

**STATE OF INDIANA
INDIANA UTILITY REGULATORY COMMISSION**

**IN THE MATTER OF THE PETITION OF INDIANA :
MICHIGAN POWER COMPANY FOR APPROVAL OF :
(1) AN ELECTRIC VEHICLE FAST CHARGING RATE :
AND TARIFF AND (2) DEFERRED ACCOUNTING :
TREATMENT FOR THE COSTS OF CERTAIN : CAUSE NO. 45919
COMPANY-OWNED ELECTRIC VEHICLE FAST :
CHARGING STATIONS AND THE REVENUES FROM :
THE ELECTRIC VEHICLE FAST CHARGING TARIFF :**

VERIFIED DIRECT TESTIMONY AND EXHIBIT OF

LISA V. PERRY

ON BEHALF OF

WALMART INC.

SEPTEMBER 13, 2023

Table of Contents

I. Introduction 1

II. Purpose of Testimony and Summary of Recommendations 4

III. Public EV Chargers and Tariff..... 6

 (A) *Overview* 6

 (B) *Proposed Utility-Owned DCFCs* 7

 (C) *EV Charging Tariffs* 11

Exhibits

Exhibit LVP-1: Witness Qualifications Statement

I. Introduction

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

A. My name is Lisa V. Perry. My business address is 2608 SE J Street, Bentonville, Arkansas 72716. I am employed by Walmart Inc. ("Walmart") as Senior Manager, Utility Partnerships.

Q. ON WHOSE BEHALF ARE YOU TESTIFYING IN THIS CAUSE?

A. I am testifying on behalf of Walmart.

Q. PLEASE DESCRIBE YOUR EDUCATION AND EXPERIENCE.

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

Q. HAVE YOU PREVIOUSLY SUBMITTED TESTIMONY BEFORE THE INDIANA UTILITY REGULATORY COMMISSION ("COMMISSION")?

A. Yes, I submitted testimony in Docket Nos. 45843 and 45816.

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

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

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

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

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

12 A. As shown on Walmart's website, Walmart operates 127 retail units, nine distribution
13 centers, four fulfillment centers, and employs over 43,000 associates in Indiana. In
14 fiscal year ending 2023, Walmart purchased \$1.1 billion worth of goods and services
15 from Indiana-based suppliers, supporting over 33,000 supplier jobs.¹

16 **Q. PLEASE BRIEFLY DESCRIBE WALMART'S OPERATIONS WITHIN THE**
17 **SERVICE TERRITORY OF INDIANA MICHIGAN POWER COMPANY**
18 **("I&M" OR "COMPANY").**

19 A. Walmart has approximately 16 retail stores, one distribution center, and related
20 facilities in I&M's service territory. These facilities are served primarily on Rate 240 –
21 Large General Service ("LGS").

¹ <http://corporate.walmart.com/about/indiana>

1 **Q. DOES WALMART HAVE EXPERIENCE IN THE ELECTRIC VEHICLE**
2 **("EV") CHARGING SPACE?**

3 A. Yes, Walmart has substantial experience with offering EV charging to its customers
4 and is actively growing its presence in the EV charging space. Specifically, Walmart
5 currently hosts more than 1,200 public Direct Current Fast Chargers ("DCFC") at 285
6 different locations and across 43 states. As announced recently, Walmart intends to
7 build its own EV fast-charging network at thousands of Walmart and Sam's Club
8 locations across the U.S over the next few years.² Walmart retail sites are ideally
9 situated for EV charging stations because of their large parking lots, easy public access,
10 and multi-site locations.

11 **Q. WHY HAS WALMART DECIDED TO PARTICPATE IN THE PUBLIC EV**
12 **CHARGING SPACE?**

13 A. As part of its renewable energy and carbon reduction efforts, Walmart is committed to
14 supporting EV adoption by providing EV charging stations in thousands of locations
15 that not only serve EV customers who reside and/or work nearby but advances the
16 nationwide EV infrastructure as a whole. Further, Walmart is proud to offer EV
17 charging as a convenience to its customers who currently own EVs and for future EV
18 owners. Building an EV charging infrastructure that serves local communities, both
19 large and small, as well as corridors located within states and throughout the country,
20 is critical as vehicle owners consider their options when purchasing a new vehicle.

² <https://corporate.walmart.com/newsroom/2023/04/06/leading-the-charge-walmart-announces-plan-to-expand-electric-vehicle-charging-network>

1 **Q. WHAT FACTORS DOES WALMART CONSIDER WHEN INSTALLING OR**
2 **SITING EV CHARGING INFRASTRUCTURE?**

3 A. As a general rule, Walmart seeks to site EV charger locations to provide value to
4 Walmart and its customers. Walmart seeks to balance the risks and costs of installing
5 and maintaining EV charging infrastructure by participating in various EV-specific
6 programs offered through states or utility companies, such as rebate programs and
7 "make ready" programs. Additionally, the economics of a particular EV charging
8 station is informed, in part, by the tariff under which the electricity is provided from
9 the utility to the owner of the EV charger.

10
11 **II. Purpose of Testimony and Summary of Recommendations**

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

13 A. The purpose of my testimony is to respond to I&M's Petition that was filed on July 19,
14 2023 ("Petition") in which the Company is seeking approval of an EV charging specific
15 tariff ("EVFC Tariff") and deferred accounting treatment for utility-owned chargers
16 and revenue generated from the EVFC Tariff.

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

19 A. Walmart's recommendations to the Commission are as follows:

20 (1) Regarding the Company's request to defer the approval and recovery of any excess
21 costs associated with Company-owned DCFCs to the Company's general rate case:

22 (a) For the purposes of this cause, Walmart does not oppose I&M's ownership
23 and operation of public DCFCs and deferring any associated costs in excess

1 of the Volkswagen ("VW") Environmental Mitigation Trust funds to its
2 general rate case for chargers that are, or will be, located in areas where the
3 Commission determines that the market will not deliver DCFC charging
4 services and the Company is the only realistic provider of charging services.

5 (b) For all other Company-owned DCFCs (*i.e.*, chargers located in areas with
6 competitive viability for third party owners due to economics, utility-based
7 incentives, or government funding), the Commission should reject the
8 Company's request to defer any excess costs to its general rate case or any
9 other future case, but instead, find that any such excess costs should be
10 borne by the Company and not its customers.

11 (2) Generally, Walmart does not have an issue with the Company charging third-party
12 owned chargers under the General Service ("GS") Secondary Tariff due to its
13 relatively low demand charge, which helps the economics of under-utilized
14 chargers. However, to further support third-party investment in public charging in
15 order to build a robust charging network throughout Indiana, Walmart supports the
16 Company's commitment to make a "comprehensive filing including a suite of EV
17 programs" during the first quarter of 2024 following market research and customer
18 focus groups and looks forward to participating in these customer focus groups to
19 discuss public and fleet EV charging opportunities including rates for third-party
20 owned public DCFCs.

21 (3) The Commission should review the rate charged to customers who use Company-
22 owned DCFCs under the EVFC Tariff on a monthly basis to ensure that such rate

1 is competitive with third-party owned chargers based on the market conditions
2 existing at that time.

3 **Q. DOES THE FACT THAT YOU MAY NOT ADDRESS AN ISSUE OR**
4 **POSITION ADVOCATED BY THE COMPANY INDICATE WALMART'S**
5 **SUPPORT?**

6 A. No. The fact that an issue is not addressed herein or in related filings should not be
7 construed as an endorsement of, agreement with, or consent to any filed position.
8

9 **III. Public EV Chargers and Tariff**

10 ***(A) Overview***

11 **Q. WHAT IS YOUR UNDERSTANDING OF THE COMPANY'S PROPOSAL**
12 **AROUND PUBLIC EV CHARGERS AND RELATED TARIFF?**

13 A. It is my understanding that the Company is proposing to (i) install, own, operate, and
14 maintain 12 public DCFCs, beginning in late 2023, within the "Crossroads EV
15 Corridor," and (ii) charge customers using those chargers the rate set forth in its
16 proposed EVFC Tariff.³

³ See Petition, p. 3, ¶¶ 4-5; see also Direct Testimony of Dona Seger-Lawson ("Seger-Lawson Direct"), p. 6, lines 3-5.

1 **Q. WHAT IS THE "CROSSROADS EV CORRIDOR"?**

2 A. Based on my understanding, the Crossroads EV Corridor is a project that was presented
3 in a proposal made by eight Indiana utilities⁴ in response to a request for proposal issued
4 by the Indiana Department of Environmental Management ("IDEM").⁵ It is not clear
5 exactly which roadways will be included in the Crossroads EV Corridor project, though
6 I understand that the intent is to target major highways in Indiana, including interstates.

7
8 ***(B) Proposed Utility-Owned DCFCs***

9 **Q. HOW DOES THE COMPANY PROPOSE TO FUND THE CAPITAL AND ON-**
10 **GOING COSTS ASSOCIATED WITH THE 12 COMPANY-OWNED PUBLIC**
11 **DCFCs?**

12 A. Following the request for proposal process, the IDEM awarded \$5.535 million from
13 the VW Environmental Mitigation Trust to the eight Indiana utilities for the purpose of
14 siting public DCFCs at a minimum of 61 locations within the Crossroads EV Corridor
15 – 12 of which are the chargers that I&M is proposing to own and operate.⁶ It is my
16 understanding that the Company plans to apply the awarded VW funds to the costs
17 associated with the 12 DCFCs and to recover any costs in excess of these funds,

⁴ The eight utilities were Duke Energy Indiana; Hoosier Energy REC, Inc.; I&M; AES Indiana (Indianapolis Power & Light Company); Northern Indiana Public Service Co.; Vectren; Wabash Valley Power Alliance; and Crawfordsville Electric Light & Power. See https://events.in.gov/event/vw_committee_awards_55_million_for_electric_vehicle_charging_stations ("IDEM press release").

⁵ See IDEM press release.

⁶ See Seger-Lawson Direct, p. 6, lines 3-7 and lines 14-16; see also Petition, p. 2, ¶ 3.

1 including capital costs, carrying costs, operation and maintenance, and taxes, in the
2 Company's base rates as approved in its next general rate case.⁷

3 **Q. WHY IS THE COMPANY SEEKING TO OWN AND OPERATE ITS OWN**
4 **PUBLIC DCFC NETWORK?**

5 A. The Company states that it is proposing to own and operate the 12 DCFCs as part of its
6 own charging network in order to support the IDEM's goals of building out a statewide
7 charging network with both DCFC and Level 2 chargers.⁸

8 **Q. DOES WALMART OPPOSE THE COMPANY OWNING AND OPERATING**
9 **PUBLIC DCFCs?**

10 A. Walmart recognizes that building a robust public charging EV network will necessitate
11 siting chargers in remote areas where the low utilization rate does not support the
12 economics for third-party investment. Walmart does not generally oppose utility-
13 owned chargers in those areas and the recovery of associated costs from customers.
14 This is not the case, however, for areas where the market (*i.e.*, third-party owned
15 chargers) is incentivized to install public EV chargers based on the economics, utility-
16 based EV incentive programs, and/or government funding. For example, Walmart has
17 concerns that the Crossroads EV Corridor will include locations that support third-party
18 investment, which would place the Company in direct competition with companies who

⁷ See Petition, p. 3, ¶ 4 and ¶ 6; *see also* Direct Testimony of Elizabeth A. Kerim ("Kerim Direct"), p. 2, line 19 to p. 3, line 5. The EV charger capital costs less the VW grant were a part of the Company's financial forecast for 2024 and are included in the Company's currently pending general rate case, Cause No. 45933. *See* Direct Testimony of Dona Seger-Lawson filed in Cause No. 45933, p. 34, lines 11-22.

⁸ *See* Seger-Lawson Direct, p. 5, lines 12-22 and p. 6, lines 7-12.

1 do not have guaranteed recovery of costs associated with a charger that is
2 underperforming.

3 For these reasons, any utility-owned charger that is sited in areas where there is
4 economic viability for non-monopoly companies to own and operate public DCFCs
5 because of higher utilization rates and/or government or utility-based incentives, these
6 chargers (i) should not be eligible for cost recovery from customers for any costs in
7 excess of funding dollars, and (ii) should not be served under a tariff that prices the
8 electricity sold to the end user at a below-market rate. Otherwise, the Company's ability
9 to recoup its costs to operate and maintain the charger, provide customer service, and
10 recover its investment of capital for chargers and charger infrastructure over any
11 funding dollars creates an anti-competitive environment in areas where third parties are
12 incentivized to locate public chargers.

13 **Q. WHY IS THIS OUTCOME ANTI-COMPETITIVE?**

14 A. Failure to achieve sufficient revenues, either through funding dollars or from the EVFC
15 tariff, to cover costs impacts I&M and third-party charging operators differently. Third-
16 party charging operators, similar to companies that operate in any competitive product
17 market, assume the risk that charger usage for a given month will fail to deliver
18 sufficient revenues to cover electricity costs and the costs for chargers and charging
19 infrastructure – they do not have a captive customer base from which to financially
20 backstop their operations. Under the Company's proposal, if I&M fails to recover
21 sufficient charging revenues to cover its charging costs, it appears that its captive
22 regulated customer base will backstop its charging operations. That is an anti-
23 competitive advantage for the utility.

1 **Q. WHAT ARE WALMART'S RECOMMENDATIONS TO THE COMMISSION**
2 **ON THE COMPANY'S REQUEST TO DEFER COSTS ASSOCIATED WITH**
3 **ITS 12 PUBLIC DCFCs TO ITS GENERAL RATE CASE?**

4 A. The Company was awarded VW funding for the proposed 12 DCFCs in an area that
5 has been identified as the Crossroads EV Corridor. Additionally, it is my understanding
6 that the Company is requesting approval and recovery of any costs associated with
7 these chargers that are in excess of the VW funds in its pending general rate case. I
8 understand that the Company is asking the Commission to defer any such excess costs
9 from this cause to that general rate case so that any approved costs may be included in
10 base rates. For purposes of this cause, Walmart makes the following recommendations
11 to the Commission regarding the Company's request to defer the approval and recovery
12 of any excess costs to the Company's general rate case:

13 (1) Walmart does not oppose I&M's ownership and operation of public DCFCs
14 and deferring any associated costs in excess of the VW funds to its general
15 rate case for chargers that are, or will be, located in areas where the
16 Commission determines that the market will not deliver DCFC charging
17 services and the Company is the only realistic provider of charging services.

18 (2) For all other Company-owned DCFCs (*i.e.*, chargers located in areas with
19 competitive viability for third party owners due to economics, utility-based
20 incentives, or government funding), the Commission should reject the
21 Company request to defer any excess costs to its general rate case or any
22 other future case, but instead, find that any such excess costs should be
23 borne by the Company and not its customers.

1 (C) *EV Charging Tariffs*

2 **Q. UNDER WHICH TARIFF DOES THE COMPANY PROPOSE TO CHARGE**
3 **THE ELECTRICITY FROM THE UTILITY TO THE COMPANY-OWNED**
4 **DCFCs?**

5 A. The Company will charge the electricity to the Company-owned chargers under the
6 same tariff it would apply to third-party owned chargers – GS Secondary Tariff.⁹

7 **Q. DOES WALMART HAVE AN ISSUE WITH THE COMPANY APPLYING ITS**
8 **GS SECONDARY TARIFF TO ITS OWN CHARGERS AND TO THIRD-**
9 **PARTY OWNED CHARGERS?**

10 A. No, it does not. Generally, Walmart does not have an issue with the Company charging
11 third-party owned chargers under the GS Secondary Tariff due to its relatively low
12 demand charge, which helps the economics of under-utilized chargers. However, to
13 further support third-party investment in public charging in order to build a robust
14 charging network throughout Indiana, Walmart commends the Company's commitment
15 to make a "comprehensive filing including a suite of EV programs" during the first
16 quarter of 2024 following market research and customer focus groups.¹⁰ Walmart looks
17 forward to participating in these customer focus groups to discuss public and fleet EV
18 charging opportunities including rates for third-party owned public DCFCs.

⁹ See Seger-Lawson Direct, p. 9, lines 3-5.

¹⁰ See Seger-Lawson Direct, p. 10, lines 23-25.

1 **Q. UNDER WHICH TARIFF IS THE COMPANY PROPOSING TO CHARGE**
2 **THE END-USE CUSTOMER FOR THE ELECTRICITY PROVIDED BY ONE**
3 **OF ITS UTILITY-OWNED DCFCs?**

4 A. In this cause, the Company is asking the Commission to approve a new tariff, the EVFC
5 Tariff, under which the Company will charge customers that use its own DCFCs.¹¹ This
6 tariff is comprised of an energy charge equal to \$0.429 per kWh and an optional idling
7 fee of \$1.00 per minute that may be applied to vehicles idling longer than 10 minutes.¹²
8 The Company states that it has designed the EVFC Tariff based on a similar tariff
9 offered by Duke Energy Indiana, LLC and approved by the Commission in Cause No.
10 45616.¹³

11 **Q. HOW DID THE COMPANY DERIVE THIS RATE?**

12 A. The Company's proposed rate is based on their evaluation of Plugshare data to evaluate
13 the average cost of 10 existing charging stations within their service territory that meet
14 the following criteria: (i) non-Tesla charging stations, (ii) greater than 50 kW in
15 charging capacity, (iii) publicly accessible 24/7, and (iv) have at least one standard
16 charging connector.¹⁴ The average rate derived by the Company was \$0.401/kWh.¹⁵
17 The Company then grossed this average rate up by the Indiana seven percent sales tax
18 of \$0.028/kWh, arriving at a total rate of \$0.429/kWh.¹⁶

¹¹ See Petition, p. 3, ¶ 5.

¹² See Attachment DSL-1, p.1.

¹³ See Seger-Lawson Direct, p. 4, lines 14-16; see *Amended Petition of Duke Energy Indiana, LLC Seeking (1) Approval of a Proposed Electric Transportation Program and Authority to Defer Related Expenses; (2) Approval of a Proposed Electric Vehicle Fast Charging (EVFC) Tariff; and (3) Approval of a Proposed Electric Vehicle Service Equipment (EVSE) Tariff*, Cause No. 45616, Order (issued June 1, 2022), p. 15, ¶ 8C.

¹⁴ See Seger-Lawson Direct, p. 7, lines 20-21 and lines 23-27.

¹⁵ See Attachment DSL-2, p. 1.

¹⁶ See Attachment DSL-2, p. 1.

1 **Q. DOES THE COMPANY INCLUDE ANY NO-COST CHARGING SITES IN ITS**
2 **EXHIBIT SUPPORTING THE EVFC TARIFF?**

3 A. No, it does not. When reviewing Attachment DSL-2, the Company lists no-cost
4 charging sites but does not include these sites in its computation of the proposed EVFC
5 Tariff rate.¹⁷

6 **Q. DOES THE COMPANY PROPOSE TO UPDATE THE EVFC TARIFF ON A**
7 **REGULAR BASIS?**

8 A. Yes, it does. The EVFC Tariff rate will be reviewed quarterly and updated when the
9 statewide average varies by more than 10% of the current rate.¹⁸

10 **Q. DOES WALMART HAVE CONCERNS WITH THE COMPANY'S PROPOSED**
11 **EVFC TARIFF?**

12 A. For purposes of this cause, Walmart does not have an issue with the EVFC Tariff and
13 rate, as proposed, provided that the rate charged under this tariff is frequently reviewed
14 by the Commission to ensure it is not anti-competitive within the then-existing market
15 conditions, that is, it does not unfairly under-price other providers in the market, and
16 fully recovers the Company's costs.

17 **Q. WHAT IS WALMART'S RECOMMENDATION TO THE COMMISSION?**

18 A. The Commission should review the rate charged to customers who use Company-
19 owned DCFCs under the EVFC Tariff on a monthly basis to ensure that such rate is not

¹⁷ See Attachment DSL-2, p. 1.

¹⁸ See Seger-Lawson Direct, p. 7, line 27 to p. 8, line 3.

1 anti-competitive and under-prices third-party owned chargers based on the market
2 conditions existing at that time.

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

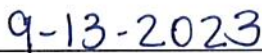
4 A. Yes.

VERIFICATION

I, Lisa V. Perry, Senior Manager, Utility Partnerships for Walmart Inc., affirm under penalties for perjury that the foregoing Direct Testimony and Exhibit are true to the best of my knowledge, information, and belief.



Lisa V. Perry



Date

**STATE OF INDIANA
INDIANA UTILITY REGULATORY COMMISSION**

IN THE MATTER OF THE PETITION OF INDIANA	:	
MICHIGAN POWER COMPANY FOR APPROVAL OF	:	
(1) AN ELECTRIC VEHICLE FAST CHARGING RATE	:	
AND TARIFF AND (2) DEFERRED ACCOUNTING	:	
TREATMENT FOR THE COSTS OF CERTAIN	:	CAUSE NO. 45919
COMPANY-OWNED ELECTRIC VEHICLE FAST	:	
CHARGING STATIONS AND THE REVENUES FROM	:	
THE ELECTRIC VEHICLE FAST CHARGING TARIFF	:	

EXHIBIT OF

LISA V. PERRY

ON BEHALF OF

WALMART INC.

SEPTEMBER 13, 2023

**STATE OF INDIANA
INDIANA UTILITY REGULATORY COMMISSION**

IN THE MATTER OF THE PETITION OF INDIANA	:	
MICHIGAN POWER COMPANY FOR APPROVAL OF	:	
(1) AN ELECTRIC VEHICLE FAST CHARGING RATE	:	
AND TARIFF AND (2) DEFERRED ACCOUNTING	:	
TREATMENT FOR THE COSTS OF CERTAIN	:	CAUSE NO. 45919
COMPANY-OWNED ELECTRIC VEHICLE FAST	:	
CHARGING STATIONS AND THE REVENUES FROM	:	
THE ELECTRIC VEHICLE FAST CHARGING TARIFF	:	

EXHIBIT LVP-1 OF

LISA V. PERRY

ON BEHALF OF

WALMART INC.

SEPTEMBER 13, 2023

Lisa V. Perry

Senior Manager, Utility Partnerships – Energy Transformation
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

2023

Oklahoma Corporation Commission Cause No. PUD 2023000038: In the Matter of the Application of Oklahoma Gas and Electric Company for Commission Preapproval of New Generation Capacity Pursuant to 17 O.S. Section 286(C).

Issue: Approval to construct two CT units and recovery of costs through a rider.

State Corporation Commission of the State of Kansas Docket No. 23-EKCE-775-RTS: In the Matter of the Joint Application of Evergy Kansas Central, In., Evergy Kansas South, Inc., and Evergy Metro, Inc. for Approval to Make Certain Changes in their Charges for Electric Service.

Issue: General rate case.

Michigan Public Service Commission Case No. U-21389: 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.

Public Service Commission of Wyoming Docket No. 20000-633-ER-23 (Record No. 17252): In the Matter of the Application of Rocky Mountain Power for Authority to Increase its Retail Electric Service Rates by Approximately \$140.2 Million Per Year or 21.6 Percent and to Revise the Energy Cost Adjustment Mechanism.

Issue: General Rate Case.

Public Utility Commission of Texas Docket No. 54634, SOAH Docket No. 473-23-14020: Application of Southwestern Public Service Company for Authority to Change Rates.

Issue: General Rate Case.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2023-00002: Application of Appalachian Power Company for a 2023 triennial review of its base rates, terms and conditions pursuant to § 56-585.1 of the Code of Virginia.

Issue: Triennial review of rates.

Michigan Public Service Commission Case No. U-21297: In the matter of the Application of DTE ELECTRIC COMPANY for authority to increase its rates, amend its rate schedules and rules governing the distribution and supply of electric energy, and for miscellaneous accounting authority.

Issue: General rate case.

Indiana Utility Regulatory Commission Cause No. 45816: Investigation of the Indiana Utility Regulatory Commission Regarding the Public Utility Regulatory Policies Act Section 111(d) Standards as Amended by the Infrastructure Investment and Jobs Act.

Issue: Electric vehicle charging programs and tariffs.

Illinois Commerce Commission Docket No. 23-0055: Commonwealth Edison Company Petition for Approval of a Multi-Year Rate Plan under Section 16-108.18 of the Public Utilities Act.

Issue: Multi-Year Rate Plan rate case.

Illinois Commerce Commission Docket No. 23-0082: Ameren Illinois Company d/b/a Ameren Illinois Petition for Approval of a Multi-Year Rate Plan pursuant to 220 ILCS 5/16-108.18.

Issue: Multi-Year Rate Plan rate case.

Illinois Commerce Commission Docket No. 23-0067: Ameren Illinois Company d/b/a Ameren Illinois Proposed General Increase in Rates and Revisions to Other Terms and Conditions of Service. (Tariff filed January 6, 2023).

Issue: Gas general rate case.

Illinois Commerce Commission Docket No. 23-0066: Northern Illinois Gas Company d/b/a Nicor Gas Company Proposed General Increase in Rates and Revisions to Other Terms and Conditions of Service. (Tariff filed January 3, 2023).

Issue: Gas general rate case.

Indiana Utility Regulatory Commission Cause No. 45843: Verified Petition of Indianapolis Power & Light Company d/b/a AES Indiana for Commission Approval of an Electric Vehicle Portfolio, Including: (1) A Public Use Electric Vehicle Pilot Program Pursuant to Ind. Code Ch. 8-1-43; and (2) Time-Varying and Other Alternative Pricing Structures and Tariffs Pursuant to Ind. Code §8-1-2.5-6(3); and for Approval of Associated Accounting and Ratemaking.

Issue: Electric vehicle charging programs and tariffs.

Arkansas Public Service Commission Docket No. 22-065-U: In the Matter of the Application of Southwestern Electric Power Company for a Certificate of Public Convenience and Necessity to Operate the John W. Turk, Jr. Power Plant to Supply a Public Service to its Arkansas Customers and for Approval of a Generation Cost Recovery Rider to Recover its Costs in Arkansas Rates.

Issue: Cost recovery from customers of an existing generation resource.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2022-00166: Petition of Appalachian Power Company for consideration of the appropriate framework for cost recovery, the allocation of costs net of benefits pursuant to Code § 56-585.5 F, and class and jurisdictional cost allocation.

Issue: Recovery methodology and cost allocation of VCEA-related costs.

Oklahoma Corporation Commission Cause No. PUD 202200093: Application of Public Service Company of Oklahoma, an Oklahoma Corporation, for an Adjustment in its Rates and Charges and the Electric Service Rules, Regulations and Conditions of Service for Electric Service in the State of Oklahoma and to Approve a Formula Base Rate Proposal.

Issue: General rate case.

Oklahoma Corporation Commission Cause No. PUD 202200121: Application of Public Service Company of Oklahoma (PSO) for Approval of the Cost Recovery of the Selected Wind and Solar Facilities (Renewable Resources); a Determination there is a Need for the Renewable Resources; Approval for Cost Recovery of Prudent Costs Incurred by PSO for the Renewable Resources; Approval of a Temporary Cost Recovery Rider; Approval of Certain Treatment of Federal Production Tax Credits; and Such Other Relief the Commission Deems PSO is Entitled.

Issue: Acquisition of renewable generation and recovery through a rider.

Arkansas Public Service Commission Docket No. 22-061-U: In the Matter of an Application into Potential Cost Shifting Associated with Net Metering.

Issue: Net metering tariff and any potential cost shifting between participating and non-participating customers.

2022

Commonwealth of Virginia State Corporation Commission Case No. PUR-2022-00124: Petition of Virginia Electric and Power Company for approval of its 2022 RPS Development Plan under § 56-585.5 D 4 of the Code of Virginia and related requests.

Issue: Approval of 2022 RPS Plan, new renewable projects, PPAs, and cost recovery mechanism, Rider CE, pursuant to the VCEA.

Public Service Commission of South Carolina Docket No. 2022-254-E: In re: Application of Duke Energy Progress, LLC for Increase in Electric Rates, Adjustments in Electric Rate Schedules and Tariffs, and Request for an Accounting Order.

Issue: General rate case.

Public Utility Commission of Texas Docket No. 53719, SOAH Docket No. 473-22-04394: Application of Entergy Texas, Inc. for Authority to Change Rates.

Issue: General rate case.

Louisiana Public Service Commission Docket No. U-36350: Application of Entergy Louisiana, LLC for Recovery in Rates of Costs Related to Hurricane Ida and Related Relief

Issue: Recovery costs related to Hurricane Ida.

Illinois Commerce Commission Docket No. 22-0432 and 22-0442 (cons.): Commonwealth Edison Company Petition for Approval of Beneficial Electrification Plan under the Electric Vehicle Act, 20 ILCS 627/45 and New EV Charging Delivery Classes under the Public Utilities Act, Article IX and Illinois Commerce Commission on its own Motion vs. Commonwealth Edison Company Investigation into Commonwealth Edison Company's Beneficial Electrification Plan Filing pursuant to 20 ILCS 627/45

Issue: Approval of Beneficial Electrification Plan.

Illinois Commerce Commission Docket No. 22-0431 and 22-0443 (cons.): Ameren Illinois Company d/b/a Ameren Illinois Petition for Approval of Beneficial Electrification Plan pursuant to Section 45 of the Electric Vehicle Act and Illinois Commerce Commission on its own Motion vs. Ameren Illinois Company d/b/a Ameren Illinois Investigation into Ameren Illinois Company's Beneficial Electrification Plan Filing pursuant to 20 ILCS 627/45

Issue: Approval of Beneficial Electrification Plan.

Florida Public Service Commission Docket No. 20220010-EI: In re: Storm protection plan cost recovery clause

Issue: Seeking approval of the cost allocation and recovery methodologies used for storm protection plan cost recovery clause.

Michigan Public Service Commission Case No. U-21224: 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.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2021-00156: *Ex Parte*: Establishing a proceeding concerning the allocation of RPS-related costs and the determination of certain proxy values for Virginia Electric and Power Company.

Issue: Allocation methodology for VCEA-related costs and benefits.

Michigan Public Service Commission Case No. U-20836: In the matter of the Application of DTE Electric Company for authority to increase its rates, amend its rate schedules and rules governing the distribution and supply of electric energy, and for miscellaneous accounting authority.

Issue: General rate case.

Oklahoma Corporation Commission Cause No. PUD 202100164: In the Matter of the Application of Oklahoma Gas and Electric Company for an Order of the Commission Authorizing Applicant to Modify its Rates, Charges, and Tariffs for Retail Electric Service in Oklahoma.

Issue: General Rate Case.

Louisiana Public Service Commission Docket No. U-36190: Application for Certification and Approval of the 2021 Solar Portfolio, Rider Geaux Green Option, Cost Recovery and Related Relief.

Issue: Approval of a voluntary renewable program backed by utility-owned solar assets.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2021-00135: Petition of Appalachian Power Company For approval of its 2021 RPS Plan under § 56-585.5 of the Code of Virginia and related requests.

Issue: Seeking approval of RPS Plan and recovery mechanisms for related costs.

Commonwealth of Kentucky Public Service Commission Case No. 2021-00481: Electronic Joint Application of American Electric Power Company, Inc., Kentucky Power Company and Liberty Utilities Co. for Approval of the Transfer of Ownership and Control of Kentucky Power Company.

Issue: Acquisition of Kentucky Power Company by Liberty Utilities Company.

Public Utility Commission of Texas Docket No. 52451, SOAH Docket No. 473-22-0816: Application of Southwestern Public Service Company for Approval of Advanced Metering System (AMS) Deployment Plan, AMS Surcharge, and Non-Standard Metering Service Fee.

Issue: Approval to implement AMS and recover costs through an additional surcharge.

Arkansas Public Service Commission Docket No. 21-070-U: In the Matter of the Application of Southwestern Electric Power Company for Approval of a General Change in Rates and Tariffs.

Issue: General rate case.

Arkansas Public Service Commission Docket No. 21-087-U: In the Matter of Oklahoma Gas and Electric Company's Request to Extend its Formula Rate Plan Rider.

Issue: Seeking extension of formula rate plan.

2021

Louisiana Public Service Commission Docket No. U-36105: Application for Certification to Deploy Natural Gas-Fired Distributed Generation and Authorization to Implement Rider UODG.

Issue: Approval to implement a distributed generation program and rider recovery.

Public Utility Commission of Texas Docket No. 52389, SOAH Docket No. 473-22-0009: Application of Southwestern Electric Power Company for Advanced Metering System (AMS) Deployment Plan, AMS Surcharge, and Non-Standard Metering Service Fees.

Issue: Approval to implement AMS and recover costs through an additional surcharge.

Louisiana Public Service Commission Docket No. U-35991: Application for Recovery in Rates of Costs Related to Hurricanes Laura, Delta, Zeta and Winter Storm Uri and for Related Relief.

Issue: Securitization of system restoration costs due to extreme weather conditions.

Oklahoma Corporation Commission Cause No. PUD 202100076: Application of Public Service Company of Oklahoma (“PSO”) for Approval of a Financing Order for the Collection of Increased Costs Caused by the Extreme Winter Weather and Contained in the Regulatory Asset Authorized by Order 717625, Including an Appropriate Carrying Cost, and Such Other Relief as the Commission Deems PSO is Entitled.

Issue: Securitization of excessive fuel costs due to extreme weather conditions.

Colorado Public Utilities Commission Proceeding No. 21A-0141E: In the Matter of the Application of Public Service Company of Colorado for Approval of its 2021 Electric Resource Plan and Clean Energy Plan.

Issue: Seeking approval of utility’s plan to meet legislative renewable and carbon reduction goals.

Arkansas Public Service Commission Docket No. 21-054-TF: In the Matter of the Application of Entergy Arkansas, LLC for a Proposed Tariff Revision Regarding a Green Promise Tariff.

Issue: Seeking approval for a voluntary renewable energy tariff.

Commonwealth of Virginia State Corporation Commission Case No. PUR-2021-00058: Application of Virginia Electric and Power Company for a 2021 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.

Public Utility Commission of Texas Docket No. 52040, SOAH Docket No. 473-21-2607: Application of El Paso Electric Company for Advanced Metering System (AMS) Deployment Plan, AMS Surcharge, and Non-Standard Metering Service Fees.

Issue: Approval to implement AMS and recover costs through an additional surcharge.

Oklahoma Corporation Commission Cause No. PUD 202100072: In the Matter of the Application of Oklahoma Gas and Electric Company for a Financing Order Pursuant to the February 2021 Regulated Utility Consumer Protection Act Approving Securitization of Costs Arising from the Winter Weather Event of February 2021.

Issue: Securitization of excessive fuel costs due to extreme weather conditions.

Public Utility Commission of Texas Docket No. 51802, SOAH Docket No. 473-21-1892: Application of Southwestern Public Service Company for Authority to Change Rates.

Issue: General rate case.

Oklahoma Corporation Commission Cause No. PUD 202100055: Application of Public Service Company of Oklahoma, an Oklahoma Corporation, for an Adjustment in its Rates and Charges and the Electric Service Rules, Regulations and Conditions of Service for Electric Service in the State of Oklahoma.

Issue: General rate case.

Louisiana Public Service Commission Docket No. U-35441: Application of Southwestern Power Company (SWEPCO) for Approval of a Change in Rates, Extension of Formula Rate Plan and Other Related Relief.

Issue: General rate case and extension of formula rate plan.

Michigan Public Service Commission Case No. U-20963: 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 Docket No. 20210010-EI: In re: Storm protection plan cost recovery clause

Issue: Seeking approval of the cost allocation and recovery methodologies used for storm protection plan cost recovery clause.

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 and 2022 Western NARUC Utility Rate School
- EUCI Courses on the utility industry, cost allocation, and rate design.