage block rate factors should be set at 1.0 and 1.25, respectively. The price per gallon for the residential nondiscretionary 0-3 kgal block should not include the price increase associated with the repression adjustment. The appropriate rate structure for the Utility's general service customers should remain the base facility charge (BFC)/uniform gallonage charge rate structure. The BFC cost recovery allocation should be set at 40%.

APPROVED

COMMISSIONERS ASSIGNED: All Commissioners

COMMISSIONERS' SIGNATURES

MAJORITY

DISSENTING

Handwritten signatures of David G. Klement, Noel A. De, J. Lynn, and B. J. [unclear]

DOCUMENT NUMBER-DATE: 01414 MAR-2010 FPSC-COMMISSION CLERK

REMARKS/DISSENTING COMMENTS:

noting oral modifications and attached spreadsheet submitted by staff. Staff given administrative authority to amend residential gallonage.

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(Continued from previous page)

Issue 3: Is a repression adjustment to the Utility's water system appropriate in this case, and, if so, what is the appropriate adjustment to make?

Recommendation: Yes, a repression adjustment is appropriate. Residential water consumption should be reduced by 2.14 percent, resulting in a consumption reduction of approximately 2,028 kgals. Total residential water consumption for ratesetting is 92,699 kgals. Total water consumption for ratesetting is 100,057 kgals, which represents a 1.99 percent reduction in overall consumption. The resulting water system reductions to revenue requirements are \$401 in purchased power expense, \$60 in chemicals expense and \$22 in regulatory assessment fees (RAFs). The post-repression revenue requirement for the water system is \$151,371.

In order to monitor the effects of both the changes in revenues and rate structure, the Utility should be ordered to prepare monthly reports detailing the number of bills rendered, the consumption billed and the revenues billed for each system. In addition, the reports should be prepared by customer class and meter size. **The reports should be filed with staff, on a semi-annual basis, for a period of two years beginning the first billing period after the approved rates go into effect.** To the extent the Utility makes adjustments to consumption in any month during the reporting period, the Utility should be ordered to file a revised monthly report for that month within 30 days of any revision.

APPROVED

Issue 4: What are the appropriate rates for this utility?

Recommendation: The appropriate monthly water rates are shown on Schedule 1 of staff's memorandum dated February 18, 2010. Excluding miscellaneous service revenues, the recommended water rates are designed to produce revenues of \$151,371. The Utility should file revised tariff sheets and a proposed customer notice to reflect the Commission-approved rates. The approved rates should be effective for service rendered on or after the stamped approval date of the revised tariff sheets, pursuant to Rule 25-30.475(1), F.A.C. In addition, the rates should not be implemented until staff has approved the proposed customer notice. The Utility should provide proof of the date the notice was given no less than 10 days after the date of the notice.

APPROVED

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(Continued from previous page)

Issue 5: What is the appropriate amount by which rates should be reduced four years after the established effective date, to reflect removal of the amortized rate case expense as required by Section 367.0816, F.S.?

Recommendation: Staff recommends in Issue 1 that the appropriate amount of rate case expense is \$0. If the Commission approves Staff's recommendation in Issue 1, there is no need to reduce rates to remove rate case expense.

APPROVED

Issue 6: Should this docket be closed?

Recommendation: No. If no person whose substantial interests are affected by the proposed agency action files a protest within twenty-one days of the issuance of the order, a consummating order will be issued. The docket should remain open for staff's verification that the revised tariff sheets and customer notice have been filed by the Utility and approved by staff. Once these actions are complete, this docket should be closed administratively.

APPROVED

SUN COMMUNITIES FINANCE, LLP D/B/A WATER OAK UTILITY
DOCKET NO. 080295-WS
HISTORICAL TEST YEAR ENDED DECEMBER 31, 2007
ANALYSIS OF RATE CASE EXPENSE
C: \JENNIE \WATER OAK \RECOMMENDED RATE CASE EXPENSE.XLS

BY: KET
18-Sep-09
4:15 PM

BY: FJL
25-Sep-09
7:20 PM

BY: FJL
21-Oct-09
12:20 PM

Date	Explanation	Hours Billed	Amount Billed	Billed Hourly Rate	Costs Billed	Related to Instant Case	Hours Allowed	Billed Hourly Rate Allowed	Staff Recommended		
									Amount Disallowed	Reason Disallowed	Amount Allowed
19-Mar-08	Review Nixon's rate restructuring schedules	2.00	\$580.00	\$290.00		Yes	1.00	\$290.00	\$290.00		\$290.00
20-Mar-08	Telephone conference with Staff regarding limited proceeding and letter to client regarding procedure to apply	1.00	\$290.00	\$290.00		Yes	0.50	\$290.00	\$145.00		\$145.00
22-Apr-08	Review email and telephone conference with Bob Nixon; reply to Brian Fannon by email regarding status of case	1.50	\$435.00	\$290.00		Yes	0.75	\$290.00	\$217.50		
23-Apr-08	Review final schedule regarding rate restructuring received from Bob Nixon	0.50	\$145.00	\$290.00		Yes	0.25	\$290.00	\$72.50		
25-Apr-08	Review rules and statutes regarding filing limited proceeding and emails to PSC staff regarding same	0.90	\$261.00	\$290.00		Yes	0.50	\$290.00	\$116.00		\$145.00
29-Apr-08	Review Bob Nixon's schedule; telephone conference with staff and email from staff regarding revenue neutral rate restructuring and review files regarding same	1.10	\$319.00	\$290.00		Yes	0.75	\$290.00	\$101.50		\$217.50
5-May-08	Work on limited proceeding pleading; review statute and rules and Bob Nixon's Schedules; begin to organize items	2.40	\$696.00	\$290.00		Yes	1.50	\$290.00	\$261.00		\$435.00
6-May-08	Continue review of documents, rules and statutes and work on pleading and organization of draft affidavit; draft letter to Hoekstra; review and send; review notice rule	3.60	\$1,044.00	\$290.00		Yes	2.00	\$290.00	\$464.00		\$580.00
7-May-08	Continue work on final application; review files and previous orders and correspondence; review water management district permits regarding requirements to change rate structure and emails to Julian Coto regarding questions regarding same	2.20	\$638.00	\$290.00		Yes	1.50	\$290.00	\$203.00		\$435.00
8-May-08	Review Coto correspondence on conservation plan; review plan and permit; review Brian Fannon email and respond to same regarding issues and potential basis for application	1.80	\$522.00	\$290.00		Yes	0.00	\$290.00	\$522.00		\$0.00

Parties/Staff Handout
Internal Affairs/Agenda
on 3/2/10
Item No. 9
080295-WS

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14-May-08	Review correspondence to water management district and reply received	0.20	\$58.00	\$290.00		Yes	0.20	\$290.00	\$0.00		\$58.00
15-May-08	Review email from Brian Fannon regarding leverage formula; review staff recommendation and schedule; review PSC website; review prior rates of return; respond to Brian Fannon; review emails from Fannon regarding water management district schedule	1.20	\$348.00	\$290.00		Yes	0.20	\$290.00	\$290.00		\$58.00
28-May-08	Review email from Brian Fannon and review application pleading and documents	0.30	\$87.00	\$290.00		Yes	0.30	\$290.00	\$0.00		\$87.00
29-May-08	Review letter from water management district; revise pleading and regarding limited proceeding	0.70	\$203.00	\$290.00		Yes	0.70	\$290.00	\$0.00		\$203.00
30-May-08	Organize, revise and finalize limited proceeding filing; file limited proceeding; with the PSC in final	1.50	\$435.00	\$290.00		Yes	0.75	\$290.00	\$217.50		\$217.50
	Filing Fee				\$1,000.00	Yes			\$0.00		\$1,000.00
	Long distance calls				\$1.10	?			\$0.00		\$1.10
11-Jun-08	Review index information from Bob Nixon; review pending rate proceeding and email to Bob Nixon and Paul Dechario; telephone conference with Bob Nixon and Paul Dechario	1.50	\$435.00	\$290.00		No	0.00	\$290.00	\$435.00		\$0.00
13-Jun-08	Review email regarding indexed rate from Bob Nixon's office and review file regarding proposed rates	0.30	\$87.00	\$290.00		No	0.00	\$290.00	\$87.00		\$0.00
23-Jun-08	Review email regarding status from Brian Fannon; review file; review PSC website; leave telephone message with staff analyst	0.80	\$232.00	\$290.00		No	0.00	\$290.00	\$232.00		\$0.00
24-Jun-08	Review PSC website; telephone conference with staff analyst and email to Brian Fannon regarding status of index and rate restructuring	1.20	\$348.00	\$290.00		No / Yes	0.25	\$290.00	\$275.50		\$72.50
30-Jun-08	Telephone conference with staff attorney; review statute and revise pleading and send revised pleading with cover letter	1.00	\$290.00	\$290.00		Yes	1.00	\$290.00	\$0.00		\$290.00

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28-Oct-08	Telephone conference with Umbel and Hoekstra; review file and the website regarding status of case; leave voice message with staff	1.20	\$348.00	\$290.00		Yes	1.20	\$290.00	\$0.00		\$348.00
29-Oct-08	Telephone conference with Paul Stallcup; review original filing and website; email to all regarding Stallcup's position and effect on filing	2.40	\$696.00	\$290.00		Yes	1.50	\$290.00	\$261.00		\$435.00
31-Oct-08	Review Bob Nixon's email and analysis of staff positions and email to all regarding suggested course of action and issues regarding same	2.20	\$638.00	\$290.00		Yes	1.50	\$290.00	\$203.00		\$435.00
14-Nov-08	Review message from Paul Stallcup and attempt to contact Stallcup regarding staff recom	0.30	\$87.00	\$290.00		Yes	0.30	\$290.00	\$0.00		\$87.00
3-Nov-08	Review email from Bob Nixon regarding issues on revenue restructuring; review file regarding same	0.50	\$145.00	\$290.00		Yes	0.50		\$0.00		\$145.00
13-Nov-08	Review file and file o the website and notes; draft email to Paul Stallcup; review emails from Jim Hoekstra and responding to same; review PSC website regarding same	1.90	\$551.00	\$290.00		Yes	1.90		\$0.00		\$551.00
17-Nov-08	Telephone conference with Paul Stallcup; work on draft rate case expense schedule; review rules on customer meetings and notices and limited proceedings	1.50	\$435.00	\$290.00		Yes	1.00		\$0.00		\$435.00
18-Nov-08	Telephone conference with Jennie Lingo of the PSC staff; continue work on rate case expense schedule; send out drafts of estimate to complete; telephone conference with Water Oak staff regarding location of clubhouses and size for customer meeting and contact for same; additional conference with staff analyst regarding same	2.20	\$638.00	\$290.00		Yes	1.65		\$0.00		\$638.00

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19-Nov-08	Review Bob Nixon's schedule on rate case expense; incorporate those schedules into a group of schedules; email to Hoekstra and Umbel regarding in-house costs; review email from Hoekstra regarding same; set up conference call for the following week	1.70	\$493.00	\$290.00		Yes	1.36		\$0.00		\$493.00
25-Nov-08	Review schedules regarding rate case expense and prepare for telephone conference; telephone conference with Jim Hoekstra regarding rate case expense and process and issues in rate restructuring proceeding; telephone conference with Bob Nixon regarding need to discuss two issues further with staff	1.20	\$348.00	\$290.00		Yes	0.90		\$0.00		\$348.00
26-Nov-08	Finish draft of rate case expense schedules and forward all with cover letter to client	1.40	\$406.00	\$290.00		Yes	1.40		\$0.00		\$406.00
2-Dec-08	Review Bob Nixon's email and Hoekstra response; additional email to Hoekstra	0.90	\$261.00	\$290.00		Yes	0.90		\$0.00		\$261.00
5-Dec-08	Telephone conference with Hoekstra; review prior emails and draft revisions to rate tariffs and send to Hoekstra	0.80	\$232.00	\$290.00		Yes	0.80		\$0.00		\$232.00
8-Dec-08	Review Hoekstra email and respond in detail; review additional emails from Hoekstra and Umbel	1.30	\$377.00	\$290.00		?	1.30		\$0.00		\$377.00
12-Dec-08	Finalize rate case expense exhibits and letter to Paul Stallcup and finalize and send same	1.00	\$290.00	\$290.00	\$120.75	Yes	1.00		\$0.00		\$290.00
13-Feb-09	Review file and website and email to staff regarding status of case	0.80	\$256.00	\$320.00		Yes	0.80	\$320.00	\$0.00		\$256.00
2-Mar-09	Review prior email regarding status of rate restructuring and PSC website regarding same; send additional email	0.60	\$192.00	\$320.00		Yes	0.60	\$320.00	\$0.00		\$192.00
4-Mar-09	Review email from Jennie Lingo and respond; review additional emails regarding status and respond and forward to James Hoekstra with cover email	1.60	\$512.00	\$320.00		Yes	1.00	\$320.00	\$192.00		\$320.00

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26-Mar-09	Review email regarding customer meeting notices; respond to Gabriele Umbel; send email to staff regarding same; review file and website	1.20	\$384.00	\$320.00		Yes	0.50	\$320.00	\$224.00		\$160.00
27-Mar-09	Forward email sent to staff on to client regarding status of case	0.50	\$160.00	\$320.00		Yes	0.50	\$320.00	\$0.00		\$160.00
8-Apr-09	Review prior emails and additional email to staff regarding status and review responses and forward all to client	0.60	\$192.00	\$320.00		Yes	0.25	\$320.00	\$112.00		\$80.00
24-Apr-09	Review client correspondence; email to staff regarding status; review prior correspondence with staff; telephone conference with Bob Nixon regarding preparation of index and implementation; review email response from staff and forward same to client with cover email; additional email correspondence with staff; and additional email to client regarding customer meeting setup	1.60	\$512.00	\$320.00		Yes	0.80	\$320.00	\$256.00		\$256.00
13-May-09	Review email regarding informal meeting and reply	0.70	\$224.00	\$320.00		Yes	0.25	\$320.00	\$144.00		\$80.00
8-Jun-09	Telephone conference with Jennie Lingo; review prior correspondence; review prior notices and emails; email to client regarding hurried notice; telephone conference with staff attorney; review rule, review staf notice and forward to client	2.60	\$832.00	\$320.00		Yes	0.60	\$320.00	\$640.00		\$192.00
9-Jun-09	Respond to emails regarding notice; prepare affidavit and send; review Jennie Lingo information and respond; forward to client and review response from client; review staff attorney email; prepare affidavit and review final affidavit and email regarding completion	1.90	\$608.00	\$320.00		Yes	0.80	\$320.00	\$352.00		\$256.00
10-Jun-09	Finalize and send memo regarding customer meeting and letter to PSC regarding affidavit; review email from Jennie Lingo regarding staff rec	1.30	\$416.00	\$320.00		Yes	0.50	\$320.00	\$256.00		\$160.00
11-Jun-09	Review email regarding agenda change and forward to client and respond to Hoekstra question regarding same by email	0.60	\$192.00	\$320.00		Yes	0.60	\$320.00	\$0.00		\$192.00
26-Jun-09	Review Gabriele Umbel email regarding customer meeting outcome	0.50	\$160.00	\$320.00		Yes	0.50	\$320.00	\$0.00		\$160.00

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30-Jul-09	Telephone conference with Jennie Lingo and Keino Young of PSC staff regarding issues with case and concerns; review files regarding same; review prior cases, statute and rules regarding same	1.70	\$544.00	\$320.00		Yes	1.70	\$320.00	\$0.00		\$544.00
31-Jul-09	Draft email to client regarding status and reply to additional emails	1.00	\$320.00	\$320.00		Yes	1.00	\$320.00	\$0.00		\$320.00
	Prepare estimate of actual and estimated rate case expense schedules for provision to auditors and staff; work with accountant and company personnel on preparation of such schedules	3.50	\$1,085.00	\$310.00			2.50	\$310.00	\$310.00		\$775.00
	Telecopies, Fed-Ex, Photocopies, Postage, and Telephone				\$100.00						
	Assist in preparation of customer meeting location and notice and distribution of notice. Assist in organization of and planning for customer meeting; telephone conferences with staff; telephone conference with company officials; correspondence to company re: plan for customer meeting and company's role and staff's role in same. Deal with any post meeting issues.	7.50	\$2,325.00	\$310.00			2.00	\$310.00	\$1,705.00		\$620.00
	Telecopies, Fed-Ex, Photocopies, Postage, and Telephone				\$100.00						
	Obtain and review staff recommendation and telephone conference with client and accountant re: same and issues related to same; detailed correspondence with client re: same and issues related to same; analysis of both and answer questions of client re: staff recommendation	6.00	\$1,860.00	\$310.00			2	\$310.00	\$1,240.00		\$620.00
	Fed-Ex, Photocopies, Fax, and Postage				\$200.00						
	Prepare for and attend final agenda conference; make presentation to Commission; return and contact client and detailed letter to client and accountant re: outcome of agenda conference and remaining steps to finalization.	6.00	\$1,860.00	\$310.00			6	\$310.00	\$0.00		\$1,860.00
	Telephone and other expenses				\$100.00						

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	Review of Final Order; discussion with client, and accountants re: same and effect of same; extensive letter to client re: same; discuss possibility of reconsideration or appeal and plan for implementation and remaining steps.	7.00	\$2,170.00	\$310.00			2	\$310.00	\$1,550.00		\$620.00
	Telecopies, Fed-Ex, Photocopies, Postage and Telephone				\$200.00						
	Check on finalization of Order; telephone conference, emails and correspondence to client and accountants re: same and re: implementation of same	2.50	\$775.00	\$310.00			1	\$310.00	\$465.00		\$310.00
	Telecopies, Photocopies, and Postage				\$75.00						
	Assist client in preparation of final customer notice of rates and preparation of final tariffs; work with staff on finalization of both; instructions to client on distribution of notice and implementation of rates; review final tariffs and forward to client for inclusion in tariff	4.00	\$1,240.00	\$310.00			1.5	\$310.00	\$775.00		\$465.00
	Telecopies, Fed-Ex, Photocopies, Postage, and Telephone				\$100.00						
29-Feb-08	Billing Analysis	2.00	\$320.00	\$160.00			2	\$160.00	\$0.00		\$320.00
1-Mar-08	Billing Analysis	5.00	\$800.00	\$160.00			5	\$160.00	\$0.00		\$800.00
3-Mar-08	Billing Analysis	0.25	\$40.00	\$160.00			0.25	\$160.00	\$0.00		\$40.00
7-Mar-08	Billing Analysis	2.25	\$360.00	\$160.00			2.25	\$160.00	\$0.00		\$360.00
10-Mar-08	Billing Analysis	0.25	\$40.00	\$160.00			0.25	\$160.00	\$0.00		\$40.00
5-Mar-08	Cons Rate Structure	1.00	\$200.00	\$200.00			1	\$185.00	\$0.00		\$200.00
6-Mar-08	Cons Rate Structure	4.00	\$800.00	\$200.00			4	\$185.00	\$0.00		\$800.00
17-Mar-08	Cons Rate Structure	8.50	\$1,700.00	\$200.00			0	\$185.00	\$1,572.50		\$127.50
18-Mar-08	Cons Rate Structure	2.00	\$400.00	\$200.00			2	\$185.00	\$0.00		\$400.00
19-Mar-08	Cons Rate Structure	8.00	\$1,600.00	\$200.00			1	\$185.00	\$1,295.00		\$305.00
30-Apr-08	Xerox				\$66.40				\$66.40		
22-Apr-08	Typing	1.50	\$64.50	\$43.00			1.5		\$0.00		\$64.50
15-Apr-05	Miscellaneous	0.50	\$21.50	\$43.00			0.5		\$0.00		\$21.50

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									Amount Disallowed	Reason Disallowed	Amount Allowed
21-Apr-08	Cons Rate Structure	1.00	\$200.00	\$200.00			1	\$185.00	\$0.00		\$200.00
22-Apr-08	Cons Rate Structure	0.50	\$100.00	\$200.00			0.5	\$185.00	\$0.00		\$100.00
30-Oct-08	Conserv Rates (Historic)	3.00	\$660.00	\$220.00			0	\$185.00	\$555.00		\$105.00
31-Oct-08	Conserv Rates (Historic)	4.00	\$880.00	\$220.00			0	\$185.00	\$740.00		\$140.00
	Prepare rate case expense schedule	2.00	\$450.00	\$225.00			2	\$185.00	\$0.00		\$450.00
	Review Staff Recommendation	4.00	\$900.00	\$225.00			0.5	\$185.00	\$647.50		\$252.50
	Conferences with client/attorney	2.00	\$450.00	\$225.00			1	\$185.00	\$185.00		\$265.00
	Proof Final Revenues	1.00	\$225.00	\$225.00	\$25.00		0.25	\$185.00	\$138.75		\$86.25
									\$17,524.65		\$23,390.85
									43%		57%