

COMMONWEALTH OF KENTUCKY
BEFORE THE PUBLIC SERVICE COMMISSION

IN THE MATTER OF:

**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)**

**CASE NO.
2021-00481**

DIRECT TESTIMONY AND EXHIBIT OF

LISA V. PERRY

ON BEHALF OF

WALMART INC.

Filed: February 21, 2021

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Exhibits

Exhibit LVP-1: Witness Qualifications Statement

1 **I. Introduction**

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

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

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

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

17 **Q. HAVE YOU PREVIOUSLY SUBMITTED TESTIMONY BEFORE THE**
18 **KENTUCKY PUBLIC SERVICE COMMISSION ("COMMISSION")?**

19 A. Yes. I submitted testimony in Case Nos. 2020-00174, 2020-00349, and 2020-00350.

20 **Q. HAVE YOU PREVIOUSLY SUBMITTED TESTIMONY BEFORE OTHER**
21 **STATE REGULATORY COMMISSIONS?**

22 A. Yes, I have submitted testimony with State Regulatory Commissions for Arkansas,
23 Colorado, Connecticut, Florida, Louisiana, Michigan, Oklahoma, South Carolina,

1 Texas, and Virginia. I have also provided legal representation for customer
2 stakeholders before the State Regulatory Commissions for Colorado, Texas, Arkansas,
3 Louisiana, and New Mexico in the cases listed under "Commission Dockets" in Exhibit
4 LVP-1.

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

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

7 **Q. PLEASE BRIEFLY DESCRIBE WALMART'S OPERATIONS IN**
8 **KENTUCKY.**

9 A. As shown on Walmart's website, Walmart operates 102 retail units and employs over
10 34,000 associates in Kentucky. In fiscal year ending 2021, Walmart purchased \$594.6
11 million worth of goods and services from Kentucky-based suppliers, supporting over
12 43,000 supplier jobs.¹

13 **Q. PLEASE BRIEFLY DESCRIBE WALMART'S OPERATIONS WITHIN**
14 **KENTUCKY POWER COMPANY'S ("KENTUCKY POWER") SERVICE**
15 **TERRITORY.**

16 A. Walmart is a large commercial customer of Kentucky Power, operating 9 retail
17 facilities in Kentucky Power's service territory, and purchasing more than 27.4 million
18 kWh in 2021 from Kentucky Power, principally under the Industrial General Service
19 Rate Schedule.

¹ <https://corporate.walmart.com/about/kentucky>

1 **Q. IS WALMART ALSO A CUSTOMER OF LIBERTY UTILITIES COMPANY**
2 **(“LIBERTY”) IN OTHER STATES?**

3 A. Yes, Walmart is an electric customer of Liberty in Missouri and New Hampshire and a
4 gas customer in Massachusetts, Georgia, Illinois, Iowa, and New York.

5 **Q. HAS WALMART ESTABLISHED CORPORATE RENEWABLE ENERGY**
6 **GOALS?**

7 A. Yes. Walmart has long had aggressive and significant company-wide renewable energy
8 goals, and on September 21, 2020, we announced new targets, including: (1) to be
9 supplied 100 percent by renewable energy by 2035; and (2) zero carbon emissions in
10 our operations, including our transportation fleet vehicles, without the use of offsets,
11 by 2040. We have also set a goal to transition to low-impact refrigerants for cooling
12 and electric equipment for heating by 2040.² To date, Walmart has contracted for, or
13 currently takes electricity from, one or more renewable resources in at least 29 states
14 and Puerto Rico.

15
16 **II. Purpose of Testimony and Summary of Recommendations**

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

18 A. The purpose of my testimony is to address aspects of the *Joint Application for Authority*
19 *to Transfer Ownership of Kentucky Power Company to Liberty Utilities Co.* (“Joint
20 Application”) filed by Kentucky Power and Liberty (collectively, “Joint Applicants”)
21 on January 4, 2022, in which the Joint Applicants seek Commission approval to transfer

² <https://corporate.walmart.com/newsroom/2020/09/21/walmart-sets-goal-to-become-a-regenerative-company>

1 ownership of Kentucky Power's common stock from its parent company, American
2 Electric Power Company, Inc. ("AEP"), to Liberty such that Kentucky Power will
3 become a wholly owned subsidiary of Liberty.

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

6 A. As a condition of transaction approval, Walmart recommends that the Commission
7 require Kentucky Power, within sixty (60) days of the close of the transaction, to
8 convene a stakeholder process for the development of one or more new renewable
9 energy offerings to be proposed for Commission approval within one (1) year of the
10 close of the transaction.

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

14 A. No. The fact that an issue is not addressed herein or in related filings should not be
15 construed as an endorsement of any filed position.

16
17 **III. Structure of Acquisition**

18 **Q. WHAT IS YOUR UNDERSTANDING OF WHY AEP IS INTERESTED IN**
19 **SELLING KENTUCKY POWER?**

20 A. My understanding is that AEP perceives Kentucky Power as a utility that operates in
21 an economically and geographically challenging environment.³ AEP also believes that

³ See Direct Testimony of Stephan T. Haynes ("Haynes Direct"), p. 6, line 22- to p. 7, line 1.

1 Liberty is better positioned to address these challenges in a manner that would
2 transition and advance Kentucky Power's operations and generation fleet.⁴ Kentucky
3 Power operated as a one of the smallest utilities within the AEP system, but it would
4 be among the largest in Liberty's system, meaning it would receive its commensurate
5 share of Liberty's "managerial attention and resources."⁵

6 **Q. WHY DOES AEP BELIEVE LIBERTY IS POSITIONED TO MOVE**
7 **KENTUCKY POWER FORWARD?**

8 A. In addition to Liberty's expertise gained from operating as an electric utility in other
9 states, AEP believes that Liberty also has the experience with utilities "undergoing
10 energy transitions" such as those involved with the retirement of the Mitchell Plant and
11 to save customers money through "locally sourced renewable energy".⁶

12 **Q. HOW DO THE JOINT APPLICANTS PROPOSE TO STRUCTURE THE**
13 **TRANSACTION?**

14 A. AEP will transfer all its outstanding Kentucky Power common stock⁷ to Liberty in
15 exchange for \$1.625 billion plus the assumption of \$1.221 billion in debt, for a total
16 purchase price of \$2.846 billion.⁸ Following the transaction, Kentucky Power will
17 become a wholly owned subsidiary of Liberty.⁹

⁴ Haynes Direct, p. 7, lines 1-4.

⁵ Hayes Direct, p. 8, lines 7-10.

⁶ Haynes Direct, p. 7, line 20 to p. 8, line 4.

⁷ The transaction also includes the transfer of AEP Kentucky Transmission Company, LLC's ("Kentucky Transco") common stock currently owned by AEP Transmission Company, LLC.

⁸ See Haynes Direct, p. 8, line 22 to p. 9, line 2 and lines 6-9.

⁹ Haynes Direct, p. 8, lines 9-10.

1 **Q. HOW DO THE JOINT APPLICANTS PROPOSE TO RECOVER COSTS**
2 **ASSOCIATED WITH THE TRANSACTION?**

3 A. Liberty states that it is not seeking to recover transaction costs or any transaction
4 premium from Kentucky Power's customers.¹⁰ It is also my understanding that Liberty
5 will not seek an increase in Kentucky Power's base rates prior to its next base rate case,
6 which is currently anticipated to be filed with a base rate effective date of January 1,
7 2024.¹¹

8
9 **IV. Claimed Customer Benefits – Economic Development and Renewable Energy**

10 **Q. DO THE JOINT APPLICANTS CLAIM THE TRANSACTION WILL RESULT**
11 **IN BENEFITS TO KENTUCKY POWER'S CUSTOMERS?**

12 A. Yes, they do. Based on my review of the Application, the Joint Applicants claim that
13 Kentucky Power's customers will receive benefits after being acquired by Liberty that
14 include infrastructure investments, working with stakeholders to implement projects
15 that will attract new businesses,¹² and providing renewable energy to customers at a
16 cost savings.¹³

17 **Q. DOES LIBERTY CLAIM TO HAVE EXPERIENCE WITH RENEWABLE**
18 **ENERGY PROJECTS?**

¹⁰ Direct Testimony of Peter Eichler ("Eichler Direct"), p. 35, lines 1-2.
¹¹ See Eichler Direct, p. 35, lines 6-8.
¹² See Direct Testimony of David Swain ("Swain Direct"), p. 11, lines 8-12.
¹³ Haynes Direct, p. 8, lines 1-4.

1 A. Yes, it does. In the Joint Application, Liberty is described as a utility that strives to
2 implement cost efficient generation facilities "in an environmentally sustainable
3 fashion" as demonstrated by specific projects developed by two of Liberty's utilities
4 subsidiaries, The Empire District Electric Company ("Empire Electric") and CalPeco
5 Electric.¹⁴ The Empire Electric project, as explained by Company witness Eichler, is a
6 "Customer Savings Plan" that provides cost savings to customers from a 600 MW wind
7 generation facility.¹⁵ The CalPeco Electric project is a 60 MW utility scale solar
8 installation that is used to offset the cost of purchased power, reduce carbon footprint,
9 and increase resiliency.¹⁶

10 **Q. DO THE JOINT APPLICANTS MAKE ANY SPECIFIC PROPOSALS**
11 **AROUND RENEWABLE ENERGY IF THE TRANSACTION IS APPROVED?**

12 A. Not specifically; however, the Joint Applicants discuss opportunities to incorporate
13 more renewable power upon the retirement of the Mitchell Plant¹⁷ and expiration of the
14 Rockport Unit Power Agreement in December 2022.¹⁸ The Joint Applicants further
15 commit to exploring ways to decarbonize Kentucky Power's generation fleet.¹⁹

16 **Q. HAVE LARGE CUSTOMERS BECOME INCREASINGLY INTERESTED IN**
17 **BEING ABLE TO ACCESS RENEWABLE ENERGY?**

¹⁴ Joint Application, p. 12, para. 25.

¹⁵ Eichler Direct, p. 16, lines 11-13.

¹⁶ Eichler Direct, p. 16, lines 18-20.

¹⁷ The Mitchell Plant is described as a 1,560 MW coal-fired plant located in Marshall County, West Virginia that is currently owned in partnership between Kentucky Power (50%) and AEP subsidiary Wheeling Power Co. (50%). *See* Joint Application, p. 3, para. 4.

¹⁸ Haynes Direct, p. 5, lines 9-11; Eichler Direct, p. 20, lines 8-14.

¹⁹ Eichler Direct, p. 41, lines 9-11.

1 A. Yes. In many states, access to renewable energy is a necessary part of economic
2 development, which, as mentioned earlier in my testimony, is an important benefit
3 claimed by the Joint Applicants of this transaction. My general understanding is several
4 companies have made access to renewable energy an important consideration when
5 locating or expanding operations.

6 **Q. IS THE JOINT APPLICANTS' PROPOSED TRANSACTION AN**
7 **OPPORTUNITY TO CREATE AND EXPAND RENEWABLE OFFERINGS**
8 **FOR KENTUCKY POWER CUSTOMERS IN KENTUCKY?**

9 A. Yes, it is. Liberty's experience with renewable energy projects in other states combined
10 with its commitment to increase renewable opportunities for customers within
11 Kentucky Power's service territory has tremendous renewable energy potential at a cost
12 savings for customers. Moreover, Liberty is committed to exploring renewable energy
13 opportunities in a responsible manner with its role as "planner and operator" of energy
14 systems at the forefront with an emphasis on economics.²⁰ Walmart has long supported
15 this approach to develop of renewable energy opportunities; renewable energy is not
16 only good for the planet, but when responsibly pursued, it can generate great economic
17 benefits to customers.

18 **Q. HAS WALMART PARTICIPATED IN LIBERTY'S RENEWABLE**
19 **OPPORTUNITIES IN OTHER JURISDICTIONS?**

20 A. Yes. Walmart has recently begun participating in Liberty's Community Solar Program
21 in Missouri, which was approved by the Missouri Public Service Commission in

²⁰ Eichler Direct, p. 43, lines 5-22.

1 October 2020.²¹ Additionally, Walmart, through testimony filed by the Midwest
2 Energy Consumers Group, supports Liberty's proposed Renewable Energy Purchase
3 program currently being considered by the Missouri Public Service Commission.²²

4 Walmart strongly encourages the Commission to consider how the creation and
5 expansion of renewable offerings for Kentucky Power customers can take advantage
6 of the region's renewable energy potential, address customer demand for renewable
7 energy, and increase the state's profile as a desirable location for business.

8 **Q. WHAT IS WALMART'S RECOMMENDATION TO THE COMMISSION**
9 **WITH REGARD TO RENEWABLE OFFERINGS FOR CUSTOMERS?**

10 A. As a condition of transaction approval, the Commission should require that Kentucky
11 Power, within sixty (60) days of the close of the transaction, convene a stakeholder
12 process for the development of one or more new renewable energy offerings to be
13 proposed for Commission approval within one (1) year of the close of the transaction.

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

15 A. Yes.

²¹ Missouri File No. ET-2020-0259, Order Approving Tariff, September 30, 2020.

²² Missouri File No. ER-2021-0312, Direct Testimony and Exhibits of Steve W. Chriss on Behalf of Midwest Energy Consumers Group, November 17, 2021.

VERIFICATION

In the Matter of:

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)

CASE NO. 2021-00481

STATE OF LOUISIANA)
PARRISH OF CADDO)

The undersigned, Lisa V. Perry, being duly sworn, deposes and says that she is Senior Manager, Energy Services for Walmart Inc., and that she has personal knowledge of the matters set forth in the foregoing testimony, and that the answers contained herein are true and correct to the best of her information, knowledge, and belief.

L. V. Perry

Lisa V. Perry

Subscribed and sworn to before me, a Notary Public in and before said Parrish and State, this 21 day of February 2022.

Jerry W. Metcalf Jr. #062528 (SEAL)

Notary Public

My Commission Expires:

Jerry W. Metcalf Jr.
Desoto Parish
062528
Notary - Louisiana
My Commission Is For Life

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**CASE NO.
2021-00481**

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

2022

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 in 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.