

**COMMISSIONER QUESTIONNAIRE
PERFORMANCE SUMMARY**

NAME CAROLEE WILLIAMS
SEAT DISTRICT 1
DATE ELECTED SEPTEMBER 23, 2020
DATE TERM EXPIRES JUNE 30, 2024- HOLDOVER

Please provide information for the review period covering July 1, 2024, through June 30, 2025. Be sure to fully address each item.

1. Educational programs.

Provide the following information regarding educational programs attended:

A. The name of the program and the sponsoring organization.

FY 2024-2025 Participation in Organizations Tracking Spreadsheet				
Commissioner Carolee Williams				
Date	Title of Event	Event Type	Hours	Virtual
	NARUC and SEARUC			
Feb. 23-26, 2025	NARUC Winter Policy Summit	Conference	20	n
April 23, 2025	NARUC - ICER Women in Energy Webinar: Networks for Growth, Circles of Influence, Mentoring Relationships	Webinar	1	y
May 28, 2025	NARUC - ICER Women in Energy Webinar: Creating Institutional Change and Change Agents/Leaders Confirmation	Webinar	1	y
March to June, 2025	NARUC Wildfire Working Group Monthly 1 hour	Committee Meeting	4	y
June 8 - 11, 2025	SEARUC Annual Education Conference	Conference	14	n
	NARUC DOE/JOET Electric Vehicle (EV) Leadership Dialogue			
Every Other Month	EV rates, Managed charging, Data Analytics	Committee Meeting	4	y
	NARUC EV State Working Group			
July 30, 2024	Equity and Access to Charging	Committee Meeting	1.5	y
April 29, 2025	Electric Power Research Institute (EPRI) EVs2Scale Initiative	Committee Meeting	1	y
May 27, 2025	Managed Charging	Committee Meeting	1	y
	NARUC - Regulatory Training Initiative			
August 21, 2024	Utility Credit Rating 101	Webinar	3	y
August 23, 2024	Utility Insurance 101	Webinar	2	y
Dec. 11-12, 2024	NASEO-NARUC Integrated Distribution System Planning 2.0	Training	12	n

FY 2024-2025 Participation in Organizations Tracking Spreadsheet				
Commissioner Carolee Williams				
Date	Title of Event	Event Type	Hours	Virtual
Lawrence Berkeley National Laboratory				
February 19, 2025	Bridging the Gap on Grid Resilience Data, Metrics and Analyses	Webinar	1	y
New Mexico State University-Center for Public Utilities				
April 6 -9, 2025	Current Issues 2025	Conference	13.5	n
Total			79	
Out of Office Participation			59.5	

Public Service Commission Educational Programs

Various dates throughout the Review Period	Cybersecurity Awareness videos and PSC Policies – Public Service Commission via SCEIS	
September 30, 2024	Annual Ethics Training – Part 1	3.25 hrs.
October 4, 2024	Annual Ethics Training – Part 2	3.25 hrs.
December 19, 2024	ND-2024-42-E - Duke Energy Carolinas, LLC and Duke Energy Progress, LLC on Hurricane Helene Restoration Efforts	
January 21, 2025	ND-2024-44-E - Conservation Voters of South Carolina Regarding Transmission Planning Best Practices and Examples of Successful Transmission Planning in Other States	
January 29, 2025	ND-2024-55-E: SERC Reliability Corporation Regarding SERC 101/ERO Enterprise, Transmission Planning, and Load Growth/Changing Resource Mix	
April 24, 2025	ND-2024-56-E: Duke Energy Carolinas, LLC and Duke Energy Progress, LLC on a Proposed Merger	
May 12, 2025	ND-2025-18-E: Conservation Voters of South Carolina on Electric Grid Benefits of Energy Efficiency	

B. A description of the topics and any certificate or recognition received:

See above. No special certification or recognition given.

C. How the program helped you as a commissioner and benefitted the Commission; and

As a lifelong public servant I go into every learning opportunity looking for the most that I can learn from the exposure. I take notes and underline key ideas. This exposure makes me a more well-rounded and more informed commissioner. I believe this leads to more informed and pertinent questions.

D. The amount of time spent out of the office due to attending educational programs.

I invested approximately 79 hours attending various National Association of Regulatory Utility Commissioners (NARUC), Southeastern Association of Regulatory Utility Commissioners (SEARUC) and the New Mexico State

University Center for Public Utilities Current Issues class. I attended other educational programs or events including the Allowable Ex Parte Communication Briefings and PSC offered trainings.

2. Participation in organizations.

Provide the following information regarding your participation in organizations:

- A. The name of organization, position held, and committee served on;
- B. A description of the organization's function;
- C. How participation in the organization helped you as a commissioner and benefitted the Commission; and
- D. The amount of time spent out of the office due to your participation in organizations.

A. The name of organization, position held, and committee served on.

NARUC -National Association of Regulatory Utility Commissioners

NARUC - representing South Carolina - Electric Vehicles State Working Group

NARUC - Department of Energy-Joint Office of Electric Transportation Executive Dialogue on EV Grid Integration

NARUC - Committee on Energy Resources & the Environment

NARUC - Committee on Consumers and the Public Interest

NARUC - Ambassador

SEARUC - Southeastern Association of Regulatory Utility Commissioners

B. A description of the organization's function.

NARUC's mission is to serve the public interest by improving the quality and effectiveness of public utility regulation. Under state laws, NARUC's members have an obligation to ensure the establishment and maintenance of utility services as may be required by law and to ensure that such services are provided at rates and conditions that are fair, reasonable, and nondiscriminatory for all consumers. Through NARUC I have met various commissioners throughout Canada and the US with whom I have built relationships and can connect with them as needed. I have developed two special connections through NARUC. One was mentioned last year and is an ongoing occasional call with a Virginia commissioner about overall issues but not detailed dockets that are facing both states. Similarly, through NARUC's Women in Utility Regulation, I have begun to develop a similar relationship with a British Columbia commissioner: a trusted colleague whom I can ask questions and talk through generally emerging issues and knowledge.

Electric Vehicles State Working Group (EVSWG) is exploring emerging topics such as electricity load from EV charging, how to shift this new load to off-peak hours, and whether and how utilities may be involved in offering EV charging to drivers with its members and experts covering topics. NARUC, with support from the U.S. Department of Energy, is facilitating the EVSWG.

NARUC Department of Energy-Joint Office of Electric Transportation Executive Dialogue on EV Grid Integration representing the SEARUC region – The purpose of this group which was formed in June of 2023 is to provide us with a chance to regularly connect with federal partners: to learn what programs the federal government is offering and to educate them regarding the realities of utility regulation. I represent the perspective of the Southeastern states. Benefits here include a growing understanding by the Deputy Assistant Secretary of Energy of the South Carolina electric vehicle economic development and regulatory landscape.

NARUC - Committee on Energy Resources & the Environment- This year I have not been able to participate in any sessions except those at NARUC Summits, due to the timing of their meetings and our meetings.

NARUC - Committee on Consumers and the Public Interest –This committee focuses on analyzing the growing and changing role State commissions play in protecting consumer interests. This year I have participated by both answering and asking questions of fellow committee members and attending sessions in person at summits.

NARUC – Ambassador- Current commissioners reach out to new commissioners in other states to discuss available educational resources and more via NARUC. I have been paired with two new commissioners this year from North Carolina.

NARUC Wildfire Handbook Steering Committee – Member – NARUC invited me to participate in the creation of a Wildfire Handbook Steering Committee during a time while South Carolina was dealing with wildfires. The work builds on the work that I previously did for the City of Charleston regarding resilience. It has been an excellent opportunity to learn about a utility management realm that has not had much impact on South Carolina but has some potential to impact us in the future.

SEARUC’s purpose is the advancement and education of commission regulation through the study and discussions of subjects concerning the operation and supervision of public utilities to protect the interests of the people with respect to regulation of the Southeastern States. SEARUC’s purpose is also to promote cooperation among the commissions of the 11 states and the unincorporated territory of the United States of America. This is where I have developed my closest connections with colleagues and resources outside of South Carolina.

C. How participation in the organization helped you as a commissioner and benefitted the Commission.

Education and Organizational Participation overlap in my mind. I have addressed some of the benefits in the descriptions given above. In general, I find that learning with my commissioner peers is an invaluable opportunity. NARUC and SEARUC create some safe spaces for knowledge enhancement as well as an opportunity to learn as I prepare for the panel to ensure that South Carolina is displayed in a positive light through my role as a moderator or participant.

D. The amount of time spent out of the office due to your participation in organizations.

The chart in Section 1 shows I spent 59.5 hours out of the office participating in the above organizations.

3. Representation in Official Capacity as Commissioner.

For any event attended in your official capacity as commissioner that has not been included in item 1 or 2, provide the following information:

- A. Each event attended;
- B. The sponsoring organization;
- C. A description of the activity (if speech or panel discussions, describe the topic); and
- D. The amount of time spent out of the office due to your representation as commissioner.

A. **Convocation for Clemson Design Center**

B. Clemson University

C. Speech entitled “You Never Know”. The speech focused on my career evolution. Each of my successive professional jobs built on prior roles. Thus, my career makes sense as a journey. I made the point that when I was the age of the students in the audience, I would never have expected to do much of what my career has focused on, including becoming a PSC commissioner. It was a good opportunity to highlight the Commission’s purpose and mission.

D. 2 hours. The speech took much longer to create, but I chose to create the speech on my own personal time since it was about much more than the Commission. It took 2 hours from my day to attend and deliver the speech.

- A. **Breakfast with Commissioners**
 - B. NARUC Winter Policy Summit
 - C. NARUC Vice President Jehmal Hudson recruited fellow commissioners to serve as facilitators at a breakfast meeting of commissioners. The purpose of the meeting was to get to know fellow commissioners by hearing about ongoing and future issues.
 - D. 1 hour preparation and 1 hour at the event
- A. **Facilitating Uprate Transactions Panel**
 - B. NARUC Winter Policy Summit Nuclear Regulatory Modernization
 - C. Moderated a session entitled “Facilitating Uprate Transactions” which was focused on loan programs offered by the US Department of Energy
 - D. .5-hour preparation and 1 hour at the event

4. Notable Cases

In your own words, describe three cases in which you participated that you believe were the most significant during the review period. Provide a brief summary of the case, including the case name, the docket number, and the issues and outcome (two-three sentences). Your response should focus on: (a) why this case was significant; and (b) how the educational programs you attended, your participation in organizations and/or experience as a commissioner benefitted your decisions in each case.

- (1) **Duke Energy Carolinas, LLC's and Duke Energy Progress, LLC's Request for Approval of Modifications to DSM/EE Portfolios (2024-303-E)**– Investor-Owned Utilities (IOU) may apply for approval of their annual review of their Demand Side Management/Energy Efficiency (DSM/EE) Portfolios without a hearing. The Commission voted on May 8, 2025, to schedule a hearing based on questions that remained primarily introduced by the Department of Consumer Affairs (DCA). On May 16, 2025, Duke Energy applied for reconsideration of the Commission’s decision. Prior to the Commission having a chance to reconsider, the parties entered a Stipulation resolving all issues. The Commission approved the Stipulation on June 5, 2025. This is a notable case as it demonstrates that the judicial process works. The Stipulation requires much more information to be provided going forward for these important programs to continue. Once the Commission determined that a hearing was necessary, the IOU committed to providing additional information in the future. As a result of the Commission making the decision to move forward with a hearing to provide greater transparency and ensure the best results for DSM/EE programs, the Company used the time during the reconsideration phase to come to an agreement with the DCA. This agreement will provide greater transparency and support good fact-based decision-making in the future. Legal training and support aided my decision-making process in this docket.
- (2) **Various Certificate of Environmental Compatibility and Public Convenience and Necessity (CEPCN) for the Construction and Operation Applications for 230 kV Transmission Lines** – This year the Commission heard nine applications for approval of new transmission lines. I find this notable as I do not recall ever having this many CEPCN hearings addressing transmission. Grid resilience is vital in a state with as much growth as South Carolina is experiencing. As such, applications for transmission siting are evidence of both the growth trend as well as South Carolina’s goal for resilience. As a visual learner and a holistic thinker, I would appreciate a more comprehensive view of how these transmission upgrades work together. I appreciate that the General Assembly has added transmission planning to the requirements of future Integrated Resource Plans. Efficiency in review was enhanced in May when the General Assembly passed Act 41 which included requirements and opportunities for more efficient yet thorough review of applications where IOUs are enhancing transmission substantially using existing rights of ways. Please note in the Public Service Commission’s FY 24 – 25 Performance Measures Report the inclusion of SAIDI (disturbances in electrical supply) SAIFI (frequency in electrical supply) from 2016 to 2024. As the above-mentioned grid enhancing and hardening measures are implemented, it will be

interesting to see how the utilities' SAIDI and SAIFI scores may change over time. Of course, grid hardening is much more complicated than just enhancing transmission, but this is a key component. Various educational opportunities associated with grid hardening and the needs for moving more electrical load throughout the state support this work.

- (3) Duke Energy Progress and Duke Energy Carolinas Integrated Resource Plan (IRP) (2023-8-E and 2023 10-E)** - A good integrated resource plan is a north star for our state's IOUs and Santee Cooper. The IOUs have each been creating IRPs for decades but only have been creating them for Commission approval since 2020. The Commission is responsible for determining that the Companies' proposed IRP is the most reasonable and prudent means of meeting energy and capacity needs. Each utility has done an increasingly clearer and more transparent job in creating their IRPs for the Commission. Still there will be differences in perspectives, opinion and data. To some degree, this was the case in this docket. At the time that this decision was made, the Commission had six commissioners. A public vote was taken which resulted in no decision. As important as a good plan is, I decided the greater good was to focus on the Duke Companies continued improvement and joined the majority to support the 2023 plan. Asking the Duke Companies to modify that plan would ultimately put the Companies and the Commission in catch up mode as the Company would be required to update its portfolio, request approval and then move forward with its annual updates. This rationale was even more significant as this is the IRP which the Duke Companies initially filed in August of 2023, but its load forecast was significantly updated and the Commission approved ORS's request to reset the maximum 300-day statutory timeline and treat the supplemental filing as the new 2023 IRP. In other words, the data used in the initial filing was already dated. In my opinion in a state with a balancing system that is changing as rapidly as South Carolina as well as the Duke Energy Carolinas territory is, greater value is produced by the Companies focusing on updates and their comprehensive 2026 IRP. The Commission's decision was not made until November 4, 2024. Much of the IRP's data was reliant on data pre-August 2023 with only the load forecast updated and submitted by November 30, 2023. The motion that ultimately passed requested additional information going forward, but did not require a new model run of the 2023 data. There is regularly a tension between the goal of perfection of a plan not getting in the way of good. In this case, I decided that basing our decisions on good data and better data in the future was prudent. General planning and legal training and experiences as well as pragmatic decision making supported the process I used in making this decision.

5. **Accomplishments of the Public Service Commission**

Describe what you believe are the greatest accomplishments of the Commission during the review period.

(1) Concurring and Dissenting Opinions

One way that I and the Commission has improved is through the clarity offered through its dissenting and concurring opinions. This year commissioners articulated different rationales through four concurring and five dissenting opinions. Such opinions provide detailed nuances into different legal basis and rationale as well as important information that was not included in the majority opinion. PURC was right when they challenged me to do better in offering these additional insights for the good of future decision making. I authored three of these opinions. All three were concurring opinions where I felt it was important to clarify a distinct rationale. These opinions also reflect my independent decision making and growth as a commissioner.

(2) Deliberative and Timely Decision Making Along with Communication

The Commission was taking sometimes months to come to a decision in 2021. Four commissioners including myself were brand new and the other three were relatively new as well. Today we have clear internal communications regarding outstanding decisions and number of days since the hearing and

days since decisions until orders are issued. We see draft agendas over one week ahead and can use this to prepare for upcoming decisions. We also get calendar information weekly looking out about 6 months with new additions clearly marked. None of these proactive preparatory communication tools were in place in 2020. In addition, all staff have access to the department Smartsheet. It's a brain trust of information: what attorney is dedicated to each docket and where it is in the process if the order writing has begun. All of this, plus the experience and understanding that comes from having been a commissioner for 5 years leads to a much more informed and prepared Commission. Strides were made several years ago and continue to be made. The difference is this year, I am comfortable enough with my workload as a commissioner that I can use these tools to be even more prepared. I no longer feel as though I am treading water but have come into my own with the support of staff and these communication tools.

(3) Process for Orders

Similarly, the process for reviewing and approving orders has continued to improve. I wrote on this improvement last year. This year an internal schedule was developed for writing, review by key staff prior to the commissioners' review of orders and finally the Chairperson's signature. That has led to continued improvement in the average number of days to issue orders decreasing from almost 33 days in June of 2024 to just under 22 days in June of 2025. This is not just about quantity, but also about the quality of the orders which improved through the updated internal collaborative processing schedule.

(4) Reorganization of Legal Staff for Effectiveness

This year the Chair reorganized our legal division to support two facets of our products. The reorganization reflects the amount of work that everyone has on their shoulders but especially our General Counsel. The following is very much an oversimplification. The oversight and prioritization of timely and quality orders was given to our Chief Staff Attorney. The General Counsel was allowed to focus on the process and quality of our hearings, allowing one person to be more timely and more responsive regarding our hearings' administration as well as issuing Standard Hearing Officer Directives, offering legal advice regarding Commission practices and much more. This was done using current staff but allowing them to excel due to narrower foci.

6. Work Schedule and Preparation

A. Describe your schedule during an average work week. For example, how often are you in your office in Columbia? How many hours do you telecommute?

During a typical work week, I prepare for business meetings and any Monday hearings over the weekend. This allows me to be prepared to request additional background information during the briefings.

Currently, we hold hearings any day of the week, but they do tend to take place on Tuesdays, Wednesdays, and Thursdays. When this happens, I tend to work remotely on Mondays and Fridays and work from the Columbia office for hearings and briefings.

One update to my patterns this year is that I realize that the more that can be discussed in our agenda briefings, the more informed everyone is going into the weekly business meetings. More specifically, a good exchange of information on Monday leads to more helpful understandings and more productive conversations throughout the week. In my opinion this exchange happens much more meaningfully when it can be done in person. Thus, this year I have been attending as many of our Monday briefings in person as I can.

As we emerged from the time of Covid, I learned that I comprehend more by being present in the office and by participating in hearings in person. Participating remotely to me means that I am operating without being able to see all the parties in the room. There are nuances lost when participating remotely, which is why, most often, I

attend business meetings and hearings in person. That experience adds an important dimension. Remote participation does work well when needed. It's just not the best in my opinion. The PSC team makes this an effective option which is good for participants and commissioners, when essential.

On average, I work from the PSC office 25 hours a week. That said, occasionally I am in the Columbia office the entire week. Some weeks when there are no hearings or business meetings, I work from my Charleston office all or most of the week.

B. Describe how you prepare for a hearing.

I think and process better using excel spreadsheets. It helps to organize my thinking and to differentiate details and perspectives. I begin by reading the pertinent law and then the application and testimony. I record key testimony and develop potential questions and add both to my spreadsheet. I move on to read intervenors' as well as the Office of Regulatory Staff's testimonies and again outline key points, salient statutory factors and questions. I follow up with PSC staff on questions that need their clarification. I continue to update this material as staff holds briefings on the same material.

There are times when, because of our schedule of back-to-back hearings with intense amounts of testimony as well as highly specialized information in that testimony I have begun to feel more confident in not reading all the testimony when time necessitates that I prioritize my reading. I strongly rely on staff briefings and review all questions that staff suggest being asked as important clarifications for the record. This year more than any other, I have been able to work ahead: reading testimony, reading summaries provided well in advance by our Special Counsel, taking my own notes and questions with much follow up to our assigned attorneys and technical staff on each docket.

As I have matured as a commissioner, I understand speed-reading ability is not a required skill for the position. Commissioners are selected based on knowledge, our ability to learn, curiosity, ability to synthesize huge volumes of information and ability to vote based on the law and the information presented in each docket.

Before deciding a case, I talk to fellow commissioners and staff and learn from their perspectives and offer my own. Not one staff member or commissioner can master it all. In our pursuit of excellence, we are stronger by understanding our individual perspectives and strengths as we individually pursue fair, just and reasonable decisions.

7. Effects of Code of Judicial Conduct and South Carolina's ethics laws on your role as Commissioner

In your own words, discuss how the Code of Judicial Conduct and the Ethics Laws interact and affect you and your role as a commissioner.

The Code of Judicial Conduct and the SC ethics laws are evidence that this job and the judicial process is not about me and any personal inclinations I have. Instead, it is about steadfastly listening and deciding based on the evidence and what is best for providers as well as the using and consuming public. It is essential that this be done in such a way that not only avoids improprieties, but the appearance of improprieties. My job as a commissioner is to be open to all perspectives in our hearings: to let the data and the law influence my questions and my decisions. In other words, this work must be done with integrity and impartiality. Through these commitments, we earn and keep the public's trust.

8. Challenges of the Public Service Commission

Describe three challenges of the Public Service Commission during the review period, and how those challenges were managed.

(1) Decision Making in Business Meetings

This year more than any other in my almost five years on the Commission, we are debating decisions and sharing our perspectives in the business meetings. While I wholeheartedly believe transparency is a valued public commodity, I also find that such discussions are more productively held in our briefings with our attorneys while getting legal advice and asking questions about statutory applications. This learning environment also feels more productive. While exchanging that same information just before a vote on a motion or a substitute motion accentuates our differences of opinions. Bottom line, I want the public to see the debates that we have, but I want those to reflect the most informed commissioners. We are working to offer more legally appropriate opportunities for meaningful discussion prior to the Commission Business Meetings.

(2) Consistency and Commission Orders

Consistent application of relevant laws in Commission cases is required. Still, this is very complex work based upon the statute and the record. Different attorneys are assigned different dockets. Twice this year, variations were discovered in Commission ordering paragraphs from one docket and utility to another. These dockets were based on the same statutes, were heard within a year or significantly less of each other and produced orders with one meaningful difference. They were both based on each individual record. These differences may mean that the Commission's Orders may have different provisions, including finds of fact and conclusions of law for different IOUs which may be inappropriate due to fairness and impartiality if the differences are not supported by the record. In the spirit of offering the best decision making and order writing that we can, the Commission must find a methodology that ensures our orders render consistent decisions where applicable. This begins with the questions that commissioners ask and concludes with our order writing.

(3) Everyone Offering their Best

We work for and represent the State of South Carolina. One of the Commission's Goals is to Improve our operations continuously. In that spirit, our work ethic and work product should be impeccable and if not that, then worthy of sincere pride. We have made vast improvements: for example, more timely Commission decisions and orders with the production average being about 20 days as of July 2025. Granted we are dealing with massive amounts of information backed up by what seems like limitless statutes, regulations and case law. It is a daunting undertaking. Ideally everyone should be doing a satisfactory to excellent job. Why is that not always the case? Sometimes it is concern for expressing opinions and publicly being deemed wrong. That is unfortunate. What I see is that when we express our opinions and catch errors, productively the organization and our work products are immensely better. In my opinion we must foster both a team attitude with all staff as well as accountability to our team.

9. Recusal

I had no recusals during the 2024-2025 review period.

NOTE: Do not provide any information that would violate the prohibition against ex parte communication or would otherwise violate any privilege.

Ethics Statement: I, Commissioner Carolee Williams have read and understand the Code of Judicial Conduct and the ethics laws of South Carolina. I certify that I have adhered to these standards at all times during this review period.

Signature: 

Date: August 28, 2025