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June 22, 2021

VIA ELECTRONIC FILING

Mr. Adam Teitzman
Commission Clerk
Florida Public Service Commission
2540 Shumard Oak Boulevard
Tallahassee, FL 32399-0850

Re: Docket No. 20210010-EI; In re: Storm protection plan cost recovery clause

Dear Mr. Teitzman:

Please find enclosed for filing in the above-referenced case on behalf of Walmart Inc. the Direct Testimony and Exhibits of Lisa V. Perry.

Please contact me if you have any questions concerning this filing.

Sincerely,

/s/ Stephanie U. Eaton

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SUE:sds

Enclosures

c: Parties of Record

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true and correct copy of the foregoing has been furnished by electronic mail to the following parties this 22nd day of June, 2021.

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/s/ Stephanie U. Eaton
Stephanie U. Eaton

BEFORE THE FLORIDA PUBLIC SERVICE COMMISSION

In re: Storm protection plan cost : **DOCKET NO. 20210010-EI**
recovery clause :
: **Filed: June 22, 2021**

DIRECT TESTIMONY AND EXHIBIT OF

LISA V. PERRY

ON BEHALF OF

WALMART INC.

Contents

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Exhibits

Exhibit LVP-1: Witness Qualifications Statement

1 **I. Introduction**

2 **Q. PLEASE STATE YOUR NAME, BUSINESS ADDRESS, AND BUSINESS OCCUPATION.**

3 A. My name is Lisa V. Perry. My business address is 2608 SE J Street, Bentonville, AR
4 72716. I am employed by Walmart Inc. ("Walmart") as Senior Manager, Energy
5 Services.

6 **Q. ON WHOSE BEHALF ARE YOU TESTIFYING IN THIS DOCKET?**

7 A. I am testifying on behalf of Walmart.

8 **Q. PLEASE DESCRIBE YOUR EDUCATION AND EXPERIENCE.**

9 A. I received a J.D. in 1999 and an LL.M. in Taxation in 2000 from the University of
10 Florida, Levin College of Law. From 2001 to 2019, I was in private practice,
11 emphasizing Energy Law from 2007 to 2019. My practice included representing a
12 large commercial client before utility regulatory commissions in Colorado, Texas,
13 New Mexico, Arkansas, and Louisiana in matters ranging from general rate cases
14 to renewable energy programs. I joined the energy department at Walmart in
15 September 2019. My Witness Qualifications Statement is attached as Exhibit LVP-
16 1.

17 **Q. HAVE YOU PREVIOUSLY TESTIFIED BEFORE THE FLORIDA PUBLIC SERVICE**
18 **COMMISSION ("COMMISSION")?**

19 A. Yes. I testified in Docket Nos. 20200067-EI, 20200069-EI, 20200070-EI, and 2020-
20 0071-EI.

1 **Q. HAVE YOU PREVIOUSLY TESTIFIED BEFORE OTHER STATE REGULATORY**
2 **COMMISSIONS?**

3 A. Yes, I have submitted testimony with State Regulatory Commissions for Arkansas,
4 Colorado, Kentucky, Louisiana, Michigan, Oklahoma, South Carolina, Texas, and
5 Virginia. I have also provided legal representation for customer stakeholders
6 before the State Regulatory Commissions for Colorado, Texas, Arkansas,
7 Louisiana, and New Mexico in the cases listed under "Commission Dockets" in
8 Exhibit LVP-1.

9 **Q. ARE YOU SPONSORING ANY EXHIBITS IN YOUR TESTIMONY?**

10 A. Yes. I am sponsoring the exhibit listed in the Table of Contents.

11 **Q. PLEASE BRIEFLY DESCRIBE WALMART'S OPERATIONS IN FLORIDA.**

12 A. As shown on Walmart's website, Walmart operates 386 retail units and eight
13 distribution centers and employs over 113,000 associates in Florida. In fiscal year
14 ending 2021, Walmart purchased \$8 billion worth of goods and services from
15 Florida-based suppliers, supporting over 82,000 supplier jobs.¹

¹ <https://corporate.walmart.com/our-story/locations/united-states/florida>

1 **Q. PLEASE BRIEFLY DESCRIBE WALMART'S OPERATIONS WITHIN THE SERVICE**
2 **TERRITORIES OF EACH OF THE UTILITIES THAT SUBMITTED PETITIONS FOR**
3 **APPROVAL OF 2021 ACTUAL/ESTIMATED STORM PROTECTION PLAN ("SPP")**
4 **COST RECOVERY CLAUSE TRUE-UP AND PROJECTED 2022 SPP COST RECOVERY**
5 **CLAUSE FACTORS IN THIS DOCKET.**

6 A. Walmart has 73 retail units, one distribution center, and one e-commerce
7 fulfillment center served by Duke Energy Florida, LLC ("DEF"), 149 retail units and
8 four distribution centers served by Florida Power & Light Company ("FPL"), 28
9 retail units served by Gulf Power Company ("Gulf"), and 36 retail units and one
10 distribution center served by Tampa Electric Company ("TECO").²

11

12 **II. Purposed of Testimony**

13 **Q. WHAT IS THE PURPOSE OF YOUR TESTIMONY?**

14 A. Pursuant to Section 366.96(7), following the approval of the Utilities' SPPs, the
15 Commission is required to conduct an annual proceeding to (i) determine the
16 prudence of the Utilities' respective SPP costs, and (ii) allow the Utilities to recover
17 such costs through a separate storm protection plan cost recovery clause
18 ("SPPCRC"). *See* § 366.96(7), F.S. This docket was opened pursuant to this
19 Subsection (7). The purpose of my testimony is to address the proposed SPPCRC

² DEF, FPL, Gulf, and TECO are collectively referred to as "Utilities."

1 filed by each of the Utilities with a focus on the proposed cost allocation and rate
2 design for this separate charge.

3 **Q. PLEASE SUMMARIZE WALMART'S RECOMMENDATIONS TO THE COMMISSION.**

4 A. Walmart does not oppose the Utilities' proposed methodology for allocating SPP
5 costs, nor does Walmart oppose the proposed methodology for recovering such
6 costs from demand-metered customers. However, to the extent that alternative
7 methodologies or modifications to the Utilities' proposals are made by other
8 parties, Walmart reserves the right to address any such changes in accordance
9 with the Commission's procedures in this Docket.

10 **Q. DOES THE FACT THAT YOU MAY NOT ADDRESS AN ISSUE OR POSITION**
11 **ADVOCATED BY THE UTILITIES INDICATE WALMART'S SUPPORT?**

12 A. No. The fact that an issue is not addressed herein or in related filings should not
13 be construed as an endorsement of, agreement with, or consent to any filed
14 position.

15

16 **III. Background**

17 **Q. HAS WALMART PARTICIPATED IN OTHER DOCKETS RELATED TO THE UTILITIES'**
18 **SPPs?**

19 A. Yes, it has. As required by Section 366.96 of the Florida Statutes, which requires
20 Florida utilities to establish SPPs and addresses the process for recovering related
21 SPP costs, the Commission opened Docket Nos. 20200067-EI thru 20200071-EI

1 (collectively referred to as the "SPP Dockets") to receive various utilities'
2 transmission and distribution protection plans covering the immediate 10-year
3 planning period.³ Walmart was granted intervention in the SPP Dockets on May
4 13, 2020, by Commission Order No. PSC-2020-0143-PCO-IE⁴. On May 26, 2020,
5 Walmart filed the Direct Testimony of Steve W. Chriss and the Direct Testimony
6 of Lisa V. Perry, along with accompanying exhibits.

7 The Commission also opened Docket No. 20200092-EI ("Cost Recovery
8 Docket") on March 13, 2020, as a companion docket and to address the
9 mechanism through which the Utilities would recover costs associated with their
10 respective SPP. Walmart was also granted intervention in the Cost Recovery
11 Docket on June 26, 2020,⁵ and filed the Direct Testimony and Exhibits of Steve W.
12 Chriss on August 28, 2020 ("Chriss Cost Recovery Testimony").

13 **Q. WERE WALMART'S ISSUES IN THE SPP DOCKETS RESOLVED?**

14 A. Yes, they were. The Commission approved three separate Stipulation and
15 Settlement Agreements covering issues presented by parties to the SPP Dockets
16 by Order No. PSC-2020-0293-AS-EI issued on August 28, 2020. Collectively, these

³ The utilities that filed SPPs include TECO (Docket No. 20200067-EI), DEF (Docket No. 20200069-EI), Gulf (Docket No. 20200070), and FPL (Docket No. 20200071). Florida Public Utilities Company was originally a party to Docket No. 20200068-EI, which was subsequently closed by the Commission in order to allow Florida Public Utilities Company additional time to prepare its proposed SPP. See Order No. 2020-0097-PCO-EI issued April 6, 2020.

⁴ By Order No. PSC-2020-0073-PCO-EI issued March 11, 2020, the Commission consolidated the SPP Dockets prior to Walmart's intervention. Accordingly, Walmart was granted intervention status in all of the SPP Dockets through a single Commission Order.

⁵ See Order No. PSC-2020-2014-PCO-EI.

1 Stipulation and Settlement Agreements resolved Walmart's outstanding issues in
2 the SPP Dockets.

3 **Q. WERE WALMART'S ISSUES IN THE COST RECOVERY DOCKET RESOLVED?**

4 Ultimately, yes. As explained in the Chriss Cost Recovery Testimony, FPL, Gulf, and
5 TECO proposed in their respective filings to recover SPP costs from demand-
6 metered customers through a \$/kW demand charge, which Walmart did not
7 oppose. See Chriss Cost Recovery Testimony, p. 5, lines 1-3. By contrast, DEF
8 originally proposed to design its SPP cost recovery mechanism to collect SPP costs
9 from demand-metered customers through the energy charge, or on a \$/kWh
10 basis, to which Walmart objected. See *id.*, p. 11, lines 18-22. As part of settling its
11 issues in Docket No. 20210016-EI, DEF and Walmart entered into a 2021
12 Settlement Agreement in which DEF agreed to bill demand customers for SPP
13 costs on a demand, or \$/kW basis, which was approved by the Commission in
14 Order No. PSC-2021-0202-AS-EI issued on June 4, 2021.⁶

15 **Q. DOES THE 2021 SETTLEMENT AGREEMENT HAVE ANY IMPACT ON THE CURRENT**
16 **DOCKET?**

17 A. Yes, it does. As stated above, DEF agreed in the 2021 Settlement Agreement to
18 design its proposed SPPCRC, the mechanism through which it will collect SPP costs

⁶ See *In re: Petition for limited proceeding to approve 2021 settlement agreement, including general base rate increases, by Duke Energy Florida, LLC*, Docket No. 20210016-EI, Order No. PSC-2021-0202-AS-EI, p. 6, Attachment A, p. 9, para. 12 and Ex. 3.

1 from customers, in way that collects SPP costs from demand-metered customers
2 through the demand charge, or on a \$/kW basis.

3

4 **IV. Proposals**

5 **Q. HOW DO THE UTILITIES PROPOSE TO ALLOCATE COSTS ASSOCIATED WITH THEIR**
6 **SPPs?**

7 A. DEF proposes to allocate the demand component based on each rate class's
8 contribution to monthly system peaks adjusted for certain losses and allocate the
9 energy component based on each class's contribution to total kWh sales adjusted
10 for certain losses. *See* Direct Testimony of Christopher A. Menendez, p. 15, line 17
11 to p. 16, line 2.

12 FPL/Gulf proposes to allocate SPP costs consistent with FPL's last rate case by
13 allocating transmission costs to all rate classes based on the 12 monthly
14 Coincident Peaks, and distribution costs based on the Group Non-Coincident Peak.
15 *See* Direct Testimony of Ranae B. Deaton, p. 13, lines 18-24.

16 Lastly, TECO is proposing to allocate SPP costs consistent with its cost of
17 service study prepared for Docket No. 20130040-EI and as applied for its current
18 base rates. *See* Testimony and Exhibit of Mark R. Roche, p. 22, lines 10-15.

1 **Q. HOW DO THE UTILITIES PROPOSE TO RECOVER THOSE COSTS FROM THEIR**
2 **DEMAND-METERED CUSTOMERS THROUGH THEIR RESPECTIVE SPPCRC?**

3 A. The Utilities, including DEF, are proposing to recover SPP costs from their demand-
4 metered customers through a demand charge, or \$/kW charge, in each Utility's
5 SPPCRC.⁷

6 **Q. DOES WALMART OPPOSE THE UTILITIES' PROPOSED COST ALLOCATION AND**
7 **RECOVERY METHODOLOGIES?**

8 A. For purposes of this Docket, Walmart does not oppose the Utilities' proposed
9 methodology for allocating SPP costs and recovering those costs from their
10 demand-metered customers through the demand charge, or on a \$/kW basis.
11 However, to the extent that alternative allocation or recovery methodologies or
12 modifications to the Utilities' proposed methodologies are made by other parties,
13 Walmart reserves the right to address any such changes in accordance with the
14 Commission's procedures in this Docket.

15 **Q. DOES THIS CONCLUDE YOUR TESTIMONY?**

16 A. Yes.

⁷ See Direct Testimony of Christopher A. Menendez, Exh. No. ____ (CAM-2), Form 6P, p. 83; see Petition of Florida Power & Light Company for Approval of the 2021 Actual/Estimated Storm Protection Plan Cost Recovery Clause True-Up and the 2022 Projected Storm Protection Plan Cost Recovery Clause Factors, Form 5P; see Testimony and Exhibit of Mark R. Roche, p. 22, lines 19-20.

BEFORE THE FLORIDA PUBLIC SERVICE COMMISSION

In re: Storm protection plan cost recovery : DOCKET NO. 20210010-EI
clause : :

EXHIBIT OF
LISA V. PERRY
ON BEHALF OF
WALMART INC.

BEFORE THE FLORIDA PUBLIC SERVICE COMMISSION

In re: Storm protection plan cost recovery : DOCKET NO. 20210010-EI
clause : :
: :

EXHIBIT LVP-1 OF

LISA V. PERRY

ON BEHALF OF

WALMART INC.

Lisa V. Perry

Senior Manager, Energy Services
Walmart Inc.

Business Address: 2608 SE J Street, Bentonville, Arkansas 72716
Business Phone: (479) 274-0238

EXPERIENCE

September 2019 – Present
Walmart Inc., Bentonville, AR
Senior Manager, Energy Services

November 2017 – September 2019
Oram & Houghton PLLC, Round Rock, TX
Of Counsel, Energy Law

February 2016 – November 2017
Ray Quinney & Nebeker, P.C., Salt Lake City, UT
Of Counsel, Energy Law

September 2007 – February 2016
Welborn, Sullivan, Meck & Tooley, P.C., Denver, CO
Partner, Energy Law

EDUCATION

2000 University of Florida Levin College of Law LL.M., Taxation
1999 University of Florida Levin College of Law J.D.
1996 University of South Florida B.A., Criminology
1993 University of South Florida B.A., Psychology

FILED TESTIMONY

2021

Arkansas Public Service Commission Docket No. 19-008-U: In the Matter of the Application of Southwestern Electric Power Company for Approval of a General Change in Rates and Tariffs.
Issue: Seeking approval for amortization period and carrying costs for extraordinary fuel costs related to Winter Storm Uri.

Public Utility Regulatory Authority of Connecticut Docket No. 17-12-03RE11: PURA Investigation into Distribution System Planning of the Electric Distribution Companies – New Rate Designs and Rates Review.
Issue: Investigation into low-income rates and economic development rates.

Public Utility Commission of Texas Docket No. 51415, SOAH Docket No. 473-21-0538:
Application of Southwestern Electric Power Company for Authority to Change Rates.

Issue: General rate case.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2020-00170: Petition of Virginia Electric and Power Company for approval of a rate adjustment clause, designated Rider RPS, under § 56-585.1 A 5 d of the Code of Virginia.

Issue: Seeking approval of a Rider RPS to recover costs associated with REC purchases made to comply with the Virginia Clean Economy Act.

Commonwealth of Kentucky Public Service Commission Case No. 2020-00350: Electronic Application of Louisville Gas and Electric Company for an Adjustment of its Electric and Gas Rates, a Certificate of Public Convenience and Necessity to Deploy Advanced Metering Infrastructure, Approval of Certain Regulatory and Accounting Treatments, and Establishment of a One-Year Surcredit.

Issue: General rate case.

Commonwealth of Kentucky Public Service Commission Case No. 2020-00349: Electronic Application of Kentucky Utilities Company for an Adjustment of its Electric Rates, a Certificate of Public Convenience and Necessity to Deploy Advanced Metering Infrastructure, Approval of Certain Regulatory and Accounting Treatments, and Establishment of a One-Year Surcredit.

Issue: General rate case.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2020-00164: *Ex Parte*: Allocating RPS costs to certain customers of Virginia Electric and Power Company.

Issue: Determining which costs and benefits of Virginia Clean Economy Act-related assets should be allocated to non-utility customers and seeking approval of a Rider NBC to recover/credit some of those costs and/or benefits.

Oklahoma Corporation Commission Cause No. PUD 202000097: Application of Public Service Company of Oklahoma (“PSO”) for Approval of the Cost Recovery of Facilities to be Located at Ft. Sill; a Determination there is a Need for the Facilities; Approval for Future Inclusion in Base Rates for Cost Recovery of Prudent Costs Incurred by PSO for the Facilities; Approval of a Temporary Cost Recovery Rider; and Such Other Relief the Commission Deems PSO is Entitled.

Issue: Seeking approval to acquire a solar facility and gas facility sited at Fort Sill.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2020-00134: *Ex Parte*: Establishing 2020 RPS Proceeding for Virginia Electric and Power Company.

Issue: Seeking approval of a Renewable Portfolio Standard Plan and rider pursuant to the Virginia Clean Economy Act (VCEA).

2020

Commonwealth of Virginia State Corporation Commission Case No. PUR-2020-00135: *Ex Parte*: Establishing 2020 RPS Proceeding for Appalachian Power Company.

Issue: Seeking approval of a Renewable Portfolio Standard Plan pursuant to the Virginia Clean Economy Act (VCEA).

Public Service Commission of South Carolina Docket No. 2019-209-E: In re: South Carolina Energy Freedom Act (House Bill 3659) Proceeding Related to Dominion Energy South Carolina, Incorporated and S.C. Code Ann. Section 58-41-30 Related to Electrical Utilities and Their Current Voluntary Renewable Energy Program, and Such Other Proceedings Required By the Commission.

Issue: Seeking approval of a Voluntary Renewable Energy Rider.

Public Service Commission of South Carolina Docket No. 2020-125-E: In re: Application of Dominion Energy South Carolina, Incorporated for Adjustment of Rates and Charges.

Issue: General rate case.

Arkansas Public Service Commission Docket No. 16-036-FR: In the Matter of Formula Rate Plan Filings of Entergy Arkansas, Inc., Pursuant to APSC Docket No. 15-015-U.

Issue: Seeking five-year extension of Formula Rate Plan.

Colorado Public Utilities Commission Proceeding No. 20A-0204E: In the Matter of the Application of Public Service Company of Colorado for Approval of its 2021-2023 Transportation Electrification Plan.

Issue: Seeking approval of utility's plan to encourage EV adoption in its service territory.

Commonwealth of Kentucky Public Service Commission Case No. 2020-00174: Electronic Application of Kentucky Power Company for (1) a General Adjustment of its Rates for Electric Service; (2) Approval of Tariffs and Riders; (3) Approval of Accounting Practices to Establish Regulatory Assets and Liabilities; (4) Approval of a Certificate of Public Convenience and Necessity; and (5) All Other Required Approvals and Relief.

Issue: General rate case.

Oklahoma Corporation Commission Cause No. PUD 202000021: In the Matter of the Application of Oklahoma Gas and Electric Company for an Order of the Commission Approving a Recovery Mechanism for Expenditures Related to the Oklahoma Grid Enhancement Plan.

Issue: Seeking approval of a rider that allows for interim recovery of costs associated with expenditures made to enhance the grid.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2020-00015: Application of Appalachian Power Company For a 2020 Triennial Review of the Rates, Terms and Conditions for the Provision of Generation, Distribution and Transmission Services Pursuant to § 56-585.1 A of the Code of Virginia.

Issue: General Rate Case.

Michigan Public Service Commission Case No. U-20697: In the matter of the application of Consumers Energy Company for authority to increase its rates for the generation and distribution of electricity and for other relief.

Issue: General rate case.

Florida Public Service Commission Consolidated Docket Nos. 20200067-EI, 20200069-EI, 20200070-EI, 20200071-EI: In re: Review of 2020-2029 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Tampa Electric Company *et al.*

Issue: Seeking approval of Storm Protection Plans submitted by Tampa Electric Company, Duke Energy Florida, LLC, Gulf Power Company, and Florida Power & Light Company.

Arkansas Public Service Commission Docket No. 20-027-U: In the Matter of the Application of Walmart Inc. for Approval to Bid Demand Response into Wholesale Electricity Markets Through an Aggregator of Retail Customers.

Issue: Seeking approval to bid demand response into MISO through a third-party aggregator.

Public Utility Commission of Texas Docket No. 49737, SOAH Docket No. 473-19-6862: Application of Southwestern Electric Power Company for Certificate of Convenience and Necessity Authorization and Related Relief for the Acquisition of Wind Generation Facilities.

Issue: Seeking approval to acquire a wind generation facility located in Oklahoma.

Louisiana Public Service Commission Docket No. U-35324: Application of Southwestern Power Company (SWEPCO) for Certification and Approval of the Acquisition of Certain Renewable Resources in Accordance with the MBM Order and the 1983 and 1994 General Orders.

Issue: Seeking approval to acquire a wind generation facility located in Oklahoma.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2019-00201: Application of Virginia Electric and Power Company for approval of its 2019 DSM Update pursuant to § 56-585.1 A 5 of the Code of Virginia.

Issue: Seek approval to implement eleven new demand-side management programs, to extend existing programs - some with updated parameters and cost/benefit results, and to continue three rate adjustment clauses.

2019

Oklahoma Corporation Commission Cause No. PUD 201900048: Application of Public Service Company of Oklahoma for Approval of the Cost Recovery of the Selected Wind Facilities; A Determination there is a Need for the SWFs; Approval for Future Inclusion in Base Rates Cost Recovery of Prudent Costs Incurred by PSO for the SWFs; Approval of a Temporary Cost Recovery Rider; Approval of Certain Accounting Procedures Regarding Federal Production Tax Credits; and Such Other Relief the Commission Deems PSO is Entitled.

Issue: Seeking approval to acquire a wind generation facility located in Oklahoma and Wind Facility Asset Rider.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2019-00094: Application of Virginia Electric and Power Company for Approval of a 100 Percent Renewable Energy Tariff, Designated Rider TRG, Pursuant to §§ 56-577 A 5 and 56-234 of the Code of Virginia.

Issue: Seek approval of a 100 percent renewable energy tariff.

Public Service Commission of South Carolina Docket No. 2019-239-E: In re: Dominion Energy South Carolina, Incorporated's Request for Approval of an Expanded Portfolio of Demand Side Management Programs, and a Modified Demand Side Management Rate Rider.

Issue: Seeking approval of an expanded Demand Side Management Plan and modified Demand Side Management Rate Rider.

Arkansas Public Service Commission Docket No. 19-035-U: In the Matter of the Application of Southwestern Electric Power Company for Approval to Acquire Wind Generating Facilities Pursuant to the Arkansas Clean Energy Development Act.

Issue: Seeking approval to acquire a wind generation facility located in Oklahoma and Wind Facility Asset Rider.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2019-00154: Petition of Virginia Electric and Power Company for approval of a plan for electric distribution grid transformation projects pursuant to § 56-585.1 A 6 of the Code of Virginia, and for approval of an addition to the terms and condition applicable to electric service.

Issue: Seeking approval of certain expenditures relating to grid improvement and grid hardening.

COMMISSION DOCKETS (Appearing as Attorney of Record)

2019

Public Utility Commission of Texas Docket No. 49421: Application of CenterPoint Energy Houston Electric, LLC for Authority to Change Rates.

Issue: General rate case

Public Utility Commission of Texas Docket No. 49494: Application of AEP Texas Inc. for Authority to Change Rates.

Issue: General rate case

Public Utility Commission of Colorado Docket No. 19AL-0268E: In the Matter of Advice Letter No. 1797 Filed by Public Service Company of Colorado to Reset the Currently Effective General Rate Schedule Adjustment ("GRSA") as Applied to Base Rates for all Electric Rate Schedules as well as Implement a Base Rate kWh Charge, General Rate Schedule Adjustment-Energy ("GRSA-E") to Become Effective June 20, 2019.

Issue: General rate case, Phase I

2018

Public Utility Commission of Texas Docket No. 48371: Entergy Texas, Inc.'s Statement of Intent and Application for Authority to Change Rates.

Issue: General rate case

Public Utility Commission of Colorado Docket No. 18M-0074EG: In the Matter of the Commission's Consideration of the Impact of the Federal Tax Cuts and Jobs Act of 2017 on the Rates of Colorado Investor-Owned Electric and Natural Gas Utilities.

Issue: Commenced by the Commission to consider the impacts of the Tax Cut and Jobs Act of 2017 on the revenue requirements and rates of all Colorado investor-owned electric and natural gas utilities.

2017

Public Utility Commission of Texas Docket No. 47461: Application of Southwestern Electric Power Company for Certificate of Convenience and Necessity Authorization and Related Relief for the Wind Catcher Energy Connection Project in Oklahoma.

Issue: Purchase of a wind generation facility and generation tie line.

Public Utility Commission of Texas Docket No. 47527: Application of Southwestern Public Service Company for Authority to Change Rates.

Issue: General rate case

Public Utility Commission of Colorado Docket No. 17A-0462EG: In the Matter of the Application of Public Service Company of Colorado for Approval of a Number of Strategic Issues Relating to its Electric and Gas Demand-Side Management Plan.

Issue: Seek Commission re-examination and approval of the overall objectives and structure of Public Service's DSM initiatives to guide the Company in designing future DSM plans.

Public Utility Commission of Colorado Docket No. 17AL-0649E: In the Matter of Advice Letter No. 1748-Electric Filed by Public Service Company of Colorado to Revise its PUC No. 8-Electric Tariff to Implement a General Rate Schedule Adjustment and Other Rate Changes Effective on Thirty Days' Notice.

Issue: General rate case, Phase I

Arkansas Public Service Commission Docket No. 17-038-U: In the Matter of the Application of Southwestern Electric Power Company for Approval to Acquire a Wind Generating Facility and to Construct a Dedicated Generation Tie Line.

Issue: Purchase of a wind generation facility and generation tie line.

Louisiana Public Service Commission Docket No. U-34619: Application for Expedited Certification and Approval of the Acquisition of Certain Renewable Resources and the Construction of a Generation Tie Pursuant to the 1983 and/or 1994 General Orders.

Issue: Purchase of a wind generation facility and generation tie line.

2016

Public Utility Commission of Colorado Docket No. 16AL-0048E: In the Matter of Advice Letter No. 1712-Electric Filed by Public Service Company of Colorado to Replace Colorado PUC No. 7-Electric Tariff with Colorado PUC No. 8-Electric Tariff.

Issue: General rate case, Phase II

Public Utility Commission of Colorado Docket No. 16A-0055E: In the Matter of the Application of Public Service Company of Colorado for Approval of its Solar*Connect Program.

Issue: Implement a voluntary solar program offering participating customers the ability to offset their current supply of energy from the Public Service system with solar energy produced at a dedicated facility or facilities.

New Mexico Public Regulation Commission Docket No. 16-00276-UT: In the Matter of the Application of Public Service Company of New Mexico for Revision of its Retail Electric Rates Pursuant to Advice Notice No. 533.

Issue: General rate case

INDUSTRY TRAINING

- 2020 Practical Regulatory Training for the Electric Industry, Center for Public Utilities, New Mexico State University College of Business
- 2020 IPU Accounting and Ratemaking Course, Michigan State University
- 2016 Western NARUC Utility Rate School
- EUCI Courses on the utility industry, cost allocation, and rate design.