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September 2, 2022

**VIA ELECTRONIC FILING**

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

**Re: Docket No. 20220010-EI; In re: Storm protection plan cost recovery clause**

Dear Mr. Teitzman:

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

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

Sincerely,

/s/ Stephanie U. Eaton  
Stephanie U. Eaton (Florida Bar No. 165610)  
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SUE:sds  
Enclosures  
c: Parties of Record

## CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true and correct copy of the foregoing has been furnished by electronic mail to the following parties this 2<sup>nd</sup> day of September, 2022.

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*/s/ Stephanie U. Eaton*  
\_\_\_\_\_  
Stephanie U. Eaton



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**Exhibit**

**Exhibit LVP-1: Witness Qualifications Statement**

1 **I. Introduction**

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

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

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

8 A. I am testifying on behalf of Walmart.

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

10 A. I received a J.D. in 1999 and an LL.M. in Taxation in 2000 from the University of  
11 Florida, Levin College of Law. From 2001 to 2019, I was in private practice,  
12 emphasizing in Energy Law from 2007 to 2019. My practice included representing  
13 a large commercial client before utility regulatory commissions in Colorado, Texas,  
14 New Mexico, Arkansas, and Louisiana in matters ranging from general rate cases  
15 to renewable energy programs. I joined the energy department at Walmart in  
16 September 2019. My Witness Qualifications Statement is attached as Exhibit LVP-  
17 1.

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

20 A. Yes. I testified in Docket Nos. 20200067-EI, 20200069-EI, 20200070-EI,  
21 20200071-EI, and 20210010-EI.

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

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

9       **Q.    ARE YOU SPONSORING ANY 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**  
12      **FLORIDA.**

13      A.    As shown on Walmart's website, Walmart operates 387 retail units, nine  
14      distribution centers, two e-commerce fulfillment centers, and employs over  
15      117,000 associates in Florida. In fiscal year ending 2022, Walmart purchased \$8.9  
16      billion worth of goods and services from Florida-based suppliers, supporting over  
17      90,000 supplier jobs.<sup>1</sup>

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<sup>1</sup> <https://corporate.walmart.com/about/florida>

1       **Q.     PLEASE BRIEFLY DESCRIBE WALMART'S OPERATIONS WITHIN**  
2           **THE SERVICE TERRITORIES OF EACH OF THE UTILITIES THAT**  
3           **SUBMITTED PETITIONS IN THIS DOCKET.**

4       A.     Walmart has 73 retail units, one distribution center, and one e-commerce fulfillment  
5           center served by Duke Energy Florida, LLC ("DEF"), 179 retail units and four  
6           distribution centers served by Florida Power & Light Company ("FPL"),<sup>2</sup> 36 retail  
7           units and one distribution center served by Tampa Electric Company ("TECO"),  
8           and two retail units served by the electric division of Florida Public Utilities  
9           Company ("FPUC").<sup>3</sup>

10  
11   **II.     Purpose of Testimony**

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

13       A.     Pursuant to Section 366.96(7) of the Florida Statutes, following the approval of the  
14           Utilities' Storm Protection Plans ("SPPs"), the Commission is required to conduct  
15           an annual proceeding to (i) determine the prudence of the Utilities' SPP costs, and  
16           (ii) allow the Utilities to recover such costs through a separate storm protection plan  
17           cost recovery clause ("SPPCRC").<sup>4</sup> This docket was opened pursuant to this  
18           Subsection (7). The purpose of my testimony is to address the proposed SPPCRC

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<sup>2</sup> This total includes 28 retail units in what was previously Gulf Power Company's ("Gulf") service territory.

<sup>3</sup> DEF, FPL, TECO, and FPUC are collectively referred to as "Utilities."

<sup>4</sup> See Fla. Stat. § 366.96(7).



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

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

5 A. Walmart makes the following recommendations to the Commission:

6 1) For purposes of this Docket, Walmart does not oppose DEF,<sup>5</sup> FPL,<sup>6</sup> and TECO<sup>7</sup>  
7 recovering prudent SPP costs from demand-metered customers consistent with  
8 how these costs are currently recovered through the SPPCRC – through the  
9 demand charge on a \$/kW basis. However, to the extent that alternative  
10 allocation or recovery methodologies or modifications to the Utilities' proposed  
11 methodologies are made by other parties, Walmart reserves the right to address  
12 any such changes in accordance with the Commission's procedures in this  
13 Docket.

14 2) Optimally, the Commission should require FPUC to allocate SPP costs  
15 according to the relevant distribution and transmission cost allocators, and  
16 recover those costs from demand-metered customers through a demand charge.

17 However, if the Commission approves FPUC's proposed cost allocation

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<sup>5</sup> See Direct Testimony of Christopher A. Menendez (filed May 2, 2022) ("Menendez May Direct"), p. 6, line 20 to p. 7, line 4 and Exh. No. \_\_ (CAM-3), Form 6P, p. 101 (listing the SPP Cost Recovery Factor as a \$/kW charge for General Service Demand Customers).

<sup>6</sup> See Petition of Florida Power & Light Company for Approval of the 2022 Actual/Estimated Storm Protection Plan Cost Recovery Clause True-up and the 2023 Projected Storm Protection Plan Cost Recovery Clause Factors (filed May 2, 2022) ("FPL May Petition"), Attachment A, Form 5P (listing the SPP Factor for demand-metered general service customers as a \$/kW charge).

<sup>7</sup> See Testimony and Exhibit of Mark R. Roche (revised August 9, 2022) ("Roche Revised Direct"), p. 28, lines 21-24 (listing the cost recovery factor for general service demand customers as a \$/kW charge).

1 methodology for SPP costs, then Walmart makes the following  
2 recommendations for recovery of SPP costs through the SPPCRC:

3 a) FPUC should divide the SPP revenue requirement by the total base rate  
4 revenue requirement from its most recent general rate case to calculate a  
5 percent factor; and

6 b) This percent factor should then be applied to the SPP revenue requirement  
7 for each class as a percentage adjuster to the base rate charges approved for  
8 each rate class in this Docket. For demand-metered customers, this adjuster  
9 would be applied to the customer charge, demand charge, and base energy  
10 charge.

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

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

16  
17 **III. Background**

18 **Q. DID WALMART PARTICIPATE IN THE DOCKETS RELATED TO THE**  
19 **UTILITIES' INITIAL SPPs AND SPPCRC OPENED IN 2020?**

20 A. Yes, it did. Walmart participated in Docket Nos. 20200067-EI thru 20200071-EI  
21 ("Initial SPP Dockets"), which were opened to receive the Utilities' initial SPPs  
22 covering the immediate 10-year planning period pursuant to Section 366.96(7) of

1           the Florida Statutes.<sup>8</sup> Walmart was granted intervention in these dockets on May  
2           13, 2020.<sup>9</sup>

3           Walmart also participated in Docket No. 20200092-EI ("Initial Cost Recovery  
4           Docket"), which was a companion docket to address the mechanism through which  
5           the Utilities would recover costs associated with their respective SPP. Walmart  
6           was granted intervention in this docket on June 26, 2020,<sup>10</sup> and filed the Direct  
7           Testimony of Steve W. Chriss on August 28, 2020 ("Chriss Cost Recovery  
8           Testimony").

9           **Q. DID WALMART PARTICIPATE IN DOCKET NO. 20210010-EI RELATED**  
10           **TO THE 2021 ANNUAL COST RECOVERY PROCEEDING?**

11           A. Yes, it did. Pursuant to Section 366.96(7) of the Florida Statutes, which requires  
12           the Commission to open an annual proceeding to establish the amount of prudently  
13           incurred SPP costs and the terms of how those costs are recovered from customers

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<sup>8</sup> See Fla. Stat. § 366.96(7). The utilities that filed SPPs include TECO (Docket No. 20200067-EI), DEF (Docket No. 20200069-EI), Gulf (Docket No. 20200070-EI), and FPL (Docket No. 20200071-EI). FPUC was originally a party to Docket No. 20200068-EI, which was subsequently closed by the Commission in order to allow FPUC additional time to prepare its proposed SPP. See *In re: Review of 2020-2029 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Florida Public Utilities Company*, Docket No. 20200068-EI, Order No. 2020-0097-PCO-EI (issued Apr. 6, 2020).

<sup>9</sup> *In re: Review of 2020-2029 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Tampa Electric Company*, Docket Nos. 20200067-EI, 20200069-EI, 20200070-EI, 20200071-EI, Order No. PSC-2020-0143-PCO-EI (issued May 13, 2020). The Commission consolidated the SPP Dockets prior to Walmart's intervention. *In re: Review of 2020-2029 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Tampa Electric Company*, Docket Nos. 20200067-EI, 20200068-EI, 20200069-EI, 20200070-EI, 20200071-EI, Order No. PSC-2020-0073-PCO-EI (issued Mar. 11, 2020). Accordingly, Walmart was granted intervention status in all of the SPP Dockets through a single Commission Order.

<sup>10</sup> See *In re: Storm protection plan cost recovery clause*, Docket No. 20200092-EI, Order No. PSC-2020-0214-PCO-EI (issued June 26, 2020).

1 through each utility's SPPCRC,<sup>11</sup> the Commission opened Docket No. 20210010-  
2 EI ("2021 Cost Recovery Docket"). Walmart was granted intervention in this  
3 docket on May 26, 2021,<sup>12</sup> and filed the Direct Testimony of Lisa V. Perry on June  
4 22, 2021.

5 **Q. DID WALMART PARTICIPATE IN DOCKET NOS. 20220048-EI,**  
6 **20220050-EI, AND 20220051-EI RELATED TO THE 2022 UPDATED SPPs**  
7 **FOR DEF, FPL, AND TECO AND DOCKET NO. 20220049-EI RELATED**  
8 **TO FPUC'S INITIAL SPP FILING?**

9 A. Walmart participated in Docket Nos. 20220048-EI, 20220050-EI, and 20220051-  
10 EI (collectively, "2022 SPP Dockets"), which were opened to review the updated  
11 SPPs for DEF, FPL, and TECO. Walmart was granted intervention in these dockets  
12 on June 17, 2022.<sup>13</sup> Walmart did not participate in Docket No. 20220049-EI  
13 regarding FPUC's initial SPP covering 2022 through 2031.<sup>14</sup>

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<sup>11</sup> See Fla. Stat. § 366.96(7).

<sup>12</sup> See *In re: Storm protection plan cost recovery cause*, Docket No. 20210010-EI, Order No. PSC-2021-0193-PCO-EI (issued May 26, 2021).

<sup>13</sup> *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Tampa Electric Company*, Case No. 20220048-EI, Order No. PSC-2022-0215-PCO-EI (issued June 17, 2022); *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Duke Energy Florida, LLC*, Case No. 20220050-EI, Order No. PSC-2022-0216-PCO-EI (issued June 17, 2022); *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Florida Power & Light Company*, Case No. 20220051-EI, Order No. PSC-2022-0218-PCO-EI (issued June 17, 2022).

<sup>14</sup> FPUC was given additional time to prepare its proposed SPP and later granted permission by the Commission to file its initial SPP in April 2022 to sync its filing with the other Utilities' updated SPP filings. See *In re: Review of 2020-2029 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Florida Public Utilities Company*, Docket No. 20200068-EI, Order No. 2020-0097-PCO-EI (issued Apr. 6, 2020); see *In re: Request to modify filing dates set forth in Order No. PSC-2020-0097-PCO-EI for storm protection plan and first plan update*, by Florida Public Utilities Company, Docket No. 20200228-EI, Order No. 2020-0502-PAA-EI (issued Dec. 16, 2020) Although Docket Nos. 20220048-EI through 20220051-EI were consolidated by the Commission in Order No. PSC-2022-0119-PCO-EI issued March 17, 2022, Walmart did not file a Petition to Intervene in Docket No. 20220049-EI.

1       **Q.     WERE WALMART'S ISSUES IN THE INITIAL SPP DOCKETS AND THE**  
2       **2022 SPP DOCKETS RESOLVED?**

3       A.     Yes, they were. With regard to the Initial SPP Dockets, the Commission approved  
4       three separate Stipulation and Settlement Agreements covering issues presented by  
5       parties on August 28, 2020.<sup>15</sup> Collectively, these Stipulation and Settlement  
6       Agreements resolved Walmart's outstanding issues in the Initial SPP Dockets.  
7       Walmart did not file Testimony in the 2022 SPP Dockets.

8       **Q.     WERE WALMART'S ISSUES IN THE INITIAL COST RECOVERY AND**  
9       **2021 COST RECOVERY DOCKETS RESOLVED?**

10      Ultimately, yes for the Initial Cost Recovery Docket. As explained in the Chriss  
11      Cost Recovery Testimony, FPL, Gulf, and TECO proposed in their respective  
12      filings to recover SPP costs from demand-metered customers through a \$/kW  
13      demand charge, which Walmart did not oppose.<sup>16</sup> By contrast, DEF originally  
14      proposed to design its SPP cost recovery mechanism to collect SPP costs from  
15      demand-metered customers through the energy charge, or on a \$/kWh basis, to  
16      which Walmart objected.<sup>17</sup> As part of settling its issues in Docket No. 20210016-  
17      EI, DEF and Walmart entered into a 2021 Settlement Agreement in which DEF

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<sup>15</sup> *In re: Review of 2020-2029 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Tampa Electric Company*, Docket Nos. 20200067-EI, 20200069-EI, 20200070-EI, 20200071-EI, Order No. PSC-2020-0293-AS-EI (issued Aug. 28, 2020).

<sup>16</sup> See Chriss Cost Recovery Testimony, p. 5, lines 1-3.

<sup>17</sup> See *id.*, p. 11, lines 18-22.

1           agreed to bill demand-metered customers for SPP costs on a demand, or \$/kW,  
2           basis, which was approved by the Commission June 4, 2021.<sup>18</sup>

3           In the 2021 Cost Recovery Docket, DEF, FPL, and TECO all proposed to  
4           recover SPP costs from demand-metered customers through a demand charge, or  
5           \$/kW charge, in each Utility's SPPCRC. Walmart filed Testimony supporting this  
6           cost recovery methodology, which was approved by the Commission on August 26,  
7           2021.<sup>19</sup>

8  
9   **IV.   Proposals by DEF, FPL, and TECO**

10   **Q.   WHAT IS DEF PROPOSING TO RECOVER THROUGH ITS SPPCRC?**

11   A.   It is my understanding that DEF is seeking Commission approval to recover from  
12       or refund to customers through its SPPCRC (i) an adjusted net 2021 true-up over-  
13       recovery of \$2.47 million,<sup>20</sup> (ii) a 2022 true-up over-recovery of \$3.99 million,<sup>21</sup>  
14       and (iii) 2023 projected jurisdictional capital and operation and maintenance

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<sup>18</sup> See *In re: Petition for limited proceeding to approve 2021 settlement agreement, including general base rate increases, by Duke Energy Florida, LLC*, Docket No. 20210016-EI, Order No. PSC-2021-0202-AS-EI (issued June 4, 2021), p. 6, Attachment A, p. 9, para. 12, and Ex. 3.

<sup>19</sup> *In re: Storm protection plan cost recovery clause*, Docket No. 20210010-EI, Order No. PSC-2021-0324-FOF-EI (issued Aug. 26, 2021).

<sup>20</sup> See Duke Energy Florida's Petition for Approval of Storm Protection Plan Cost Recovery Clause Final True-Up for the Period January 2021 – December 2021 (filed April 1, 2022), p. 1, para. 3; see also Direct Testimony of Christopher A. Menendez (filed April 1, 2022) ("Menendez April Testimony"), p. 3, lines 13-17 and Ex. No. \_\_\_\_ (CAM-1), Form 1A, p. 1.

<sup>21</sup> See Duke Energy Florida's Petition for Approval of 2022 Actual/Estimated True-Up, 2023 Projected Costs, and Storm Protection Plan Cost Recovery Factor for the Period January 2023 Through December 2023 (filed May 2, 2022) ("DEF May Petition"), p. 2, para. 5; see also Menendez May Direct, p. 4, lines 1-2 and Ex. No. \_\_\_\_ (CAM-2), Form 1E, p. 1.

1 ("O&M") revenue requirement for its 2023-2032 SPP projects in the amount of  
2 \$142.75 million.<sup>22</sup>

3 **Q. WHAT IS FPL PROPOSING TO RECOVER THROUGH ITS SPPCRC?**

4 A. It is my understanding that FPL is seeking Commission approval to recover from  
5 or refund to customers through its SPPCRC (i) a total 2021 true-up over-recovery  
6 of \$5.15 million,<sup>23</sup> (ii) a 2022 true-up under-recovery of \$4.68 million,<sup>24</sup> and  
7 (iii) 2023 projected jurisdictional capital and O&M revenue requirement for its  
8 2023-2032 SPP projects in the amount of \$366.98 million.<sup>25</sup>

9 **Q. WHAT IS TECO PROPOSING TO RECOVER THROUGH ITS SPPCRC?**

10 A. It is my understanding that TECO is seeking Commission approval to recover from  
11 or refund to customers through its SPPCRC (i) a 2021 true-up over-recovery of  
12 \$4.94 million,<sup>26</sup> (ii) a 2022 true-up over-recovery of \$5.26 million,<sup>27</sup> and (iii) 2023  
13 projected jurisdictional revenue requirement for its 2022-2031 SPP projects in the  
14 amount of \$65.57 million.<sup>28</sup>

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<sup>22</sup> See DEF May Petition, pp. 2-3, para. 6; see also Menendez May Direct, Ex. No. \_\_\_\_ (CAM-3), Form 1P, p. 1.

<sup>23</sup> See Petition of Florida Power & Light Company for Approval of the 2021 Storm Protection Plan Cost Recovery Clause Final True-Up (filed April 1, 2022), p. 5, para. 15 (listing the 2021 over-recovery amounts for FPL at \$2.99 million and for Gulf Power Company at \$2.16, totaling \$5.15 million); see also Direct Testimony of Renae B. Deaton (filed April 1, 2022) ("Deaton April Direct"), p. 5, line 13 to p. 6, line 2 and Ex. RBD-1, p. 1.

<sup>24</sup> See FPL May Petition, p. 7, para. 20; see also Direct Testimony Renae B. Deaton (filed May 2, 2022) ("Deaton May Direct"), p. 7, lines 3-10 and Ex. RBD-3, Form 1E, p. 1.

<sup>25</sup> See Revised Ex. RBD-4, p. 2 (filed Aug. 11, 2022).

<sup>26</sup> See Revised Petition of Tampa Electric Company (filed Aug. 9, 2022) ("TECO Revised Petition"), p. 1, para. 1.

<sup>27</sup> See TECO Revised Petition, p. 1, para. 2; see also Roche Revised Direct, Ex. MRR-2, Form E-1, p. 1.

<sup>28</sup> See TECO Revised Petition, p. 2, para. 3; see also Roche Revised Direct, p. 13, lines 16-22 and Ex. No. MRR-2, Form P-1, p. 1.

1       **Q.     DO DEF, FPL, OR TECO PROPOSE TO RECOVER THEIR RESPECTIVE**  
2       **SPP COSTS FROM THEIR DEMAND-METERED CUSTOMERS**  
3       **THROUGH THE DEMAND CHARGE CONSISTENT WITH PRIOR**  
4       **RECOVERY THROUGH THEIR SPPCRCs?**

5       A.     Based on my review of the filings made by DEF,<sup>29</sup> FPL,<sup>30</sup> and TECO,<sup>31</sup> it appears  
6       that they are not proposing any changes to the recovery method currently used to  
7       recover SPP costs from demand-metered customers through their respective  
8       SPPCRC; *i.e.*, through a demand or \$/kW charge.

9       **Q.     DOES WALMART OPPOSE DEF, FPL, AND TECO CONTINUING TO**  
10       **RECOVER SPP COSTS FROM DEMAND-METERED CUSTOMER**  
11       **THROUGH THE DEMAND CHARGE?**

12       A.     For purposes of this Docket, Walmart does not oppose DEF, FPL, and TECO  
13       recovering SPP costs from demand-metered customers consistent with how these  
14       costs are currently recovered through the SPPCRC pursuant to the demand charge  
15       or on a \$/kW basis. However, to the extent that alternative allocation or recovery  
16       methodologies or modifications to the Utilities' proposed methodologies are made  
17       by other parties, Walmart reserves the right to address any such changes in  
18       accordance with the Commission's procedures in this Docket.

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<sup>29</sup> See Menendez May Direct, p. 6, line 20 to p. 7, line 4 and Exh. No. \_\_ (CAM-3), Form 6P, p. 101 (listing the SPP Cost Recovery Factor as a \$/kW charge for General Service Demand Customers).

<sup>30</sup> See FPL May Petition, Attachment A, Form 5P (listing the SPP Factor for demand-metered general service customers as a \$/kW charge).

<sup>31</sup> See Roche Revised Direct, p. 28, lines 21-24 (listing the cost recovery factor for general service demand customers as a \$/kW charge).



1 **V. Proposal by FPUC**

2 **Q. WHAT IS FPUC PROPOSING TO RECOVER THROUGH ITS SPPCRC?**

3 A. It is my understanding that FPUC is seeking Commission approval to recover from  
4 customers through its SPPCRC a total revenue requirement for the period May  
5 2022 through December 2023 in the amount of \$1.47 million, representing \$0.33  
6 million for the remainder of 2022 plus a projected \$1.14 million for 2023.<sup>32</sup>

7 **Q. HOW HAS FPUC PROPOSED TO ALLOCATE SPP COSTS IN THIS**  
8 **DOCKET?**

9 A. It is my understanding that FPUC proposes to allocate SPP-related transmission  
10 and distribution costs to its rate classes as follows: (i) determine each class's  
11 percentage of total base rate revenues, (ii) multiply each class's percentage of total  
12 base rate revenues by the \$1.47 million revenue requirement, and (iii) divide each  
13 class's portion of the revenue requirement by the 2023 estimated usage, or kWh  
14 billing determinants, for that class to calculate the per kWh charge that will be billed  
15 to customers.<sup>33</sup> The impact on the rate classes is listed in Table 1 below.

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<sup>32</sup> See Revised Petition for Approval of Storm Protection Plan Cost Recovery Factors for Florida Public Utilities Company ("filed Aug. 18, 2022), pp. 3-4, para. 9; see also Revised Direct Testimony of Michelle D. Napier (filed Aug, 18, 2022) ("Napier Revised Direct"), p. 3, lines 5-16 and SPPCRC Form 1P, p. 1 (revised Aug, 12, 2022).

<sup>33</sup> See Napier Revised Direct, p. 5, lines 13-20.

**Walmart Inc.**  
**Direct Testimony of Lisa V. Perry**  
**Florida Public Service Commission Docket No. 20220010-EI**

Table 1. Proposed Allocation for SPP Transmission and Distribution Costs.				
<u>Rate Class</u>	<u>% of base revenue</u>	<u>Revenue Requirement</u>	<u>2023 kWh</u>	<u>Dollars per kWh</u>
Residential	54.22%	\$ 797,802	318,679,444	\$ 0.00250
General Service	10.92%	\$ 160,679	54,762,182	\$ 0.00293
GS Demand	15.72%	\$ 231,307	172,050,339	\$ 0.00134
GS Large Demand	8.61%	\$ 126,689	82,987,816	\$ 0.00153
Industrial	2.86%	\$ 42,082	24,496,250	\$ 0.00172
Lighting	7.67%	\$ 112,858	7,527,819	\$ 0.01499
	100.00%	\$ 1,471,416	660,503,850	
Revenue Requirement	\$ 1,471,416			

Source: SPPCRC Form 5P (Revised 8/12/2022), p. 1

1

2

**Q. DOES WALMART HAVE CONCERNS WITH FPUC'S PROPOSAL?**

3

A. Yes. As discussed below, the Company's proposed cost allocation by percent of base revenues, which include energy revenues, is not cost-based by failing to appropriately reflect the demand-related nature of the underlying SPP transmission and distribution costs included for recovery through the SPPCRC. Additionally, the Company's proposed rate design creates interclass subsidies within demand-metered customer classes.

8

9

**Q. WHAT IS YOUR UNDERSTANDING OF THE COSTS TO BE INCURRED BY FPUC IN EXECUTING ITS SPP?**

10

11

A. My understanding is that Rule 25-6.030 of the Florida Administrative Code targets the enhancement of a utility's transmission and distribution infrastructure in order to reduce restoration costs and outage times associated with extreme weather in order to improve overall service reliability.

14

1       **Q.    IS IT YOUR UNDERSTANDING THAT TRANSMISSION AND**  
2       **DISTRIBUTION INFRASTRUCTURE COSTS ARE FIXED AND DO NOT**  
3       **CHANGE WITH THE AMOUNT OF ENERGY CONSUMED BY**  
4       **CUSTOMERS?**

5       A.    Yes.

6       **Q.    DOES FPUC'S PROPOSAL TO ALLOCATE COSTS BASED ON A**  
7       **CLASS'S PERCENTAGE OF BASE RATE REVENUE AS DETERMINED**  
8       **BY THE ENERGY AND CUSTOMER CHARGE HAVE THE EFFECT OF**  
9       **ALLOCATING FIXED COSTS ON AN ENERGY CHARGE?**

10      A.    Yes, it does. As such, recovering demand-related (fixed) costs through an energy  
11      (variable) charge violates cost causation principles.

12      **Q.    DOES CHARGING DEMAND-RELATED COSTS THROUGH AN**  
13      **ENERGY CHARGE DISADVANTAGE HIGHER LOAD FACTOR**  
14      **CUSTOMERS?**

15      A.    Yes. The shift in demand-related costs from per kW demand charges to per kWh  
16      energy charges results in a shift in demand cost responsibility from lower load  
17      factor customers to higher load factor customers. This results in a misallocation of  
18      cost responsibility as higher load factor customers overpay for the demand-related  
19      costs incurred by FPUC to serve them. In other words, higher load factor customers  
20      are paying for a portion of the demand-related costs that are incurred to serve the  
21      lower load factor customers simply because of the manner in which FPUC proposes  
22      to allocate SPP costs. This occurs on both an intraclass and interclass basis.

1       **Q.    TO THE BEST OF YOUR KNOWLEDGE, WERE THESE SPP**  
2       **TRANSMISSION AND DISTRIBUTION COSTS TO BE BROUGHT IN**  
3       **THROUGH TRADITIONAL RATE CASE PROCESSES, WOULD THEY**  
4       **BE    CONSIDERED    DEMAND-RELATED    AND    ALLOCATED**  
5       **ACCORDINGLY?**

6       A.    It is my understanding that for the most part, yes.  As such, FPUC's SPP cost  
7       allocation proposal is a significant departure from traditional ratemaking.  To better  
8       align cost allocation with cost responsibility, SPP costs should be allocated in a way  
9       that better reflects the demand-related nature of those costs.

10      **Q.    WHAT IS WALMART'S RECOMMENDATION TO THE COMMISSION**  
11      **ON THIS ISSUE?**

12      A.    Optimally, the Commission should require FPUC to allocate SPP costs according  
13      to the relevant distribution and transmission cost allocators, and recover those costs  
14      from demand-metered customers through a demand charge.  However, if the  
15      Commission approves FPUC's proposed cost allocation methodology for SPP  
16      costs, then Walmart makes the following recommendations for recovery of SPP  
17      costs through the SPPCRC:

- 18           1) FPUC should divide the SPP revenue requirement by the total base rate revenue  
19           requirement from its most recent general rate case to calculate a percent factor;  
20           and  
21           2) This percent factor should then be applied to the SPP revenue requirement for  
22           each class as a percentage adjustor to the base rate charges approved for each

1                   rate class in this Docket. For demand-metered customers, this adjuster would  
2                   be applied to the customer charge, demand charge, and base energy charge.

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

4       A.    Yes.

**BEFORE THE  
FLORIDA PUBLIC SERVICE COMMISSION**

**In re: Storm protection plan cost** : **DOCKET NO. 20220010-EI**  
**recovery clause.** :  
: **Filed: September 2, 2022**

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

**BEFORE THE  
FLORIDA PUBLIC SERVICE COMMISSION**

**In re: Storm protection plan cost** : **DOCKET NO. 20220010-EI**  
**recovery clause.** :  
: **Filed: September 2, 2022**

**EXHIBIT LVP-1 OF  
LISA V. PERRY  
ON BEHALF OF  
WALMART INC.**

# Lisa V. Perry

Senior Manager, Energy Services  
Walmart Inc.

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## 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**

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.

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