

25993789	2/15/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Prepare for and participate in call with legal and regulatory team regarding fuel-handling expense adjustment.	555.00	0.80	0.00	0.00	5444.00
25993925	2/17/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Analyze inquiry from M. Knapp regarding J. Sample update testimony scope.	555.00	0.20	0.00	0.00	5111.00
25994006	2/28/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Garza, Cathy	Prepare for and participate in M. Knapp's scoping call.	455.00	0.90	0.00	0.00	5406.50
25996115	2/23/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Correspond with J. Marshall regarding fuel-handling expenses.	555.00	0.20	0.00	0.00	5111.00
25996158	2/24/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Confer with M. Knapp regarding fuel-handling expense adjustment.	555.00	0.20	0.00	0.00	5111.00
25996199	2/27/2023	Task	L250 Other Written Motions/Submissions	A104 Review/analyze	Hopkins, Marty	Confer with J. Stuart regarding list of issues and address comments.	555.00	0.30	0.00	0.00	5166.50
25996963	2/27/2023	Task	L350 Discovery Motions	A103 Draft/revise	Merrick, Sarah	Prepare draft objection to AXM RFI 1-1.	230.00	0.40	0.00	0.00	582.00
25996931	2/27/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Call with client team regarding discovery process.	230.00	0.40	0.00	0.00	582.00
25997390	2/14/2023	Task	L250 Other Written Motions/Submissions	A104 Review/analyze	Stuart, Jeffrey	Review draft procedural schedule and provide comments and edits to draft.	595.00	0.80	0.00	0.00	5476.00
25997493	2/14/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Consider and respond to question from K. Kopel regarding AXM 1.	595.00	0.20	0.00	0.00	5119.00
26001959	2/1/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review Commission orders, ALJ proposals for decision on capital structure issues.	595.00	2.80	0.00	0.00	51,547.00
26001880	2/1/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Prepare for and participate in discussion with B. Trammell and others on ROE, capital structure issues.	595.00	0.80	0.00	0.00	5476.00
26001903	2/1/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review B. Trammell edits to financial testimony and revise drafts in light of prior discussion and additional research.	595.00	2.30	0.00	0.00	51,368.50
26001816	2/1/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review and revise J. Totten draft ROE and capital structure testimony.	595.00	1.70	0.00	0.00	51,011.50
26001979	2/2/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review NMLCG discovery requests and confer with witnesses regarding same.	595.00	0.40	0.00	0.00	5238.00
26002008	2/2/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Continue review and revisions of J. Totten draft ROE and capital structure testimony.	595.00	1.90	0.00	0.00	51,130.50
26002024	2/2/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Prepare for and participate in J. Totten testimony review call.	595.00	0.70	0.00	0.00	5416.50
26002048	2/2/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review and finalize Koch direct.	595.00	1.20	0.00	0.00	5714.00
26002066	2/2/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review and create near final version of Shipman direct.	595.00	1.80	0.00	0.00	5952.00
26002070	2/3/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review and create near final version of D'Ascendis direct.	595.00	2.70	0.00	0.00	51,606.50
26002100	2/3/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Prepare for and participate in D'Ascendis review call.	595.00	0.70	0.00	0.00	5416.50
26002128	2/3/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Work on finalizing financial witness testimonies.	595.00	3.10	0.00	0.00	51,844.50
26002139	2/5/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review, revise, and comment on Totten and Shipman testimonies.	595.00	2.80	0.00	0.00	51,686.00
26002180	2/6/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review, revise, comment, and work toward finalizing Martin, Totten and Shipman testimonies.	595.00	4.70	0.00	0.00	52,796.50
26002245	2/7/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Confer with witness and revise Totten draft.	595.00	0.80	0.00	0.00	5476.00
26002325	2/8/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review final pdf of Martin and send small edits to regulatory team.	595.00	1.80	0.00	0.00	5952.00
26002346	2/7/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review final D'Ascendis pdf prior to filing.	595.00	2.10	0.00	0.00	51,249.50
26002539	2/14/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Review AXM's first set of RFIs and identify potential objections.	595.00	0.70	0.00	0.00	5416.50
26002678	2/16/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Boldt, Michael	Attention to TIEC's concerns with temporary rates, review filings, confer with client regarding response.	595.00	1.90	0.00	0.00	51,130.50

# INVOICE

**Invoice No. SPS 2023-1**

Date: February 14, 2023

To: Michael Boldt, Eversheds Sutherland

Invoice for Services		
Date	Description	Hours
	Services provided pursuant to Letter Agreement between Eversheds Sutherland and Osprey Energy Group:	
January 18	Review documents	0.5
January 19	Review documents	1
January 20	Review documents, draft testimony	1.5
January 23	Review documents	0.5
January 24	Review documents, draft testimony	4
January 25	Draft testimony, call w/Eversheds, SPS	1.25
January 26	Review documents, draft testimony	2
January 30	Review documents, draft testimony	0.75
February 1	Draft testimony	1.25
February 2	Draft testimony, call w/Eversheds, SPS	2
February 3	Draft testimony	2
February 6	Draft testimony	0.75
February	Draft testimony	0.75
<b>Total Hours</b>		<b>18.25</b>
<b>Billing Rate is \$350</b>		<b>Total Amount Due \$6,387.50</b>
<p>Please contact Jess Totten if there are any questions concerning this invoice.  512-800-2664</p> <p>Please remit payment to:</p> <p>Osprey Energy Group  4930 Trail West Drive  Austin, Texas 78767</p> <p>Tax ID No. 32-0544549</p>		

26002974	2/21/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Confer with AXM lawyers regarding potential objection to 1st set of RFIs and analyze potential grounds and scope of objection.	595.00	1.20	0.00	0.00	\$714.00
26003017	2/24/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Continue conferring with AXM lawyers regarding potential objection to 1st set of RFIs and work on potential objection.	595.00	0.80	0.00	0.00	\$476.00
26003104	2/22/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Review AXM's 3rd set of RFIs and responses from last case.	595.00	0.60	0.00	0.00	\$297.60

#### Invoice 23886 - Date Received 5/15/23

<b>Vendor</b>	Courtney, Courtiss, Brian & Bailey, L.L.P.	<b>Billing Start Date</b>	4/3/2023	<b>Total Fees</b>	\$7,124.00
<b>Invoice Date</b>	5/1/2023	<b>Billing End Date</b>	4/30/2023	<b>Total Expenses - Other</b>	
<b>Date Received</b>	5/16/2023	<b>Invoice Amount</b>	\$7,124.00	<b>Total Invoice/Total Expenses - Experts</b>	\$7,124.00
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Experts</b>	
<b>Posting Status</b>	Posted				

LOC	DATE	TYPE	DESCRIPTION	SUBJECT	ATTORNEY	DESCRIPTION	WARNING	FEES	EXPENSES	TOTAL	DATE	
47732	4/3/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, D. HOOLEY, K. KNAPP, AND R. ARCHER TO REVIEW FINAL RESPONSES AND EXHIBITS TO FIRST SUPPLEMENTAL RESPONSES TO AXM'S 2ND AND AXM'S 3RD REQUESTS FOR INFORMATION.		260.00	1.00	0.00	0.00	\$260.00
47733	4/3/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S FIRST SUPPLEMENTAL RESPONSE AND EXHIBITS TO AXM'S 2ND REQUEST FOR INFORMATION.		260.00	1.50	0.00	0.00	\$390.00
47734	4/3/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S FIRST SUPPLEMENTAL RESPONSE TO AXM'S 3RD REQUEST FOR INFORMATION.		260.00	1.00	0.00	0.00	\$260.00
47735	4/3/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S RESPONSE TO SIERRA CLUB'S 2ND REQUEST FOR INFORMATION.		260.00	0.70	0.00	0.00	\$182.00
47736	4/3/2023	Task	L320 Document Production	A103 Draft/revise	Shelhamer, Amy M	PREPARE AND FINALIZE VOLUMINOUS INDEX TO FIRST SUPPLEMENTAL RESPONSE TO AXM'S 2ND REQUEST FOR INFORMATION.		260.00	0.60	0.00	0.00	\$196.00
47737	4/3/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO SPS'S RESPONSES TO OPUC'S 2ND REQUEST FOR INFORMATION.		260.00	0.70	0.00	0.00	\$182.00
47738	4/3/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO SPS'S RESPONSES TO TIEC'S 1ST REQUEST FOR INFORMATION.		260.00	0.60	0.00	0.00	\$156.00
47739	4/4/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S RESPONSE TO OPUC'S 2ND REQUEST FOR INFORMATION.		260.00	0.70	0.00	0.00	\$182.00
47740	4/4/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S RESPONSE TO TIEC'S 1ST REQUEST FOR INFORMATION.		260.00	0.80	0.00	0.00	\$208.00
47741	4/4/2023	Task	L320 Document Production	A103 Draft/revise	Shelhamer, Amy M	PREPARE AND FINALIZE CONFIDENTIAL INDEX TO TIEC'S 1ST REQUEST FOR INFORMATION.		260.00	0.50	0.00	0.00	\$130.00

47742	4/4/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, D. HOOLEY, K. KNAPP, AND R. ARCHER TO REVIEW FINAL RESPONSES AND EXHIBITS TO FIRST SUPPLEMENTAL RESPONSES TO TIEC'S 1ST AND OPUC'S 2ND REQUESTS FOR INFORMATION.	260.00	0.50	0.00	0.00	\$130.00
47743	4/6/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, K. KNAPP, R. ARCHER, AND C. GARZA TO REVIEW DRAFT RESPONSES AND EXHIBITS TO STAFFS 2ND REQUEST FOR INFORMATION.	260.00	0.70	0.00	0.00	\$182.00
47744	4/11/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, B. ELSEY, I. FETTERS, C. WHITESIDE, J. STUART, M. MOELLER, ET. AL. TO REVIEW DRAFT RESPONSES TO TIEC'S 2ND REQUEST FOR INFORMATION.	260.00	0.30	0.00	0.00	\$78.00
47745	4/12/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, B. ELSEY, D. LOW, C. WHITESIDE, A. DIETENBERGER, C. JACKSON, ET. AL. TO REVIEW DRAFT RESPONSES TO AXM'S 4TH (PART I) REQUEST FOR INFORMATION.	260.00	1.30	0.00	0.00	\$338.00
47746	4/12/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH C. PINZUR, K. PONDER, M. KNAPP AND R. ARCHER TO DISCUSS FILING OF ADDITIONAL WATSON WORKPAPERS.	260.00	0.40	0.00	0.00	\$104.00
47747	4/13/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, S. NIEMI, A. DIETENBERGER, M. LYTAL, ET. AL. TO REVIEW DRAFT RESPONSES TO AXM'S 4TH (PART 2) REQUEST FOR INFORMATION.	260.00	1.30	0.00	0.00	\$338.00
47748	4/13/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, K. PONDER, M. MOELLER, C. PINZUR, R. MOSS, ET. AL. TO REVIEW DRAFT RESPONSES TO AXM'S 5TH REQUEST FOR INFORMATION.	260.00	0.40	0.00	0.00	\$104.00
47749	4/18/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, C. PINZUR, J. STUART, M. KNAPP, ET. AL. TO REVIEW FINAL RESPONSES TO TIEC'S 2ND REQUEST FOR INFORMATION.	260.00	0.50	0.00	0.00	\$130.00
47750	4/19/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, C. GARZA, R. MOSS, J. STUART, M. KNAPP, R. ARCHER ET. AL. TO REVIEW FINAL RESPONSES TO AXM'S 4TH (PART 1) REQUEST FOR INFORMATION.	260.00	1.00	0.00	0.00	\$260.00
47751	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, C. GARZA, M. BOLDT, R. MOSS, J. STUART, M. KNAPP, R. ARCHER ET. AL. TO REVIEW FINAL RESPONSES TO AXM'S 4TH (PART 2) REQUEST FOR INFORMATION.	260.00	0.80	0.00	0.00	\$208.00
47752	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, B. TRAMMELL, R. MOSS, M. KNAPP, R. ARCHER ET. AL. TO REVIEW FINAL RESPONSES TO AXM'S 5TH REQUEST FOR INFORMATION.	260.00	0.80	0.00	0.00	\$196.00
47753	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH B. ELSEY, N. LINDGREN, W. NIELSEN, A. WULF, C. GARZA, J. SPARKS, ET. AL. TO REVIEW DRAFT RESPONSES TO OPUC'S 3RD REQUEST FOR INFORMATION.	260.00	0.80	0.00	0.00	\$208.00
47754	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH B. ELSEY, J. COOLEY, T. WHALEN, W. BERGER, A. GOHIR, M. LUTH, J. SPARKS, ET. AL. TO REVIEW DRAFT RESPONSES TO TIEC'S 3RD REQUEST FOR INFORMATION.	260.00	1.30	0.00	0.00	\$338.00
47755	4/10/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S RESPONSE TO STAFFS 2ND REQUEST FOR INFORMATION.	260.00	0.70	0.00	0.00	\$182.00

47756	4/10/2023	Task	L320 Document Production	A103 Draft/revise	Shelhamer, Amy M	PREPARE AND FINALIZE CONFIDENTIAL INDEX TO STAFF'S 2ND REQUEST FOR INFORMATION.	260.00	0.40	0.00	0.00	\$104.00
47757	4/6/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO DRAFT RESPONSES AND EXHIBITS TO STAFF'S 2ND REQUEST FOR INFORMATION.	260.00	0.50	0.00	0.00	\$130.00
47758	4/17/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO DRAFT RESPONSES TO TIEC'S 2ND REQUEST FOR INFORMATION.	260.00	0.40	0.00	0.00	\$104.00
47759	4/20/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO DRAFT RESPONSES AND EXHIBITS TO AXM'S 4TH REQUEST FOR INFORMATION.	260.00	1.00	0.00	0.00	\$260.00
47760	4/21/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO DRAFT RESPONSES AND EXHIBITS TO AXM'S 5TH REQUEST FOR INFORMATION.	260.00	0.60	0.00	0.00	\$156.00
47761	4/24/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S RESPONSES TO AXM'S 4TH REQUEST FOR INFORMATION.	260.00	1.30	0.00	0.00	\$338.00
47762	4/24/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	FINALIZE SPS'S RESPONSES TO AXM'S 5TH REQUEST FOR INFORMATION.	260.00	0.80	0.00	0.00	\$208.00
47763	4/27/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO DRAFT RESPONSES TO TIEC'S 3RD REQUEST FOR INFORMATION.	260.00	0.60	0.00	0.00	\$156.00
47764	4/24/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH B. ELSEY, D. LOW, J. WEST, M. MOELLER, J. SPARKS, ET. AL. TO REVIEW DRAFT RESPONSES TO SIERRA CLUB'S 3RD REQUEST FOR INFORMATION.	260.00	0.70	0.00	0.00	\$182.00
47765	4/25/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH M. CISNEROS, M. LUTH, A. GOHIR, M. LUTH, J. STUART, J. SPARKS, ET. AL. TO REVIEW DRAFT RESPONSES TO STAFF'S 3RD REQUEST FOR INFORMATION.	260.00	0.20	0.00	0.00	\$62.00
47766	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, R. MOSS, J. COOLEY, M. KNAPP, D. HOOLEY R. ARCHER, ET. AL. TO REVIEW FINAL RESPONSES TO TIEC'S 3RD REQUEST FOR INFORMATION.	260.00	0.60	0.00	0.00	\$156.00
47767	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH J. SPARKS, R. MOSS, C. GARZA, M. KNAPP, D. HOOLEY ET. AL. TO REVIEW FINAL RESPONSES TO OPUC'S 3RD REQUEST FOR INFORMATION.	260.00	0.30	0.00	0.00	\$78.00
47768	4/27/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO SPS'S RESPONSES TO TIEC'S 3RD REQUEST FOR INFORMATION.	260.00	0.30	0.00	0.00	\$78.00
47769	4/28/2023	Task	L310 Written Discovery	A103 Draft/revise	Shelhamer, Amy M	EDITS TO SPS'S RESPONSES TO OPUC'S 3RD REQUEST FOR INFORMATION.	260.00	0.50	0.00	0.00	\$130.00
47770	4/28/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Shelhamer, Amy M	TEAMS MEETING WITH R. MOSS, J. STUART, J. SPARKS, M. KNAPP, ET. AL. TO REVIEW FINAL RESPONSES TO SIERRA CLUB'S 3RD REQUEST FOR INFORMATION.	260.00	0.40	0.00	0.00	\$104.00
47771	4/6/2023	Task	L210 Pleadings	A104 Review/analyze	Shelhamer, Amy M	REVIEW UNOPPOSED PROCEDURAL SCHEDULE.	260.00	0.10	0.00	0.00	\$26.00

# Invoices

## Invoice 1238542A - Date Received 3/30/23

<b>Vendor</b>	Eversheds Sutherland (US) LLP	<b>Billing Start Date</b>	1/1/2023	<b>Total Fees</b>	\$201,838.50
<b>Invoice Date</b>	3/28/2023	<b>Billing End Date</b>	1/31/2023	<b>Total Expenses - Other</b>	
<b>Date Received</b>	3/30/2023	<b>Invoice Amount</b>	\$201,838.50	<b>Total Invoice (excl. Expenses - Experts)</b>	\$201,838.50
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Experts</b>	
<b>Posting Status</b>	Posted				

DATE	TIME	DATE	DESCRIPTION	ASSN	CONTACT	DESCRIPTION	WARNING	DATE	TIME	DATE	EXP	AMT
25839363	1/2/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of D. Ripperger.		505.00	1.20	0.00	0.00	\$606.00
25839365	1/2/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of D. Watson.		505.00	0.60	0.00	0.00	\$303.00
25849445	1/3/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Merrick, Sarah	Prepare draft initial brief and research regarding same.		230.00	0.80	0.00	0.00	\$184.00
25850225	1/5/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with M. Knapp regarding testimony tracker and organization.		555.00	0.30	0.00	0.00	\$166.50
25850367	1/4/2023	Task	L190 Other Case Assessment, Dev and Admin	A110 Manage data/files	Merrick, Sarah	Prepare filing sharing site for rate case expense documentation for T. Anson's review.		230.00	0.50	0.00	0.00	\$115.00
25851356	1/5/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review comments on C. Romer direct testimony and confer with J. Marshall regarding same.		555.00	0.50	0.00	0.00	\$277.50
25851414	1/1/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Review comments from J. Cunningham on C. Romer's direct testimony.		555.00	0.10	0.00	0.00	\$65.50
25851869	1/4/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Hopkins, Marty	Correspond with R. Starkweather and J. Cunningham regarding direct testimony.		555.00	0.20	0.00	0.00	\$111.00
25852136	1/5/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Correspond with R. Starkweather and M. Knapp regarding direct testimony.		555.00	0.20	0.00	0.00	\$111.00
25852798	1/8/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Hough direct testimony.		555.00	2.30	0.00	0.00	\$1,276.50
25852830	1/8/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Confer with C. Romer witness team regarding outstanding item on direct testimony.		555.00	0.20	0.00	0.00	\$111.00
25852835	1/8/2023	Task	L130 Experts/Consultants	A103 Draft/revise	Hopkins, Marty	Review and revise R. Starkweather direct testimony to address comments.		555.00	0.80	0.00	0.00	\$444.00
25852851	1/8/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Review and revise Direct Testimony of M. Moeller.		505.00	0.90	0.00	0.00	\$454.50
25852852	1/8/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Review and revise Direct Testimony of D. Watson.		505.00	1.80	0.00	0.00	\$309.00
25852853	1/8/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Review and revise Direct Testimony of A. Rodriguez.		505.00	1.50	0.00	0.00	\$757.50
25852861	1/8/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Review and revise Direct Testimony of D. Ripperger.		505.00	0.40	0.00	0.00	\$202.00
25854742	1/6/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Conference call with M. Knapp regarding the scope of his direct testimony.		455.00	0.50	0.00	0.00	\$227.50

25854854	1/9/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mandola, Lino	Review initial draft of A. Rodriguez testimony and revise same in preparation for meeting with A. Rodriguez and team and compare draft to New Mexico testimony and update for consistency as necessary. Participate in review call and follow up with internal team to address questions raised in review call.	805.00	4.60	0.00	0.00	\$3,703.00
25855855	1/9/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Analyze and revise Direct Testimony of A. Rodriguez.	505.00	0.30	0.00	0.00	\$151.50
25857089	1/10/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Pinzur, Caren	Review and analyze comments to Direct Testimony of A. Rodriguez.	505.00	0.20	0.00	0.00	\$101.00
25857797	1/9/2023	Task	L120 Analysis/Strategy	A102 Research	Merrick, Sarah	Research regarding previous testimony on supporting extension of PPAs.	230.00	0.70	0.00	0.00	\$161.00
25860215	1/12/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Review and revise Direct Testimony of D. Ripperger.	505.00	0.30	0.00	0.00	\$151.50
25860453	1/12/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Pinzur, Caren	Conference call with regulatory team to discuss Direct Testimony of D. Ripperger.	505.00	0.40	0.00	0.00	\$202.00
25860832	1/12/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise direct testimony of R. Luth.	505.00	1.80	0.00	0.00	\$806.00
25862441	1/13/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Pinzur, Caren	Conference call with R. Luth, L. Mandola and SPG regulatory team to discuss Direct Testimony of R. Luth.	505.00	1.00	0.00	0.00	\$505.00
25862445	1/13/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of R. Luth.	505.00	0.60	0.00	0.00	\$303.00
25862448	1/13/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of A. Rodriguez.	505.00	1.10	0.00	0.00	\$555.50
25862761	1/12/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on Schedules G-9.1, H-12.5f, I-10, I-15, I-9, K-1, K-2, K-3, K-4, K-5, K-6, K-7, K-8, K-8, O-1.1, O-1.1, and O-1.2.	455.00	2.50	0.00	0.00	\$1,137.50
25865339	1/16/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise N. Doyle testimony.	585.00	1.70	0.00	0.00	\$1,011.50
25866341	1/16/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise S. Rohlfing testimony.	585.00	2.60	0.00	0.00	\$1,547.00
25866590	1/17/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Prepare for and participate in testimony review call for M. Remington direct testimony.	555.00	1.50	0.00	0.00	\$832.50
25866368	1/17/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Review and analyze EV testimony in other jurisdictions, in Entergy rate case, and other EV material provided by C. Hough in support of C. Hough direct testimony.	555.00	2.50	0.00	0.00	\$1,387.50
25866783	1/17/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Prepare for and participate in testimony review call for J. Sample.	555.00	0.80	0.00	0.00	\$444.00
25867054	1/17/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of A. Rodriguez.	505.00	5.80	0.00	0.00	\$2,925.00
25868253	1/17/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise A. Dielenberger testimony.	585.00	1.80	0.00	0.00	\$1,071.00
25868256	1/17/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise N. Doyle testimony and call with N. Doyle regarding the same.	585.00	1.40	0.00	0.00	\$833.00
25868258	1/17/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise S. Rohlfing testimony.	585.00	2.20	0.00	0.00	\$1,309.00
25868260	1/17/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Lead S. Rohlfing testimony review call.	585.00	0.40	0.00	0.00	\$238.00
25868263	1/17/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise N. Lindgren testimony.	585.00	1.90	0.00	0.00	\$1,130.50
25869480	1/13/2023	Task	L190 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Prepare engagement letter for J. Totten.	230.00	0.20	0.00	0.00	\$46.00
25869508	1/13/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Merrick, Sarah	Call with T. Anson regarding rate case expense documentation.	230.00	1.00	0.00	0.00	\$230.00
25869555	1/13/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Stuart, Jeffrey	Review and comments on Batch 6 & 7 Schedules in advance of schedule review call.	585.00	4.10	0.00	0.00	\$2,438.50
25871350	1/17/2023	Task	L130 Experts/Consultants	A106 Communicate (with client)	Merrick, Sarah	Communicate with M. Knapp and J. Cunningham regarding rate case expense documentation for T. Anson testimony.	230.00	0.20	0.00	0.00	\$46.00

25871839	1/18/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Review Lindgren testimony and attachments and participate in testimony review call.	595.00	1.10	0.00	0.00	\$654.50
25871843	1/18/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Stuart, Jeffrey	Review schedules needed for Deloitte per Mr. Sparks.	595.00	2.00	0.00	0.00	\$1,190.00
25871847	1/19/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with Clean Transportation Policy team to discuss C. Hough direct testimony and strategy related to same.	555.00	0.60	0.00	0.00	\$335.00
25871854	1/18/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Participate in conference call regarding EAP programs testimony for N. Lindgren.	595.00	0.50	0.00	0.00	\$297.50
25871887	1/9/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Review N. Doyle testimony in preparation for review call.	595.00	1.30	0.00	0.00	\$773.50
25871889	1/9/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Participate in N. Doyle testimony review call.	595.00	0.40	0.00	0.00	\$238.00
25872137	1/17/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in the M. Boehlke review call.	455.00	0.50	0.00	0.00	\$227.50
25872139	1/17/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review M. Boehlke's draft direct testimony in advance of the review call.	455.00	1.70	0.00	0.00	\$773.50
25872148	1/17/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review T. Anson's draft direct testimony.	455.00	1.50	0.00	0.00	\$682.50
25872151	1/17/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding his draft direct testimony.	455.00	0.10	0.00	0.00	\$45.50
25872152	1/17/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare email to G. Mills regarding affiliate data for purposes of his draft direct testimony.	455.00	0.30	0.00	0.00	\$136.50
25872154	1/17/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare email to N. Mark regarding affiliate data for purposes of his draft direct testimony.	455.00	0.10	0.00	0.00	\$45.50
25872155	1/17/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare email to C. Lee regarding affiliate data for purposes of his draft direct testimony.	455.00	0.10	0.00	0.00	\$45.50
25872176	1/18/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and revise C. Bouw's draft direct testimony in advance of the 1/19 review call.	455.00	1.60	0.00	0.00	\$728.00
25872192	1/13/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in the Batch 6-7 Schedule Review Call.	455.00	0.70	0.00	0.00	\$318.50
25872196	1/13/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in conference call with M. Knapp and T. Anson regarding SPS's request to recover rate case expenses.	455.00	1.00	0.00	0.00	\$455.00
25872222	1/13/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review M. Knapp's draft direct testimony in advance of 1/13 conference call.	455.00	1.00	0.00	0.00	\$455.00
25872227	1/13/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on Schedules O-1.3, O-1.4, O-1.7, O-10.1, O-10.2, O-10.3, O-3.1, and O-3.3.	455.00	1.80	0.00	0.00	\$819.00
25872237	1/10/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare for and participate in conference call with M. Baylor, T. Piroue, and M. Knapp regarding M. Baylor's draft direct testimony and attachments.	455.00	1.10	0.00	0.00	\$500.50
25872244	1/19/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Prepare for and participate in M. Desalich testimony review call.	555.00	0.70	0.00	0.00	\$388.50
25872467	1/19/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Remington direct testimony and analyze capital additions files.	555.00	5.40	0.00	0.00	\$2,967.00
25872489	1/19/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise J. Sample direct testimony and analyze capital addition files.	555.00	2.80	0.00	0.00	\$1,554.00
25873460	1/19/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Merrick, Sarah	Communicate with J. Totten and provide him with other witness testimony for his review.	230.00	0.30	0.00	0.00	\$69.00
25873740	1/20/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise J. Sample direct testimony and review supporting material.	555.00	3.10	0.00	0.00	\$1,720.50
25874202	1/20/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Prepare for and participate in C. Hough testimony review call.	555.00	0.70	0.00	0.00	\$388.50



25874531	1/20/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Remington direct testimony.	555.00	1.10	0.00	0.00	\$610.50
25874594	1/20/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Analyze and research known and measurable adjustment to fuel-handling expenses.	555.00	0.40	0.00	0.00	\$222.00
25876506	1/19/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Merrick, Sarah	Communicate with J. Totten regarding review of company witness direct testimony drafts.	230.00	0.20	0.00	0.00	\$46.00
25876516	1/19/2023	Task	L130 Experts/Consultants	A103 Draft/revise	Merrick, Sarah	Update and edit T. Anson direct testimony.	230.00	0.50	0.00	0.00	\$115.00
25877123	1/23/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise J. Sample direct testimony.	555.00	0.50	0.00	0.00	\$277.50
25877219	1/23/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Hough direct testimony.	555.00	3.80	0.00	0.00	\$2,109.00
25877653	1/23/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with M. Remington witness team to address management review comments.	555.00	0.90	0.00	0.00	\$496.50
25877785	1/23/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with B. Downing regarding physical security capital projects in J. Sample direct testimony.	555.00	1.00	0.00	0.00	\$555.00
25877836	1/23/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of A. Rodriguez.	505.00	1.40	0.00	0.00	\$707.00
25877838	1/23/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Revise Direct Testimony of D. Watson.	505.00	0.30	0.00	0.00	\$151.50
25877859	1/23/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Pinzur, Caren	Review and analyze Direct Testimony of M. Mosler.	505.00	0.20	0.00	0.00	\$101.00
25877882	1/23/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Revise Direct Testimony of D. Rippberger.	505.00	0.20	0.00	0.00	\$101.00
25878177	1/23/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of R. Luth.	505.00	0.80	0.00	0.00	\$404.00
25878611	1/22/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and comment on M. Knapp's draft direct testimony supporting SPS's rate case expense request.	455.00	1.90	0.00	0.00	\$864.50
25878676	1/22/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and revise M. Baylor's draft direct testimony including to address comments from management review.	455.00	0.60	0.00	0.00	\$273.00
25878879	1/20/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare for and participate in conference call with G. Mills regarding his draft direct testimony and attachments.	455.00	2.20	0.00	0.00	\$1,001.00
25879059	1/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on Schedules H-13.3, H-7.3, H-7.4, H-7.5, I-4, O-1.8, O-1.9, O-2.1, O-2.2, O-2.3, O-4.1, O-6.1, and O-6.2.	455.00	2.10	0.00	0.00	\$955.50
25880151	1/24/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on the updated Schedules O-1.1, O-1.2, O-1.3, and O-1.10.	455.00	0.60	0.00	0.00	\$273.00
25880659	1/24/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Hough direct testimony.	555.00	3.70	0.00	0.00	\$2,063.50
25881004	1/22/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on rate case expense summary and documentation associated with Docket No. 51802.	455.00	1.60	0.00	0.00	\$728.00
25881012	1/22/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on rate case expense summary and documentation associated with Docket No. 52210.	455.00	1.00	0.00	0.00	\$455.00
25881020	1/22/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on rate case expense summary and documentation associated with Docket No. 52446.	455.00	0.30	0.00	0.00	\$136.50
25881024	1/22/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on rate case expense summary and documentation associated with Docket No. 52451.	455.00	1.20	0.00	0.00	\$546.00
25881027	1/23/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on rate case expense summary and documentation associated with Docket No. 53034.	455.00	1.30	0.00	0.00	\$591.50
25881164	1/24/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS team to discuss Direct Testimony of R. Luth.	505.00	1.20	0.00	0.00	\$606.00
25881165	1/24/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of R. Luth.	505.00	3.90	0.00	0.00	\$1,969.50

25881817	1/20/2023	Task	L180 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Update and edit Anson and Mills direct testimony.	230.00	1.00	0.00	0.00	\$230.00
25882474	1/25/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Hopkins, Marty	Call with r. Starkweather regarding Boahika testimony reference and correspondence regarding comments on direct testimony from management.	555.00	0.40	0.00	0.00	\$222.00
25882545	1/25/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Call with M. Knapp regarding J. Sample direct testimony.	555.00	0.30	0.00	0.00	\$199.50
25882589	1/25/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise J. Sample direct testimony.	555.00	0.60	0.00	0.00	\$333.00
25882712	1/25/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with M. Remington witness team regarding resolving management comments on direct testimony.	555.00	1.00	0.00	0.00	\$555.00
25882833	1/25/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Romer direct testimony and research relevant adjustment.	555.00	2.60	0.00	0.00	\$1,443.00
25883080	1/25/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with S. Young and J. Sample witness team regarding capital additions.	555.00	0.40	0.00	0.00	\$222.00
25883434	1/17/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Remington direct testimony.	555.00	1.00	0.00	0.00	\$555.00
25883436	1/17/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Prepare for and participate in C. Hough testimony review call.	555.00	1.00	0.00	0.00	\$555.00
25883470	1/24/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with C. Archuleta and M. Knapp regarding J. Sample direct testimony.	555.00	0.40	0.00	0.00	\$222.00
25883713	1/23/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Merrick, Sarah	Communicate with J. Totten regarding current testimony drafts for his review.	230.00	0.20	0.00	0.00	\$46.00
25883722	1/23/2023	Task	L130 Experts/Consultants	A103 Draft/revise	Merrick, Sarah	Review and edit T. Anson direct testimony.	230.00	0.90	0.00	0.00	\$207.00
25884432	1/26/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Consider strategy regarding fuel-handling expense known and measurable adjustment and participate in call with J. Marshall regarding same.	555.00	0.50	0.00	0.00	\$277.50
25884784	1/26/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with R. Matley and J. Cunningham regarding fuel-handling adjustment.	555.00	0.50	0.00	0.00	\$277.50
25885073	1/26/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Romer direct testimony.	555.00	1.50	0.00	0.00	\$832.50
25885077	1/26/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Pinzur, Caren	Conference call with SP3 team to discuss Direct Testimony of A. Rodriguez.	505.00	0.70	0.00	0.00	\$353.50
25885110	1/26/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Desalich direct testimony.	555.00	4.40	0.00	0.00	\$2,442.00
25885223	1/26/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of A. Rodriguez.	505.00	2.20	0.00	0.00	\$1,111.00
25885224	1/26/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of R. Luth.	505.00	1.30	0.00	0.00	\$656.50
25885231	1/26/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Revise Direct Testimony of D. Ripberger.	505.00	0.20	0.00	0.00	\$101.00
25885484	1/24/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Faeght, Soroosh	Read, review and revise Dietersberger testimony and confer with J. Stuart regarding same.	425.00	6.20	0.00	0.00	\$2,635.00
25886301	1/26/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise S. Rohlfing testimony based on latest edits and correspond with S. Rohlfing regarding the same.	595.00	0.90	0.00	0.00	\$536.50
25886306	1/26/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Review Dietersberger attachments and cumulative correspondence with regulatory team regarding the same.	595.00	0.70	0.00	0.00	\$416.50
25886308	1/26/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise N. Lindgren testimony based on latest edits from witness team.	595.00	1.30	0.00	0.00	\$773.50
25886338	1/27/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise J. Sample direct testimony.	555.00	3.70	0.00	0.00	\$2,053.50
25886498	1/27/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Call with M. Remington witness team to address comments from management.	555.00	0.80	0.00	0.00	\$444.00

25886628	1/27/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Desalich direct testimony.	555.00	3.50	0.00	0.00	\$1,942.50
25887101	1/27/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Hough direct testimony.	555.00	1.30	0.00	0.00	\$721.50
25887296	1/27/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Consider strategy regarding C. Romer direct testimony adjustment and revise testimony accordingly.	555.00	1.00	0.00	0.00	5655.00
25887227	1/28/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Desalich direct testimony.	555.00	2.40	0.00	0.00	\$1,332.00
25887900	1/28/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Remington direct testimony.	555.00	1.30	0.00	0.00	\$721.50
25887939	1/28/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Hough direct testimony.	555.00	4.70	0.00	0.00	\$2,908.50
25888181	1/24/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Merrick, Sarah	Communicate with J. Totten regarding updating fact witness testimony.	230.00	0.10	0.00	0.00	\$23.00
25888184	1/24/2023	Task	L130 Experts/Consultants	A104 Review/analyze	Merrick, Sarah	Review rate case expense documentation for completeness and accuracy.	230.00	0.80	0.00	0.00	\$138.00
25888190	1/25/2023	Task	L130 Experts/Consultants	A104 Review/analyze	Merrick, Sarah	Continue review of rate case expense documentation for completeness and accuracy.	230.00	1.50	0.00	0.00	\$345.00
25888191	1/25/2023	Task	L190 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Update and edit Boehlke direct testimony.	230.00	0.50	0.00	0.00	\$115.00
25888193	1/25/2023	Task	L190 Other Case Assessment, Dev and Admin	A102 Research	Merrick, Sarah	Research regarding J. Love direct testimony from Docket No. 38147.	230.00	0.20	0.00	0.00	\$46.00
25888198	1/26/2023	Task	L190 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Proofread and edit S. Niami direct testimony.	230.00	2.90	0.00	0.00	\$667.00
25888238	1/25/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Faugh, Soroosh	Continue revising Dieterbarger testimony and send revised draft to J. Stuart.	425.00	2.10	0.00	0.00	\$892.50
25888394	1/27/2023	Task	L190 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Add citations to N. Koch direct testimony and research regarding same.	230.00	0.50	0.00	0.00	\$115.00
25890718	1/30/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with R. Medley and M. Desalich regarding adjustments.	555.00	0.50	0.00	0.00	\$277.50
25890719	1/30/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review J. Cunningham's comments on C. Hough direct testimony and incorporate and continue to revise same.	555.00	4.30	0.00	0.00	\$2,386.50
25890817	1/30/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise M. Remington direct testimony to address comments.	555.00	0.90	0.00	0.00	\$496.50
25903191	1/30/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Correspond with M. Knapp and J. Sample witness team regarding outstanding items on J. Sample direct testimony.	555.00	0.50	0.00	0.00	\$277.50
25903202	1/25/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and revise M. Boehlke's draft direct testimony.	455.00	1.60	0.00	0.00	\$728.00
25903210	1/23/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer by phone with M. Knapp regarding his draft direct testimony and attachments.	455.00	0.80	0.00	0.00	\$364.00
25903501	1/29/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review draft of M. Boehlke's direct testimony in management review.	455.00	0.50	0.00	0.00	\$227.50
25903536	1/25/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare for and participate in conference call regarding the native costs supported by C. Bouw in her direct testimony.	455.00	0.50	0.00	0.00	\$227.50
25903910	1/24/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Garza, Cathy	Confer by phone with B. Miskranis regarding M. Boehlke's draft direct testimony.	455.00	0.40	0.00	0.00	\$182.00
25903915	1/24/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and comment on M. Boehlke's draft direct testimony.	455.00	1.60	0.00	0.00	\$728.00
25903925	1/24/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review, revise, and comment on M. Knapp's draft direct testimony.	455.00	4.20	0.00	0.00	\$1,911.00
25903940	1/24/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review, revise, and comment on N. Mark's draft direct testimony.	455.00	1.40	0.00	0.00	\$637.00
25903946	1/25/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and finalize N. Mark's draft direct testimony for management review.	455.00	0.20	0.00	0.00	\$91.00

Timekeeper daily time entry exceeds the maximum allowed time of 10.00 hrs on : current invoice (line item 25886536,25886498,25886628...)

25903949	1/24/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review revisions to G. Mills' draft direct testimony.	455.00	0.20	0.00	0.00	\$91.00
25903957	1/25/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and finalize C. Bouw's draft direct testimony.	455.00	0.50	0.00	0.00	\$227.50
25904057	1/23/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and revise G. Mills' draft direct testimony.	455.00	0.70	0.00	0.00	\$318.50
25904077	1/23/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, analyze, and comment on M. Knapp's draft direct testimony in advance of testimony review call.	455.00	2.10	0.00	0.00	\$955.50
25904086	1/20/2023	Task	L110 Fact Investigation/Development	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding SPS's rate case expenses.	455.00	0.50	0.00	0.00	\$227.50
25904105	1/30/2023	Task	L110 Fact Investigation/Development	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding his draft direct testimony and rate case expense documentation.	455.00	0.90	0.00	0.00	\$409.50
25904113	1/30/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on Schedules P-2, P-3, P-4, P-5, P-6, P-7, and P-8 in advance of Batch 7 schedule review conference call.	455.00	1.20	0.00	0.00	\$546.00
25904131	1/30/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Stuart, Jeffrey	Review and comment on Batch 7 schedules.	595.00	1.70	0.00	0.00	\$1,011.50
25904132	1/30/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Participate in Batch 7 schedule review call.	595.00	0.20	0.00	0.00	\$119.00
25904136	1/30/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Final review of Dietsenberger testimony and attachments for purposes of management review.	595.00	1.60	0.00	0.00	\$952.00
25904187	1/27/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Prepare for and participate in S. Niemi testimony review call.	595.00	1.40	0.00	0.00	\$833.00
25904191	1/27/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise S. Niemi testimony based on comments received and review prior rate case order for purposes of the same.	595.00	3.80	0.00	0.00	\$2,261.00
25904194	1/27/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Cumulative correspondence with A. Dietsenberger regarding testimony and review and revise the same.	595.00	2.30	0.00	0.00	\$1,368.50
25904203	1/27/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Cumulative correspondence with client team regarding S. Niemi attachments and review the same.	595.00	1.60	0.00	0.00	\$952.00
25905003	1/25/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence and phone call with S. Rohling regarding comments received on testimony.	595.00	0.80	0.00	0.00	\$476.00
25905007	1/25/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Review N. Doyle attachments and correspond with N. Doyle and regulatory team regarding the same.	595.00	0.40	0.00	0.00	\$238.00
25905014	1/25/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with regulatory team regarding A. Dietsenberger attachments and review revisions related to the same.	595.00	0.90	0.00	0.00	\$535.50
25905018	1/25/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Correspondence with revenue requirements regarding Technosylva adjustment.	595.00	0.40	0.00	0.00	\$238.00
25905038	1/25/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise S. Rohling testimony based on comments received including reviewing Technosylva technical information available on website.	595.00	2.40	0.00	0.00	\$1,428.00
25905081	1/13/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Attend weekly status call.	595.00	0.30	0.00	0.00	\$178.50
25905155	1/30/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Mendola, Lino	Read, review, and revise testimony of A. Rodriguez in preparation for management review.	805.00	2.30	0.00	0.00	\$1,851.50
25905222	1/23/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise S. Niemi testimony in advance of testimony review call.	595.00	3.20	0.00	0.00	\$1,904.00
25905225	1/23/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Participate in S. Niemi testimony review call.	595.00	1.20	0.00	0.00	\$714.00
25905250	1/23/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with M. Knapp regarding various testimonies.	595.00	0.50	0.00	0.00	\$297.50

25906300	1/20/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review and revise S. Rohlwing testimony including drafting new section regarding wildfire risk mitigation.	595.00	2.80	0.00	0.00	\$1,696.00
25906307	1/20/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Prepare for and participate in A. Diatenberger testimony review call and revise same based on call including review of figures contained in testimony and attachments.	595.00	2.50	0.00	0.00	\$1,487.50
25906336	1/8/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Mendola, Lino	Review status of testimony drafts in case including review of A. Rodriguez, B. Trammell and S. Naimi and work to synchronize same where appropriate.	805.00	3.60	0.00	0.00	\$2,898.00
25906352	1/8/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Mandola, Lino	Further review and editing of A. Rodriguez testimony in preparation for initial review call and participate in initial review call with A. Rodriguez and team.	805.00	2.90	0.00	0.00	\$2,334.50
25906366	1/10/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Mandola, Lino	Review and revise draft testimony of M. Luth on issues related to tariff changes, and class cost allocation, discuss same with C. Pinzur and compare current testimony to prior testimony and prior PUCT Order to ensure all issues are being covered.	805.00	3.30	0.00	0.00	\$2,656.50
25906374	1/5/2023	Task	L110 Fact Investigation/Development	A105 Communicate (in firm)	Mandola, Lino	Confer with C. Pinzur on suggested modifications to A. Rodriguez testimony after initial review call.	805.00	0.80	0.00	0.00	\$644.00
25906410	1/24/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Draft and revise EAP and customer assistance section of N. Lindgren testimony.	595.00	2.20	0.00	0.00	\$1,306.00
25906417	1/24/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review revisions from Diatenberger and revise testimony based on the same.	595.00	1.60	0.00	0.00	\$952.00
25906428	1/24/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review edits and comments from S. Rohlwing and revise testimony regarding the same.	595.00	1.30	0.00	0.00	\$773.50
25906436	1/24/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with N. Lindgren witness team.	595.00	0.50	0.00	0.00	\$287.50
25906444	1/24/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Review of latest Diatenberger testimony attachments and cumulative correspondence with regulatory team regarding the same.	595.00	0.70	0.00	0.00	\$416.50
25906450	1/13/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Mandola, Lino	Review and suggest modifications to initial testimony of M. Luth and follow up with C. Pinzur and M. Luth prior to initial testimony review call.	805.00	2.20	0.00	0.00	\$1,771.00
25906486	1/19/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Consider and respond to question from Lindgren witness team regarding employee headcount.	595.00	0.30	0.00	0.00	\$178.50
25906493	1/19/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Stuart, Jeffrey	Review Batch 6 and 7 schedules.	595.00	2.10	0.00	0.00	\$1,249.50
25906512	1/19/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Review N. Lindgren attachment and work on testimony related to the same.	595.00	3.40	0.00	0.00	\$2,023.00
25906520	1/19/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Participate in schedule review call.	595.00	0.30	0.00	0.00	\$178.50
25906546	1/19/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Attend weekly planning call.	595.00	0.40	0.00	0.00	\$238.00
25906564	1/16/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendola, Lino	Review various pieces of testimony on SharePoint including testimony of B. Trammell, J. Totten, and S. Naimi to identify themes pertinent to testimony of A. Rodriguez or M. Luth.	805.00	3.70	0.00	0.00	\$2,878.50
25906604	1/11/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Prepare for and participate in S. Naimi testimony review call.	595.00	1.00	0.00	0.00	\$595.00
25906772	1/31/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendola, Lino	Continue work on A. Rodriguez testimony in preparation for final review and revise testimony according to prior discussion to add themes and issues corresponding to testimony of B. Trammell and participate in review call.	805.00	4.60	0.00	0.00	\$3,703.00

25906806	1/23/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendiola, Lino	Continue work on testimony of M. Luth including reviewing attached exhibits and relevant schedules in preparation for final review call with M. Luth and participate in call.	805.00	4.50	0.00	0.00	53,622.50
25906897	1/31/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with M. Deselich to address comments to direct testimony.	555.00	0.70	0.00	0.00	5368.50
25906898	1/31/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise C. Hough direct testimony.	555.00	4.30	0.00	0.00	\$2,386.50
25906291	1/12/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendiola, Lino	Review status of cost of capital testimony and supporting documents with M. Boldt and analyze same to ensure consistent thematic approach to case and provide comments on testimony of D'Ascendis, Martin, and Totten.	805.00	7.20	0.00	0.00	55,795.00
25906352	1/30/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendiola, Lino	Continue work on open issues related to cost allocation and rate design and address bracketed items and other issues in M. Luth testimony and confer with C. Pinzur regarding same.	805.00	5.60	0.00	0.00	54,508.00
25906957	1/31/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review revisions to C. Bouw's draft direct testimony.	455.00	0.20	0.00	0.00	\$91.00
25906962	1/31/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Correspond with client regarding revisions to C. Bouw's draft direct testimony.	455.00	0.30	0.00	0.00	\$136.50
25906965	1/31/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Garza, Cathy	Confer by phone with M. Baylor regarding his draft direct testimony.	455.00	0.10	0.00	0.00	\$45.50
25906969	1/31/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and provide suggested edits to M. Baylor's draft direct testimony regarding extension of BEA PPA.	455.00	0.90	0.00	0.00	\$409.50
25906973	1/31/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and revise N. Mark's draft direct testimony relating to native costs.	455.00	0.60	0.00	0.00	\$273.00
25907026	1/30/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and analyze revisions and comments to C. Bouw's draft direct testimony.	455.00	0.30	0.00	0.00	\$136.50
25907032	1/30/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review draft direct testimonies of B. Trammell, B. Elsay, and N. Mark in advance of conference call regarding interruptible tariffs.	455.00	0.90	0.00	0.00	\$409.50
25907034	1/30/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in conference call with client regarding interruptible tariffs.	455.00	0.70	0.00	0.00	\$318.50
25907040	1/30/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Request rate case expense documentation for T. Anson.	455.00	0.30	0.00	0.00	\$136.50
25907213	1/29/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review comments to C. Bouw's draft direct testimony.	455.00	0.10	0.00	0.00	\$45.50
25907217	1/29/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review revisions and comments to N. Mark's draft direct testimony.	455.00	0.10	0.00	0.00	\$45.50
25907225	1/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and comment on N. Mark's draft direct testimony in advance of testimony review call.	455.00	1.30	0.00	0.00	\$591.50
25907228	1/19/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare for and participate in C. Bouw's testimony review call.	455.00	0.50	0.00	0.00	\$227.50
25907238	1/19/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in N. Mark's testimony review conference call.	455.00	0.60	0.00	0.00	\$273.00
25907248	1/19/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in conference call regarding Batch 6 & 7 Schedules.	455.00	0.20	0.00	0.00	\$91.00
25907253	1/19/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in C. Lee's testimony review conference call.	455.00	0.50	0.00	0.00	\$227.50
25907260	1/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and analyze C. Lee's draft direct testimony in advance of testimony review call.	455.00	0.60	0.00	0.00	\$273.00
25907281	1/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review correspondence from client regarding rate case expense documentation.	455.00	0.20	0.00	0.00	\$91.00
25907286	1/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review rate case amounts included in T. Anson's draft direct testimony.	455.00	0.10	0.00	0.00	\$45.50
25907337	1/6/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer by phone with M. Knapp regarding his direct testimony.	455.00	0.50	0.00	0.00	\$227.50

25907461	1/4/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Garza, Cathy	Prepare notes on OPL discovery responses sponsored by M. Luth for C. Pinzur.	455.00	0.30	0.00	0.00	5136.50
25907665	1/31/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Review E. Kane's comments on C. Romer's direct testimony and consider strategy.	555.00	0.80	0.00	0.00	5444.00
25908424	1/30/2023	Task	L130 Experts/Consultants	A102 Research	Marrick, Sarah	Research updated information for J. Totten direct testimony.	230.00	0.70	0.00	0.00	5161.00
25908431	1/30/2023	Task	L180 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Update citations in N. Koch's direct testimony.	230.00	0.20	0.00	0.00	546.00
25908448	1/31/2023	Task	L180 Other Case Assessment, Dev and Admin	A102 Research	Merrick, Sarah	Research previous testimony regarding regulatory assets and deferred O&M expenses.	230.00	1.30	0.00	0.00	5299.00
25908485	1/31/2023	Task	L180 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Proofread and edit S. Niemi direct testimony.	230.00	1.40	0.00	0.00	5322.00
25909189	1/20/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and comment on M. Boehlke's draft direct testimony.	455.00	1.50	0.00	0.00	5682.50
25909228	1/20/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer with B. Miskanis regarding M. Boehlke's draft direct testimony.	455.00	0.20	0.00	0.00	581.00
25909286	1/20/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and finalize C. Lee's draft direct testimony.	455.00	1.00	0.00	0.00	5455.00
25909436	1/31/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Continue to work on S. Niemi testimony based on edits received including comparing numbers to cost of service and review of attachments.	595.00	5.20	0.00	0.00	53,084.00
25909464	1/9/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and revise M. Baylor's draft direct testimony regarding BEA PPA extension.	455.00	2.10	0.00	0.00	5955.50
25909473	1/9/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding SPS's rate case expenses.	455.00	0.40	0.00	0.00	5182.00
25909474	1/31/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Review comments to A. Dietsberger and consider approach for incorporating.	595.00	0.80	0.00	0.00	5476.00
25909529	1/31/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Phone call with N. Lindgren and review of testimony additions.	595.00	0.50	0.00	0.00	5297.50
25910006	1/31/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise direct testimony of A. Rodriguez.	505.00	0.80	0.00	0.00	5404.00
25910148	1/25/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Pinzur, Caren	Conference call to discuss draft Direct Testimony of D. Ripberger.	505.00	0.50	0.00	0.00	5262.50
25910161	1/25/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of D. Ripberger.	505.00	0.40	0.00	0.00	5202.00
25910185	1/27/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of R. Luth.	505.00	0.60	0.00	0.00	5303.00
25910207	1/30/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Pinzur, Caren	Review and analyze draft direct testimony of D. Watson.	505.00	0.30	0.00	0.00	5151.50
25910230	1/30/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of R. Luth.	505.00	1.30	0.00	0.00	5656.50
25910311	1/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Pinzur, Caren	Review and analyze Direct Testimony of D. Watson.	505.00	0.20	0.00	0.00	5101.00
25910433	1/20/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Pinzur, Caren	Draft and revise Direct Testimony of D. Watson.	505.00	0.50	0.00	0.00	5252.50
25910582	1/6/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Correspond with C. Hough regarding direct testimony.	555.00	0.20	0.00	0.00	5111.00
25911361	1/31/2023	Task	L310 Written Discovery	A104 Review/analyze	Faugh, Soroosh	Read and review various cases in connection with researching necessary standards for establishing a regulatory asset and confer with M. Hopkins regarding same.	425.00	2.00	0.00	0.00	5850.00
25911399	1/9/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Hopkins, Marty	Analyze information to include in R. Starkweather direct testimony.	555.00	0.10	0.00	0.00	565.50
25912583	1/13/2023	Task	L130 Experts/Consultants	A108 Communicate (other external)	Hopkins, Marty	Review revisions to R. Starkweather direct testimony.	555.00	0.10	0.00	0.00	565.50
25913317	1/18/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Review Optimize Your Charge fee analysis in preparation for C. Hough testimony.	555.00	0.20	0.00	0.00	5111.00

25914306	1/22/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Confer with regulatory team regarding J. Sample and M. Remington capital additions attachments.	555.00	0.20	0.00	0.00	5111.00
25914422	1/23/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Confer with regulatory team regarding J. Sample and M. Remington capital additions attachments.	555.00	0.20	0.00	0.00	5111.00
25914843	1/24/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Review updated J. Sample and M. Remington capital additions attachments.	555.00	0.40	0.00	0.00	5222.00
25914894	1/24/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze.	Hopkins, Marty	Review and analyze correspondence from R. Matley regarding fuel-handling expense known and measurable adjustment.	555.00	0.50	0.00	0.00	5277.50
25915069	1/25/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Confer with R. Matley regarding adjustments sponsored by M. Deselich.	555.00	0.30	0.00	0.00	5196.50
25915398	1/26/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Correspond with M. Knapp and R. Starkweather regarding finalizing R. Starkweather direct testimony.	555.00	0.30	0.00	0.00	5196.50
25915521	1/27/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in calls with M. Deselich regarding direct testimony.	555.00	1.50	0.00	0.00	5832.50
25915678	1/27/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Participate in call with R. Matley regarding adjustments sponsored by M. Deselich.	555.00	0.50	0.00	0.00	5277.50
25915741	1/28/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Confer with J. Marshall regarding fuel-handling adjustment strategy.	555.00	0.20	0.00	0.00	5111.00
25915830	1/30/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Hopkins, Marty	Review and consider B. Trammell's comments on C. Romer direct testimony and confer with J. Stuart regarding same.	555.00	0.40	0.00	0.00	5222.00
25915846	1/30/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Finalize M. Deselich direct testimony for management review.	555.00	0.50	0.00	0.00	5277.50
25915863	1/30/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Hopkins, Marty	Call with C. Hough regarding direct testimony.	555.00	0.40	0.00	0.00	5222.00
25915897	1/31/2023	Task	L110 Fact Investigation/Development	A103 Draft/revise	Hopkins, Marty	Review and revise J. Sample testimony.	555.00	0.50	0.00	0.00	5277.50
25915921	1/31/2023	Task	L110 Fact Investigation/Development	A102 Research	Hopkins, Marty	Legal research regarding regulatory assets and deferred O&M expense accounting treatment in support of C. Hough direct testimony.	555.00	1.50	0.00	0.00	5832.50
25917124	1/31/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Research Xcel charitable programs for purposes of developing N. Lindgren testimony.	595.00	1.80	0.00	0.00	\$1,071.00
25917126	1/31/2023	Task	L420 Expert Witnesses	A103 Draft/revise	Stuart, Jeffrey	Work on N. Lindgren testimony based on call with N. Lindgren and review of charitable programs.	595.00	2.10	0.00	0.00	\$1,249.50
25989383	1/5/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Discuss potential engagement with Dr. James Dyer.	595.00	0.50	0.00	0.00	5297.50
25989397	1/10/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Discuss potential engagement with Jess Totten.	595.00	0.50	0.00	0.00	5297.50
25989405	1/6/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Review and revise, comment on Shipman direct testimony.	595.00	2.30	0.00	0.00	\$1,368.50
25989410	1/9/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Prepare for and participate in Shipman direct testimony review call.	595.00	1.20	0.00	0.00	5714.00
25989416	1/9/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Conduct additional review of and revisions to Shipman direct testimony.	595.00	1.70	0.00	0.00	\$1,011.50
25989419	1/10/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Review and revise, comment on Martin direct testimony.	595.00	2.40	0.00	0.00	\$1,428.00
25989425	1/10/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Prepare for and participate in Martin testimony review call.	595.00	0.70	0.00	0.00	\$416.50
25989432	1/11/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Conduct additional review of and revisions to Martin direct testimony.	595.00	1.80	0.00	0.00	\$1,071.00
25989435	1/12/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Review and comment on D'Ascendis direct testimony.	595.00	2.70	0.00	0.00	\$1,606.50



25986439	1/13/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Prepare for and participate in D'Ascendis testimony review call.	595.00	1.10	0.00	0.00	\$654.50
25989443	1/13/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Prepare for and participate in discussion regarding ROE, cap structure testimony, issues, facts, other related items with J. Totten.	595.00	2.60	0.00	0.00	\$1,547.00
25989448	1/19/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Work on Totten direct testimony.	595.00	1.80	0.00	0.00	\$1,071.00
25986450	1/17/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Review and revise, comment on Koch direct testimony.	595.00	2.30	0.00	0.00	\$1,368.50
25986456	1/19/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Continue review and editing of Koch direct.	595.00	1.60	0.00	0.00	\$952.00
25989457	1/17/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Prepare for and participate in Koch review call.	595.00	0.90	0.00	0.00	\$535.50
25986461	1/21/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Review management review edits to D'Ascendis, Martin, and Shipman testimonies.	595.00	1.30	0.00	0.00	\$773.50
25989467	1/24/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Work on Totten direct.	595.00	1.70	0.00	0.00	\$1,011.50
25989470	1/25/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Prepare for and participate in Totten review call.	595.00	1.30	0.00	0.00	\$773.50
25989483	1/25/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Review and discuss management edits with Koch, address outstanding items.	595.00	1.80	0.00	0.00	\$1,071.00
25986501	1/30/2023	Task	L420 Expert Witnesses	A108 Communicate (other external)	Boldt, Michael	Work on finalizing Koch testimony.	595.00	1.20	0.00	0.00	\$714.00

LEGAL EXPENSE FOR  
WINSTEAD PC

BOOKED IN MAY 2023  
FOR DOCKET 54634

Invoice 3212392 - Date Received 5/9/23

<b>Vendor</b>	Winstead PC	<b>Billing Start Date</b>	4/3/2023	<b>Total Fees</b>	\$7,875.00
<b>Invoice Date</b>	5/5/2023	<b>Billing End Date</b>	4/30/2023	<b>Total Expenses - Other</b>	\$1,250.00
<b>Date Received</b>	5/9/2023	<b>Invoice Amount</b>	\$9,125.00	<b>Total Invoice (Fees + Expenses - Expenses)</b>	\$9,125.00
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Experts</b>	
<b>Posting Status</b>	Posted				

Row	Date	Type	Summary	Activity	Case/Party	Description	Warning	Rate	Hours	Cost	Fees	Amount
2717916	4/3/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to Staff and Intervenor discovery		450.00	0.70	0.00	0.00	\$315.00
2722952	4/6/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to AXM discovery		450.00	0.80	0.00	0.00	\$360.00
2725892	4/13/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in calls regarding AXM 4 discovery		450.00	1.00	0.00	0.00	\$450.00
2725893	4/13/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to discovery		450.00	0.70	0.00	0.00	\$315.00
2727148	4/20/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to AXM discovery		450.00	1.30	0.00	0.00	\$585.00
2727149	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in calls regarding discovery responses		450.00	1.00	0.00	0.00	\$450.00
2731393	4/24/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in call regarding Sierra Club discovery		450.00	0.40	0.00	0.00	\$180.00
27179117	4/4/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to Staff and OPUC discovery		450.00	1.60	0.00	0.00	\$720.00
27229512	4/10/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to discovery		450.00	0.30	0.00	0.00	\$135.00
27229515	4/11/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in call regarding TIEC discovery		450.00	0.40	0.00	0.00	\$180.00
27229516	4/11/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to AXM discovery		450.00	1.00	0.00	0.00	\$450.00
27229527	4/12/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Prepare for and participate in call regarding AXM 4 discovery		450.00	1.50	0.00	0.00	\$675.00
27258914	4/14/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to discovery		450.00	0.30	0.00	0.00	\$135.00
27258923	4/18/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in discovery calls		450.00	1.00	0.00	0.00	\$450.00
27258929	4/19/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in call regarding AXM 4 discovery		450.00	1.00	0.00	0.00	\$450.00
27271414	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Prepare for and participate in calls regarding TIEC and OPUC discovery		450.00	2.20	0.00	0.00	\$990.00
27313912	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in review calls for TIEC and OPUC discovery		450.00	1.00	0.00	0.00	\$450.00
27313913	4/26/2023	Task	L310 Written Discovery	A104 Review/analyze	Moss, Ron	Review and edit draft responses to discovery		450.00	1.00	0.00	0.00	\$450.00
27313922	4/28/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Moss, Ron	Participate in call regarding Sierra Club 3 discovery		450.00	0.30	0.00	0.00	\$135.00
733110005	4/6/2023	Expense	E123 Other professionals			Advance For Other Contract Services - Management Applications Consulting, Inc. (Pays by Check) - Consulting Services		1,250.00	1.00	0.00	0.00	\$1,250.00



**Management Applications Consulting, Inc.**

1103 Rocky Drive, Suite 201  
Reading, PA 19609-1157

T.I.N. 23-2293083

# Invoice

Date	Invoice #
4/6/2023	20230410

<b>Bill To</b>
Winstead PC 401 Congress Avenue, Suite 2100 Austin, TX 78701 Attn: Ron Moss

<b>Ship To</b>
Reference: Xcel Energy / Southwestern Public Service, Texas

5 Weeks Ended 3/31/23

P/O #	Terms	Project	
	Net 60 Days	202301 SPS, TX Elec Rate Case Assist	
Hours	Description	Rate	Amount
5	Debbie L. Gajewski	250.00	1,250.00
		<b>Total</b>	<b>\$1,250.00</b>

**MANAGEMENT APPLICATIONS CONSULTING, INC.**

**Professional Services**

**March 2023**

**Debbie Gajewski**

**Winstead PC**

**W. O. #202301**

**Xcel Energy/Southwestern Public Service Co.  
Texas Electric Rate Case Support**

<b><u>Date</u></b>	<b><u>Time</u></b>	<b><u>Description</u></b>
03-13-23	5.00	Relink TX jurisdiction cost of service (COS) model to the retail COS model and identify issues.
	<b>5.00</b>	<b>TOTAL HOURS</b>

LEGAL EXPENSE FOR  
HINKLE SHANOR LLP

BOOKED IN MAY 2023  
FOR DOCKET 54634

Invoice 361211 - Date Received 5/9/23

<b>Vendor</b>	Hinkle Shanor LLP	<b>Billing Start Date</b>	4/3/2023	<b>Total Fees</b>	\$2,510.00
<b>Invoice Date</b>	5/9/2023	<b>Billing End Date</b>	4/30/2023	<b>Total Expenses - Other</b>	\$208.64
<b>Date Received</b>	5/9/2023	<b>Invoice Amount</b>	\$2,718.64	<b>Total Invoice/Other Expenses - Exports</b>	\$2,718.64
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Exports</b>	
<b>Posting Status</b>	Posted				

Row	Date	Type	Category	Activity	Case/Party	Description	Warning	Rate	Hours	Cost	Fee	Amount
1	4/3/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review draft Responses to Sierra Club's Second Discovery Requests.		300.00	0.30	0.00	0.00	\$90.00
2	4/4/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review/analyze AXM's Fourth Discovery Requests to SPS.		300.00	0.30	0.00	0.00	\$90.00
3	4/4/2023	Task	L310 Written Discovery	A103 Draft/revise	Hardy, Dana	Revise Responses to OPUC's Second Discovery Requests.		300.00	0.40	0.00	0.00	\$120.00
4	4/4/2023	Task	L310 Written Discovery	A103 Draft/revise	Hardy, Dana	Revise Responses to TIEC's First Discovery Requests.		300.00	0.50	0.00	0.00	\$150.00
5	4/7/2023	Task	L250 Other Written Motions/Submissions	A104 Review/analyze	Hardy, Dana	Review stipulated procedural schedule.		300.00	0.20	0.00	0.00	\$60.00
6	4/9/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review AXM's Fourth Discovery Requests.		300.00	0.30	0.00	0.00	\$90.00
7	4/9/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review/analyze issues related to Responses to TIEC's Second Discovery Requests.		300.00	0.30	0.00	0.00	\$90.00
8	4/10/2023	Task	L210 Pleadings	A111 Other	Mares, Sonya	Calendar all deadlines in Procedural Schedule.		80.00	1.00	0.00	0.00	\$80.00
9	4/11/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review/analyze issues related to Responses to AXM's Fourth Discovery Requests.		300.00	0.30	0.00	0.00	\$90.00
10	4/11/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review OPUC's Third Discovery Requests and assignments.		300.00	0.20	0.00	0.00	\$60.00
11	4/11/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS counsel and representatives regarding TIEC's Second Discovery Requests.		300.00	0.40	0.00	0.00	\$120.00
12	4/19/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and counsel regarding Responses to AXM's Fourth Discovery Requests.		300.00	1.00	0.00	0.00	\$300.00
13	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and counsel regarding Responses to AXM's Fourth Discovery Requests.		300.00	0.70	0.00	0.00	\$210.00
14	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS representatives and counsel regarding Responses to OPUC's Third Discovery Requests.		300.00	0.50	0.00	0.00	\$150.00
15	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS representatives and counsel regarding Responses to TIEC's Third Discovery Requests.		300.00	0.90	0.00	0.00	\$270.00
16	4/26/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review OPUC's Fourth Discovery Requests.		300.00	0.20	0.00	0.00	\$60.00
17	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and counsel regarding Responses to TIEC's Third Discovery Requests.		300.00	0.50	0.00	0.00	\$150.00
18	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and counsel regarding Responses to OPUC's Third Discovery Requests.		300.00	0.30	0.00	0.00	\$90.00

19	4/26/2023	Task	L180 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and counsel regarding case status and strategy.	300.00	0.40	0.00	0.00	5120.00
20	4/28/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and counsel regarding Responses to Sierra Club's Third Discovery Requests.	300.00	0.40	0.00	0.00	5120.00
21	4/30/2023	Expense	E124 Other			NMQRT	208.64	1.00	0.00	0.00	5208.64



CONSULTING EXPENSES  
FOR WILLIS TOWER  
WATSON US LLC

BOOKED IN JUNE 2023  
FOR DOCKET 54634



March 20, 2023

To:

Mr. Rick Schrubbe

Benefits Accounting

Xcel Energy Inc.

414 Nicollet Mall

MINNEAPOLIS, MN 55401

UNITED STATES

From:

Willis Towers Watson US LLC

8400 Normandale Lake Boulevard

Suite 1700

MINNEAPOLIS, MN 55437-3837

UNITED STATES

Subject:

February 2023 Invoice: Rate Case Consulting

Customer Number

609084

Invoice Number

100065516955E

Please include the Invoice Number on your check or wire payable to Willis Towers Watson US LLC

Rate Case Consulting		Amount
Not Chargeable to the Plan Trusts		
General Consulting:		
•	Colorado	
	○ PSCo legal entity PRW results letter	\$4,993
•	Texas	
	○ SPS legal entity PRW results letter	4,934
Total		\$9,927

Please remit payment to:

Payee/Beneficiary name: Willis Towers Watson US LLC/ Tax ID # 53-0181291

Preferred payment method: EDI, ACH/EFT (using CTX or CCD+), or wire transfer

Address for submitting electronic payment details: GFO.CashApplication.NA@willistowerswatson.com

Bank name: JPMorgan Chase

Account number:

Transit or ABA #: 021000021

SWIFT CODE: CHASUS33

Lockbox address for paper checks: Willis Towers Watson US LLC/Lockbox 28025/28025 Network Place/Chicago,IL 60673-1280



June 21, 2023

To: Mr. Rick Schrubbe  
Benefits Accounting  
Xcel Energy Inc.  
414 Nicollet Mall  
MINNEAPOLIS, MN 55401  
UNITED STATES

From: Willis Towers Watson US LLC  
8400 Normandale Lake Boulevard  
Suite 1700  
MINNEAPOLIS, MN 55437-3837  
UNITED STATES

Subject: May 2023 Invoice: Rate Case Consulting

Customer Number **609084**  
Invoice Number **100065568187E**  
Please include the Invoice Number on your check or wire payable to Willis Towers Watson US LLC

**Rate Case Consulting  
Not Chargeable to the Plan Trusts**

**Amount**

**Special Authorizations:**

- S.A. #2023-21 - MN Rate Case Support \$30,000

**General Consulting:**

- **Texas**
  - SPS legal entity PRW results letter 3,644
- **Colorado**
  - PSCo legal entity PRW results letter 3,643

**Total \$37,287**

**Please remit payment to:**

Payee/Beneficiary name: Willis Towers Watson US LLC/ Tax ID # 53-0181291  
Preferred payment method: EDI, ACH/EFT (using CTX or CCD+), or wire transfer  
Address for submitting electronic payment details: GFO.CashApplication.NA@willistowerswatson.com  
Bank name: JPMorgan Chase  
Account number:  
Transit or ABA #: 021000021  
SWIFT CODE: CHASUS33  
Lockbox address for paper checks: Willis Towers Watson US LLC/Lockbox 28025/28025 Network Place/Chicago,IL 60673-1280

CONSULTING EXPENSE  
FOR  
SCOTT MADDEN

BOOKED IN JUNE 2023  
FOR DOCKET 54634



## INVOICE

Page: 1

ScottMadden  
2626 Glenwood Ave  
Suite 480  
Raleigh, NC 27608-1367  
Tax ID: 56-1445505

Xcel Energy  
550 15th Street

Denver, CO 80202  
USA

Invoice Number: PS-INV103537  
Invoice Date: 5/30/2023  
  
P.O. Number: 4501076482  
Contract Number: LINE 10 ITEM  
3000051

In Reference To: Professional services provided in April 2023 for project 100767-1078  
SPS TX 2022 ROE Testimony

	Date	Quantity	Rate	Total Price
Dylan D'Ascendis - Discovery responses	04/06/23	0.5	470.00	235.00
<b>Dylan D'Ascendis - Partner</b>		<b>0.5</b>		<b>235.00</b>

**Total Fees:** 235.00  
**Support Fee:** 2.35  
**Total Expenses:** 0.00  
**Tax:** 0.00  
**Total USD:** 237.35

By ACH (Preferred) or Bank Wire transfer as follows:

#### BANK INFORMATION

Wells Fargo Checking  
Transit# 121000248  
Account Name: ScottMadden  
Account#

If by Check, Payable To:

#### ADDRESS

ScottMadden  
PO Box 935955  
Atlanta, GA 31193-5955



## INVOICE

Page: 1

ScottMadden  
2626 Glenwood Ave  
Suite 480  
Raleigh, NC 27608-1367  
Tax ID: 56-1445505

Xcel Energy  
550 15th Street

Denver, CO 80202  
USA

Invoice Number: PS-INV103610  
Invoice Date: 6/26/2023

P.O. Number: 4501076482  
Contract Number: LINE 10 ITEM  
3000051

In Reference To: Professional services provided in May 2023 for project 100767-1078  
SPS TX 2022 ROE Testimony

	Date	Quantity	Rate	Total Price
Dylan D'Ascendis - Discovery responses	05/22/23	0.5	470.00	235.00
<b>Dylan D'Ascendis - Partner</b>		<b>0.5</b>		<b>235.00</b>
Adam Perry - Drafted responses to data requests	05/22/23	3	365.00	1,095.00
Adam Perry - Drafted responses to data requests	05/25/23	1	365.00	365.00
Adam Perry - Drafted responses to data requests	05/30/23	2	365.00	730.00
Adam Perry - Participated in call with project team	05/31/23	0.5	365.00	182.50
<b>Adam Perry - Director</b>		<b>6.5</b>		<b>2,372.50</b>

**Total Fees: 2,607.50**  
**Support Fee: 26.08**  
**Total Expenses: 0.00**  
**Tax: 0.00**  
**Total USD: 2,633.58**

By ACH (Preferred) or Bank Wire transfer as follows:

BANK INFORMATION  
Wells Fargo Checking  
Transit# 121000248  
Account Name: ScottMadden  
Account#

If by Check, Payable To:

ADDRESS  
ScottMadden  
PO Box 935955  
Atlanta, GA 31193 5955

LEGAL EXPENSE FOR  
EVERSHEDS SUTHERLAND  
(US) LLP

BOOKED IN JUNE 2023  
FOR DOCKET 54634

Invoice 1249713 - Date Received 5/19/23

<b>Vendor</b>	Eversheds Sutherland IUS LLP	<b>Billing Start Date</b>	1/1/2023	<b>Total Fees</b>	\$50,643.50
<b>Invoice Cycle</b>	5/18/2023	<b>Billing End Date</b>	4/30/2023	<b>Total Expenses - Other</b>	\$335.00
<b>Date Received</b>	5/19/2023	<b>Invoice Amount</b>	\$60,766.00	<b>Total Invoice (Fees + Expenses - Experts)</b>	\$50,978.50
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Experts</b>	\$9,787.50
<b>Posting Status</b>	Posted				

Index	Date	Type	Activity	Activity	Description	Warning	Hours	Rate	Value	Unit	Value
6393957	4/7/2023	Expense	E112 Court fees		Recording Fees: Recording Services 03/30/2023/Kennedy Reporting Service, Inc.; Sarah Merrick		335.00	1.00	0.00	0.00	\$335.00
6394315	4/11/2023	Expense	E119 Experts		Professional Services: services rendered through March 31, 2023/Clerk Hill, PLC; Jeffrey Stuart		9,787.50	1.00	0.00	0.00	\$9,787.50
26090925	4/4/2023	Task	L310 Written Discovery	A104 Review/analyze	Hopkins, Marly	Consider strategy with regard to AXM's 4th discovery set and review related prior rate case discovery in support of same.	555.00	0.50	0.00	0.00	\$277.50
26098770	4/7/2023	Task	L310 Written Discovery	A104 Review/analyze	Hopkins, Marly	Analyze and revise draft responses to AXM 4th set of discovery and confer with J. Stuart regarding strategy/objections to same.	555.00	0.80	0.00	0.00	\$444.00
26102472	4/7/2023	Task	L310 Written Discovery	A103 Draft/revise	Merrick, Sarah	Proofread and edit draft response to Staff's 2nd RFI.	230.00	0.90	0.00	0.00	\$207.00
26102477	4/7/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Merrick, Sarah	Review prehearing conference transcript and communicate with attorney team regarding same.	230.00	0.20	0.00	0.00	\$46.00
26105687	4/11/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Review of AXM 4 RFIs and schedules related to fuel inventory for purposes of negotiating potential objections.	595.00	1.20	0.00	0.00	\$714.00
26105690	4/11/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Attend TREC 2 review call.	595.00	0.50	0.00	0.00	\$297.50
26105693	4/11/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with client and counsel for AXM regarding AXM 4 potential objections.	595.00	0.40	0.00	0.00	\$238.00
26107157	4/11/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Merrick, Sarah	Review procedural order and discuss same with attorney team.	230.00	0.40	0.00	0.00	\$92.00
26107186	4/11/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (in firm)	Merrick, Sarah	Attend weekly case status call with attorney team.	230.00	0.20	0.00	0.00	\$46.00
26107486	4/12/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Participate in AXM 4 review call.	595.00	1.00	0.00	0.00	\$595.00
26107506	4/12/2023	Task	L310 Written Discovery	A103 Draft/revise	Stuart, Jeffrey	Draft and revise objections to AXM 4th RFIs.	595.00	1.80	0.00	0.00	\$1,071.00
26107509	4/12/2023	Task	L310 Written Discovery	A107 Communicate (other outside counsel)	Stuart, Jeffrey	Cumulative correspondence with AXM and client team regarding AXM 4th potential objections.	595.00	0.80	0.00	0.00	\$476.00
26107751	4/13/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to AXM's 5th set of RFIs.	505.00	0.30	0.00	0.00	\$151.50
26108862	4/12/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Merrick, Sarah	Audit file sharing site for completeness and finality and communicate with C. Garza regarding same.	230.00	1.60	0.00	0.00	\$368.00
26108969	4/12/2023	Task	L350 Discovery Motions	A103 Draft/revise	Merrick, Sarah	Prepare objections to AXM's 4th RFIs.	230.00	1.00	0.00	0.00	\$230.00
26108986	4/12/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend call regarding responses to AXM's 4th RFI.	230.00	0.80	0.00	0.00	\$184.00



26109003	4/13/2023	Task	L310 Written Discovery	A103 Draft/revise	Stuart, Jeffrey	Review and revise draft response to AXM 4-14.	595.00	0.40	0.00	0.00	\$238.00
26109007	4/13/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Participate in AXM 4 review call.	595.00	1.00	0.00	0.00	\$695.00
26109009	4/13/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Receive and revise Sierra Club 3 RFIs.	595.00	0.20	0.00	0.00	\$119.00
26111621	4/13/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend review calls for AXM's 4th and 5th RFIs. Review and revise SPS's Third Petition for Review of Municipal Resolutions and Motion to Consolidate.	230.00	1.40	0.00	0.00	\$322.00
26112253	4/14/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Participate in AXM 4 Initial Review conference call for Question Nos. 46-72.	455.00	1.60	0.00	0.00	\$728.00
26112271	4/13/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Review and revise SPS's responses to AXM's 4th Set of RFIs.	455.00	1.20	0.00	0.00	\$546.00
26112282	4/13/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Prepare email to client regarding ShareFile review.	455.00	0.50	0.00	0.00	\$227.50
26112291	4/13/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer by phone with B. Trammell regarding ShareFile review.	455.00	0.20	0.00	0.00	\$91.00
26112296	4/13/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Review and revise SPS's Objections to AXM's 4th Request for Information.	455.00	0.20	0.00	0.00	\$91.00
26112371	4/12/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Participate in weekly internal strategy meeting.	455.00	1.20	0.00	0.00	\$546.00
26112385	4/11/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy		455.00	0.50	0.00	0.00	\$227.50
26112387	4/11/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in Teams meeting with C. Bouw and A. Rutherford regarding SPS's response to Question No. 5-20 in AXM's 5th Set of RFIs.	455.00	0.20	0.00	0.00	\$91.00
26112605	4/3/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on SPS's First Supplemental Response to AXM's 2nd RFI.	455.00	1.90	0.00	0.00	\$864.50
26112606	4/3/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and comment on SPS's First Supplemental Response to AXM's 3rd RFI.	455.00	1.20	0.00	0.00	\$546.00
26112613	4/3/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review, revise, and comment on SPS's draft responses to Staff's 2nd Set of RFIs.	455.00	2.60	0.00	0.00	\$1,183.00
26112643	4/5/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and revise Affidavit of Jeffrey B. Stuart for purposes of responding to Question No. 2-3 of Staff's 2nd Set of RFIs.	455.00	0.50	0.00	0.00	\$227.50
26112644	4/5/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding comments to SPS's draft responses to Staff's 2nd Set of RFIs.	455.00	0.40	0.00	0.00	\$182.00
26112704	4/4/2023	Task	L120 Analysis/Strategy	A105 Communicate (in firm)	Garza, Cathy	Participate in weekly internal strategy meeting.	455.00	0.70	0.00	0.00	\$318.50
26112748	4/4/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review filed version of SPS's Supplemental Responses to AXM's 2nd and 3rd Sets of RFIs for potential corrections.	455.00	1.30	0.00	0.00	\$691.50
26112783	4/5/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding SPS's draft responses to Staff's 2nd Set of RFIs regarding rate case expenses.	455.00	0.80	0.00	0.00	\$364.00
26112792	4/6/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in final review call on SPS's responses to Staff's 2nd Set of RFIs.	455.00	0.80	0.00	0.00	\$364.00
26112797	4/6/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Prepare SPS's Second Supplemental Response to AXM's 2nd Set of RFIs to correct portions of certain responses.	455.00	0.90	0.00	0.00	\$409.50
26112798	4/6/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Prepare SPS's Second Supplemental Response to AXM's 3rd Set of RFIs to correct portions of certain responses.	455.00	0.40	0.00	0.00	\$182.00
26112801	4/6/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and comment on SPS's draft responses to Staff's 2nd Set of RFIs.	455.00	1.00	0.00	0.00	\$455.00
26113265	4/10/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review SPS's responses to Staff's 2nd Set of RFIs.	455.00	0.60	0.00	0.00	\$273.00
26113282	4/11/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review Question No. 5-20 in AXM's 5th Set of RFIs and research whether a similar request has been made in SPS's prior rate case.	455.00	0.60	0.00	0.00	\$273.00

26113313	4/11/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Prepare Excel file shell for purposes of reviewing 45-day update files uploaded to SharePoint.	455.00	0.40	0.00	0.00	\$182.00
26113345	4/7/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and comment on SPS's draft responses to Staff's 2nd Set of RFIs relating to rate case expenses.	455.00	1.00	0.00	0.00	\$455.00
26114393	4/14/2023	Task	L250 Other Written Motions/Submissions	A103 Draft/revise	Merrick, Sarah	Proofread, edit and finalize third motion to consolidate municipal resolutions and correspondence with the parties regarding same.	230.00	0.90	0.00	0.00	\$207.00
26114412	4/14/2023	Task	L310 Written Discovery	A103 Draft/revise	Merrick, Sarah	Proofread, edit and insert references into draft response to AXM's 4th RFI.	230.00	1.30	0.00	0.00	\$299.00
26117161	4/18/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Phone call with S. Niemi team regarding AXM 4 and OPUC 3.	595.00	1.10	0.00	0.00	\$654.50
26117319	4/7/2023	Task	L310 Written Discovery	A110 Manage data/files	Stuart, Jeffrey	Correspondence with TIEC regarding production of documents and attention to matters related to the same.	595.00	1.10	0.00	0.00	\$654.50
26117320	4/7/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Review AXM 4 for potential objections.	595.00	0.70	0.00	0.00	\$416.50
26118091	1/1/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to AXM's 4th set of RFIs.	505.00	1.00	0.00	505.00	\$0.00
26121692	4/19/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend AXM 4 final review call and prepare Exhibit SPS-AXM 4-16 for D. Watson's review and approval.	230.00	1.00	0.00	0.00	\$230.00
26124571	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend final review call for AXM's 4th RFI.	230.00	0.50	0.00	0.00	\$115.00
26127197	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend initial review calls for OPUC's 3rd and TIEC's 3rd RFIs.	230.00	0.90	0.00	0.00	\$207.00
26127992	4/24/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Participate in Sierra Club 3rd review call.	595.00	0.50	0.00	0.00	\$297.50
26130027	4/24/2023	Task	L310 Written Discovery	A104 Review/analyze	Merrick, Sarah	Review discovery responses provided to date to identify needed supplements.	230.00	1.70	0.00	0.00	\$391.00
26130033	4/24/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend initial review call for Sierra Club's 3rd RFI.	230.00	0.30	0.00	0.00	\$69.00
26130048	4/24/2023	Task	L310 Written Discovery	A106 Communicate (other external)	Merrick, Sarah	Prepare and send service email for responses to AXM's 4th and 5th RFIs.	230.00	0.20	0.00	0.00	\$46.00
26131297	4/25/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Attend Staff 3 review call.	595.00	0.40	0.00	0.00	\$239.00
26131303	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Attend OPUC 3 review call.	595.00	0.50	0.00	0.00	\$297.50
26131307	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Attend TIEC 3 review call.	595.00	0.50	0.00	0.00	\$297.50
26131324	4/3/2023	Task	L310 Written Discovery	A107 Communicate (other outside counsel)	Stuart, Jeffrey	Consider approach on TIEC 2 and correspond with TIEC regarding the same.	595.00	0.30	0.00	0.00	\$178.50
26131370	4/10/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Consider potential objections to AXM 4.	595.00	0.40	0.00	0.00	\$239.00
26131404	4/20/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Review draft of AXM 4 responses.	595.00	0.50	0.00	0.00	\$367.00
26131406	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Participate in AXM 4 review call.	595.00	0.50	0.00	0.00	\$297.50
26131422	4/20/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Stuart, Jeffrey	Review passed version of SB 1016 related to compensation in rates and consider impact and approach for rate case.	595.00	0.70	0.00	0.00	\$416.50
26131438	4/19/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Participate in AXM 4 final review call.	595.00	0.50	0.00	0.00	\$297.50
26131466	4/4/2023	Task	L250 Other Written Motions/Submissions	A106 Communicate (with client)	Stuart, Jeffrey	Draft procedural schedule pleading and correspond with parties and client team regarding the same.	595.00	1.00	0.00	0.00	\$695.00
26131484	4/4/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Cumulative correspondence with client team regarding various issues with AXM 4 and review prior responses and objections for purposes of the same.	595.00	1.20	0.00	0.00	\$714.00
26132430	4/25/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend Staff's 3rd RFI review call.	230.00	0.20	0.00	0.00	\$46.00

26132818	4/26/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Participate in weekly client team status call.	595.00	0.40	0.00	0.00	\$238.00
26132922	4/2/2023	Task	L310 Written Discovery	A105 Communicate (in firm)	Hopkins, Marly	Confer with J. Stuart regarding objection deadlines and process.	555.00	0.20	0.00	0.00	\$111.00
26146528	4/3/2023	Task	L310 Written Discovery	A103 Draft/revise	Hopkins, Marly	Review and revise responses to OPUC's second set of discovery.	555.00	0.50	0.00	0.00	\$277.50
26146658	4/3/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hopkins, Marly	Participate in call with M. Deselich regarding responses to OPUC's second set of discovery.	555.00	0.50	0.00	0.00	\$277.50
26146711	4/14/2023	Task	L250 Other Written Motions/Submissions	A103 Draft/revise	Stuart, Jeffrey	Review and revise motion to consolidate appeals of municipal actions.	595.00	0.40	0.00	0.00	\$238.00
26146997	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call to discuss draft responses to OPUC 3.	505.00	0.20	0.00	0.00	\$101.00
26147011	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call to discuss draft responses to TIEC's 3rd Set of RFIs.	505.00	0.50	0.00	0.00	\$252.50
26147053	4/25/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to Staff's 3rd Set of RFIs.	505.00	0.30	0.00	0.00	\$151.50
26150319	4/3/2023	Task	L310 Written Discovery	A104 Review/analyze	Hopkins, Marly	Review and analyze AXM's fourth set of discovery and confer with C. Romer, R. Starkweather, and M. Deselich regarding same.	555.00	0.50	0.00	0.00	\$277.50
26150388	4/4/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hopkins, Marly	Prepare for and participate in call with C. Romer and J. Marshall regarding AXM's 4th discovery set.	555.00	0.50	0.00	0.00	\$277.50
26150399	4/4/2023	Task	L310 Written Discovery	A104 Review/analyze	Hopkins, Marly	Analyze and provide recommendation to J. Stuart regarding fuel-related questions in AXM's 4th discovery set.	555.00	0.30	0.00	0.00	\$166.50
26150419	4/4/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hopkins, Marly	Confer with M. Deselich and J. Stuart regarding response to AXM 4-48.	555.00	0.30	0.00	0.00	\$166.50
26151791	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to OPUC's 3rd Set of RFIs.	505.00	0.50	0.00	0.00	\$252.50
26151796	4/21/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to TIEC's 3rd Set of RFIs.	505.00	0.90	0.00	0.00	\$454.50
26151810	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to AXM's 5th Set of RFIs.	505.00	0.60	0.00	0.00	\$303.00
26151814	4/20/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to AXM's 4th Set of RFIs.	505.00	0.50	0.00	0.00	\$303.00
26151825	4/18/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to TIEC's 2nd Set of RFIs.	505.00	0.40	0.00	0.00	\$202.00
26151838	4/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend final review call for OPUC's 3rd RFI and update draft of same.	230.00	0.60	0.00	0.00	\$138.00
26151898	4/11/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to TIEC's 2nd Set of RFIs.	505.00	0.40	0.00	0.00	\$202.00
26151949	4/12/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to AXM's 4th and 5th Sets of RFIs.	505.00	0.70	0.00	0.00	\$353.50
26151971	4/12/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to AXM's 4th Set of RFIs.	505.00	1.00	0.00	0.00	\$505.00
26151978	4/13/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to 4th Set of RFIs.	505.00	1.00	0.00	0.00	\$505.00
26152011	4/3/2023	Task	L310 Written Discovery	A103 Draft/revise	Pinzur, Caren	Draft, revise and analyze responses to TIEC's 2nd Set of RFIs.	505.00	0.40	0.00	0.00	\$202.00
26152027	4/4/2023	Task	L310 Written Discovery	A104 Review/analyze	Pinzur, Caren	Review, analyze and revise draft supplemental responses to AXM's 2nd Set of RFIs.	505.00	0.50	0.00	0.00	\$252.50
26152082	4/6/2023	Task	L310 Written Discovery	A103 Draft/revise	Pinzur, Caren	Draft and revise responses to AXM's 5th Set of RFIs.	505.00	0.50	0.00	0.00	\$303.00

26152088	4/12/2023	Task	L310 Written Discovery	A103 Draft/revise	Pinzur, Caren	Draft, revise and analyze responses to AXM's 4th and 5th Sets of RFIs.	505.00	1.50	0.00	0.00	\$757.50
26152129	4/13/2023	Task	L310 Written Discovery	A103 Draft/revise	Pinzur, Caren	Draft, revise and analyze responses to AXM's 5th Set of RFIs.	505.00	0.40	0.00	0.00	\$202.00
26152157	4/18/2023	Task	L310 Written Discovery	A104 Review/analyze	Pinzur, Caren	Review and analyze draft responses to AXM's 4th and 5th Sets of RFIs.	505.00	0.30	0.00	0.00	\$151.50
26152181	4/19/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SPS regulatory and witnesses to discuss draft responses to AXM's 4th Set of RFIs.	505.00	0.50	0.00	0.00	\$252.50
26152203	4/19/2023	Task	L310 Written Discovery	A104 Review/analyze	Pinzur, Caren	Review and analyze responses to AXM's 4th Set of RFIs.	505.00	0.50	0.00	0.00	\$252.50
26152225	4/20/2023	Task	L310 Written Discovery	A103 Draft/revise	Pinzur, Caren	Revise and analyze responses to AXM's 5th Set of RFIs.	505.00	0.50	0.00	0.00	\$303.00
26152551	4/24/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review SPS's draft responses to OPUC's 3rd Set of RFIs on SharePoint.	455.00	0.20	0.00	0.00	\$91.00
26152611	4/25/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review SPS's discovery responses to be supplemented.	455.00	0.40	0.00	0.00	\$182.00
26152692	4/26/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in OPUC 3rd Final Review conference call with client.	455.00	0.20	0.00	0.00	\$91.00
26152985	4/12/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in AXM 4 Initial Review conference call with client.	455.00	1.00	0.00	0.00	\$455.00
26153020	4/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review M. Deselich's direct testimony.	455.00	1.50	0.00	0.00	\$682.50
26153068	4/20/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in AXM 4 Final Review (Questions 37-72) conference call with client.	455.00	0.70	0.00	0.00	\$318.50
26153139	4/21/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in OPUC 3rd Initial Review conference call.	455.00	0.50	0.00	0.00	\$273.00
26153190	4/21/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and revise certain SPS responses to OPUC's 3rd Set of RFIs.	455.00	0.50	0.00	0.00	\$273.00
26153472	4/12/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review S. Merrick's spreadsheet detailing her review of SPS's 45-day update materials on SharePoint site.	455.00	0.50	0.00	0.00	\$227.50
26153482	4/12/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review internal emails regarding objections to certain RFIs contained in AXM's 4th Set.	455.00	0.20	0.00	0.00	\$91.00
26159145	4/5/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hopkins, Marly	Confer with M. Deselich regarding responses to AXM's 4th set of discovery.	555.00	0.10	0.00	0.00	\$55.50
26161933	4/28/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend final review call for Sierra Club's 3rd RFI.	230.00	0.30	0.00	0.00	\$69.00
26162956	4/5/2023	Task	L250 Other Written Motions/Submissions	A107 Communicate (other outside counsel)	Stuart, Jeffrey	Revise draft procedural schedule and correspond with parties regarding the same.	595.00	0.50	0.00	0.00	\$297.50
26162982	4/5/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Consider approach for responding to AXM 4 and correspondence with Doyle team regarding the same.	595.00	0.60	0.00	0.00	\$357.00

26163068	4/6/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Review of draft responses to Staff's 2nd set of RFIs.	595.00	0.50	0.00	0.00	\$297.50
26163095	4/6/2023	Task	L250 Other Written Motions/Submissions	A107 Communicate (other outside counsel)	Stuart, Jeffrey	Correspondence with parties regarding procedural schedule and finalize same for filing.	595.00	0.70	0.00	0.00	\$416.50
26163193	4/6/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Phone call with N. Doyle regarding AXM 4.	595.00	0.20	0.00	0.00	\$119.00
26163164	4/6/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with client team regarding various questions in AXM 4.	595.00	0.60	0.00	0.00	\$357.00
26163168	4/4/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Faegh, Soroosh	Read, review, and analyze supplemental responses to Sierra Club's and AXM's requests for information and confer with C. Garza regarding same.	425.00	2.30	0.00	0.00	\$977.50
26163169	4/5/2023	Task	L190 Other Case Assessment, Dev and Admin	A103 Draft/revise	Faegh, Soroosh	Continue reviewing, reading, and analyzing Sierra Club's and AXM's responses to requests for information, revise same, and send revisions to C. Garza for review.	425.00	3.60	0.00	0.00	\$1,530.00
26163220	4/5/2023	Task	L250 Other Written Motions/Submissions	A104 Review/analyze	Stuart, Jeffrey	Review of 2nd motion to consolidate municipal decisions.	595.00	0.30	0.00	0.00	\$178.50
26163302	4/28/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with J. Rich Sparks regarding municipal decisions.	595.00	0.30	0.00	0.00	\$178.50
26163462	4/28/2023	Task	L420 Expert Witnesses	A102 Research	Stuart, Jeffrey	Research regarding prior NMPPRC dockets and PSCo dockets for purposes of developing W. Berger testimony.	595.00	3.50	0.00	0.00	\$2,082.50
26166827	4/3/2023	Task	L320 Document Production	A104 Review/analyze	Boldt, Michael	Work on discovery responses to Staff's second set of requests.	595.00	1.00	0.00	0.00	\$595.00
26166862	4/3/2023	Task	L320 Document Production	A104 Review/analyze	Boldt, Michael	Work on discovery responses to Sierra Club's second set of requests.	595.00	0.70	0.00	0.00	\$416.50
26166893	4/3/2023	Task	L320 Document Production	A104 Review/analyze	Boldt, Michael	Review discovery requests and consider witness assignments.	595.00	0.40	0.00	0.00	\$238.00
26166922	4/3/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendola, Lino	Review Staff's proposed procedural schedule and confer with J. Stuart regarding same.	805.00	0.70	0.00	0.00	\$563.50
26167273	4/5/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendola, Lino	Further review and discussion around Texas rate case procedural schedule.	805.00	0.40	0.00	0.00	\$322.00
26167328	4/4/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Prepare for and participate in litigation team group strategy discussion regarding rate case.	595.00	0.60	0.00	0.00	\$357.00
26167520	4/5/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendola, Lino	Review and analyze AXM's Fifth set of RFIs regarding depreciation and other issues and discuss same with lawyers addressing depreciation issues.	805.00	0.60	0.00	0.00	\$644.00
26168268	4/10/2023	Task	L320 Document Production	A104 Review/analyze	Boldt, Michael	Attention to discovery responses to AXM's fourth set of requests.	595.00	0.60	0.00	0.00	\$357.00
26168306	4/4/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Faegh, Soroosh	Continue to read, review, and analyze supplemental responses to Sierra Club's and AXM's requests for information.	425.00	1.20	0.00	0.00	\$610.00
26168416	4/11/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Prepare for and participate in litigation team group strategy discussion regarding rate case.	595.00	0.50	0.00	0.00	\$297.50
26168599	4/6/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hopkins, Marly	Review draft response to AXM 4th set of discovery and correspondence from C. Hough regarding same.	555.00	0.20	0.00	0.00	\$111.00
26168617	4/12/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Work on responses to AXM 4.	595.00	1.70	0.00	0.00	\$1,011.50
26168650	4/12/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Prepare for and participate in AXM 4 response teleconference.	595.00	1.20	0.00	0.00	\$714.00
26169110	4/13/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Prepare for and participate in AXM 4 response teleconference.	595.00	1.10	0.00	0.00	\$654.50
26169219	4/14/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Review Staff RFIs.	595.00	0.30	0.00	0.00	\$178.50
26169230	4/17/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Mendola, Lino	Review TIEC's third RFI and Sierra Club's third RFI and consider issues raised therein.	805.00	0.60	0.00	0.00	\$644.00

28169704	4/19/2023	Task	L320 Document Production	A103 Draft/revise	Boldt, Michael	Work on AXM 4 draft discovery response.	995.00	0.70	0.00	0.00	9416.50
28169716	4/19/2023	Task	L320 Document Production	A103 Draft/revise	Boldt, Michael	Participate in AXM 4 draft discovery response review call.	995.00	0.60	0.00	0.00	5357.00
28169806	4/20/2023	Task	L320 Document Production	A103 Draft/revise	Boldt, Michael	Work on draft response and participate in AXM 4 draft discovery response review call.	995.00	0.90	0.00	0.00	5535.90



Southwestern Public Service Company  
c/o Mr. Jeffrey B. Stuart  
Eversheds Sutherland (US) LLP  
600 Congress Avenue, Suite 2000  
Austin, TX 78701  
jeffreystuart@eversheds-sutherland.com

Invoice: 1302263  
Date: 04/11/2023  
Client: K2481  
Matter: 446851

Matter Name: 2022 Rate Case Expert Testimony

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**LEGAL SERVICES RENDERED AND COSTS ADVANCED THROUGH MARCH 31, 2023**

Total Fees:	\$	9,787.50
<b>Total Due This Invoice:</b>	<b>\$</b>	<b>9,787.50</b>



Tom Anson, Expert Witness  
Matter Name: 2022 Rate Case Expert  
Testimony  
Client: K2481 Matter: 446851  
Invoice: 1302263

April 11, 2023

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FOR LEGAL SERVICES RENDERED in connection with the above matter.

#### TIME AND FEE SUMMARY

Name	Initials	Rate	Hours	Amount
Tom Anson	TA	\$675.00	14.50	9,787.50
<b>Total</b>			<b>14.50</b>	<b>\$ 9,787.50</b>

#### DETAIL OF LEGAL SERVICES

Date	Initials	Description	Hours
03/01/23	TA	Telephone conference with Cathy Garza regarding 45-day update testimony matters; work on same; brief review of the Staff and intervenor proposed list of issues.	0.90
03/02/23	TA	Continued work regarding 45-day update testimony matters; brief review of the draft preliminary order.	1.20
03/03/23	TA	Continued work regarding 45-day update testimony matters.	0.10
03/10/23	TA	Continued work regarding 45-day update testimony matters including information review and further testimony drafting.	6.60
03/14/23	TA	Continued work regarding 45-day update testimony matters including information review, draft testimony revision matters, and conference call with the RCE team regarding same; work on update testimony affidavit matters.	3.70
03/16/23	TA	Continued work regarding 45-day update testimony matters including communications with Cathy Garza regarding same.	0.20
03/17/23	TA	Review update testimony matters.	0.10
03/21/23	TA	Review Staff's 2d RFI to SPS; review information relating to same; communications with Cathy Garza regarding same; communications with her and Mike Knapp regarding update testimony finalization matters.	0.70
03/23/23	TA	Review Staff's notice of no material deficiency in the rate change application.	0.10



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03/24/23	TA	Review relevant SPS 45 day update filings.	0.30
03/30/23	TA	Staff 2nd RFI Response Initial Review Zoom Meeting.	0.50
03/31/23	TA	Communications with the client team regarding the draft Staff 2nd RFI Responses.	0.10
<b>Total</b>			<b>14.50</b>



Southwestern Public Service Company  
c/o Mr. Jeffrey B. Stuart  
Eversheds Sutherland (US) LLP  
600 Congress Avenue, Suite 2000  
Austin, TX 78701  
jeffreystuart@eversheds-sutherland.com

Invoice: 1302263  
Date: 04/11/2023  
Client: K2481  
Matter: 446851

Matter Name: 2022 Rate Case Expert Testimony

## REMITTANCE

### Summary Of Account

Invoice Date	Invoice Number	Invoice Total	Payments	Balance
01/09/23	1274185	337.50	(80.00)	257.50
02/15/23	1285973	26,527.50	0.00	26,527.50
03/07/23	1291440	3,307.50	0.00	3,307.50
			<b>Total</b>	<b>\$ 30,092.50</b>

**Total Due This Invoice:** \$ **9,787.50**

Balances From Previous Invoices 30,092.50

**Total Amount Due** \$ **39,880.00**

FOR ACH/WIRE REMITTANCES:  
PNC Bank, N.A.  
500 First Ave.  
Pittsburgh, PA 15219  
ABA ACH: 041000124  
WIRE: 041000124  
Account: 4130223462  
Account Name: Clark Hill PLC  
SWIFTCODE: PNCCUS33

PLEASE REMIT TO:  
Clark Hill PLC  
P.O. Box 641858  
Pittsburgh, PA 15264-1858  
  
Fed ID: 38-0425840

Scan to Pay  
[clarkhill.com/invpayments](https://clarkhill.com/invpayments)



For assistance making a payment please call (313) 965-8290.

Invoice 1252887 - Date Received 6/16/23

<b>Vendor</b>	Eversheds Sutherland (US) LLP	<b>Billing Start Date</b>	5/1/2023	<b>Total Fees</b>	\$42,160.00
<b>Invoice Date</b>	6/15/2023	<b>Billing End Date</b>	5/31/2023	<b>Total Expenses - Other</b>	
<b>Date Received</b>	6/16/2023	<b>Invoice Amount</b>	\$45,467.50	<b>Total Invoiced Expenses - Experts</b>	\$42,160.00
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Experts</b>	\$3,307.50
<b>Pasting Status</b>	Posted				

Item	Date	Type	Category	Activity	Case/Party	Description	Warning	Rate	Hours	Cost	Fees	Auto
6400338	5/9/2023	Expense	E119 Experts			Professional Services: Professional Services Rendered through April 30, 2023/Clerk Hill. PLC, Jeffrey Stuart		3,307.50	1.00	0.00	0.00	\$3,307.50
26172290	5/1/2023	Task	L310 Written Discovery	A108 Communicate (other external)	Merrick, Sarah	Prepare and send service email for responses to OPUC's 3rd and TEC's 3rd RFIs.		230.00	0.20	0.00	0.00	\$46.00
26172495	5/1/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Stuart, Jeffrey	Correspondence with Mr. Sparks regarding OPUC 3.		595.00	0.20	0.00	0.00	\$119.00
26172498	5/1/2023	Task	L310 Written Discovery	A107 Communicate (other outside counsel)	Stuart, Jeffrey	Correspondence with OPUC regarding potential objections to OPUC 4.		595.00	0.40	0.00	0.00	\$238.00
26172509	5/1/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with W. Berger, M. Luh, and team regarding data needs for W. Berger rebuttal testimony.		595.00	0.60	0.00	0.00	\$357.00
26174719	5/2/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Stuart, Jeffrey	Correspondence with client team regarding OPUC 4.		595.00	0.20	0.00	0.00	\$119.00
26178328	5/3/2023	Task	L120 Analysis/Strategy	A105 Communicate (with client)	Garza, Cathy	Prepare for and participate in conference call regarding SPS's supplemental responses to Staff's 2nd Set of RFIs.		455.00	0.70	0.00	0.00	\$318.50
26179531	5/4/2023	Task	L420 Expert Witnesses	A105 Communicate (with client)	Stuart, Jeffrey	Phone call with W. Berger regarding rebuttal testimony.		595.00	0.50	0.00	0.00	\$297.50
26179536	5/4/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Stuart, Jeffrey	Correspondence with client team regarding OPUC 4.		595.00	0.30	0.00	0.00	\$178.50
26179907	5/3/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Merrick, Sarah	Attend Staff's 2nd RFI update call and analysis regarding same.		230.00	0.80	0.00	0.00	\$184.00
26179912	5/3/2023	Task	L310 Written Discovery	A108 Communicate (other external)	Merrick, Sarah	Prepare and send service email for response to Sierra Club's 3rd RFI.		230.00	0.10	0.00	0.00	\$23.00
26182089	5/4/2023	Task	L310 Written Discovery	A108 Communicate (other external)	Merrick, Sarah	Prepare and send service email for response to Staff's 3rd RFI.		230.00	0.10	0.00	0.00	\$23.00
26184446	5/5/2023	Task	L190 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Attention to recent interventions and update service list regarding same.		230.00	0.20	0.00	0.00	\$46.00
26186042	5/9/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review OPUC's 5th Set of RFIs.		455.00	0.10	0.00	0.00	\$45.50
26186313	5/1/2023	Task	L190 Other Case Assessment, Dev and Admin	A104 Review/analyze	Faegh, Soroosh	Research market compensation studies in connection with SB-1016.		425.00	2.00	0.00	0.00	\$850.00
26189834	5/9/2023	Task	L310 Written Discovery	A104 Review/analyze	Merrick, Sarah	Review supplemental response and exhibits to Staff's 2nd RFI for accuracy and completeness and communicate with C. Garza regarding same.		230.00	2.30	0.00	0.00	\$529.00
26192320	5/10/2023	Task	L310 Written Discovery	A103 Draft/revise	Merrick, Sarah	Update exhibits for first supplemental response to Staff's 2nd RFI and discuss same with C. Garza.		230.00	1.00	0.00	0.00	\$230.00
26195772	5/11/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Merrick, Sarah	Analyze regarding Texas Railroad Commission rate case testimony regarding employee compensation.		230.00	1.20	0.00	0.00	\$276.00

26195783	5/11/2023	Task	L310 Written Discovery	A103 Draft/revise	Merrick, Sarah	Review supplemental response to Sierra Club RFI 1-6 and communicate with J.R. Sparks.	230.00	0.20	0.00	0.00	\$46.00
26195788	5/11/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Merrick, Sarah	Attend call regarding supplemental responses to Staff's 2nd RFI.	230.00	0.70	0.00	0.00	\$161.00
26197856	5/15/2023	Task	L120 Analysis/Strategy	A102 Research	Garza, Cathy	Review Senate Bill 1016 and research Commission precedent regarding long-term incentive compensation in connection with M. Deselich's testimony.	455.00	1.10	0.00	0.00	\$500.50
26197856	5/15/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Review and respond to C. Hough's email regarding RFI No. AXM 7-22, including review of C. Hough's direct testimony.	455.00	0.30	0.00	0.00	\$136.50
26197869	5/11/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in conference call with client regarding SPS's supplemental response to Staff's 2nd Set of RFIs.	455.00	0.50	0.00	0.00	\$227.50
26197873	5/11/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare email to client regarding the draft proof of notice.	455.00	0.20	0.00	0.00	\$91.00
26197916	5/10/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and revise SPS's draft supplemental responses to Staff's 2nd Set of RFIs and exhibits thereto, including requesting rate case expense documentation.	455.00	1.20	0.00	0.00	\$546.00
26197923	5/10/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review, revise, and comment on SPS's proof of notice.	455.00	0.60	0.00	0.00	\$273.00
26198481	5/12/2023	Task	L110 Fact Investigation/Development	A102 Research	Merrick, Sarah	Review of PUC Staff report on cost recovery mechanisms.	230.00	0.70	0.00	0.00	\$161.00
26198492	5/12/2023	Task	L310 Written Discovery	A103 Draft/revise	Merrick, Sarah	Update supplemental exhibit SPS-Staff 1-27.	230.00	0.30	0.00	0.00	\$69.00
26201362	5/16/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Review draft response to AXM 6 and correspond with Romer team regarding the same.	595.00	0.20	0.00	0.00	\$119.00
26201367	5/16/2023	Task	L250 Other Written Motions/Submissions	A101 Plan and prepare for	Stuart, Jeffrey	Consider approach on supplemental testimony for SB 1016 in preparation for call with client team regarding the same.	595.00	0.70	0.00	0.00	\$416.50
26201370	5/16/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Review OPUC 5 draft responses.	595.00	0.30	0.00	0.00	\$178.50
26201471	5/15/2023	Task	L310 Written Discovery	A104 Review/analyze	Stuart, Jeffrey	Review of AXM 6 and 7 and consider approach for responding to the same.	595.00	0.40	0.00	0.00	\$238.00
26202511	5/15/2023	Task	L310 Written Discovery	A108 Communicate (other external)	Merrick, Sarah	Prepare and send service email for response to OPUC's 4th RFI and supplemental response to Sierra Club's 1st RFI.	230.00	0.10	0.00	0.00	\$23.00
26203337	5/16/2023	Task	L180 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Proofread and edit C. Garza's LTI Compensation Summary.	230.00	0.20	0.00	0.00	\$46.00
26204071	5/17/2023	Task	L110 Fact Investigation/Development	A106 Communicate (with client)	Garza, Cathy	Conference call with client regarding SB 1016 and SPS's compensation and benefits.	455.00	0.50	0.00	0.00	\$227.50
26204352	5/16/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Prepare supplemental direct testimony of M. Deselich.	455.00	5.40	0.00	0.00	\$2,457.00
26204395	5/16/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Prepare summary on long-term incentive compensation based on review of proposal for decision, order, and testimony filed in Docket No. 53601.	455.00	1.70	0.00	0.00	\$773.50
26204544	5/9/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding SPS's supplemental discovery responses to Staff's 2nd Set of RFIs.	455.00	0.70	0.00	0.00	\$318.50
26206895	5/17/2023	Task	L180 Other Case Assessment, Dev and Admin	A103 Draft/revise	Merrick, Sarah	Proofread and edit Deselich supplemental direct testimony.	230.00	1.00	0.00	0.00	\$230.00
26215442	5/16/2023	Task	L310 Written Discovery	A108 Communicate (other external)	Merrick, Sarah	Prepare and send service email for first supplemental response to Staff's 2nd RFI.	230.00	0.10	0.00	0.00	\$23.00
26216865	5/19/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review testimony regarding Talk Optimization Plan for purposes of trial preparation.	455.00	0.60	0.00	0.00	\$273.00
26222906	5/22/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare email to client with references to Talk Optimization Plan testimony for purposes of trial preparation.	455.00	0.60	0.00	0.00	\$273.00

26222810	5/22/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Revise M. Desalich's draft supplemental direct testimony regarding Senate Bill 1016 and its implications.	455.00	0.70	0.00	0.00	5318.50
26222943	5/18/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review SP5's draft responses to Question Nos. AXM 7-22 and 7-23.	455.00	0.50	0.00	0.00	\$227.50
26222869	5/18/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review Docket No. 51415 regarding long-term incentive compensation for purposes of rebuttal testimony and trial preparation.	455.00	1.00	0.00	0.00	5455.00
26231592	5/23/2023	Task	L310 Written Discovery	A103 Draft/revise	Merrick, Sarah	Fill in references to testimony in response to AXM RFI 6-9 and research regarding same.	230.00	1.00	0.00	0.00	5230.00
26233228	5/23/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SP5 regulatory, legal, and witnesses to discuss draft responses to AXM's 6th Set of RFIs.	505.00	1.00	0.00	0.00	5505.00
26233273	5/2/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Pinzur, Caren	Conference call with SP5 regulatory and legal teams to discuss draft responses to Staff's 3rd Set of RFIs.	505.00	0.20	0.00	0.00	\$101.00
26234703	5/24/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in conference call with client regarding M. Desalich's supplemental direct testimony.	455.00	0.60	0.00	0.00	\$273.00
26234765	5/24/2023	Task	L120 Analysis/Strategy	A102 Research	Garza, Cathy	Review testimony and exhibits in support of a gas utility's compensation and benefits for purposes of M. Desalich's supplemental direct testimony.	455.00	5.70	0.00	0.00	\$2,593.50
26234779	5/24/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and revise SP5's draft responses to AXM 7-3 through 7-5.	455.00	0.20	0.00	0.00	\$91.00
26234780	5/24/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Revise M. Desalich's draft supplemental direct testimony in advance of conference call.	455.00	0.20	0.00	0.00	\$91.00
26234787	5/24/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer with J. Rich Sparks regarding SP5's draft responses to AXM 7-3 through 7-5.	455.00	0.20	0.00	0.00	\$91.00
26234873	5/23/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in AXM 6th Initial Review conference call.	455.00	1.20	0.00	0.00	5545.00
26234875	5/23/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in AXM 6th Initial Review conference call.	455.00	1.00	0.00	0.00	5455.00
26234888	5/23/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Prepare email to S. Herrera regarding Question Nos. AXM 6-10 through 6-12.	455.00	0.20	0.00	0.00	\$91.00
26236790	5/24/2023	Task	L310 Written Discovery	A103 Draft/revise	Merrick, Sarah	Update responses to AXM's 7th RFI.	230.00	0.40	0.00	0.00	\$92.00
26236797	5/24/2023	Task	L110 Fact Investigation/Development	A102 Research	Merrick, Sarah	Analysis regarding RRC testimony on employee compensation and discuss same with C. Garza.	230.00	0.70	0.00	0.00	5161.00
26236804	5/25/2023	Task	L110 Fact Investigation/Development	A102 Research	Merrick, Sarah	Analysis regarding previous PUC testimony regarding incentive compensation.	230.00	1.70	0.00	0.00	5391.00
26246132	5/26/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Participate in Staff 4 review call.	595.00	0.50	0.00	0.00	5297.50
26246667	5/26/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Prepare email to client regarding protective order in connection with an exhibit to be provided in response to an RFI.	455.00	0.50	0.00	0.00	\$227.50
26246677	5/26/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and revise M. Desalich's draft supplemental direct testimony, incorporating comments from client.	455.00	1.50	0.00	0.00	\$682.50
26246810	5/25/2023	Task	L120 Analysis/Strategy	A102 Research	Garza, Cathy	Analyze compensation and benefits support from gas utility cases before the Railroad Commission of Texas.	455.00	0.70	0.00	0.00	\$318.50
26246906	5/8/2023	Task	L120 Analysis/Strategy	A108 Communicate (other external)	Garza, Cathy	Confer by phone with T. Anson regarding SP5's supplemental response to Staff's 2nd Set of RFIs.	455.00	0.10	0.00	0.00	\$45.50
26246921	5/8/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review SP5's draft supplemental responses to Staff's 2nd Set of RFIs.	455.00	1.10	0.00	0.00	\$500.50
26246964	5/9/2023	Task	L110 Fact Investigation/Development	A104 Review/analyze	Garza, Cathy	Identify items to address for purposes of SP5's supplemental response to Staff's 2nd Set of RFIs.	455.00	1.20	0.00	0.00	\$546.00
26248561	5/30/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in DS4634 - AXM 7th Final Review conference call.	455.00	0.90	0.00	0.00	\$409.50

26248562	5/30/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in D64634 - AXM 6th Final Review conference call.	455.00	0.50	0.00	0.00	\$227.50
26248575	5/30/2023	Task	L120 Analysis/Strategy	A106 Communicate (in firm)	Garza, Cathy	Participate in internal strategy meeting regarding legislation potentially impacting SPS.	455.00	0.20	0.00	0.00	\$91.00
26248576	5/30/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer by phone with C. Hough regarding AXM's 7th Set of RFI's, the protective order, and the procedural schedule.	455.00	0.20	0.00	0.00	\$91.00
26248578	5/30/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review Exhibits SPS-AXM 7-20(HSPM) and 7-21.	455.00	0.30	0.00	0.00	\$136.50
26248582	5/30/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer by phone with M. Deselich regarding his supplemental direct testimony.	455.00	0.30	0.00	0.00	\$136.50
26248604	5/15/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Continue to prepare summary of relationship between base rate cases and other cost recovery mechanisms.	455.00	2.60	0.00	0.00	\$1,183.00
26248606	5/10/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Prepare summary of relationship between base rate cases and other cost recovery mechanisms.	455.00	1.50	0.00	0.00	\$682.50
26249387	5/26/2023	Task	L110 Fact Investigation/Development	A102 Research	Merrick, Sarah	Review regarding citations in Deselich supplemental testimony.	230.00	0.40	0.00	0.00	\$92.00
26249393	5/26/2023	Task	L310 Written Discovery	A108 Communicate (other external)	Merrick, Sarah	Prepare and send service email regarding response to OPUC's 5th RFI.	230.00	0.10	0.00	0.00	\$23.00
26249756	5/16/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and analyze C. Hough's direct testimony.	455.00	1.00	0.00	0.00	\$455.00
26254739	5/31/2023	Task	L310 Written Discovery	A108 Communicate (other external)	Merrick, Sarah	Prepare and send service email for responses to Staff's 4th RFI and first supplemental response to Staff's 1st RFI.	230.00	0.10	0.00	0.00	\$23.00
26255906	5/31/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Cumulative correspondence with client team and TIEC regarding CCOS issues and scheduling of telephone conference.	595.00	0.50	0.00	0.00	\$297.50
26255988	5/31/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Participate in final review call regarding M. Deselich's supplemental direct testimony.	455.00	0.40	0.00	0.00	\$182.00
26256080	5/31/2023	Task	L120 Analysis/Strategy	A102 Research	Garza, Cathy	Review compensation and benefits testimony in gas utility cases before the Railroad Commission of Texas for purposes of M. Deselich's supplemental direct testimony.	455.00	0.80	0.00	0.00	\$364.00
26256113	5/31/2023	Task	L120 Analysis/Strategy	A106 Communicate (with client)	Garza, Cathy	Confer by phone with M. Deselich regarding his supplemental direct testimony.	455.00	0.50	0.00	0.00	\$227.50
26256134	5/31/2023	Task	L120 Analysis/Strategy	A104 Review/analyze	Garza, Cathy	Review and revise M. Deselich's supplemental direct testimony.	455.00	1.80	0.00	0.00	\$819.00
26256177	5/30/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Participate in AXM 6 review call.	595.00	0.50	0.00	0.00	\$297.50
26256201	5/30/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Consider approach for M. Deselich supplemental testimony.	595.00	1.30	0.00	0.00	\$773.50
26256289	5/31/2023	Task	L120 Analysis/Strategy	A103 Draft/revise	Garza, Cathy	Review and revise SPS's draft response to AXM 7-23 based on review of C. Hough's direct testimony.	455.00	0.80	0.00	0.00	\$409.50
26256353	5/23/2023	Task	L190 Other Case Assessment, Dev and Admin	A103 Draft/revise	Stuart, Jeffrey	Review and revise guidance to client regarding relationship of base rate cases and other cost recovery mechanisms and correspond with Ms. Kane regarding the same.	595.00	1.00	0.00	0.00	\$595.00
26256530	5/22/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Correspondence with AXM and client team regarding AXM 6.	595.00	0.20	0.00	0.00	\$119.00
26256614	5/17/2023	Task	L420 Expert Witnesses	A106 Communicate (with client)	Stuart, Jeffrey	Prepare for and participate in conference call regarding SB 1016.	595.00	1.00	0.00	0.00	\$595.00
26256821	5/17/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Participate in weekly core team meeting.	595.00	0.30	0.00	0.00	\$178.50
26256890	5/17/2023	Task	L420 Expert Witnesses	A104 Review/analyze	Stuart, Jeffrey	Review prior cases at RRC for purposes of supplemental testimony from M. Deselich regarding SB 1016.	595.00	2.30	0.00	0.00	\$1,368.50

Line item description contains a charge matching disallowed description: scheduling

26257056	5/19/2023	Task	L310 Written Discovery	A107 Communicate (other outside counsel)	Stuart, Jeffrey	Correspondence with AXM regarding AXM 6.	595.00	0.20	0.00	0.00	5119.00
26257152	5/19/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Stuart, Jeffrey	Correspondence with J. Sparks regarding AXM 7.	595.00	0.20	0.00	0.00	\$119.00
26257561	5/10/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Stuart, Jeffrey	Participate in weekly core team meeting.	595.00	0.30	0.00	0.00	5178.50
26258894	5/3/2023	Task	L320 Document Production	A108 Communicate (other external)	Boldt, Michael	Review OPUC discovery, confer with client, and confer with OPUC lawyers regarding potential objection and response.	595.00	1.30	0.00	0.00	\$773.50
26260264	5/4/2023	Task	L320 Document Production	A106 Communicate (with client)	Boldt, Michael	Participate in discovery review call.	595.00	1.00	0.00	0.00	5595.00
26260976	5/9/2023	Task	L120 Analysis/Strategy	A105 Communicate (in firm)	Boldt, Michael	Discuss SPS cases with litigation team.	595.00	1.00	0.00	0.00	5595.00
26260993	5/2/2023	Task	L120 Analysis/Strategy	A105 Communicate (in firm)	Boldt, Michael	Discuss SPS cases with litigation team.	595.00	0.80	0.00	0.00	\$476.00
26261011	5/10/2023	Task	L120 Analysis/Strategy	A105 Communicate (in firm)	Boldt, Michael	Work on discovery response final drafts and participate in review call.	595.00	0.90	0.00	0.00	\$535.50
26261028	5/11/2023	Task	L120 Analysis/Strategy	A105 Communicate (in firm)	Boldt, Michael	Work on discovery responses to Sierra Club and Staff RFI's.	595.00	1.80	0.00	0.00	5952.00
26261356	5/15/2023	Task	L320 Document Production	A103 Draft/revise	Boldt, Michael	Confer with Ms. Otto and work on draft discovery responses.	595.00	0.70	0.00	0.00	\$416.50
26261419	5/16/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Confer with litigation team and review, revise trial preparation discussion outline.	595.00	1.20	0.00	0.00	\$714.00
26261555	5/17/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Prepare for presentation of issues for large group witness training and trial preparation discussion.	595.00	2.00	0.00	0.00	\$1,190.00
26261600	5/18/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Participate in litigation team meeting regarding large group witness training and trial preparation discussion.	595.00	1.00	0.00	0.00	5595.00
26261631	5/19/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Prepare for and help lead large group witness training and trial preparation discussion.	595.00	2.70	0.00	0.00	\$1,606.50
26261868	5/23/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Prepare for and help lead large group witness training and trial preparation discussion.	595.00	2.30	0.00	0.00	\$1,368.50
26261890	5/23/2023	Task	L120 Analysis/Strategy	A101 Plan and prepare for	Boldt, Michael	Participate in discovery review call.	595.00	1.00	0.00	0.00	5595.00
26262789	5/30/2023	Task	L320 Document Production	A101 Plan and prepare for	Boldt, Michael	Prepare and review discovery responses.	595.00	0.90	0.00	0.00	5535.50

Timekeeper daily time entry exceeds the maximum allowed time of 10.00 hrs on : 1252886 (line item 26260788,26260667,26260872...)

Timekeeper daily time entry exceeds the maximum allowed time of 10.00 hrs on : 1252886 (line item 26261243,26261305,26261514)

Line item description contains a charge matching disallowed description: training

Line item description contains a charge matching disallowed description: training

Line item description contains a charge matching disallowed description: training

Line item description contains a charge matching disallowed description: training



Southwestern Public Service Company  
c/o Mr. Jeffrey B. Stuart  
Eversheds Sutherland (US) LLP  
600 Congress Avenue, Suite 2000  
Austin, TX 78701  
[jeffreystuart@eversheds-sutherland.com](mailto:jeffreystuart@eversheds-sutherland.com)

Invoice: 1291440  
Date: 03/07/2023  
Client: K2481  
Matter: 446851

Matter Name: 2022 Rate Case Expert Testimony

**LEGAL SERVICES RENDERED AND COSTS ADVANCED THROUGH FEBRUARY 28, 2023**

Total Fees:	\$	3,307.50
<b>Total Due This Invoice:</b>	<b>\$</b>	<b>3,307.50</b>





Tom Anson, Expert Witness  
Matter Name: 2022 Rate Case Expert  
Testimony  
Client: K2481 Matter: 446851  
Invoice: 1291440

March 7, 2023

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FOR LEGAL SERVICES RENDERED in connection with the above matter.

#### TIME AND FEE SUMMARY

Name	Initials	Rate	Hours	Amount
Tom Anson	TA	\$675.00	4.90	3,307.50
<b>Total 4.90</b>			<b>\$</b>	<b>3,307.50</b>

#### DETAIL OF LEGAL SERVICES

Date	Initials	Description	Hours
02/02/23	TA	Communications with Cathy Garza regarding rate case invoice information matters.	0.80
02/03/23	TA	Work regarding rate case invoice information and draft testimony matters. and communications with SPS, Cathy Garza, and Sarah Merrick regarding same.	0.80
02/05/23	TA	Communications with Cathy Garza and work regarding rate case expense testimony and invoice documentation matters.	0.50
02/06/23	TA	Work on rate case expense testimony and invoice documentation matters, and communications with Cathy Garza regarding same.	1.60
02/07/23	TA	Work on rate case expense testimony finalization matters and communications with SPS and with Cathy Garza regarding same.	0.70
02/08/23	TA	Review rate case expense testimony as filed and related application information.	0.40
02/09/23	TA	Communications with Cathy Garza regarding rate filing matters.	<del>0.10</del>
<b>Total</b>			<b>4.90</b>

Southwestern Public Service Company  
c/o Mr. Jeffrey B. Stuart  
Eversheds Sutherland (US) LLP  
600 Congress Avenue, Suite 2000  
Austin, TX 78701  
[jeffreystuart@eversheds-sutherland.com](mailto:jeffreystuart@eversheds-sutherland.com)

Invoice: 1291440  
Date: 03/07/2023  
Client: K2481  
Matter: 446851

Matter Name: 2022 Rate Case Expert Testimony

## REMITTANCE

### Summary Of Account

Invoice Date	Invoice Number	Invoice Total	Credits	Balance
01/09/23	1274185	387.50	(130.00)	257.50
02/15/23	1285973	26,527.50	0.00	26,527.50
<b>Total</b>				<b>\$ 26,785.00</b>

<b>Total Due This Invoice:</b>	<b>\$</b>	<b>3,307.50</b>
Balances From Previous Invoices		26,785.00
<b>Total Amount Due</b>	<b>\$</b>	<b>30,092.50</b>

FOR ACH/WIRE REMITTANCES:  
Citizens Bank, NA  
1 Citizens Drive  
Riverside, RI 02915  
ABA ACH: 241070417 WIRE:241070417  
Account: 4504282878  
Account Name: Clark Hill PLC  
SWIFTCODE: CTZIUS33

PLEASE REMIT TO:  
Clark Hill PLC P.O.  
Box 3760 Pittsburgh,  
PA 15230

Fed ID: 38-0425840

Scan to Pay  
[www.clarkhill.com/invoypayment](http://www.clarkhill.com/invoypayment)



For assistance making a payment please call (313) 965-8290.

LEGAL EXPENSE FOR  
HINKLE SHANOR LLP  
  
BOOKED IN JUNE 2023  
FOR DOCKET 54634

Invoice 362056 - Date Received 6/7/23

<b>Vendor</b>	Hinkle Shenor LLP	<b>Billing Start Date</b>	4/30/2023	<b>Total Fees</b>	\$2,040.00
<b>Invoice Date</b>	6/7/2023	<b>Billing End Date</b>	5/31/2023	<b>Total Expenses - Other</b>	\$678.01
<b>Date Received</b>	6/7/2023	<b>Invoice Amount</b>	\$2,718.01	<b>Total Invoice/Other Expenses - Experts</b>	\$2,718.01
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Experts</b>	
<b>Posting Status</b>	Posted				

Row	Date	Type	Summary	Activity	Case/Party	Description	Warning	Rate	Hours	Cost	Fees	Amount
1	5/9/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review OPUC's fifth discovery requests.		300.00	0.20	0.00	0.00	\$60.00
2	5/10/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Hardy, Dana	Review responses to OPUC's fifth discovery requests.		300.00	0.30	0.00	0.00	\$90.00
3	5/12/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review/analyze AXM's sixth discovery requests.		300.00	0.30	0.00	0.00	\$90.00
4	5/12/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review/analyze AXM's seventh discovery requests.		300.00	0.30	0.00	0.00	\$90.00
5	5/17/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Hardy, Dana	Telephone conference with SPS representatives regarding case status.		300.00	0.20	0.00	0.00	\$60.00
6	5/23/2023	Task	L440 Other Trial Preparation and Support	A105 Communicate (with client)	Hardy, Dana	Virtual meeting with witnesses regarding hearing preparation.		300.00	1.50	0.00	0.00	\$450.00
7	5/23/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and witnesses regarding responses to AXM's seventh discovery requests.		300.00	1.20	0.00	0.00	\$360.00
8	5/24/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and counsel regarding review of responses to OPUC's fifth discovery requests.		300.00	0.40	0.00	0.00	\$120.00
9	5/24/2023	Task	L190 Other Case Assessment, Dev and Admin	A106 Communicate (with client)	Hardy, Dana	Telephone conference with SPS regulatory regarding case status.		300.00	0.20	0.00	0.00	\$60.00
10	5/25/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review/analyze TIEC's fourth discovery requests to SPS.		300.00	0.30	0.00	0.00	\$90.00
11	5/25/2023	Task	L310 Written Discovery	A105 Communicate (with client)	Hardy, Dana	Telephone conference with J. Sparks regarding responses to AXM's fifth discovery requests.		300.00	0.30	0.00	0.00	\$90.00
12	5/28/2023	Task	L310 Written Discovery	A104 Review/analyze	Hardy, Dana	Review/analyze TIEC's fifth discovery requests.		300.00	0.20	0.00	0.00	\$60.00
13	5/30/2023	Task	L310 Written Discovery	A106 Communicate (with client)	Hardy, Dana	Virtual meeting with SPS regulatory and representatives regarding responses to AXM's sixth discovery requests.		300.00	0.50	0.00	0.00	\$150.00
14	5/30/2023	Task	L310 Written Discovery	A106 Communicate (other external)	Hardy, Dana	Virtual meeting with SPS regulatory and representatives regarding responses to AXM's seventh discovery requests.		300.00	0.50	0.00	0.00	\$150.00
15	5/30/2023	Task	L310 Written Discovery	A103 Draft/revise	Hardy, Dana	Revise responses to AXM's sixth discovery requests.		300.00	0.40	0.00	0.00	\$120.00
16	5/31/2023	Expense	E124 Other			NMGRT		169.58	1.00	0.00	0.00	\$169.58
17	4/30/2023	Expense	E124 Other			Portion of Collaboration Vendor Subscription/ Xcel Energy Inc. April 2023 - March 2024 (Mitrtech Holdings Inc)	Line item description contains a charge matching disallowed description: subscription, Collaborati, Mitrtech Line item description contains a charge matching disallowed description: Mitrtech	508.43	1.00	0.00	0.00	\$508.43

LEGAL EXPENSE FOR  
WINSTEAD PC

BOOKED IN JUNE  
2023 FOR DOCKET  
54634

Invoice 3224473 - Date Received 6/12/23

<b>Vendor</b>	Winstead PC	<b>Billing Start Date</b>	5/4/2023	<b>Total Fees</b>	\$6,480.00
<b>Invoice Date</b>	6/5/2023	<b>Billing End Date</b>	6/5/2023	<b>Total Expenses - Other</b>	\$500.00
<b>Original Date</b>	6/12/2023	<b>Invoice Amount</b>	\$6,980.00	<b>Total Invoice (incl. Expenses - Experts)</b>	\$6,980.00
<b>Matter Name</b>	SPS PUCT 2022 Texas Electric Rate Case	<b>Invoice Warnings</b>		<b>Total Expenses - Experts</b>	
<b>Posting Status</b>	Posted				

Line	Date	Type	Description	Ref/Vol	Process Step	Process Desc	Warning	Rate	Hours	Cost	Charge	Charge
1	5/10/2023	Task	L190 Other Case Assessment, A106 Communicate (with client)	Moss, Ron		Participate in call regarding case status		450.00	0.50	0.00	0.00	\$225.00
2	5/17/2023	Task	L190 Other Case Assessment, A106 Communicate (with client)	Moss, Ron		Participate in core team call		450.00	0.30	0.00	0.00	\$135.00
3	5/4/2023	Task	L310 Written Discovery A106 Communicate (with client)	Moss, Ron		Participate in call regarding OPUC 4 draft responses		450.00	0.50	0.00	0.00	\$225.00
4	5/18/2023	Task	L310 Written Discovery A106 Communicate (with client)	Moss, Ron		Prepare for and participate in call regarding OPUC discovery		450.00	0.50	0.00	0.00	\$225.00
5	5/18/2023	Task	L310 Written Discovery A104 Review/analyze	Moss, Ron		Review and edit draft responses to AXM and Staff discovery		450.00	1.20	0.00	0.00	\$640.00
6	5/23/2023	Task	L310 Written Discovery A106 Communicate (with client)	Moss, Ron		Prepare for and participate in calls regarding AXM and Staff discovery		450.00	1.30	0.00	0.00	\$695.00
7	5/24/2023	Task	L310 Written Discovery A106 Communicate (with client)	Moss, Ron		Prepare for and participate in calls regarding OPUC and AXM discovery		450.00	0.70	0.00	0.00	\$315.00
8	5/24/2023	Task	L310 Written Discovery A104 Review/analyze	Moss, Ron		Review and edit draft responses to discovery		450.00	1.50	0.00	0.00	\$675.00
9	5/29/2023	Task	L310 Written Discovery A104 Review/analyze	Moss, Ron		Review and edit draft responses to AXM 6 discovery		450.00	1.10	0.00	0.00	\$495.00
10	5/30/2023	Task	L310 Written Discovery A106 Communicate (with client)	Moss, Ron		Prepare for and participate in call regarding AXM 6 discovery responses		450.00	0.70	0.00	0.00	\$315.00
11	5/18/2023	Task	L440 Other Trial Preparation and Support A106 Communicate (with client)	Moss, Ron		Participate in call regarding meeting with witnesses to discuss hearing preparation		450.00	0.50	0.00	0.00	\$225.00
12	5/19/2023	Task	L440 Other Trial Preparation and Support A106 Communicate (with client)	Moss, Ron		Prepare for and participate in call with witnesses to prepare for hearing on the merits		450.00	3.50	0.00	0.00	\$1,620.00
13	5/23/2023	Task	L440 Other Trial Preparation and Support A106 Communicate (with client)	Moss, Ron		Prepare for and participate in meeting to discuss hearing preparation		450.00	2.00	0.00	0.00	\$900.00
14	5/1/2023	Expense	E123 Other professionals			Advance For Other Contract Services - Management Applications Consulting, Inc. (Pays by Check) - consulting services		500.00	1.00	0.00	0.00	\$500.00



**Management Applications Consulting, Inc.**

1103 Rocky Drive, Suite 201  
Reading, PA 19609-1157

T.I.N. 23-2293083

**Invoice**

Date	Invoice #
6/1/2023	20230605

<b>Bill To</b>
Winstead PC 401 Congress Avenue, Suite 2100 Austin, TX 78701 Attn: Ron Moss

<b>Ship To</b>
Reference: Xcel Energy / Southwestern Public Service, Texas

4 Weeks Ended 5/26/23

P/O #	Terms	Project	
	Net 60 Days	202301 SPS, TX Elec Rate Case Assist	
Hours	Description	Rate	Amount
2	Debbie L. Gajewski	250.00	500.00
		<b>Total</b>	<b>\$500.00</b>

---

**MANAGEMENT APPLICATIONS CONSULTING, INC.**

**Professional Services**

**May 2023**

**Debbie Gajewski**

**Winstead PC**

**W. O. #202301**

**Xcel Energy/Southwestern Public Service Co.  
Texas Electric Rate Case Support**

<b><u>Date</u></b>	<b><u>Time</u></b>	<b><u>Description</u></b>
05-23-23	2.00	Prepare data response for AXM 7-30 and AMX 7-31.
	<b>2.00</b>	<b>TOTAL HOURS</b>



CONSULTING  
EXPENSES FOR BURNS  
& MCDONNELL  
ENGINEERING CO.,  
INC.

BOOKED IN JUNE 2023  
FOR DOCKET 54634



CREATE AMAZING.

June 19, 2023

Invoice: 153749-2  
Federal ID: 43-0956142  
Client Purchase Order: 4501311069  
PO Line #: 00010  
Client Agreement: 6957

XCEL ENERGY INC ACCOUNTS PAYABLE PO BOX 840 DENVER CO 80201	<b>SEND PAYMENT TO:</b>  Burns & McDonnell Engineering Co., Inc. PO Box 411883 Kansas City, MO 64141-1883  Reference Invoice Number with Payment  <b>TERMS: NET 30 DAYS</b>	<b>WIRE INSTRUCTIONS:</b>  Account: Routing: 101000695 SWIFT Code: UMKCUS44 United Missouri Bank 1010 Grand KANSAS CITY, MO 64106 (816)-860-7000
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Professional Engineering Services for Decommissioning Study Regulatory & Testimony Support

SERVICE THROUGH: 31-May-2023

<u>Labor Classifications</u>	<u>Regular Hours</u>	<u>Regular Rate</u>	<u>Amount</u>
Managing Director	3.00	417.00	1,251.00
	3.00		1,251.00

Subtotal Amount	1,251.00
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TOTAL AMOUNT DUE THIS INVOICE	1,251.00 USD
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Contract Maximum	50,000.00
Less Total Billed to Date	18,066.00
Amount Remaining	31,934.00

AcctsPayable-PO@xcelenergy.com

**Thank you for your business. We appreciate the opportunity to serve you.**

Project Manager: Brittany Hixon +1 (816) 823-7881 brittany.hixon@1898andco.com  
Invoice Inquiry: Subhash Parke SSParke@burnsmcd.in

## Invoice 153749-2

Labor Summary Amount				
Reg. Hours	Prem. Hours	Number	Name	Classification
3.00		4607	Kopp, Jeff	Managing Director
3.00				

**Management Applications Consulting, Inc.  
1103 Rocky Drive, Suite 201, Reading, Pennsylvania**

**Debbie L. Gajewski  
610-670-9199**

**dgajewski@manapp.com**

January 4, 2023

Mr. Ron Moss  
Winstead PC - rhmoss@winstead.com

Dear Mr. Moss,

I am pleased to submit this proposal to provide support to Xcel Energy for the 2023 Texas Electric rate case under the direction of Xcel Energy. I understand that you are filing an electric rate case in February 2023 and the proposed support I will provide to Xcel Energy is based on my understanding of your needs are:

1. Provide technical support such as data input, programming and VBA support to the cost of service model to ensure the accuracy of the model;
2. Provide expert support such as providing assistance and addressing issues found in the cost of service studies as needed;
3. Other ad hoc support needed by the Company.

The actual professional fees for this assignment will be based on the actual hours worked based on the requirement of the Company of the rate of \$250 per hour. The total hours of work are not to exceed 120 hours and the total actual professional fees will not exceed \$30,000. Any increase in the 120 hours and total fees will be approved in writing by Excel Energy prior to additional hours being incurred.

In addition to the professional fees quoted above, expenses while on assignment (e.g. transportation, hotel, subsistence and telephone) will be billed to Xcel Energy at actual cost (no mark-up). Other expenditures incurred on Xcel Energy's behalf, such as courier costs, will also be charged at actual cost.

If you have any questions, please contact me at the phone number or Email address shown above.

Sincerely,

Debbie Gajewski  
Managing Consultant

Attachments:  
Billing Rates  
MAC Terms and Conditions

**MANAGEMENT APPLICATIONS CONSULTING, INC.  
BILLING TERMS AND CONDITIONS**

**Professional Services:**

Charges for professional services will be at the standard hourly rates as shown on the attached schedule. Time charges will be made only while actually at work on the assignment and for the travel time during normal working hours, where applicable.

**Out-of-Pocket Expenses:**

In addition to the cost of professional services, travel and living expenses while engaged on a project away from the home office, such as commercial travel fares, meals, lodging, telephone and rented automobiles, will be billed at cost. Use of a personal car to make a trip in your interest will be billed at the currently allowed IRS rate. Outside services or extraordinary expenses, when specifically authorized and incurred on your behalf, will be billed at cost. ~~Other expenses such as telephone, reproduction, postage, freight, and data processing will be billed at 5% of professional service revenues.~~ Where applicable, local, state and other taxes will be charged in addition to Professional Services and out-of-pocket expenses.

**Method of Billing:**

Billings will be rendered monthly for the preceding month's services performed and expense incurred on your behalf. Invoices will be due and payable thirty days after receipt. Our assignment may be interrupted or terminated at any time without further liability other than for the charges and expenses incurred up to the date of such interruption or termination.

**Software Rights:**

Any software developed in the course of this assignment will be considered confidential trade secrets and will become the property of MAC. If requested, a copy of this software will be provided to you for your exclusive use in conducting your own business. This software is not to be copied, except for archival purposes, nor is it to be distributed to any third party without the expressed written consent of MAC. MAC retains the sole rights to reproduce, copy, distribute, and license this software.

**Confidentiality:**

In the course of the assignment, MAC may be provided confidential, proprietary and/or secret materials of the client that are not known publicly. MAC will maintain all confidences and shall restrict such information to its personnel with a need to know. MAC will not copy or record any confidential information except as reasonably necessary for the performance of its assignment. MAC will not remove any such information from client's premises unless specifically provided by the client. MAC will dispose of any and all confidential materials in any manner as may be directed by client.

**MANAGEMENT APPLICATIONS CONSULTING, INC.**

**BILLING RATES**

<b><u>CLASSIFICATION</u></b>	<b><u>HOURLY BILLING RATE</u></b>
Managing Consultant	\$250
Senior Consultant	\$225
Consultant	\$150
Analyst	\$125
Junior Analyst	\$100
Technical Assistant	\$ 75
Word Processing	\$ 50



## **Filing Receipt**

**Filing Date - 2023-08-22 03:14:54 PM**

**Control Number - 54634**

**Item Number - 417**

**SOAH DOCKET NO. 473-23-14020  
PUC DOCKET NO. 54634**

**APPLICATION OF SOUTHWESTERN § BEFORE THE STATE OFFICE  
PUBLIC SERVICE COMPANY FOR § OF  
AUTHORITY TO CHANGE RATES § ADMINISTRATIVE HEARINGS**

**ERRATA TO THE DIRECT TESTIMONY OF VONETTA JACKSON**

The Staff (Staff) of the Public Utility Commission of Texas (Commission) files the following Errata to the Direct Testimony of Vonetta Jackson, originally filed on August 11, 2023. These errata add the legal expenses incurred by the Alliance of Xcel Municipalities into Ms. Jackson's testimony along with a few formatting and other small edits. This filing includes a redlined copy, and a clean copy of Mr. Jackson's testimony with errata, both attached hereto with each copy having all attachments mentioned in the testimony.

Date: August 22, 2023

Respectfully submitted,

**PUBLIC UTILITY COMMISSION OF TEXAS  
LEGAL DIVISION**

Marisa Lopez Wagley  
Division Director

/s/ Andy Aus  
Andy Aus  
State Bar No. 24077782  
Anthony Kanalas  
State Bar No. 24125640  
Bradley Reynolds  
State Bar No. 24125839  
David Berlin  
State Bar No. 24126088  
1701 N. Congress Avenue  
P.O. Box 13326  
Austin, Texas 78711-3326  
(512) 936-7292  
(512) 936-7268 (facsimile)  
[andy.aus@puc.texas.gov](mailto:andy.aus@puc.texas.gov)



Page 2 of 2

**SOAH DOCKET NO. 473-23-14020  
PUC DOCKET NO. 54634**

**CERTIFICATE OF SERVICE**

I certify that unless otherwise ordered by the presiding officer, notice of the filing of this document will be provided to all parties of record via electronic mail on August 22, 2023 in accordance with the Second Order Suspending Rules, issued in Project No. 50664.

/s/ Andy Aus  
Andy Aus

SOAH DOCKET NO. 473-23-14020  
PUC DOCKET NO. 54634

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APPLICATION OF SOUTHWESTERN  
PUBLIC SERVICE COMPANY FOR  
AUTHORITY TO CHANGE RATES

BEFORE THE STATE OFFICE  
OF  
ADMINISTRATIVE HEARINGS



ERRATA TO DIRECT TESTIMONY OF  
VONETTA JACKSON  
RATE REGULATION DIVISION  
PUBLIC UTILITY COMMISSION OF TEXAS  
AUGUST ~~14~~22, 2023

DOCKET NO. 54634 SOUTHWESTERN PUBLIC SERVICE COMPANY Page 1 of 22

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V.RECOMMENDATION RELATED TO SPS'S DOCKET NO. 54634 RATE-CASE EXPENSES .....	<u>Error! No bookmark name given.</u> 46
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#### ATTACHMENTS

VJ-1	Office of the Attorney General July 17, 2023, Memorandum
VJ-2	Docket No. 51625 Expense Summary
VJ-3	Docket No. 51802 Expense Summary
VJ-4	Docket No. 52210 Expense Summary
VJ-5	Docket No. 52446 Expense Summary
VJ-6	Docket No. 52451 Expense Summary
VJ-7	Docket No. 53034 Expense Summary
VJ-8	Docket No. 53634 Expense Summary
VJ-9	Staff's Calculation of Adjustments to SPS's Request

DIRECT TESTIMONY OF VONETTA JACKSON

DOCKET NO. 54634 SOUTHWESTERN PUBLIC SERVICE COMPANY Page 2 of 22

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1 I. STATEMENT OF QUALIFICATIONS

2 Q. Please state your name and business address.

3 A. My name is Vonetta Jackson. My business address is 1701 N. Congress Avenue, Austin,  
4 Texas.

5 Q. By whom are you employed and in what position?

6 A. I am employed by the Public Utility Commission of Texas (Commission) as Regulatory  
7 Accountant in the Rate Regulation Division.

8 Q. What are your principal responsibilities at the Commission?

9 A. My responsibilities include testifying as an expert witness on accounting matters in rate  
10 cases and other applications filed with the Commission and participating in the overall  
11 examination, review, and analysis of such applications.

12 Q. Please describe your professional and educational background.

13 A. In May 2003, I graduated from Xavier University of Louisiana with a Bachelor of Science  
14 degree in accounting. In June 2012, I obtained a Master of Accounting and Financial  
15 Management from Keller Graduate School of Management. Having earned 150 hours, the  
16 Texas State Board of Public Accountancy has ruled me an eligible candidate to sit for the  
17 Uniform Certified Public Accountant Exam. From November 2011 to July 2022, I was  
18 employed by the Railroad Commission of Texas as an auditor. In August 2022, I began  
19 employment with the Commission in my current position. I also serve as an accounting  
20 adjunct at Houston Community College and Lone Star College.

21 Q. Have you previously filed testimony in regulatory proceedings before the  
22 Commission?

23 A. Yes, I previously filed testimony in Docket No. 54807, *Application of Texas-New Mexico*  
24 *Power Company to Amend its Distribution Cost Recovery Factor* and Docket No. 54040,

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DIRECT TESTIMONY OF VONETTA JACKSON

DOCKET NO. 54634 SOUTHWESTERN PUBLIC SERVICE COMPANY Page 3 of 22

*Application of Southwestern Electric Power Company for Approval to Amend Its  
Transmission Cost Recovery Factor.*

**II. PURPOSE AND SCOPE OF TESTIMONY**

**Q. What is the purpose of your testimony?**

A. The purpose of my testimony is to provide my recommendation related to the review of rate-case expenses incurred by Southwestern Public Service Company (SPS) and the Alliance of Xcel Municipalities (AXM, also referred to as the City of Amarillo in documentation provided by SPS in this proceeding) in Docket Nos. 51625,<sup>1</sup> 51802,<sup>2</sup> 52210,<sup>3</sup> 52446,<sup>4</sup> 52451,<sup>5</sup> 53034,<sup>6</sup> and this rate case.<sup>7</sup> My recommendation addresses the following issues from the Commission's Preliminary Order that was filed on March 9, 2023 in this case.

27. What are SPS's reasonable and necessary rate-case expenses in accordance with PURA § 36.061(b)(2) and 16 TAC § 25.245? Does this amount include any anticipated expenses to appeal this proceeding or a prior rate-case proceeding? Is it appropriate to recover expenses associated with appeals of prior Commission orders before the appeals are completed?

a. If attorney's fees are included in the rate-case expenses, are they supported by the testimony or affidavit of a licensed attorney qualified to render admissible opinions on the reasonableness of the attorney's fees?

<sup>1</sup> *Application of Southwestern Public Service Company for Authority to Revise Its Fuel Factor Formula and Related Relief*, Docket No. 51625, Order (Nov. 19, 2021).

<sup>2</sup> *Application of Southwestern Public Service Company for Authority to Change Rates*, Docket No. 51802, Order (May 20, 2022).

<sup>3</sup> *Application of Southwestern Public Service Company to Implement an Interim Net Surcharge for Under-Collected Fuel Costs*, Docket No. 52210, Order (Dec. 15, 2022).

<sup>4</sup> *Application of Southwestern Public Service Company to Implement a Credit for the Hold-Harmless Payment from Lubbock Power and Light to Southwestern Public Service Company*, Docket No. 52446, Order (Apr. 4, 2022).

<sup>5</sup> *Application of Southwestern Public Service Company for Approval of Advanced Metering System (AMS) Deployment Plan, AMS Surcharge, and Non-Standard Metering Service Fees*, Docket No. 52451, Order (Jul. 14, 2022).

<sup>6</sup> *Application of Southwestern Public Service Company for Authority to Reconcile Fuel and Purchased Power Costs*, Docket No. 53034, Order (Mar. 9, 2023).

<sup>7</sup> Application, Direct Testimony of Brook Trammell at 85.

DIRECT TESTIMONY OF VONETTA JACKSON

DOCKET NO. 54634 SOUTHWESTERN PUBLIC SERVICE COMPANY Page 4 of 22

28. What are the intervening cities' reasonable rate-case expenses in accordance with PURA § 33.023(b) and 16 TAC § 25.245? Does this amount include any anticipated expenses to appeal this proceeding or a prior rate-case proceeding?

a. If attorney's fees are included in the rate-case expenses, are they supported by the testimony or affidavit of a licensed attorney qualified to render admissible opinions on the reasonableness of the attorney's fees?

**Q. What is the basis of your recommendation?**

A. The basis of my recommendation is my review of SPS's rate filing package, 45-Day Update, accompanying work papers, responses to requests for information (RFIs), and the testimony filed on behalf of SPS and AXM. I verified the accuracy of schedules in the application and RFI responses and reviewed expenditure categories for reasonableness and necessity.

**Q. What standard do you use to make your determination concerning the overall reasonableness of the rate-case expenses?**

A. The standard that I rely upon is 16 Texas Administrative Code (TAC) § 25.245(b), which states:

Requirements for claiming recovery of or reimbursement for rate-case expenses.

A utility or municipality requesting recovery of or reimbursement for its rate-case expenses shall have the burden to prove the reasonableness of such rate-case expenses by a preponderance of the evidence. A utility or municipality seeking recovery of or reimbursement for rate-case expenses shall file sufficient information that details and itemizes all rate-case expenses, including, but not limited to, evidence verified by testimony or affidavit, showing:

- (1) the nature, extent, and difficulty of the work done by the attorney or other professional in the rate case;
- (2) the time and labor required and expended by the attorney or other professional;
- (3) the fees or other consideration paid to the attorney or other professional for the services rendered;
- (4) the expenses incurred for lodging, meals and beverages, transportation, or other services or materials;
- (5) the nature and scope of the rate case, including:
  - (A) the size of the utility and number and type of consumers served;
  - (B) the amount of money or value of property or interest at stake;
  - (C) the novelty or complexity of the issues addressed;

DIRECT TESTIMONY OF VONETTA JACKSON

DOCKET NO. 54634 SOUTHWESTERN PUBLIC SERVICE COMPANY Page 5 of 22

(D) the amount and complexity of discovery;  
(E) the occurrence and length of a hearing; and  
(6) the specific issue or issues in the rate case and the amount of rate-case  
expenses reasonably associated with each issue.

**Q. Do you use an additional standard to make your determination concerning the overall reasonableness of the rate-case expenses?**

**A.** Yes. I rely additionally upon 16 TAC § 25.245(c), which states:  
Criteria for review and determination of reasonableness.

In determining the reasonableness of the rate-case expenses, the presiding officer shall consider the relevant factors listed in subsection (b) of this section and any other factor shown to be relevant to the specific case. The presiding officer shall decide whether and the extent to which the evidence shows that:

(1) the fees paid to, tasks performed by, or time spent on a task by an attorney or other professional were extreme or excessive;  
(2) the expenses incurred for lodging, meals and beverages, transportation, or other services or materials were extreme or excessive;  
(3) there was duplication of services or testimony;  
(4) the utility's or municipality's proposal on an issue in the rate case had no reasonable basis in law, policy, or fact and was not warranted by any reasonable argument for the extension, modification, or reversal of commission precedent;  
(5) rate-case expenses as a whole were disproportionate, excessive, or unwarranted in relation to the nature and scope of the rate case addressed by the evidence pursuant to subsection (b)(5) of this section; or  
(6) the utility or municipality failed to comply with the requirements for providing sufficient information pursuant to subsection (b) of this section.

**Q. On whose behalf are you testifying?**

**A.** I am testifying on behalf of Commission Staff.

### **III. DISCUSSION OF SPS'S REQUEST**

**Q. Please describe SPS's request for recovery of rate-case expenses.**

**A.** In this proceeding, SPS requests \$9,862,118 in total rate-case expenses that were incurred or are expected to be incurred by SPS and the intervening municipalities in the following dockets.<sup>8</sup>

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<sup>8</sup> Update Testimony of Brooke A. Trammell (Trammell Update) at 23.

DOCKET NO. 54634 SOUTHWESTERN PUBLIC SERVICE COMPANY Page 6 of 22

**Table VJ-1: SPS's Requested Rate-Case Expenses<sup>9</sup>**

Docket	SPS Expenses	AXM Expenses	Total
51625 –Fuel Formula (Trailing expenses not included in Docket No. 51802)	\$80,297	\$87,865	\$168,162
51802 – 2021 Rate Case (Trailing expenses not included in Docket No. 51802)	\$425,522	\$561,986	\$987,508
52210 – Fuel Surcharge	\$335,426	\$86,274	\$421,700
52446 – LP&L Hold Harmless Credit	\$10,270	N/A	\$10,270
52451 – Advanced Metering System (AMS) Deployment Plan	\$506,852	\$129,665	\$636,517
53034 – Fuel Reconciliation	\$1,812,726	\$244,945	\$2,057,671
2023 Texas Rate Case	\$4,580,290	\$1,000,000	\$5,580,290
<b>Total Requested Amount</b>	<b>\$7,751,383</b>	<b>\$2,110,735</b>	<b>\$9,862,118</b>

However, SPS's responses to Staff's RFIs in conjunction with SPS witness Michael Knapp's update testimony produce the following total requested rate-case expenses incurred thus far, exclusive of estimated amounts.

**Table VJ-2: Total Requested Rate-Case Expenses**

Docket	SPS Expenses	AXM Expenses	Total
51625 –Fuel Formula (Trailing expenses not included in Docket No. 51802) (through December 2022)	\$79,302 <sup>10</sup>	\$86,865 <sup>11</sup>	\$166,167 <sup>12</sup>

<sup>9</sup> *Id.*

<sup>10</sup> Update Testimony of Michael K. Knapp (Knapp Update) at native spreadsheet 51625-Summary of Trailing Charges Knapp Update Testimony (Attachment VJ-2).

<sup>11</sup> *Id.*

<sup>12</sup> *Id.*

DIRECT TESTIMONY OF VONETTA JACKSON



DOCKET NO. 54634 SOUTHWESTERN PUBLIC SERVICE COMPANY Page 7 of 22

51802 – 2021 Rate Case (Trailing expenses not included in Docket No. 51802 through December 2022)	\$414,522- <sup>13</sup>	\$556,986- <sup>14</sup>	\$971,508- <sup>15</sup>
52210 – Fuel Surcharge (through March 2023)	\$334,926- <sup>16</sup>	\$81,274- <sup>17</sup>	\$416,200- <sup>18</sup>
52446 – LP&L Hold Harmless Credit (through December 2022)	\$10,270- <sup>19</sup>	N/A	\$10,270- <sup>20</sup>
52451 – Advanced Metering System (AMS) Deployment Plan (through March 2023)	\$493,148- <sup>21</sup>	\$119,665- <sup>22</sup>	\$612,813- <sup>23</sup>
53034 – Fuel Reconciliation (through March 2023)	\$1,638,731- <sup>24</sup>	\$234,945- <sup>25</sup>	\$1,873,675- <sup>26</sup>
2023 Texas Rate Case (through March 2023)	\$430,423- <sup>27</sup>	\$8,125- <sup>28</sup>	\$438,548- <sup>29</sup>
<b>Total Requested Amount</b>	<b>\$3,401,322</b>	<b>\$1,087,860</b>	<b>\$4,489,182</b>

<sup>13</sup> Update Testimony of Michael K. Knapp (Knapp Update) at native spreadsheet 51802-Summary of Trailing Charges Knapp Update Testimony (Attachment VJ-3).

<sup>14</sup> *Id.*

<sup>15</sup> *Id.*

<sup>16</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.1(SUPP01) (Attachment VJ-4).

<sup>17</sup> *Id.*

<sup>18</sup> *Id.*

<sup>19</sup> Update Testimony of Michael K. Knapp (Knapp Update) at native spreadsheet 52446-Summary of LPL RCE(Attachment VJ-5).

<sup>20</sup> *Id.*

<sup>21</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.2(SUPP01) (Attachment VJ-6).

<sup>22</sup> *Id.*

<sup>23</sup> *Id.*

<sup>24</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.3(SUPP01) (Attachment VJ-7).

<sup>25</sup> *Id.*

<sup>26</sup> *Id.*

<sup>27</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.4(SUPP01) (Attachment VJ-8).

<sup>28</sup> *Id.*

<sup>29</sup> *Id.*

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- 1 **Q. Does the total that you present in Table VJ-1 differ from SPS's request as stated in**  
2 **its response to Staff's Second RFI and its Update Testimony of Michael Knapp?**  
3 **A.** Yes. The presentation of the total in Table VJ-1 differs from SPS's total expenses to date  
4 as presented in Table VJ-2. Table VJ-1 includes amounts that SPS estimated but has not  
5 actually incurred or paid. Table VJ-2 represents the amounts as obtained in SPS's  
6 responses to Staff's Second RFI and the Update Testimony of Michael Knapp for  
7 expenses incurred and paid without regard to the estimated expenses.  
8 **Q. Please describe the rate-case expenses that SPS seeks to recover in relation to the**  
9 **current proceeding.**  
10 **A.** As shown in Table VJ-3 below, the composition of SPS's Docket No. 54634 rate-case  
11 expenses in the requested amount of \$430,423.00 consists of the listed disciplines,  
12 vendors, and amounts. The components do not include the expenses reimbursed to  
13 AXM.<sup>30</sup>

**Table VJ-3 (Docket No. 54634 Expenses of SPS)**

Discipline	Vendor	Amount
Consultant	Alliance Consulting Group	\$24,384 <sup>31</sup>
Consultant	Scott Madden – D'Ascendis	\$59,479 <sup>32</sup>
Consultant	Scott Madden – Starkweather	\$29,780 <sup>33</sup>
Consultant	Utility Credit Consulting - Shipman	\$14,531 <sup>34</sup>

<sup>30</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.4(SUPP01) (Attachment VJ-8).

<sup>31</sup> *Id.*

<sup>32</sup> *Id.*

<sup>33</sup> *Id.*

<sup>34</sup> *Id.*

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Consultant	Deloitte	\$75,000 <sup>35</sup>
Legal Counsel	Courtney, Countiss, Brian & Bailey	\$24,128 <sup>36</sup>
Legal Counsel	Eversheds Sutherland	\$63,050 <sup>37</sup>
Legal Counsel	Hinkle Shanor LLP	\$24,390 <sup>38</sup>
Legal Counsel	Winstead PC	\$41,310 <sup>39</sup>
Miscellaneous	Employee and Other Expenses	\$74,371 <sup>40</sup>
Total		\$430,423

- 1 **Q.** Please describe the expenses incurred by SPS related to Docket No. 51802?
- 2 **A.** Table VJ-4 below provides the composition of the Docket No.51802 rate-case expenses
- 3 in the requested amount of \$414,522.09, which consists of the listed disciplines, vendors,
- 4 and amounts.

**Table VJ-4 (Docket No. 51802 Expenses of SPS)**

Discipline	Amount
Consulting	\$ 65,730.00 <sup>41</sup>
Legal Counsel	\$ 347,060.68 <sup>42</sup>

<sup>35</sup> *Id.*

<sup>36</sup> *Id.*

<sup>37</sup> *Id.*

<sup>38</sup> *Id.*

<sup>39</sup> *Id.*

<sup>40</sup> *Id.*

<sup>41</sup> Update Testimony of Michael K. Knapp (Knapp Update) at native spreadsheet 51802-Summary of Trailing Charges Knapp Update Testimony (Attachment VJ-3).

<sup>42</sup> *Id.*

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Miscellaneous	\$ 1,731.41 <sup>43</sup>
<b>Total</b>	<b>\$ 414,522.09<sup>44</sup></b>

1 **Q. In this proceeding, does SPS seek recovery of rate-case expenses related to Docket**  
2 **No. 51625?**

3 A. Yes. Table VJ-5 below provides the composition of the Docket No. 51625 rate-case  
4 expenses in the requested amount of \$79,302.42, which consists of the listed disciplines,  
5 vendors, and amounts.

**Table VJ-5 (Docket No. 51625 Expenses of SPS)**

<b>Discipline</b>	<b>Vendor</b>	<b>Amount</b>
Legal Counsel	Baker Botts L.L.P.	\$ 78,045.50 <sup>45</sup>
Miscellaneous	Employee and Other Expenses	\$ 1,256.92 <sup>46</sup>
<b>Total</b>		<b>\$ 79,302.42<sup>47</sup></b>

6 **Q. In this proceeding, does SPS seek recovery of rate-case expenses related to Docket**  
7 **No. 52210?**

8 A. Yes. Table VJ-6 below provides the composition of the Docket No. 51802 rate-case  
9 expenses in the requested amount of \$334,926.06, which consists of the listed disciplines,  
10 vendors, and amounts.

11  
12  
13

<sup>43</sup> *Id.*

<sup>44</sup> *Id.*

<sup>45</sup> *Id.* at 1-4.

<sup>46</sup> *Id.*

<sup>47</sup> *Id.*

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**Table VJ-6 (Docket No. 52210 Expenses of SPS)**

Discipline	Vendor	Amount
Legal Counsel	Baker Botts L.L.P.	\$ 318,387.20 <sup>48</sup>
Miscellaneous	Employee and Other Expenses	\$ 16,538.86 <sup>49</sup>
<b>Total</b>		<b>\$ 334,926.06<sup>50</sup></b>

1 **Q. In this proceeding, does SPS seek recovery of rate-case expenses related to Docket**  
2 **No. 52446?**

3 **A. Yes. Table VJ-7 below provides the composition of the Docket No. 52446 rate-case**  
4 **expenses in the requested amount of \$10,269.56, which consists of the listed disciplines,**  
5 **vendors, and amounts.**

**Table VJ-7 (Docket No. 52446 Expenses of SPS)**

Discipline	Vendor	Amount
Legal Counsel	Winstead PC	\$ 9,630.00 <sup>51</sup>
Miscellaneous	Employee and Other Expenses	\$ 639.56 <sup>52</sup>
<b>Total</b>		<b>\$ 10,269.56<sup>53</sup></b>

<sup>48</sup> *Id.* at 1-4.

<sup>49</sup> *Id.*

<sup>50</sup> *Id.*

<sup>51</sup> *Id.* at 1-4.

<sup>52</sup> *Id.*

<sup>53</sup> *Id.*

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1 Q. In this proceeding, does SPS seek recovery of rate-case expenses related to Docket  
2 No. 52451?

3 A. Yes. Table VJ-8 below provides the composition of the Docket No. 52451 rate-case  
4 expenses in the requested amount of \$489,852.18, which consists of the listed disciplines,  
5 vendors, and amounts.

Table VJ-8 (Docket No. 52451 Expenses of SPS)

Discipline	Vendor	Amount
Legal Counsel	Eversheds Sutherland LLP	\$ 359,491.86 <sup>54</sup>
Miscellaneous	Employee and Other Expenses	\$ 130,360.32 <sup>55</sup>
Total		\$ 489,852.18 <sup>56</sup>

6 Q. In this proceeding, does SPS seek recovery of rate-case expenses related to Docket  
7 No. 53034?

8 A. Yes. Table VJ-9 below provides the composition of the Docket No. 53034 rate-case  
9 expenses in the requested amount of \$1,638,730.59, which consists of the listed  
10 disciplines, vendors, and amounts.

<sup>54</sup> *Id.* at 1-4.

<sup>55</sup> *Id.*

<sup>56</sup> *Id.*

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**Table VJ-9 (Docket No. 53034 Expenses of SPS)**

Discipline	Amount
Consultants	\$ 136,513.23 <sup>57</sup>
Legal Counsel	\$ 1,353,459.97 <sup>58</sup>
Miscellaneous	\$ 148,757.39 <sup>59</sup>
<b>Total</b>	<b>\$ 1,638,730.59<sup>60</sup></b>

1

2 **IV. DISCUSSION OF AXM'S REQUEST**

3 **Q. Please describe AXM's request for recovery of rate-case expenses related to its**  
4 **participation in this proceeding.**

5 A. As part of this proceeding, AXM seeks reimbursement from SPS for the legal and  
6 consulting expenses that it incurred. As shown in Table VJ-10 below, the composition of  
7 AXM's Docket No. 54634 rate-case expenses in the requested amount of  
8 ~~\$225,441.50~~ \$2462,315.90 through July 31, 2023, consists of the listed disciplines, vendors,  
9 and amounts.

**Table VJ-10 (AXM Docket No. 54634)**

Discipline	Vendor	Amount
Consultant	J. Randall Woolridge, PhD	\$ 31,033.75 <sup>61</sup>

<sup>57</sup> *Id.* at 1-4.

<sup>58</sup> *Id.*

<sup>59</sup> *Id.*

<sup>60</sup> *Id.*

<sup>61</sup> Direct Testimony of J. Randall Woolridge, Ph.D, at 89 (Aug. 4, 2023).

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Consultant	Resolve Utility Consulting	\$ 39,881.25 <sup>62</sup>
Consultant	Norwood Energy Consulting, LLC	\$ 41,040.00 <sup>63</sup>
Consultant	ReSolved Energy Consulting, LLC	\$ 22,591.50 <sup>64</sup>
Consultant	Larkin & Associates, PLLC	\$ 90,895.00 <sup>65</sup>
<u>Legal fees</u>	<u>Herrera Law &amp; Associates, PLLC</u>	<u>\$ 236,874.40<sup>66</sup></u>
<b>Total</b>		<b>\$ <u>225,441.50</u> <u>462,315.90</u></b>

- 1 **Q.** In this proceeding, does SPS seek recovery of rate-case expenses related to its  
2 reimbursement to AXM for its participation in the various other proceedings for  
3 which trailing expenses occurred or that the Commission deferred to the instant  
4 proceeding?
- 5 **A.** Yes. As part of this proceeding SPS seeks recovery of the reimbursements to AXM for  
6 the legal and consulting expenses that it incurred because of its participation in the various  
7 other dockets identified in Table VJ-2 above. As shown in Table VJ-11 below, the  
8 composition of SPS's requested recovery of reimbursements to AXM for rate-case  
9 expenses in the requested amount of \$ 1,084,733.93 ~~consists of~~ consists of the listed  
10 proceedings.<sup>67</sup>

**Table VJ-11 (Total AXM from Other Dockets)**

Docket No.	Amount
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<sup>62</sup> Direct Testimony of David J. Garrett at 26 (Aug. 4, 2023).

<sup>63</sup> Direct Testimony of Scott Norwood at 20 (Aug. 4, 2023).

<sup>64</sup> Direct Testimony of Karl Nalepa at 24 (Aug. 4, 2023).

<sup>65</sup> Direct Testimony of Ralph C. Smith at 27 (Aug. 4, 2023).

<sup>66</sup> Direct Testimony of Karl Nalepa at 13 (Aug. 4, 2023).

<sup>67</sup> *Id.*

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Docket No. 51625	\$86,865.00 <sup>68</sup>
Docket No. 51802	\$556,985.50 <sup>69</sup>
Docket No. 52210	\$86,273.80 <sup>70</sup>
Docket No. 52446	\$0 <sup>71</sup>
Docket No. 52451	\$119,665.10 <sup>72</sup>
Docket No. 53034	\$234,944.53 <sup>73</sup>
<b>Total</b>	<b>\$1,084,733.93</b>

**V. RECOMMENDATION RELATED TO SPS'S DOCKET NO. 54634 RATE-CASE EXPENSES**

**Q. What is your recommendation regarding SPS's requested Docket No. 54634 rate-case expenses?**

**A.** I propose a reduction of \$19,329.64 to SPS's requested expenses paid to date, which is comprised of several categories of expenses. My recommended adjustment is summarized in Table VJ-12 below and results in my recommendation that SPS recover reasonable and necessary rate-case expenses incurred and supported through May 30, 2023, in the amount of \$411,093.36 (\$430,423 - \$19,329.64). Additionally, as part of my recommendation, I do not recommend recovery of any estimated remaining expenses unless SPS presents documentation supporting the reasonableness and necessity of the costs it actually incurs.

<sup>68</sup> Attachment VJ-2.

<sup>69</sup> Attachment VJ-3.

<sup>70</sup> Attachment VJ-4.

<sup>71</sup> Attachment VJ-5.

<sup>72</sup> Attachment VJ-6.

<sup>73</sup> Attachment VJ-7.

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1 Later, in Section IX of this testimony, I discuss my recommendation related to rate-case  
2 expenses incurred and supported after May 30, 2023.

**Table VJ-12 (Staff's Recommended Adjustments)**

<b>Billing Entity</b>	<b>Amount</b>
Baker Botts, L.L.P.	(\$500.00)
Eversheds Sutherland (US) LLP	(\$5,803.00)
Hinkle Shenor LLP	(\$144.39)
Utility Credit Consultancy, LLC	(\$12,882.25)
<b>Total</b>	<b>(\$19,329.64)</b>

3 **Q. Based upon your review of the supporting documentation presented in this**  
4 **proceeding, do you recommend any adjustments to SPS's requested rate-case**  
5 **expenses?**

6 **A.** After reviewing the supporting documentation presented in SPS's supplemental response  
7 to Staff's Second RFI, I recommend an adjustment to the amount requested for Baker  
8 Botts, Eversheds Sutherland, Hinkle Shenor and Utility Credit Consultancy legal fees and  
9 services in the amount of (\$19,329.64). The documentation that I reviewed included  
10 hourly legal rates more than \$550 per hour. The reason for my adjustment is to remove  
11 the amount of hourly fees more than \$550 per hour that total \$19,329.64.

12 **Q. Why do you recommend an adjustment to remove hourly legal fees in excess of \$550**  
13 **per hour?**

14 **A.** I recommend the use of the \$550 hourly rate referenced in Findings of Fact 306 through  
15 311 from the Commission's Order in Docket No. 51415 as a reasonable benchmark for  
16 capping the recovery from ratepayers of the hourly rate for SPS's outside legal counsel.<sup>74</sup>  
17 In the referenced Southwestern Electric Power Company proceeding, a comprehensive

<sup>74</sup> *Application of Southwestern Electric Power Company for Authority to Change Rates*, Docket No. 51415, Order at Findings of Fact 306-311 (Jan. 14, 2022).

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base rate proceeding of a vertically integrated electric utility, the Commission found that rate-case expenses that were reasonable and necessary and in compliance with I6 TAC § 25.245 were those expenses in which the hourly rate for any service did not exceed \$550. That is, to the extent the hourly rate for any service exceeded \$550, only \$550 was included in the rate-case expenses. For consistency and regulatory certainty, I recommend that the \$550 limit apply to the hourly rates billed by the attorneys employed by Baker Botts, Eversheds Sutherland, Hinkle Shenor and Utility Credit Consultancy. Attachment VJ-2 provides the detailed adjustment to the billings from those entities related to this proceeding.

306. The Office of the Attorney General issued a memorandum in 2016 that limited the maximum outside counsel per-hour fee to \$525 but allowed the Deputy Attorney General to authorize a higher fee. This memorandum was addressed to, among others, state agencies and addressed "Outside Counsel Contract Rules and Templates."<sup>75</sup>

307. The Office of the Attorney General issued a follow-up memorandum, in 2019 that did not increase the \$525 per-hour fee cap. This follow-up memorandum also was directed to state agencies and addressed Outside Counsel Contract Rules and Templates.<sup>76</sup>

308. SWEPSCO did not meet its burden of proof to show that the nature, extent, and difficulty of the work performed by the attorneys who charged in excess of \$550 per hour justified hourly rates in excess of \$550 in this base-rate case.<sup>77</sup>

309. The rates SWEPSCO paid to outside attorneys in excess of \$550 per hour are excessive and not reasonable.<sup>78</sup>

310. The fact that other entities may be willing to pay an attorney a rate in excess of \$550 per hour does not mean that the rate is reasonable and not excessive in the context of a Commission electric utility rate proceeding.<sup>79</sup>

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<sup>75</sup> *Id.*

<sup>76</sup> *Id.*

<sup>77</sup> *Id.*

<sup>78</sup> *Id.*

<sup>79</sup> *Id.*

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1 311. SWEPSCO's request to recover \$65,167 in rate-case expenses related  
2 to outside attorney fees billed in excess of \$550 per hour should be  
3 denied.<sup>80</sup>

4 **Q. Has the Office of the Attorney General updated its 2016 memorandum and if so, does**  
5 **the update change the previous hourly rate guidance?**

6 A. Yes. The Office of the Attorney General updated its 2016 memorandum with its July 17,  
7 2023 memorandum, which did not change the previous hourly rate guidance.<sup>81</sup>

8 **VI. RECOMMENDATION RELATED TO RATE-CASE EXPENSES RELATED**  
9 **TO OTHER PROCEEDINGS**

10 **Q. Based upon your review of the supporting documentation presented in this**  
11 **proceeding, do you recommend any adjustments to SPS's requested legal expenses**  
12 **for the various other dockets?**

13 A. After reviewing the supporting documentation presented in SPS's response and  
14 supplemental response to Staff's Second RFI, I recommend adjustments to remove the  
15 amounts associated with hourly billing rates in excess of \$550 per hour. The basis for my  
16 recommended adjustments follows the rationale presented above and is consistent with  
17 recent Commission precedent. My recommended adjustments by docket number appear  
18 below in Table VJ-13. Additionally, please see Attachment VJ- 9-for9 for the details  
19 supporting each recommended adjustment.

**Table VJ-13 (SPS Hourly Rates Above \$550)**

<b>Docket No.</b>	<b>Amount</b>
Docket No. 51625	\$4,000.00
Docket No. 51802	\$20,132.50

<sup>80</sup> *Id.*

<sup>81</sup> Memorandum from Office of the Attorney General to State Agencies, University Systems, and Institutions of Higher Education (Jul. 17, 2023) (Attachment VJ-1).

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Docket No. 52210	\$20,700.00
Docket No. 52451	\$7,561.00
Docket No. 53034	\$60,118.50
<b>Total</b>	<b>\$112,512.00</b>

**VII. RECOMMENDATION RELATED TO AXM'S RATE-CASE EXPENSES**

**Q.** Please provide your recommendation with respect to your review of the rate-case expenses for which AXM incurred in this proceeding, Docket No. 54634 as well as the expenses that SPS reimbursed AXM for participation in Docket Nos. 51625, 51802, 52210, 52451, and 53034.

**A.** Based upon my review of the supporting documentation presented by AXM in its August 4, 2023, direct testimonies, I recommend no reductions to the rate-case expenses for which AXM seeks recovery in this proceeding through July 31, 2023. Additionally, based upon my review of the documentation presented by SPS in its direct case and RFI responses, I recommend no reductions to the rate-case expenses for which SPS seeks to recovery after reimbursement to AXM for its participation in the proceedings identified above.

**VIII. SURCHARGE RECOMMENDATION**

**Q.** Please describe your recommendation regarding a surcharge to allow SPS to recover its reasonable and necessary rate-case expenses.

**A.** SPS included its rate-case expenses related to Docket Nos. 54634, 53034, 52451, 52446, 52210, 51802, and 51625 as components of its Regulatory Commission expenses presented in Schedule G-U14.<sup>82</sup> Rather than include the recovery of rate-case expenses in SPS's base rates, I recommend that the Commission approve recovery through a rate-

<sup>82</sup> Update Schedules and Schedule Workpapers at Schedule G-U14, Bates p. 261.

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1 case expense surcharge rider and that the recovery occur over a four year surcharge period.  
2 The four-year surcharge period aligns with the provisions of PURA § 36.212 that require  
3 electric utilities operating solely outside of ERCOT to initiate a comprehensive base rate  
4 proceeding on or before the fourth anniversary of the date of the final order in the electric  
5 utility's most recent comprehensive base rate proceeding. In order to prevent recovery of  
6 rate-case expenses through base rates as well as a surcharge, I recommend that the  
7 Commission remove the amounts provided in Schedule G-U14 as case processing  
8 expenses associated with Docket Nos. 54634, 53034, 52451, 52446, 52210, 51802, and  
9 51625 from SPS's requested revenue requirement. As presented in Schedule G-U14, I  
10 recommend an adjustment of (\$9,862,124) to remove SPS's requested rate-case expenses  
11 from the revenue requirement.<sup>83</sup>

12 **Q. Please summarize the amount that you recommend for inclusion in a rate-case**  
13 **expense surcharge by docket number.**

14 **A.** My recommendation produces rate-case expense recovery as shown in Table VJ-14 below  
15 in the total amount of ~~\$4,574,656.86~~\$11,531.26, including reimbursement to AXM for its  
16 reasonable expenses.

17 **Table VJ-14 (Recoverable Rate-Case Expenses)**

Docket No.	SPS's Expenses	Staff Adjustment to SPS	AXM's Expenses	Total Rate-Case Expenses to Surcharge
51625	\$79,302.00 <sup>84</sup>	(\$4,000.00)	\$86,865.00 <sup>85</sup>	\$162,167.00

<sup>83</sup> *Id.*

<sup>84</sup> Update Testimony of Michael K. Knapp (Knapp Update) at native spreadsheet 51625-Summary of Trailing Charges Knapp Update Testimony (Attachment VJ-2).

<sup>85</sup> *Id.*

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51802	\$414,522.00 <sup>86</sup>	(\$20,132.50)	\$556,986.00 <sup>87</sup>	\$951,375.50
52210	\$334,926.00 <sup>88</sup>	(\$20,700.00)	\$81,274.00 <sup>89</sup>	\$395,500.00
52446	\$10,270.00 <sup>90</sup>	\$0	___\$0	\$10,270.00
52451	\$493,148.00 <sup>91</sup>	(\$7,561.00)	\$119,665.00 <sup>92</sup>	\$605,252.00
53034	\$1,638,731.00 <sup>93</sup>	(\$60,118.50)	\$234,945.00 <sup>94</sup>	\$1,813,557.50
54634	\$430,423.00 <sup>95</sup>	(\$19,329.64)	\$225,441.50462,315.90	\$636,534.86873,409.26
<b>Total</b>		<b>(\$131,841.64)</b>	<b>\$1,305,176.50542,050.90</b>	<b>\$4,674,656.86811,531.26</b>
	<b>\$3,401,322.00</b>			

IX. ONGOING RATE-CASE EXPENSES

Q. Please describe your recommendation related to the recovery of the rate-case expenses incurred and supported subsequent to May 30, 2023, for SPS and July 31, 2023, for AXM.

A. Because SPS and AXM continue to incur rate-case expenses related to this proceeding, I recommend that both provide updates to the rate-case expense reporting along with their reply to briefs to support the amount of rate-case expenses incurred during the hearing on

<sup>86</sup> Update Testimony of Michael K. Knapp (Knapp Update) at native spreadsheet 51802-Summary of Trailing Charges Knapp Update Testimony (Attachment VJ-3).

<sup>87</sup> *Id.*

<sup>88</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.1(SUPP01) (Attachment VJ-4).

<sup>89</sup> *Id.*

<sup>90</sup> Update Testimony of Michael K. Knapp (Knapp Update) at native spreadsheet 52446-Summary of I.P.L. RCE(Attachment VJ-5).

<sup>91</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.2(SUPP01) (Attachment VJ-6).

<sup>92</sup> *Id.*

<sup>93</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.3(SUPP01) (Attachment VJ-7).

<sup>94</sup> *Id.*

<sup>95</sup> Southwestern Public Service Company's First Supplemental Response to Commission Staff's Second Request for Information at Exhibit SPS-Staff 2-1.4(SUPP01) (Attachment VJ-8).

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1 the merits and post hearing briefing. This reporting will allow the presiding officer to  
2 consider the final rate case expense updates in the Proposal for Decision to be issued in  
3 this docket. With respect to the presentation of future updates to rate-case expenses, I  
4 recommend that the presentation of the information begin with the spreadsheet provided  
5 in the First Supplemental Response to Staff's Second RFI and include updates to each  
6 category for all additional expenses requested, including those incurred by AXM.

7 **Q. What is your recommendation related to the rate-case expenses SPS incurs after it**  
8 **files its post-hearing briefing?**

9 A. I recommend that SPS record a regulatory asset for its rate-case expenses incurred after it  
10 files its post-hearing briefing, along with the expenses incurred by AXM. I recommend  
11 that the Commission allow SPS to request recovery of the trailing expenses included this  
12 regulatory asset in its next full base rate case and require it to provide supporting  
13 documentation at that time.

14 **Q. Does this conclude your testimony?**

15 A. Yes

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DIRECT TESTIMONY OF VONETTA JACKSON





THE OFFICE OF THE ATTORNEY GENERAL OF TEXAS

To: State Agencies, University Systems, Institutions of Higher Education and Prospective  
Outside Counsel for any of the aforementioned

From: Office of the Attorney General — General Counsel Division

Date: July 17, 2023

Re: Outside Counsel Contract Rules, Process Changes, and Community System Updates

Pursuant to its statutory duties, the Office of the Attorney General ("OAG") has adopted administrative rules related to outside counsel contracts for state agencies, university systems, and institutions of higher education (individually "agency" and collectively "agencies") pursuant to statute.<sup>1</sup> In light of continuing updates made to the processes and procedures governing these contracts, the OAG is taking this opportunity to provide agencies updated direction regarding Outside Counsel Contracts (OCCs), including OCC amendments, invoice submission and approval, and administrative fees. Please note that the guidance in this letter supersedes all previously issued Letters to State Agencies. The OAG reserves the right, under its statutory authority, to revise this document and the policies and procedures it details at any time. The best source for information concerning outside counsel matters (including the latest version of this letter) is the OAG's website at: [Texas Attorney General, Outside Counsel Contracts](https://oag.texas.gov/outside-counsel-contracts). Questions which are not answered herein, or in other resources available on the OAG's website, may be directed to the OAG's General Counsel Division<sup>2</sup> at: [GCDContracts@oag.texas.gov](mailto:GCDContracts@oag.texas.gov)

**Introductory Notes**

The Attorney General serves as legal counsel for the state and all its agencies. Agencies may not retain, or utilize services provided by, outside counsel without first receiving authorization and approval from the OAG. If an agency requires any legal services whatsoever from any outside counsel, regardless of the source of funds that would be used to pay for such legal services, or if the services would be provided at no cost, it must first electronically submit to the OAG a Request to Retain Outside Counsel ("RtR") through the OAG's online Community system ([Community](#)<sup>3</sup>).

<sup>1</sup> See Tex. Gov't Code § 402.0212(f).

<sup>2</sup> Those involved with the outside counsel process in the past may recall the division formerly handling these matters was Financial Litigation and Charitable Trusts (FLD or FinLit), but the unit responsible for outside counsel has been absorbed by the General Counsel Division.

<sup>3</sup> The Community User Guide is on our website here: [Community User Guide](#).

Upon receipt of an RtR from an agency through the online Community system, the OAG will review the agency's submission to determine whether the requested legal services should be provided by the OAG or whether retaining outside counsel would be in the best interests of the state, and for compliance with applicable rules and statutes. Within ten (10) business days after receiving the RtR submission, the OAG will notify the agency that the OAG either (1) approves the RtR and will process an OCC for the agency and outside counsel, (2) denies the RtR, or (3) will notify the agency that additional or corrected information or documentation is required to make a determination. Please be aware that in the outside counsel process the OAG is acting primarily as a regulatory body and not as counsel for state agencies; therefore, the OAG is unable to provide legal counsel and advice regarding the specific business terms the agency negotiates with its proposed outside counsel.

Although the OAG generally will not approve any deviation from the OCC template and the policies and procedures detailed in this document, the OAG recognizes that exceptional and compelling circumstances could necessitate changes or exceptions in rare cases. As a result, the OAG reserves the right to make changes to the OCC or grant exceptions to these policies and procedures if the OAG determines, in its discretion, that it is in the State's best interest to do so. Because the electronic submission process does not allow for any changes to be made to the OCC template, agencies wishing to deviate from the OAG's OCC template must include comprehensive details about its requested changes in its RtR so that the OAG can evaluate them. The OCC template is updated each biennium to incorporate new applicable legislation and improve efficacy. Agencies should not sign engagement letters with any potential outside counsel as they do not comply with applicable laws, rules, and procedures, and are not compatible with the OAG's contract template.

When an RtR is approved, the OAG will route the resulting OCC electronically via DocuSign for signature by the agency and outside counsel.

### **Requests to Retain Outside Counsel**

There are several requirements in the Community system for submitting an RtR and a summary is provided below.

#### *a. Designation of Agency Contact and Responsible Attorney*

Agencies must designate an individual employed by the agency to act as the agency contact and handle all matters and correspondence with the OAG related to the RtR and any resulting contract. If the agency contact is not an attorney, then the agency must also designate a responsible attorney, employed by the agency's Office of General Counsel, or otherwise representing the agency, who must be familiar with all aspects of the RtR and maintain familiarization with any resulting OCC throughout the life of the contract. Agencies must ensure the information for the designated agency contact and/or the responsible attorney is accurate as long as the RtR is in process and any resulting contract is in place.

*b. University Systems and Institutions of Higher Education Requirement for System-Wide Contracts*

University systems and institutions of higher education may not submit separate RtRs on behalf of the system's or institution's individual member schools or universities. More specifically, the system must submit its RtR(s) where the system is the contracting party, and the terms of the resulting contract encompass the system and all its member schools together. Importantly, this requires the system to request the entire amount of the proposed limitation of liability (maximum contract value) applicable to the system and all its member schools in the RtR.

*c. Start and end dates for Outside Counsel Contracts*

The requested start date for an OCC may be a date in the future, or any date from the date of the RtR's submission to the first day of the calendar month in which the RtR was submitted. For example, an RtR submitted April 30<sup>th</sup> may have a start date of April 1<sup>st</sup>, but an RtR submitted May 1<sup>st</sup> may only have a May 1<sup>st</sup> or later start date. Best practice is to submit RtRs well in advance of a requested start date to allow for complete processing of the request including, if necessary, resolution of any issues with the submission. Any request for a start date earlier than the first day of the month the RtR is submitted would only be permitted if the OAG, in its sole discretion, determined that unusual and compelling circumstances exist.

Requested end dates may be any date within the current fiscal biennium (for example, August 31, 2023). If outside counsel services are needed beyond the end of the biennium, then an RtR for a new contract must be submitted. For certain litigation OCCs, there is a potential exception to allow the OCC to extend to the end of the litigation matter, as determined by the agency in consultation with the OAG. Where the date is indeterminate due to ongoing litigation, it may be acceptable to submit an end date for one or more bienniums in the future (e.g., 8/31/2029 or 8/31/2031).

*d. Guidance for Requested Scopes of Service for Outside Counsel Contracts*

In the RtR, the text entered (or attached) for the proposed Scope of Services *will directly become part of the OCC, in its entirety (as Addendum A)*. The Scope of Services must be narrowly tailored to provide the OAG with enough information to make an informed decision about whether the proposed outside counsel representation is appropriate, while still fulfilling the agency's objectives for the representation. Failure to narrowly tailor the Scope of Services will, at best, result in a delay in processing the RtR, and, at worst, could result in the RtR being rejected. Agencies should draft the Scope of Services carefully to obtain the desired results from the proposed outside counsel representation. Additionally, no single OCC may contain a Scope of Services that permits legal representation across more than one practice area unless each is *clearly related to the central subject matter* of the representation. Accordingly, please ensure the Scope of Services in the RtR is limited to one practice area or is specifically tied to one central subject matter to which one or more practice areas clearly relate.

*e. Documents that Must Accompany Requests to Retain*

When submitting an RtR, agencies must attach: (1) an outside counsel's signed Conflicts Disclosure statement<sup>4</sup>; (2) the agency's Affirmation Statement indicating that it has reviewed the Disclosure statement and is satisfied with its choice of outside counsel notwithstanding anything contained in the Conflicts Disclosure<sup>5</sup>; and (3) documentation of the eligibility of the requested Lead Counsel attorney to practice law in the State of Texas, where required, or in the jurisdiction in which the services will be performed. These documents will be included in the DocuSign routing envelope if an OCC is approved. Any RtR not accompanied by these documents will be automatically rejected by the Community system. Additional information about the specific requirements for these documents is below. The agency may submit additional documents if desired (for example, a biography of the proposed Lead Counsel attorney).

Conflicts Disclosures and Agency Affirmation Statements: As mentioned above, outside counsel's Conflicts Disclosure statement must be attached to the agency's electronic submission of the RtR and must be dated no more than 30 (thirty) calendar days prior to the date the RtR is either initially submitted, or, if the RtR requires revisions, the date submitted in its final acceptable form. Outside counsel must sign the statement and attest to its completeness and accuracy. Under section 57.4(d)(1) of the Texas Administrative Code, the Conflicts Disclosure must identify:

[E]very matter in which the firm represents, or has represented, within the past calendar year, any entity or individual in any litigation matter in which the entity or individual is directly adverse to the State of Texas or any of its boards, agencies, commissions, universities, or elected or appointed agency officials in connection with their official job duties and responsibilities.<sup>6</sup>

And, where matters are listed, it must also "include a short description of the nature of the matter and the relief requested or obtained in each matter and any identifying cause or case number."<sup>7</sup> Additionally, the agency must affirm that it has reviewed the Conflicts Disclosure statement and is satisfied with the choice of the proposed outside counsel notwithstanding anything contained in the disclosure statement.<sup>8</sup> Agency Affirmation Statements must be dated after (or simultaneously with) outside counsel's final Conflicts Disclosure. Meaning, if a Conflicts Disclosure is updated during the RtR process, then an updated Affirmation Statement must also be submitted.

As a point of clarification, the OAG requires that outside counsel disclose any and all conflicts that the entire firm (including any offices located outside the State of Texas) has to any and all agencies of the State of Texas, not merely the agency that is a party to the OCC and that requirement is an ongoing obligation for outside counsel which continues throughout the life of the contract. Outside counsel must monitor its conflicts for the duration of its representation and

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<sup>4</sup> 1 Tex. Admin. Code § 57.5(c).

<sup>5</sup> *Id.*

<sup>6</sup> 1 Tex. Admin. Code § 57.4(d)(1).

<sup>7</sup> *Id.* § 57.4(d)(2).

<sup>8</sup> *Id.* § 57.4(c).

disclose to the agency and the OAG any existing or potential conflicts that arise concerning the agency, the OAG, or the State of Texas.

The OAG will not modify, alter, waive, or allow agencies to waive this disclosure requirement absent exceptional and compelling circumstances unique to the specific law firm or representation sought.

*f. Total Liability to Outside Counsel*

The limitation of liability amount specified in the contract is the maximum value of the contract and is entered in Community as the “Anticipated Legal Costs.” The total of all legal service fees and expenses, regardless of the funding source or method, cannot exceed the limitation of liability amount (i.e., no payment over this amount may be made to outside counsel). Under no circumstances will expenses or fees relating to the representation be exempted from the limitation of liability.

*g. Competitive Procurement Process*

Unless good cause exists, an agency is required to publish a Request for Qualifications (“RFQ”) before selecting outside counsel, regardless of the anticipated maximum liability of the OCC.<sup>9</sup> The RFQ must be published in the Electronic State Business Daily for a minimum of 30 (thirty) calendar days. The RFQ may also be placed in other publications, such as the Texas Register, at the agency’s discretion. Because the OAG will not review or approve an agency’s RFQ, the agency is not required to provide a copy of the RFQ to the OAG. Likewise, it is up to the respective agency to determine how long a response to a published RFQ will be valid.

If an agency would like an exemption from the RFQ process requirements, it must *affirmatively certify in its RtR that the agency has good cause or a reasonable justification* for the exemption. The OAG does not determine what constitutes good cause or a reasonable justification; rather, such determinations must be made independently by the agency in consultation with agency’s internal legal counsel and/or agency leadership.

*h. Addendum B of the Outside Counsel Contract*

When submitting an RtR in the Community system, please be mindful of the following for Addendum B, which includes, Timekeepers, Rates (including Travel Rates), and Billing Period:

**Timekeeper Rates and Classifications:** Unless expressly approved by the First Assistant Attorney General in advance, hourly rates for attorneys shall not exceed \$525/hour, and hourly rates for non-attorney legal work (generally limited to paralegals, legal secretaries and legal assistants) shall not exceed \$225/hour.

- All other timekeepers (for example, Patent Agents) must be identified as “Other” with their specific title(s) entered in the classification field. These timekeepers are also generally limited to \$225/hr, but an agency may provide written justification for an increased rate for the OAG’s consideration.

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<sup>9</sup> 1 Tex. Admin. Code § 57.4.

- “Not to exceed” — Agencies that wish to use hourly rates to identify an entire classification of employees must use a “not to exceed” rate. For example, such a rate would appear as “Partners’ rates shall not exceed \$300/hr.” This would mean that all partners are covered for any rate up to \$300/hour. If the agency wants to ensure that only certain individuals are providing their legal services, naming each individual and their specific hourly rate can be done. An example of identifying a particular individual, the individual’s classification, and the individual’s hourly rate would be “Susan Smith, Partner, not to exceed \$250/hr.”
- Be aware that outside counsel may not bill for administrative staff/support, law clerks, or interns under Section 5.5 of the OCC (if the contract is based on the OAG’s current template).
- Additionally, a Default Classification is included in Addendum B to allow the OAG more flexibility to approve invoices containing time billed by Attorneys, Paralegals, and Legal Assistants not otherwise listed in Addendum B. For example, if Addendum B includes “Attorney, Partner: \$525” and “Attorney, Associate: \$450,” but does not include “Attorney, Of Counsel,” and an invoice is submitted for OAG approval with time billed for “Attorney, Of Counsel,” rather than deny that billed time, the “Of Counsel” attorney’s hourly rate may default to the lower of either the lowest attorney rate expressly listed in Addendum B, or the hourly rate listed in the invoice.

Fixed Fee or Fee Schedule for Projects or Matters: Instead of using hourly rates, some legal services (for example, immigration, bond, or intellectual property work), may be appropriately billed by a fixed fee per project. An example of a fixed fee per project would be “H-1B Visa Petition, \$900.” If the agency is requesting an OCC with both fixed fee and hourly rates, an agency must draft and upload its own Addendum B that includes language specifically directing when either the fixed fee or hourly rate ranges will be used because the Community system cannot populate billing terms for mixed and hourly services into a standard Addendum B. For example, a contract involving both fixed fees for H-1B Visa Petitions and hourly rates for other services would state “Preparation of H-1B Visa Petition, \$900. All other services are governed by the identified hourly rates.” *Please note, fixed fees should be treated as set amounts, rather than as not-to-exceed limitations.*

For any Invoices with amounts deviating from the fees established by the Outside Counsel Contract, the reason(s) for the deviation(s) must be clearly identified on the Invoice itself. Otherwise, the OAG will be unable to approve payment of the Invoice.

If a subcontractor is providing legal services at a fixed fee, a statement must be provided to the OAG certifying that the time spent on the flat fee work was, at a minimum, comparable to what would have been spent had the firm been billing at the maximum hourly rate allowed under Addendum B of the Outside Counsel Contract.

Billing Period: The billing period is the interval that determines the frequency outside counsel will submit Invoices to the agency. The agency and outside counsel will determine and specify the billing period in each contract. Most frequently, the billing period will be monthly and in a calendar month format (i.e., beginning the first day and ending the last day of the calendar month). Additionally, outside counsel must submit the Invoice(s) to the agency within one calendar month from the end of the relevant billing period covered by the Invoice. Any untimely invoice

submissions by Outside counsel will delay processing and may constitute breach of the outside counsel contract, which could result in an Invoice being disapproved for payment. Agencies likewise must review Invoices and submit Voucher Requests to the OAG in a timely manner.

Travel: By setting hourly travel rates in an OCC, the agency and outside counsel are permitted, but not required, to pay for time spent traveling to or from a place where legal services are to be provided to the agency. Note that an attorney's travel rate may not exceed half of that attorney's standard hourly rate under the OCC. The OAG does not consider it a best practice for attorneys to provide legal services while traveling; however, if an attorney is providing legal services while traveling, the attorney may charge the standard hourly rate for the time spent providing those legal services. Additionally, any timekeepers traveling for work must either be named or fall under one of the timekeeper classifications in Addendum B of the contract; this applies even if the firm is only providing work under a fixed fee schedule.

#### **Invoices for Legal Services and Expenses Under Outside Counsel Contracts**

Please note, the OAG establishes a contract number for each OCC upon its approval. An agency may establish its own contract number in addition to the OAG's contract number; however, an agency must note the OAG contract number in all correspondence with the OAG.

##### *a. Invoices*

Outside counsel must prepare and submit to the agency correct and complete Invoices and Invoice Summaries for legal services and expenses in accordance with the OCC and the OAG's administrative rules. Invoices cannot be paid by the agency, regardless of the source of funds used, without the prior approval of the OAG. Therefore, after the agency reviews and approves an outside counsel Invoice in accordance with the Outside Counsel Contract and the administrative rules, it must seek approval from the OAG to pay the Invoice.

When an agency determines that an Invoice, or a portion thereof, should be paid, the agency must submit a Request for Voucher Approval through the online Community system. The completed Request for Voucher Approval, a copy of the subject Invoice(s), and all other information required to be submitted by the administrative rules make up one "Voucher Request".

An agency should submit one Voucher Request per billing period per contract (as specified in the OCC). However, one Voucher Request may include multiple Invoices from the same billing period. Multiple Voucher Requests covering the same billing period as other Voucher Requests for the same contract will be rejected as incomplete and may result in an Invoice not being approved for payment.

Outside counsel must submit Invoice(s) to the agency for review withing one calendar month from the end of the relevant billing period covered by the Invoice. The agency must submit Invoices and the corresponding Request for Voucher Approval to the OAG within 25 (twenty-five) days<sup>10</sup> of the agency's receipt of a "correct and complete Invoice"<sup>11</sup> from outside counsel.

<sup>10</sup> Tex. Gov't Code § 402.0212(b)(1).

<sup>11</sup> See 1 Tex. Admin. Code § 57.6(b) (defining "correct and complete Invoice").

The 25-day-period begins once the last, timely, correct and complete Invoice for the relevant billing period has been received by the agency.

Outside counsel's failure to timely submit each Invoice constitutes a breach of the OCC. Failure to timely submit a Voucher Request to the OAG for review may result in the OAG declining to approve payment of the Invoice(s) included in the Voucher Request, unless the OAG determines that good cause exists for the delay. *No late Voucher Request submissions that include late Invoices will be reviewed by the OAG unless a reasonable justification for the delay has been provided.*

Once the Voucher Request is received and reviewed by the OAG, the Invoice(s), or a portion thereof, will either be approved or rejected, or the agency will be notified that more information is required. If approved, the OAG will issue a Voucher Approval to the agency. The agency may then enter the payment information into the Uniform Statewide Accounting System ("USAS") or, if permitted, otherwise proceed to pay the Invoice. Agencies should use Comptroller Code 7258 when entering payment information into USAS. Once an agency receives a Voucher Approval from the OAG, payment can occur when the agency enters the payment information and approves the documentation in USAS.

If any Invoices under a Voucher Request are rejected, or if the OAG has questions regarding a Voucher Request, it will contact the agency to attempt to resolve the issue. *The OAG cannot discuss invoice issues with outside counsel.*

*b. Expenses*

If outside counsel bills for allowable expenses, copies of actual, itemized receipts must be submitted to the agency. Additional details of what may and may not constitute reimbursable expenses are found in Sections 5 and 6 of the OCC (if the contract is based on the OAG's current template). Examples of expenses that are not reimbursable include, without limitation: gratuities; alcohol; non-coach class airfare or premium or preferred benefits related to airfare; routine copying charges; fax charges; routine postage; office supplies; telephone charges; local travel (within 20-mile radius of office), including mileage, parking, and tolls; all delivery services incurred by internal staff; air-conditioning; electricity or other utilities; and internet charges.

The OAG shall review outside counsel's Invoices only to determine whether the legal services for which the agency is billed were performed within the term of the contract, and are within the scope of the legal services authorized by the contract, and are therefore eligible for payment.<sup>12</sup> Agencies shall submit to the OAG a statement with each Invoice confirming the agency-approved amounts to be paid to outside counsel for legal services and expenses allowed under the contract and the amount of any expenses allowed under the contract which were paid for directly by the agency or any party other than outside counsel.

The agency shall also include with any Voucher Request (and associated Invoices) submitted to OAG for approval, a written certification, as provided by the Request for Voucher Approval, that the legal services for which the agency is billed were performed within the term of the contract,

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<sup>12</sup> Tex. Gov't Code § 402.0212(b).



are within the scope of the legal services authorized by the contract and are reasonably necessary to fulfill the purpose of the contract.<sup>13</sup> This certification is part of the submission process in the Community system.

### **Administrative Fee**

Outside counsel must pay an administrative fee to the OAG for the review of Invoices.<sup>14</sup> The fee is non-refundable and is due each fiscal biennium. Outside counsel may not charge or seek reimbursement from the agency for the fee.

The initial administrative fee is due to the OAG within 30 (thirty) calendar days of the date the proposed OCC has received final approval by the OAG and been returned to the agency. If outside counsel has not submitted the required administrative fee within that time, the OAG's approval of the OCC may be withdrawn. Any Invoice submitted to the OAG for review as part of a Voucher Request prior to the receipt of the administrative fee will be deemed ineligible for payment until outside counsel submits the requisite administrative fee to the OAG. For OCCs that cross the State's fiscal biennium, separate administrative fees are due to the OAG on September 1 of each subsequent biennium covered by the term of the contract. *Please note that an administrative fee is not due for each Invoice submitted.*

The OAG has granted a very narrow and limited exemption from the administrative fee and Invoice review only for university systems and institutions of higher education regarding certain legal services that are solely related to the prosecution and management of system or institution intellectual property, which includes patents, trademarks, and copyrights. This limited exemption does not apply to the enforcement of intellectual property rights—including litigation—or corporate legal services relating to the monetization of intellectual property. The OAG may rescind this limited exemption at any time. If the OAG decides to conduct periodic testing of Invoices under an OCC that qualified for this limited exemption, the exemption will be deemed rescinded, and the applicable non-refundable administrative fee is due immediately upon notice by the OAG that testing will occur. If an exemption is not requested and/or the OCC's Scope of Services does not qualify for the exemption, but it is subsequently discovered that the agency has been paying invoices without submitting and receiving approval of Voucher Requests, the agency must contact the OAG immediately.

The administrative fee is set on a sliding scale, based on the contract maximum value<sup>15</sup>, as follows:

<b>Limitation of Liability Amount</b>	<b>Administrative Fee</b>
Less than \$2,000.00, but more than \$0.00	\$100.00
Equal to or greater than \$2,000.00 but less than \$10,000.00	\$200.00
Equal to or greater than \$10,000.00 but less than \$50,000.00	\$500.00
Equal to or greater than \$50,000.00 but less than \$150,000.00	\$1,000.00

<sup>13</sup> *Id.* § 402.0212(b-1).

<sup>14</sup> Tex. Gov't Code § 402.0212(c).

<sup>15</sup> Please note, the full administrative fee is owed regardless of what, if any, amount is subsequently invoiced under the OCC.

Equal to or greater than \$150,000.00 but less than \$1,000,000.00	\$1,500.00
Equal to or greater than \$1,000,000.00	\$2,000.00

**Please note that no administrative fee is due on a contract with a maximum liability of \$00.00.**

If the OCC is amended and the original limitation of liability amount is increased to an amount that would require a higher fee, outside counsel shall pay the difference between the original lesser fee, if already paid, and the new higher fee upon the OAG's approval of the amendment and its return to the agency.

Outside counsel must submit the administrative fee to the following address:

Outside Counsel Invoice  
Office of the Attorney General  
P.O. Box 13175  
Austin, TX 78711-3175

Checks or money orders must be made payable to the "Office of the Attorney General" and reference the OCC Number.

#### **Amending an Outside Counsel Contract**

Any change to an executed and OAG-approved OCC must be supported by a written amendment and that amendment must also be approved by the OAG. An agency wishing to amend a contract must submit an amendment request through the Community system. Common reasons for amendment requests include increasing the limitation of liability amount or extending the term (end date). Please ensure the data entered in Community for the amendment terms conform to the OCC amendment template. A copy of the template is available in Community.

#### **Access to the Community System**

Community may be used by anyone within an agency who needs access to OCC information. We strongly encourage agencies to review the [Community User Guide](#) for comprehensive details. User profiles in Community are broken into categories:

- Agency Head: Responsible for reviewing and administering the rights for users with Contract and Voucher Requester roles for their agency. The Agency Head also has all the rights of the Contract and Voucher Requester roles. Only one Agency Head permitted per agency.
- Contract and Voucher Requester: Has access to all Community activities except for user administration. Agencies may have more than one Contract and Voucher Requester.
- Contract or Voucher Requester: May only view and submit information and documents related to either RtRs or requests for voucher approval for their agency. An agency may have more than one Contract Requestor or Voucher Requester. Note, these roles are not required if a user with the Contract and Voucher Requester role will manage both RtRs and Voucher Requests for the agency.

**In Closing**

Should you have any additional questions regarding the outside counsel process, please do not hesitate to contact the OAG's General Counsel Division using the information below. Thank you for your attention to these important matters and the Attorney General looks forward to being of service to you.

**Important Addresses and Contact Information**

**Requests to Retain Outside Counsel and Outside Counsel Contracts and Amendments:**

GCDContracts@oag.texas.gov

**Requests for Voucher Approval:**

OCCInvoice@oag.texas.gov

**Mail may be sent to:**

Outside Counsel Contracts  
Office of the Attorney General  
General Counsel Division, Mail Code 074-1  
Post Office Box 12548  
Austin, Texas 78711-2548

**Outside Counsel must submit administrative fees to:**

Outside Counsel Invoice Office  
of the Attorney General  
P.O. Box 13175  
Austin, TX 78711-3175

If you have additional questions, you may reach the General Counsel Division at:

(512) 936-1403 or  
(512) 463-9906

Southwestern Public Service Company  
Rate Case Expenses by Month Booked  
Docket No. 51625  
December 2021 to December 2022

Line No.		(A) Amount Previously Recovered In Docket No. 51802	(B) Trailing Expenses Booked through December 2022	(C) Estimated Expenses Not Booked	(D) Total Requested Expenses in Docket No. 54634	(E) Total Expenses For Docket	(F) Total Requested Expenses in Docket No. 54634 For Docket
1	<u>Testifying Consultant</u>						
2	Concentric Energy Advisors						
3	Gas Futures Pricing - Moreno, Ruben						
4	Professional Fees	\$ 36,916.25	\$ -	\$ -	\$ -	\$ 36,916.25	\$ -
5	Expenses	-	-	-	-	-	-
6	Total Charges	\$ 36,916.25	\$ -	\$ -	\$ -	\$ 36,916.25	\$ -
7	Total Consultants	\$ 36,916.25	\$ -	\$ -	\$ -	\$ 36,916.25	\$ -
8	<u>Legal Counsel</u>						
9	Baker Botts J.L.P.						
10	Regulatory Counsel						
11	Professional Fees	\$ 311,656.50	\$ 78,039.50	\$ 1,000.00	\$ 79,039.50	\$ 390,696.00	\$ -
12	Expenses	3,182.09	6.00	-	6.00	3,188.09	-
13	Total Charges	\$ 314,838.59	\$ 78,045.50	\$ 1,000.00	\$ 79,045.50	\$ 393,884.09	\$ -
14	Total Legal Counsel	\$ 314,838.59	\$ 78,045.50	\$ 1,000.00	\$ 79,045.50	\$ 393,884.09	\$ -
15	<u>City of Amarillo</u>						
16	Cities Expenses						
17	Professional Fees	\$ 75,577.50	\$ 86,865.00	\$ 1,000.00	\$ 87,865.00	\$ 163,442.50	\$ -
18	Expenses	-	-	-	-	-	-
19	Total Charges	\$ 75,577.50	\$ 86,865.00	\$ 1,000.00	\$ 87,865.00	\$ 163,442.50	\$ -
20	Total Consultants, Legal, and Cities	\$ 427,332.34	\$ 164,910.50	\$ 2,000.00	\$ 166,910.50	\$ 594,242.84	\$ -
21	<u>Miscellaneous Expenses</u>						
22	Employee and Other Expenses						
23	Airfare	\$ -	\$ -	\$ -	-	\$ -	\$ -
24	Airfare - Service Fees	-	-	-	-	-	-
25	Car Rental	-	-	-	-	-	-
26	Car Rental - Gas	-	-	-	-	-	-