

COMMONWEALTH OF KENTUCKY
BEFORE THE PUBLIC SERVICE COMMISSION

In the Matter of:

**ELECTRONIC APPLICATION OF JACKSON)
PURCHASE ENERGY CORPORATION FOR)
A GENERAL ADJUSTMENT OF RATES AND)
OTHER GENERAL RELIEF)**

**CASE NO.
2021-00358**

**INITIAL DATA REQUESTS OF JACKSON PURCHASE ENERGY CORPORATION
TO THE KENTUCKY ATTORNEY GENERAL OFFICE OF RATE INTERVENTION**

Filed: January 25, 2022

I. DEFINITIONS AND INSTRUCTIONS

1. With respect to each discovery request, all information is to be divulged that is within the knowledge, possession or control of the parties to whom it is addressed, including their agents, employees, advisors, consultants, attorneys and/or investigators.

2. Please identify the witness(es) who will be prepared to answer questions concerning each request.

3. These requests shall be deemed continuing so as to require further and supplemental responses if the party receives or generates additional information within the scope of these requests between the time of the response and the time of any hearing conducted hereon.

4. All answers must be separately and fully stated in writing under oath.

5. Where a data request calls for an answer in more than one part, each part should be separated in the answer so that the answer is clearly understandable.

6. If any request appears confusing, please request clarification directly from counsel for Jackson Purchase Energy Corporation (“Jackson Purchase”).

7. For purpose of these discovery requests, the following terms shall have meanings set forth below:

- (a) As used herein, “document,” “documentation” and/or “record,” whether stated as the singular or the plural, means any course of binders, book, pamphlet, periodical, letter, correspondence, memoranda, including but not limited to, any memorandum or report of a meeting or telephone or other conversation, invoice, account, credit memo, debit memo, financial statement, general ledger, ledger, journal, work papers, account work papers, report, diary, telegram, record, contract, agreement, study, draft,

telex, handwritten or other note, sketch, picture, photograph, plan, chart, paper, graph, index, tape, data processing card, data processing disc, data cells or sheet, check acceptance draft, e-mail, studies, analyses, contracts, estimates, summaries, statistical statements, analytical records, reports and/or summaries of investigations, opinions or reports of consultants, opinions or reports of accountants, trade letters, comparisons, brochures, pamphlets, circulars, bulletins, notices, forecasts, electronic communication, printouts, all other data compilations from which information can be obtained (translated if necessary by defendants into usable form), any preliminary versions, drafts or revisions of any of the foregoing, and/or any other written, recorded, transcribed, punched, taped, filmed or graphic matter, however produced or reproduced and regardless of origin or location, in the possession, custody and/or control of the defendant and/or their agents, accountants, employees, representatives and/or attorneys. "Document" and "record" also mean all copies of documents by whatever means made, if the copy bears any other markings or notations not found on the original.

- (b) The terms "relating to," "referring to," "referred to," "pertaining to," "pertained to" and "relates to" means referring to, reporting, embodying, establishing, evidencing, comprising, connected with, commenting on, responding to, showing, describing, analyzing, reflecting, presenting and/or constituting and/or in any way involving.

- (c) The terms “and,” “or,” and “and/or” within the meaning of this document shall include each other and shall be both inclusive and disjunctive and shall be construed to require production of all documents, as above-described, in the broadest possible fashion and manner.
- (d) Unless otherwise noted, the term “AG” shall mean The Kentucky Attorney General’s Office of Rate Intervention and shall include, but is not limited to, each and every employee, advisor, consultant and/or attorney of The Kentucky Attorney General’s Office of Rate Intervention. The term “you” shall be deemed to refer to the Kentucky Attorney General’s Office of Rate Intervention.
- (e) The term “Commission” shall mean the Kentucky Public Service Commission.
- (f) To “identify” shall mean:
 - (1) With respect to a document, to state its date, its author, its type (for example, letter, memorandum, chart, photograph, sound reproduction, etc.), its subject matter, its present location, and the name of its present custodian. The document may be produced in lieu of supplying the foregoing information. For each document which contains information as privileged or otherwise excludable from discovery, there shall be included a statement as to the basis for such claim of privilege or other grounds for exclusion.

- (2) With regard to a natural person, to state his or her full name, last known employer or business affiliation, title and last known home address.
- (3) With regard to a person other than a natural person, state the title of that person, any trade name, or corporate name or partnership name used by that person, and the principal business address of that person.
- (g) To “produce” or to “identify and produce,” shall mean that Company shall produce each document or other requested tangible thing. For each tangible thing which Company contends is privileged or otherwise excludable from discovery, there shall be included a statement as to the basis for such claim of privilege or other grounds for exclusion.
- (h) The terms “Party or Parties” shall mean any organization, person, corporation, entity, etc., which intervened in the above-captioned proceeding and shall further include the Commission Staff.

8. The information requested herein is due back to Jackson Purchase no later than February 11, 2022.

Respectfully submitted,

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Counsel for Jackson Purchase Energy Corporation

1. Please reference the Direct Testimony of Lane Kollen (“Kollen Direct”), page 5, line 19. Please provide a list of all regulated electric utilities in Kentucky that have relied upon a forecast test period in a general rate case since 2000, pursuant to KRS 278.192, including the utility name and docket number.
2. Please reference Kollen Direct, page 9, lines 16-18. Please provide a list of all regulated utilities in Kentucky that use the recommended deferral accounting for rate riders, as described in the referenced paragraph.
3. Please reference Kollen Direct, page 13, lines 6-7. Provide all references in the case record to statements or other information from Jackson Purchase which was relied upon by Mr. Kollen as support for the statement in his testimony that “...the total payroll cost calculated in this manner is a forecast annual cost for the twelve months ending in June 2022 (July 2021 through June 2022).”
4. Please reference Kollen Direct, page 18, line 20 through page 19, lines 1-3.
 - a. Please provide a detailed explanation supporting Mr. Kollen’s claim that Jackson Purchase recovers purchase power expense for the new headquarters building.
 - b. Explain the rationale for Mr. Kollen’s claim that Jackson Purchase recovers this cost through its FAC rider, not base revenues.
5. Please reference Kollen Direct, page 27, lines 3-10. Please provide a list of all regulated utilities in Kentucky (a) that utilize the recommended reserve accounting for allowed ROW maintenance expense, or (b) that limit any actual contractor charges to the reserve balance, as described in the referenced paragraph.