

State Regulation of Public Utilities Review Committee

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April 23, 2025

Members of the South Carolina General Assembly
Columbia, South Carolina

Dear Fellow Members:

Enclosed is the State Regulation of Public Utilities Review Committee's Report as to Qualifications of Candidates for Seats 2, 4 and 6 of the Public Service Commission (Commission). The report is designed to provide you with information on the candidates qualified and nominated by the Review Committee. The Review Committee is charged with nominating up to three candidates for each seat on the Commission. In accordance with this mandate, the Review Committee thoroughly investigated each candidate with respect to his or her suitability for service on the Commission.

The Review Committee held public hearings on April 17, 2025, to question the candidates and consider the qualifications of each candidate. A transcript of the oral examination of the candidates, as well as each candidate's edited Personal Data Questionnaire, is available for review on the Review Committee's website at:

<https://www.scstatehouse.gov/CommitteeInfo/PublicUtilitiesReviewComm/2025PublicServiceCommissionScreeningInfo.php>

The Review Committee found a total of four candidates qualified and nominated for consideration by the General Assembly. The Review Committee's finding that a candidate is qualified and nominated means that the candidate satisfies the constitutional and statutory criteria for service on the Commission and the Review Committee's evaluative criteria.

Candidates are prohibited from asking for your commitment until Friday, April 25, 2025, at 9:00 a.m. Members of the General Assembly are not permitted to issue letters of introduction, announcements of candidacy, or statements detailing a candidate's qualifications on behalf of a candidate, and are not permitted to offer a pledge to vote for a candidate until 9:00 a.m. on Friday, April 25, 2025.

If you find a candidate violating the pledging prohibitions or if you have questions about this report, please contact Breeden John at (803) 212-6216 or Bryan Triplett at (803) 734-3015.

Sincerely,

A handwritten signature in blue ink that reads "Thomas C. Alexander". The signature is written in a cursive style with a large, stylized 'T' and 'A'.

Thomas C. Alexander

**REVIEW COMMITTEE REPORT AS TO THE QUALIFICATIONS
OF CANDIDATES FOR THE PUBLIC SERVICE COMMISSION, SEATS 2, 4, AND 6**

INTRODUCTION

Section 58-3-530(1)(a) of the South Carolina Code of Laws charges the State Regulation of Public Utilities Review Committee ("Review Committee") with the duty to nominate candidates for the members of the South Carolina Public Service Commission ("Commission"). The terms for Commission Seats 2, 4, and 6 expired on June 30, 2022.

The Review Committee began the screening process on March 7, 2025, with advertisements and press releases regarding the positions. A total of six candidates submitted applications by the application deadline of March 28, 2025. Two of these candidates withdrew from consideration prior to the Review Committee's public hearings on April 17, 2025. After the public hearings concluded, the Review Committee found a total of four candidates qualified and nominated for consideration by the General Assembly.

The Review Committee conducted background investigations of each candidate, including credit, driver's license, and law enforcement checks. It gave a written examination to determine the level of knowledge that each candidate has with respect to substantive public utility issues, ethical constraints applicable to the Commission, and the operations of the Commission. During the public hearings, each candidate was questioned and given an opportunity to make statements as to his or her qualifications and desire to serve as a Commissioner. Each candidate was also questioned and given an opportunity to discuss matters from his or her background check; matters of a private or confidential nature were discussed in executive session.

LEGAL QUALIFICATIONS

Pursuant to Section 58-3-20(A), members of the Commission must have the following qualifications:

- (1) a baccalaureate or more advanced degree; and
- (2) a background of substantial duration and an expertise in at least one of the following areas:
 - (a) energy;
 - (b) telecommunications;
 - (c) consumer protection and advocacy;
 - (d) water and wastewater;
 - (e) finance, economics, and statistics;
 - (f) accounting;
 - (g) engineering; or
 - (h) law.

The Review Committee is also required to consider: "(1) the ability, dedication, compassion, common sense, and integrity of the candidates; and (2) the race and gender of the candidates and other demographic factors to assure nondiscrimination to the greatest extent possible of all segments of the population of the State." S.C. Code Ann. §58-3-560. The

determination of legal qualifications includes a determination of the candidate's residence in the appropriate Public Service Commission district as established by Section 58-3-20, the candidate's eligibility for election as determined by Section 58-3-24, and the candidate's compliance with constitutional provisions limiting election to those persons eligible to be electors of this State.

Pursuant to S.C. Code Ann. §58-3-530, the annual performance review of Commissioners seeking reelection must be made a part of the Commissioner's record for consideration if the Commissioner seeks reelection. These evaluations are included after the Commissioners' summary of qualifications.

GENERAL QUALIFICATIONS

To determine fitness beyond mere legal qualifications, the Review Committee considered each candidate's experience, temperament, compliance with and knowledge of legal and ethical constraints on public service, knowledge of Commission operations, demonstrated or potential aptitude for meaningful leadership and/or service at the Commission, and demonstrated integrity, including the handling of personal financial affairs. The Review Committee considered each candidate as a whole in making a determination of qualified and nominated.

Experience

Section 58-3-20 requires that Commissioners have a background of substantial duration and an expertise in energy; telecommunications; consumer protection and advocacy; water and wastewater; finance, economics, and statistics; accounting; engineering; or law. The Review Committee considered not only whether a candidate has succeeded in one of these fields but also whether the candidate has the capability of transferring this success and knowledge to the operations of the Commission. The Review Committee's transcript contains each applicant's background and employment history.

Temperament

The Review Committee sought to determine whether a candidate's sense of the role he or she is to fill on the Commission is such that his or her work will be productive, proactive, and protective of the interests of all South Carolinians.

Compliance with and Knowledge of Legal and Ethical Constraints

Section 58-3-30 requires that Commissioners adhere to the State Ethics Act and the Judicial Code of Conduct. The Review Committee believes that not only must the candidates be aware of the legal and ethical constraints, they must have conducted and comported themselves with the highest regard for ethics in their actions.

Potential Aptitude for Meaningful Leadership and/or Service at the Public Service Commission

The Review Committee believes that the Commission should have strong leadership, work

toward common goals, have a positive influence on employees, and ensure that parties and persons appearing before the Commission are treated fairly and impartially. The Review Committee therefore sought to gauge each candidate's potential aptitude to serve as a leader and/or as a Commissioner supporting the goals and mission of the agency.

Integrity

Candidates must assure the Review Committee that their word is their bond. The Code of Judicial Conduct requires, among other factors, that Commissioners and candidates handle their finances in a responsible manner. The Review Committee therefore considered the way each candidate has managed his or her financial affairs.

Substantive Knowledge of Commission Operations

The Review Committee believes that every candidate, whether incumbent or non-incumbent, must demonstrate some basic understanding of the role of the Commission and its operations. It would be unfair, however, to require non-incumbents to have accumulated a wealth of knowledge about Commission operations specifically, or regulated utilities generally. Unlike incumbent Commissioners, challengers have not had the benefit of a compensated opportunity to educate themselves in hearings or through conversations with Commission staff. The Review Committee expects incumbents and others who have substantial experience appearing before the Commission to be able to discuss these matters with a greater fluency than those persons who have, to date, committed themselves to other employment. The Review Committee emphasizes that the substantive knowledge findings contained in this report are a measure of a candidate's knowledge at the time of his or her candidacy. The findings are not necessarily indicative of a candidate's ability to subsequently master Commission operations and the multitude of issues relating thereto.

FINDINGS AS TO QUALIFICATIONS AND NOMINATIONS

The Review Committee screened a total of four candidates for Seats 2, 4, and 6 on April 17, 2025. In accordance with Section 58-3-530(1)(a), the Review Committee may nominate up to three candidates per seat to be elected by the General Assembly. The Review Committee found the following candidates qualified and nominated them for election to the South Carolina Public Service Commission:

| | |
|----------------------|---|
| <u>SEAT 2</u> | Florence P. Belser Richard N. McIntyre |
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|----------------------|-----------------------|
| <u>SEAT 4</u> | H. David Britt |
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|----------------------|---------------------------|
| <u>SEAT 6</u> | Justin T. Williams |
|----------------------|---------------------------|

This report provides a summary of qualifications for the candidates found qualified and nominated. More detailed information about each candidate can be found in the screening transcripts at: <https://www.scstatehouse.gov/CommitteeInfo/PublicUtilitiesReviewComm/2025PublicServiceCommissionScreeningInfo.php>

EXHIBIT 1

CANDIDATES FOUND QUALIFIED AND NOMINATED

FLORENCE P. BELSER
SEAT 2

Review Committee Finding: QUALIFIED AND NOMINATED

Personal Information, Educational Background, and Work Experience:

Ms. Belser earned a Bachelor of Science degree in biology from the College of Charleston in 1983 and obtained a Juris Doctor from the University of South Carolina in 1987.

Ms. Belser has served on the Public Service Commission as the commissioner for the Second Congressional District since 2019. She served as Vice Chair of the Commission from July 2020 through June 2022 and Chair of the Commission from July 2022 through June 2024.

Ms. Belser previously worked as a substitute teacher in Clarendon, SC from 1987-1988. She then served as a judicial law clerk for the Honorable James “Mac” Morris from 1988-1990. From 1990-1991, she served as an associate with John E. Miles, Esquire. From 1991-1993, she worked as an assistant solicitor for the Third Judicial Circuit.

Ms. Belser worked as a staff attorney and Deputy General Counsel for the Public Service Commission (PSC) from 1993-2003 and she served as an Executive Assistant for the PSC from 2003-2004. Ms. Belser then served as General Counsel for the Office of Regulatory Staff from 2004-2019.

Ms. Belser is a member of the National Association of Regulatory Utility Commissioners (NARUC) where she serves as Co-Vice Chair of the NARUC Electricity Committee; is a member of the NARUC Energy Resources and the Environment Committee; and is a member of the NARUC Nuclear Energy Subcommittee. She is also a member of the Southeastern Association of Regulatory Utility Commissioners and has been a member of South Carolina Bar Association since 1988. Ms. Belser is also a member of St. Matthias Anglican Church, member of the American Legion Auxiliary, Clarendon Hall Land Trust Trustee, and Life Member of the College of Charleston Alumni Association.

Test Score: 91

**COMMISSIONER QUESTIONNAIRE
PERFORMANCE SUMMARY**

NAME: FLORENCE P. BELSER
SEAT : DISTRICT 2
DATE ELECTED: FEBRUARY 6, 2019
DATE TERM EXPIRES: JUNE 30, 2022

Please provide information for the review period covering July 1, 2023 through June 30, 2024. 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;
- B. A description of the topics and any certificate or recognition received;
- C. How the program helped you as a commissioner and benefitted the Commission; and
- D. The amount of time spent out of the office due to attending educational programs.

I. NARUC and SEARUC Meetings / Conferences / Conference Calls

(I) SEARUC Annual Education Conference held in Ashville, N.C. — June 2-5, 2024.

Sponsoring organization is the Southeastern Association of Regulatory Utility Commissioners (SEARUC). The conference was an in-person event, starting on Sunday, June 2 and concluding on Wednesday, June 5. I traveled to the conference on Sunday, June 2 and returned to Columbia on Wednesday, June 5. I was out of the office for three (3) days. No certificate of attendance was provided.

I attended the following sessions during the 2024 SEARUC Annual Education Conference:

Monday, June 3

- General Session 1
 - Opening Remarks
 - Panel of Speakers addressing: “Empowering the Southeast: Navigating Load Growth, Resiliency, and Affordability”
- Concurrent Session: “Perspectives from Wall Street”
- Keynote Address: Roy Cooper, Governor of North Carolina
- Concurrent Session: “Improving Long-Term and Future Affordability”
- General Session 2
 - Panel of Speakers addressing: “Empowering the Southeast: Navigating Load Growth, Resiliency, and Affordability – Part 2”

Tuesday, June 4

- Concurrent Session: “Load Growth and Capacity: Short Term Needs. Long-Term Solutions”
- Concurrent Session: “Powering Tomorrow: Confronting the Interconnection Backlog”

Wednesday, June 5

- Commissioner's Business Meeting
- General Session: Closing Remarks

(2) NARUC Energy Resources and the Environment Committee (ERE Committee)

During the review period, I participated in one ERE Committee meeting via a Zoom conference call on September 26, 2023. (Approximately 2 hours) I was unable to participate in other calls scheduled during the review period due to conflicts with the Commission's scheduled hearings or with other Commission business.

Benefits of attending NARUC and SEARUC programs:

NARUC and SEARUC meetings provide excellent educational opportunities on multiple utility issues across industries. By attending these meetings, I have increased my knowledge and understanding of utility regulation and learned of current issues on both the state and national levels. Each meeting and session attended provides exposure to additional information on issues. The knowledge gained and shared through these meetings and conferences broadens my perspective which I can draw upon in making decisions.

The Commission benefits from my attendance at these meetings because increased knowledge, experience, and understanding of issues help me make more informed decisions on the matters before the Commission for adjudication.

II. In House Briefings / Educational Sessions

(1) Ethics Training (Required by S.C. Code Ann. § 58-3-30(C) (2015))

(Total hours 6.0)

a. October 2, 2023 (3.0 hours in this session)

- Freedom of Information Act presented by Steven W. Hamm, Esquire (1.0 hour)
- Code of Judicial Conduct presented by Hon. Thomas W. Cooper, Jr. (1.0 hour)
- Code of Judicial Conduct/Ethics & Administrative Procedures Act presented by Desa Ballard, Esquire (1.0 hour)

b. October 6, 2023 (3.0 hours in this session)

- Ethical Public Service: Beyond the State Ethics Act presented by Barbara M. Seymour, Esquire (1.0 hour)
- Substance Abuse and Cyber Ethics presented by Jack Pringle, Esquire (2.0 hours)

This required training reinforces the Code of Judicial Conduct (CJC), the State Ethics Act (SEA), and the Administrative Procedures Act (APA). As Commissioners, we must adhere to these rules and statutes, and, for me, continual study strengthens my knowledge and understanding of the requirements contained in the CJC, SEA, and APA. It is a benefit to the

Commission as an institution that commissioners and employees are knowledgeable of the provisions of the CJC, SEA, and APA so that we may all conduct ourselves and the business of the Commission in compliance with the requirements of the CJC, SEA, and APA.

Additionally, a session of mental health, wellness, and substance abuse was presented. For us to be effective employees, we need to be aware of challenges and stresses we may encounter that could impact our ability to be productive employees. This session provided some valuable tips and resources on dealing with stress and challenges associated with both work-life and private-life and encouraging productive habits for mental well-being. This session has proven to be popular with commission employees.

(2) Allowable *Ex Parte* Briefings (Pursuant to S.C. Code Ann. § 58-3-30(C) (2015))

- a. July 6, 2023 — Allowable *Ex Parte* Briefing from Texican Natural Gas Company.
Topic of briefing: Natural Gas Markets in South Carolina. (Docket No. 2023-70-G)
- b. July 12, 2023 — Allowable *Ex Parte* Briefing from South Carolina Office of Regulatory Staff.
Topic of briefing: SERC Reliability Corporation, Resource Adequacy, and Related Matters (ND 2023-33-E)
- c. September 15, 2023 — Allowable *Ex Parte* Briefing from Duke Energy Carolinas, LLC and Duke Energy Progress, LLC.
Topic of briefing: Duke Energy Carolinas, LLC's and Duke Energy Progress, LLC's Integrated Resource Plan filing, "2023 Carolinas Resource Plan." (Docket No. 2023-8-E and Docket No. 2023-10-E)
- d. September 21, 2023 — Allowable *Ex Parte* Briefing from Conservation Voters of South Carolina.
Topic of briefing: How other states have reliably integrated renewable energy onto their grids. (ND-2023-46-E)
- e. November 30, 2023 — Allowable *Ex Parte* Briefing from Duke Energy Carolinas, LLC and Duke Energy Progress, LLC.
Topic of the briefing: Energy Efficiency, Demand-Side Management, and Demand Response Overview. (Docket No. 2023-8-E, Docket No. 2023-10-E, Docket No. 2013-298-E, and Docket No. 2015-163-E)
- f. January 24, 2024 — Allowable *Ex Parte* Briefing from Carolina for Affordable and Reliable Energy (CARE).
Topic of the briefing: South Carolina Electric and Natural Gas Reliability Study. (ND-2024-3-EG)

- g. January 29, 2024 — Allowable *Ex Parte* Briefing from Conservation Voters of South Carolina.
Topic of the briefing: Battery Storage. (ND -2023-88-E)
- h. February 27, 2024 — Allowable *Ex Parte* Briefing from TotalEnergies Renewables USA, LLC.
Topic of the briefing: The Opportunity for Offshore Wind, including TotalEnergies Carolinas Long Bay Project to be developed off the coast of Wilmington, North Carolina. (ND-2024-4-E)
- i. March 19, 2024 — Allowable *Ex Parte* Briefing from Southeastern Wind Coalition.
Topic of the briefing: Overview of offshore wind's potential to meet economic development, grid reliability, and resource demand needs in the Southeast. (ND-2024-12-E)
- j. May 7, 2024 — Allowable *Ex Parte* Briefing from Duke Energy Carolinas, LLC and Duke Energy Progress, LLC.
Topic of the briefing: Duke Energy Carolinas, LLC's and Duke Energy Progress, LLC's proposed Customer Renewable Programs and proposed modifications to Green Source Advantage Programs and Riders GSA (Docket No. 2022-326-E and Docket No. 2018-320-E)

(3) PSC Policies

- a. July 27, 2023 — PSC Information Security Policy Reminders and Quiz
- b. September 7, 2023 — Security Awareness Essentials for State Employees
- c. November 27, 2023 — Public Service Commission Tenant Handbook
- d. March 21, 2024 — PSC Reduction in Force Policy
- e. March 21, 2024 — PSC Alternate Work Schedule Policy and Guidelines and Quiz
- f. March 21, 2024 — PSC Confidentiality Agreement and Quiz
- g. March 21, 2024 — PSC Drug-Free Workplace and Substance Abuse Policy and Quiz
- h. March 21, 2024 — PSC Dual Employment Policy and Quiz
- i. March 21, 2024 — PSC IT Acceptable Use Policy and Quiz
- j. March 21, 2024 — PSC Mobile Device Management User Agreement and Quiz
- k. March 21, 2024 — PSC Social Media Policy and Quiz
- l. March 21, 2024 — PSC Emergency and Safety Procedures and Quiz
- m. March 21, 2024 — PSC South Carolina Code of Judicial Conduct Rule 501 and Quiz
- n. April 12, 2024 — PSC Revised *Ex Parte* Communications Guidelines and Quiz
- o. June 18, 2024 — PSC Information Security Policy Reminders and Quiz

The training listed in this section was conducted online through the SCEIS website. The training on PSC Policies is important to ensure commissioners and all employees of the agency

comply with the approved policies of the agency. Completion of the courses was recorded on the SCEIS website.

III. Other Educational Session

(1) IPU Accounting and Ratemaking Course 2024 (March 12 – 14, 2024).

Sponsoring organization — Michigan State University Institute of Public Utilities

Sessions addressed:

- Foundations of Public Utility Regulation and Ratemaking (topics included: introduction to the course and objectives; public utility monopolies and governance; sustainable utilities and elements of capacity; regulatory policy foundations; jurisdiction for utility rates; regulatory standards of review; accounting basics and concepts; accounting governance (FASB, GASB); generally accepted accounting principles and standards; regulatory accounting vs. GAAP; Uniform System of Accounts (USoA); regulatory and rate-case auditing; financial statements and reports; regulatory enforcement; ratemaking process and key steps; cost-of-service ratemaking; test year for revenues and rates; revenue requirements and formulas; case-study overview.)
- Balance Sheet, Capital Expenditures, and Rate Base (Capex) (topics included: balance sheet overview; capital planning and asset management; certificates of need and preapproval; utility plant in service; contributed capital (CIAC); funds for construction (AFUDC, CWIP); asset valuation methods; acquisition adjustments; plant service lives and depreciation; accumulated depreciation; deferred income taxes; working capital; operating reserve accounts; regulatory assets and liabilities; deriving the rate base; ratemaking scenarios.)
- Income Statement, Revenues, and Expenses (Opex) (topics addressed: income statement overview; operating revenues; revenues by customer class; operating expenses; personnel-related expenses; expenses by function; disallowed expenses; depreciation expense; income and other taxes; cost adjusted mechanisms (trackers); system improvement charges; financial auditing for ratemaking; management auditing; rate-case adjustments; ratemaking scenarios.)
- Cash Flow, Debt and Equity Financing, and Revenue Requirements (topics included: cash-flow statement overview; financial performance metrics; utility ownership structures; corporate governance and accountability; financial regulation and reporting; risk factors and disclosure; capital structure (debt and equity); debt financing and credit ratings; equity financing and capital markets; cost of equity methods; return on equity calculation; weighted cost of capital; authorized rates of return; risk, returns, and incentives; regulatory lag and returns; deriving

revenue requirements; revenue deficiency and conversion factors; rate-case scenarios.)

- Tariffs, Cost Allocation, Rate Design, and Consumer Policies (topics included: rate schedules (tariffs); evaluation criteria in ratemaking; price elasticity of demand; dynamic role of price; variations and trends in demand; deliveries to the system; non-revenue production; price differentiation; cost-of-service studies and methods; functionalization and classification; cost allocation by class; metering and billing; fixed and variable charges; rate-design alternatives; bill calculation and impact; consumer rights and responsibilities; affordability and assistance; implementing rate changes; settlement conditions; ratemaking scenarios.)

The class lasted three days and instruction covered five 160-minute sessions for total attendance of 13.33 hours. The class was conducted on the internet with virtual attendance. I participated from the office and received a certificate of attendance.

The class provided me with additional instruction in regulated utility ratemaking principles and increased knowledge is a benefit to Commission. I try to take advantage of as many classes as possible as there is always something new to learn. Also, review of material aids is very helpful. Continued exposure and study leads to an expanded understanding of issues and regulatory policies and law. Classes which broaden my knowledge, and which assist in understanding the issues in the cases that come before the Commission, aid in making reasoned and sound decisions.

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;

I am a member of the National Association of Regulatory Utility Commissioners (NARUC) and the Southeastern Association of Regulatory Utility Commissioners (SEARUC). Within NARUC, I am a member of the NARUC Committee on Energy Resources and the Environment (ERE).

- B. A description of the organization's function;

NARUC is a non-profit organization dedicated to representing the state public service commissions which regulate the utilities that provide essential services such as energy, telecommunications, power, water, and transportation. NARUC's stated mission is

to serve in the public interest by improving the quality and effectiveness of public utility regulation. Under state law, 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.

SEARUC is also a non-profit corporation, and the purpose of SEARUC 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."

The NARUC ERE Committee focuses on renewable and distributed resources, energy efficiency, consumer protection, environmental protection, and public interest research and development. The Committee provides a venue for state regulators to discuss current issues on both the national and state levels and to exchange information of environmentally sustainable and affordable energy.

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

The greatest benefits from participation in NARUC and SEARUC are education and exposure to current issues. The conferences provide relevant and timely educational programs related to public utility regulation. The conferences, while educational, provide opportunities to learn from other utility commissioners as well as opportunities to gain regional and national perspectives on issues. I have benefited from these meetings by enhancing and increasing my knowledge of public utility regulation. Information gained from attending conferences and participating on committee conference calls has alerted me to recent issues and provided me with a better understanding of many issues. Increased knowledge and exposure of relevant, current topics improves my effectiveness as a regulator by providing greater understanding of public utility regulation. The Commission and the state benefit from commissioners being well-informed, and the conferences, webinars, and conference calls offered by NARUC and SEARUC are opportunities for me to further study and learn about utility regulation and issues.

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

In June 2024, I attended the SEARUC annual conference and was out of the office for three (3) days.

I also participated in one NARUC ERE Committee meeting during the review period. These committee meetings are held virtually via Zoom, and I participate from my office. Due to scheduled hearings and other Commission business, I only participated in one ERE Committee meeting.

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.

I did not attend any events in my official capacity as a commissioner during the review period.

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.

A. Petition of Duke Energy Progress, LLC for a Storm Securitization Financing Order (Docket No. 2023-89-E)

In 2022, the South Carolina General Assembly passed Act 227 (Storm Securitization Statute) which addressed storm damage recovery costs by authorizing an electrical utility to pursue securitization to recover prudently incurred costs due to storm recovery activity. The process consists of two parts: first, identification of prudently incurred storm recovery costs (Phase 1) and second, issuance of a financing order which will authorize the issuance of the storm recovery bonds; the imposition, collection, and periodic adjustments of a storm recovery charge; the creation of storm recovery property; and the sale, assignment, or transfer of storm recovery property to an assignee (Phase 2).

In August 2022, DEP filed a petition for review and recovery of storm recovery principal costs (Phase 1). (*See*, Docket No. 2022-256-E). Following a hearing in Docket No. 2022-256-E, the Commission issued Order No. 2023-260 (dated May 30, 2023) approving a partial Stipulation and approving storm costs of approximately \$170 million.

On March 31, 2023, Duke Energy Progress, LLC (DEP) filed its petition for a financing order requesting authorization for the financing of storm recovery costs due to storm recovery activities resulting from several named storms (Phase 2). This docket marked the continuation of the first case brought by an electrical utility pursuant to the S.C. Act No. 227 of 2022 (Storm Securitization Statute). The parties filed a Settlement Agreement in the case. Following a hearing on the Phase 2 petition and the Settlement Agreement, the Commission on October 23, 2023, issued the “Storm Recovery Financing Order Approving Comprehensive Settlement Agreement and Accounting Order.” (*See*, Order No. 2023-752(A)).

This case is significant because it is the first case on a financing order pursuant to the Storm Securitization Statute. Commissioners and staff members spent considerable time preparing for the case including studying the Storm Securitization Statute and the materials filed in the docket. My experience as a commissioner and as a lawyer practicing in the area of utility regulation, along with knowledge gained from seminars and educational opportunities, helped in understanding the issues presented in this case.

B. 2023 Integrated Resource Plan for the South Carolina Public Service Authority (Santee Cooper) (Docket No. 2023-154-E)

2019 Act 62 (South Carolina Energy Freedom Act or SCEFA) requires the Commission to hold a proceeding to review each electrical utility's IRP. Act 90, passed in 2021, requires the South Carolina Public Service Authority (Santee Cooper) to file its IRP with the Commission for review. Prior to the passage of 2019 Act 62 and 2021 Act 90, electrical utilities filed their IRPs with the State Energy Office, but no formal proceedings were required for review of the IRPs.

In May 2023, Santee Cooper filed its 2023 Integrated Resource Plan (IRP). This docket is significant because this is the first instance where Santee Cooper's IRP was reviewed by the Commission. The Commission issued its order in March 2024 approving Santee Cooper's IRP.

This case is noteworthy because this docket was the first instance where the Commission reviewed an IRP filed by Santee Cooper. To me, this case is also significant because the Commission has only recently been tasked with reviewing IRPs and IRP Updates, and each IRP case the Commission reviews presents another opportunity to gain more understanding of the complex issues involved and addressed in the IRP process. In reviewing an IRP, I rely upon my experience as a commissioner, as an attorney having practiced in the area of utility regulation for 30 years, as well as knowledge gained from attendance at conferences, seminars, and educational sessions, in identifying and understanding the issues presented in these cases. I have also found that every case, not just cases involving IRPs, presents a learning experience, and with the review of IRPs and the complexity and detail of the issues, each IRP case involves considerable study of the materials to grasp the issues.

C. Annual Review of Base Rates for Fuel Costs of Duke Energy Progress, LLC (Docket No. 2024-1-E)

Under the provisions of S.C. Code Ann. Section 58-27-865 (2015), the Commission must review annually the base rate for fuel costs of electrical utilities. The Commission is required to determine the amount designed to recover the fuel costs found to be appropriate for the succeeding twelve months, including adjustment for any over-recovery or under-recovery from the preceding twelve months. Stated another way, the base rate of fuel for the upcoming twelve months is based on the true-up of the cost of fuel the utility paid in the previous year and the projected cost of fuel for the upcoming year. Also addressed in the context of the annual fuel proceeding is the Distributed Energy Resource Program (DERP) charge allowed pursuant to S.C. Code Ann. Section 58-39-150 (2015) and Commission Order No. 2015-194.

This case is important for two reasons. First, this 2024 case resulted in a decrease in the fuel factor following increases from the past couple of years. Second, an issue that arose from a customer complaint case was addressed in this docket. In Docket No. 2023-242-E, the Commission heard a customer complaint alleging improper billing by Duke Energy Progress (DEP). One area where the customer alleged to have been overcharged related to the charge for the Distributed Energy Resource Program (DERP). In that customer complaint docket, the Commission determined that DEP had charged the customer an extra DERP charge on the customer's outdoor lighting service. DEP agreed with the billing error related to that customer and started an investigation of possible instances where other customers may have also been overcharged. In this current fuel case, DEP reported results of its investigation and reported 3,584 accounts were affected by the overcharge for a total amount of \$69,956.12. DEP agreed to refund the overcharges to all customers identified, and DEP is in the process of making the refunds to those customers. Further, the Commission required DEP to continue to investigate the DERP overcharge issue, report its findings to ORS, provide a root cause analysis and corrective action plan to ORS, and further update and address this issue in the 2025 annual fuel proceeding.

The statute governing the recovery of fuel costs by electric utilities is designed to provide recovery of prudently incurred fuel costs. The parties to the proceeding must present evidence regarding, and the Commission must review, the prices paid during the review period, the prices forecast for the upcoming twelve months, outages of generating units, and other factors to ensure that the utility made every reasonable effort to minimize fuel costs. The totality of my experiences (as a commissioner, previous work experiences, and numerous educational opportunities over a number of years) has helped me understand the concepts and issues presented in these cases which occur annually. Further, my experience helped to identify that one of the issues raised by the customer in the complaint docket was valid, leading to DEP's investigation and identification of the billing error which impacted numerous customers.

5. Accomplishments of the Public Service Commission

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

The time in issuing Commission orders has improved. In the review period, the average time to issue orders improved to 32.83 days — an improvement from 37.80 days in 2022-2023 and 39.55 days in 2021-2022. The Commission speaks through its orders, and it is important to the parties, the public, the Commission, and the regulatory process that well-written, well-reasoned, and accurate orders are issued in a timely manner. The Commission continues to work toward issuing all orders within thirty (30) days of the decision on a matter. During the review period, all orders subject to a statutory deadline have been issued within the statutory deadline.

During the review period and to assist with tracking and collaborating on orders, the Commission implemented the use of Smartsheet, a workflow management program. Among other functions, Smartsheet generates and sends reports to Commissioners and

Staff from information entered into the spreadsheets in the program. Use of this program has assisted in keeping Commissioners informed on the status of orders, including when deadlines are nearing and when orders are available for review by Commissioners. Once the benefits of Smartsheet were observed, the Executive Director and Staff members identified other areas where Smartsheet could be useful and began using Smartsheet for workflow in other departments and areas. In my opinion, Smartsheet has proven to be an effective tool and has resulted in improved workflow, collaboration, and communication.

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?

I live in Columbia and rarely telecommute. I am in the office daily, usually arriving by 8:30 a.m. and remaining in the office until 4:45 p.m. or later. When the daily or weekly schedule requires additional time, I arrive earlier or stay later than normal business hours or work on the weekend. I am accustomed to an office environment and am more comfortable with working in the office than working from home. Additionally, being in the office helps ensure that I have access to all materials I may need.

I usually start the day by going through emails and reviewing the daily activity report containing matters which were filed the previous day. A large part of Monday is spent reviewing matters on the agendas for the Commission business meeting, which is usually held on Thursday afternoon. Throughout the week, I will discuss upcoming matters on the meeting agenda with other commissioners and commission staff.

I spend a good portion of my time reviewing materials for upcoming hearings or upcoming business meetings. Preparation for hearings and meetings requires reviewing materials of each case or matter. Pleadings and prefiled testimony take considerable time to read. I read quite a bit while at the office and also read at home during the evenings and on weekends. After hearings, time is spent reviewing the record and proposed orders in preparation for making decisions on various matters at a Commission Business Meeting. After the Commission votes on a matter at the Commission Business Meeting, a directive recording the prevailing motion and vote is issued. Commission Staff attorneys then prepare an order memorializing the decision of the Commission and submit the order for Commissioner review. After I complete my review of an order, I will discuss with one or more of the attorneys any edits, suggestions, or concerns I have with the order. Reviewing the orders drafted by the staff attorneys and discussions following my review take time, but it is time well spent to produce a good order.

During the review period, I served as Chair of the Commission and met with the Executive Director and the leadership team to set the agendas for the business meetings. I also attended meetings with the Executive Director, managers, and other personnel regarding agency operations.

B. Describe how you prepare for a hearing.

Hearing preparation requires reading and studying the pleadings, prefiled testimony, and other documents filed in a case. Pursuant to Commission's regulations parties must prefile written testimony and exhibits. On most cases, I track the established dates for prefiling of testimony and exhibits so that I can obtain the prefiled testimony and exhibits within a few days of the documents being filed. I go through the testimony and exhibits to identify issues and make notes for reference. I try to keep up with additional materials as they are filed because I find it better to stay abreast as matters are received than try to absorb all the information at one time shortly before the hearing. However, once all the testimony and exhibits are filed, I go through the materials to ensure that I am familiar with the parties' positions, evidence, and arguments. I also research and review relevant statutes and case law on the issues presented. Commission staff members also provide briefings on major cases, and it is helpful to consult with staff members and other commissioners on issues and matters on which I have questions.

Following a hearing, work continues to prepare for discussion and voting on a case or matter at a business meeting. I review post-trial briefs or proposed orders and often review the hearing transcript or hearing record. Throughout the process, I try to discuss issues with other commissioners and with commission staff. These discussions with other commissioners and with commission staff are helpful to review the issues and evidence upon which the Commissioners must base our 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 provides a set of ethical principles and guidelines to promote integrity, impartiality, and diligence. Our legal system is based on the premise that an independent, fair, and competent judiciary will interpret and apply the laws that govern us, and these same principles apply to Commissioners who serve on the Public Service Commission. The Code of Judicial Conduct provides guidance and structure to our professional and personal lives, and when followed, the Code of Judicial Conduct helps us maintain high standards of professional and personal conduct. Similarly, the State Ethics Laws also provide structure on how we must comport ourselves in the discharge of our duties.

It is an honor to serve as a Commissioner on the Public Service Commission. I take the responsibilities of this office seriously and strive to carry out my duties as a commissioner in a professional manner. Public trust is essential to government and is essential to being a good commissioner. It is important that we are fair, impartial, and unbiased. All who are impacted by the Commission's decisions, from the parties appearing before the Commission to ratepayers, deserve impartial decisions free from bias and improper influence. Adherence to the Code of Judicial Conduct and the state ethics rules help me be an effective commissioner and state employee.

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.

A. Scheduling

During the review period, the Commission dealt with a number of complex and time-consuming cases. Scheduling of matters is often a challenge. There are several types of cases which occur annually, and for these annual cases, schedules have been developed to meet dates for decisions which are set internally or by statute for when these cases must be decided. For many cases which do not require a hearing, study of pleadings, filings, and law is required to make an informed decision, and some of these cases require considerable preparation and study. In cases requiring a hearing, scheduling can be a challenge to ensure that parties have enough time for preparation, that time is reserved for hearing, that adequate time is afforded for commissioners to review the case record and deliberate before making a decision, and that sufficient time to prepare an order is reserved. Even after schedules are set, schedules must often be adjusted to accommodate requests from parties. Challenges in scheduling have been met by the Commission and the parties working together as much as possible to ensure that conflicts in scheduling are resolved while maintaining all parties' right to a fair process. Flexibility from the Commission and parties to the proceeding is needed to address scheduling of matters. Scheduling challenges will continue to arise, and the Commission will need to continue to work with the parties to ensure that all are afforded a fair hearing while balancing the Commission's need for sufficient time to study a record, make a decision, and timely issue a well-reasoned, complete order.

B. Content of Orders

While more of a goal than a challenge, the writing of clear, well-reasoned, accurate orders is an area where continued improvement is desired. The Commission's orders must accurately explain the case, address the issues presented, and clearly and correctly explain the reasons for the decision reached. The Commission has a statutory requirement to ensure that "final orders and decisions of the commission must be sufficient in detail to enable the court on appeal to determine the controverted questions presented . . . and must include (1) findings and conclusions, and the reasons or bases therefor, upon all materials issues of fact or law presented." *See*, S.C. Code Ann. Section 58-3-250 (2015). Staff attorneys worked diligently on orders during the review period, and commissioners have worked with the staff attorneys in reviewing and providing suggestions to reflect the decisions of the Commission. Content of the orders has been, and continues to be, a priority and is an area where improvement should always be sought.

C. Continued Improvement

Despite best efforts and hard work, issues will arise that indicate areas of improvement. The Commission and commission staff must be engaged to identify when improvements may be required. Upon identifying issues, we must all be willing to address the issue, work on solutions, and reassess to ensure resolution. As discussed above, shortening the timeframe for issuance of orders has been a challenge which the Commission and commission staff have worked to address and will continue to address. Identifying and utilizing technology (Smartsheet) is one area that helped in reducing the time to issue

orders. However, technology alone will not solve an issue. We all must be willing to change habits or thoughts to improve our work. A mindset of “this is the way we have always done it” and not being open to change or new approaches will not produce different or better results. While change may not be easy, we must seek to improve so that we can do our best work and produce a quality work product. The only way to improve is to work with an open mind to new methods and opportunities and approaches. We are all creatures of habit; there is comfort in routine. However, the challenge lies in changing our habits and routines to work smarter and more effectively—whether that be through embracing new technologies or by treating challenges as an opportunity for improvement.

9. Recusal

If there was a matter in which you were recused during the review period, provide a brief description of the matter and the reason(s) for the recusal.

I had no recusals during this review period for any reason under the Code of Judicial Conduct.

On June 20, 2023, I was on sick leave due to illness. The Commission was scheduled to hear two dockets on that date. Pursuant to Commission Order No. 2023-295 (dated April 27, 2023), the Commission scheduled the hearing in Docket No. 2022-159-E to be heard starting at 10:00 a.m. on June 20, 2023, and upon conclusion of that hearing, to hear the matter in Docket No. 2022-158-E. At the outset of the hearing in Docket No. 2022-159-E, a motion was made to hold the hearing in Docket No. 2022-158-E in abeyance to allow the parties additional time to discuss and resolve certain issues in that docket. That motion was granted on the record by the Acting Chairman, and the hearing in Docket No. 2022-158-E was not held. The hearing in Docket No. 2022-159-E proceeded as scheduled on June 20, 2023. Pursuant to S.C. Code Ann. Section 58-3-225 (2015) which states in relevant part, “If a commissioner is absent from or leaves a hearing for fifteen consecutive minutes or longer . . . the commissioner may not participate in the deliberations or vote on the matter.” Because I missed the hearing in Docket No. 2022-159-E, I did not participate in deliberations or vote on the matter when it came before the Commission for a decision.

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 Florence P. Belser 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: _____

Oct. 16, 2024

RICHARD N. MCINTYRE
SEAT 2

Review Committee Finding: QUALIFIED AND NOMINATED

Personal Information, Educational Background, and Work Experience:

Mr. McIntyre earned a Bachelor of Science degree in Accounting and Finance from the University of South Carolina in 1980.

Mr. McIntyre is a Market Executive for First Reliance Bank, a position he has held since 2003 through his retirement effective April 30, 2025.

Mr. McIntyre previously worked for C&S National Bank (and its successor, NationsBank) from 1981-2003 where he held the positions of Collector, Branch Manager, Commercial Lender, and Consumer Loan Administrator. He then worked for Carolina First as the bank's Lexington County Executive from 1993-2003.

Mr. McIntyre was elected to serve on the Lexington-Richland Airport Commission from 2014-2020 where he was Finance Chairman from 2015-2020 and Vice Chairman from 2019-2020.

Mr. McIntyre served on the Riverbanks Zoo Society Board of Directors from 2004-2014, has been a member of the Lexington Rotary Club since 1985 and the Lexington Chamber of Commerce since 1984.

Test Score: 63

H. DAVID BRITT
SEAT 4

Review Committee Findings: QUALIFIED AND NOMINATED

Personal Information, Educational Background, and Work Experience:

Mr. Britt earned a Bachelor of Arts degree in Government from Wofford College in 1977.

Mr. Britt has been the Vice President and General Manager of the South Carolina Division of Tindall Corporation since 1988. He has served on Spartanburg County Council (District 3) since 1991, where he has held the positions of Vice Chairman of Council and Chair of the Economic Development Committee since elected in 1991.

Mr. Britt has previously worked as the Director of Human Resources for Flowers Industries from 1977-1980. He then worked as the as the Director of Industrial Relations for Boiler Tube Co. of the USA from 1980-1985. Mr. Britt founded David Britt and Associates in 1985 where we worked as a management consultant for several industrial manufacturing companies in the United States until 1988.

Mr. Britt was elected to the Spartanburg District 7 School Board in 1987 where he served until 1991.

Mr. Britt has served on the Chapman Cultural Center Board, the Spartanburg Regional Health System Heart Foundation Board, the Wofford College Alumni Board, and is a member of First Presbyterian Church of Spartanburg where is a former Deacon and Elder.

Test Score: 50

JUSTIN T. WILLIAMS
SEAT 6

Review Committee Findings: QUALIFIED AND NOMINATED

Personal Information, Educational Background, and Work Experience:

Mr. Williams attended the University of South Carolina and earned a Bachelor of Arts degree in Public Relations in 2006 and a Juris Doctorate from the University of South Carolina School of Law in 2010. In 2015, he completed the Judge Advocate Officer's Basic Course. Mr. Williams earned a Master of Environmental Management degree from Duke University in May 2024.

Mr. Williams has served on the Public Service Commission as the commissioner for District 6 since 2018. Mr. Williams served as Chair of the commission from 2020-2022. He currently serves as Vice Chair of the commission.

Mr. Williams previously worked for the Fifth Judicial Circuit Solicitor Office from 2011-2013 and then again from 2015-2016. From 2013-2015, he was an associate at Wilson Jones Carter & Baxley, P.A. where he specialized in worker's compensation litigation. Mr. Williams then worked as an associate with Moore Bradley Myers from 2017-2018. Mr. Williams is also a Judge Advocate in the United States Army Reserve; his service began in 2015.

Mr. Williams is a member of the National Association of Regulatory Utility Commissioners, the Richland County Bar Association, the South Carolina Bar Association, and the South Carolina Black Lawyers Association. He is also a member of Downtown Church, Kappa Alpha Psi Fraternity, and Sigma Pi Phi Fraternity.

Mr. Williams also currently owns and operates a small family farm in Aiken County, South Carolina.

Test Score: 88

**COMMISSIONER QUESTIONNAIRE
PERFORMANCE SUMMARY**

NAME: JUSTIN THOMAS WILLIAMS
SEAT: SIXTH CONGRESSIONAL DISTRICT
DATE ELECTED: MAY 11, 2018
DATE TERM EXPIRES: JUNE 30, 2022

Please provide information for the review period covering July 1, 2023, through June 30, 2024. 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

Duke University, Nicholas School of the Environment, Duke Environmental Leadership Master of Environmental Management (concentration in energy and the environment).

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

Strategic Planning for Environmental Leaders: This course focused on the development of management skills, including decision-making, motivation, working in teams, organizational cultures, organizational design, learning organizations, and change management for private, public, and not-for-profit organizations.

Environmental Law and Policy: This course focused on the evolution of environmental policies from strict reliance on command-and-control systems to experimentation with alternative approaches by examining the history and context of U.S. policy development processes and institutions. This course also explored command approaches to air and water pollution and waste management and alternative approaches, such as market-based programs, public-private partnerships, voluntarism, policies for managing land, natural resources, species protection, and addressing transnational and global environmental problems.

Duke Environmental Leadership Seminar: This course focused on reflecting on each student's leadership journey, defining and refining the "WHY" for each student's leadership efforts, and learning and practicing leadership skills crucial for today's rapidly changing world.

Research Design for Environmental Social Science: The purpose of the course was to 1) examine the concept of 'research' (philosophy and epistemology, as well as practice) in general and the environmental and social sciences specifically and 2) overview types of data used by environmental, social scientists, and some specific methods for collecting them. Although a range of methods and data sources were scoped, the focus was on qualitative data and the methods used to 'collect' data from/with people; 3) introduce approaches to and methods for analyzing qualitative data and presenting it. Although topics and methods are relevant to social sciences generally, readings, examples, and activities highlight the relevance and utility of research methods for understanding human uses, values, interactions, and beliefs about the environment.

Mandatory Masters Project: This course was a culminating hands-on experience that allowed me to apply the professional skills and knowledge that I acquired in the classroom to tackle a real-world industry and government challenge.

After completing 36 hours of coursework, including a 43-page Master's project, Duke University, Nicholas School of the Environment awarded me a Master of Environmental Management on May 12, 2024.

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

This rigorous academic program has exposed me to educational theories and emerging issues of law, policy, and technology related to the provision of energy and environmental management. It has also enhanced my critical thinking skills regarding energy and environmental issues associated with the local community, the state, the nation, and the world. I have also received intensive leadership coaching and counseling, allowing me to grow as a leader. The commission has benefited from my participation in this program through my sharing of the lessons that I have learned with fellow commissioners and commission staff and offering a spectrum of academic perspectives during commission deliberations.

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

I spent nine days out of the office during the rating period to complete this program.

A. The name of the program and the sponsoring organization

United States Army Command and General Staff Officer College Intermediate Leader Education Phases 2 and 3.

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

C300A Unified Action: C300 Unified Action (UA) is a 44-hour block of instruction broken into two blocks (C300A and C300B) that builds on the study of the strategic level of war and systems perspective introduced in C200 *Strategic Context of Operational Art*. The block (C300A) begins with a basic understanding of the roles, functions, capabilities, limitations, and operational considerations of the US military services and unified action partners: US Army, US Air Force, US Navy & US Coast Guard, USMC, Special Operations Forces (SOF), Space Operations, Cyberspace Operations, Conventional Nuclear Integration, and Joint Logistics & Army Sustainment Support of UA. The remaining lessons (C300B in Phase 3) provided me with an understanding of the fundamentals of Unified Action, Joint Functions, the range of military operations (ROMO), Multinational Operations, and Interorganizational Cooperation and Support to provide the context for how joint forces and unified action partners are integrated and synchronized to support the Joint Force Command's plans and operations.

F100 Force Management: This course focused on following the Force Management Model in examining primary systems, concepts, and issues of Army change management while describing how resource management supports integrating and maintaining capabilities at the unit level. Students' understanding of force management and resource management are key topics in developing military professionals who understand the service as a whole.

H100 History: The course gave a broad perspective on the relationship between the study of history, the development of the theory upon which doctrine is written, and that doctrine's

implementation in war. The block also examines the interplay between war and Western society and, through that perspective, some insights into the challenges and opportunities the US military faces today. The block consisted of 27 hours of instruction, distributed across thirteen lessons. H100 contributes to the college's outcomes by producing officers who can understand war, the spectrum of conflict, and the complexity of the operational environment (history, culture, ethics, geography). The block also develops critical and creative thinkers who can apply solutions to operational problems in a volatile, uncertain, complex, or ambiguous environment. Last, H100 enhances an officer's ability to communicate concepts clearly and precisely in written and oral forms.

L100 Leadership: This course discussed leadership in a formal professional military education setting. It also focused on professional growth as an organizational-level leader, centered on transitioning from direct to organizational-level leadership. It addressed the challenges leaders face as they improve organizations while operating to accomplish the mission.

C400 Apply US Army Doctrine: This course focused on learning and applying Unified Land Operations and Mission Command, which links critical and creative thinking with the tactical level of war, the strategic level of war, and Unified Action.

C500 Operational Art and Joint Planning: This course was a culminating hands-on capstone experience that allowed students to practice and display their understanding of operational art and design by developing, analyzing, and evaluating an operation approach with a doctrinally complete course of action at the operational level of war based on a scenario in the Baltics State region.

After completing 284.5 hours of coursework, including five significant papers, two briefings, eight exams, and a capstone project, I graduated from the United States Army Command and General Staff College Command and General Staff Officer Common Core Course on May 24, 2024.

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

This program helped me develop as a leader by teaching me to dissect and evaluate various leadership styles and organizational theories to determine their effectiveness. It also helped me understand how to use the tools available in an organization, including how to interpret and apply history to accomplish the desired end state. The commission benefitted from my participation in this program because I am actively using the skills that I learned to improve the efficiency and effectiveness of the commission at all levels (commissioners, staff, hearing preparation, hearings, and orders).

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

I spent 10 days out of the office during the rating period to complete this program.

A. The name of the program and the sponsoring organization

National Association of Regulatory Utility Commissioners (NARUC) Winter Policy Summit

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

The Changing Energy Landscape and Regulatory Challenges: *The Hon. Jennifer Granholm, Secretary of Energy, DOE*

The Wright Touch: A Conversation with David Wright

The Hon. Tricia Pridemore, Georgia, hosted a one-on-one with the Hon. David Wright, Nuclear Regulatory Commission and past president of NARUC.

Measuring Equity: The Energy Equity Roundtable

The IIJA and IRA will provide more than \$1 trillion in investments to address climate change and a just energy transition. There is a clear focus on equity in these significant investments, and the Justice40 Initiative is most visible. The established goal is to achieve an equitable distribution of resources, such that 40 percent of the federal investment spending should benefit disadvantaged and underserved communities. But how do you measure success? The goals of equitable opportunities, allocation of resources, and impact of programs cannot be achieved without a precise measure of what constitutes equity.

This session used a roundtable talk show format that brought together crucial energy equity stakeholders, including the current administration, corporate leaders, energy regulators, and community engagement experts. The roundtable discussed and examined existing initiatives to probe for a universal definition of equity. Participants further discussed evaluative tools to assess community needs and strategic approaches for policymakers who must direct efforts to achieve equitable impacts for underserved and disadvantaged communities. Discussions overall center on big-bucket energy issues such as infrastructure, transportation/EV, energy manufacturing/innovation, and Workforce development. This session stimulated collaborative conversations that could lead to action solutions so that the great energy transition leaves no community behind.

Overcoming the Transmission Bottleneck: Exploring Federal Funding and Regional Planning to Support Transmission Expansion for a Clean Energy Future

Over the past two decades, approximately 200 GW of wind and solar were added to the U.S. power grid, and recently enacted federal incentives in the Inflation Reduction Act (IRA) will only accelerate the deployment of clean energy and storage across the U.S. Currently, a large amount of potential clean power capacity is struggling with the wait times and costs of connecting to the transmission grid, and the declining construction of new high-voltage transmission lines over the last decade. A lack of sufficient transmission capacity stands to be a potential barrier to fully achieving IRA's emissions reduction potential, which studies have shown will require a doubling of the historical pace of electricity transmission expansion that has been seen over the last decade. This panel covered how IRA, IIJA, and DOE funding can be leveraged to support transmission projects by deploying capacity-enhancing Grid Enhancing Technologies (GETs) on existing transmission infrastructure and exploring ways to engage in effective regional infrastructure planning.

Making the Smart Grid Smarter Through Intelligent Rate Design

As the array of distributed energy resources (DERs) available to customers expands and diversifies, the ability to facilitate an increasingly flexible, efficient, and cleaner "grid of the future" becomes more important than ever. In the past decade, billions of dollars have been spent on "smart" meters and other advanced metering infrastructure (AMI) to modernize the grid, improve grid resilience, increase DER participation, and reduce costs to ratepayers. However, the benefits of a "smart" grid can't be realized without implementing rates intelligently designed to activate changes on the demand side. Rate design is, therefore, central to optimizing DERs and the other benefits of AMI for customers and the grid. States are

piloting and exploring DER-optimized rate designs, from designs that provide price signals to charge and discharge battery storage to options that encourage EV owners to charge their cars during off-peak hours. This panel explored the various time-varying and dynamic rate design options to facilitate optimized DER adoption, grid resilience, and increased customer benefits.

GSA-Utility Partnerships Will Cut Emissions and Lower Energy Costs for the Nation's Largest Energy Consumer

The federal government is the single largest consumer of energy in the country and also the country's biggest landlord, overseeing nearly 350,000 buildings. The U.S. General Services Administration (GSA) has committed to 100% Carbon Pollution-Free Electricity on a Net Annual Basis by 2030, including 50% on a 24/7 basis. GSA is continuing its work to eliminate onsite carbon pollution in newly constructed facilities and facilities undergoing major modernization to achieve Net-Zero Emissions Buildings by 2045, including a 50% reduction by 2032. Through these actions, GSA creates innovative economic opportunities that advance clean energy goals, create jobs, develop healthy and prosperous communities, and save taxpayer money. Partnerships are critical to success, including utilities regulated by NARUC's members. Panelists discussed the impact and implementation of these goals as well as the role of utility regulators and stakeholders.

First Do No Harm: Siting EV Charging Infrastructure Joint with the Committee on Energy Resources and the Environment

Electrification, including transportation electrification (TE), has the potential to be a source of downward pressure on rates. To allow for this potential, the infrastructure necessary to serve TE load must be sited strategically to avoid locations requiring costly and time-consuming upgrades to support additional load on the electric system. Moreover, as we prepare for the disbursement of National Electric Vehicle Infrastructure (NEVI) program funds, planning for and siting infrastructure in locations requiring less grid investment will stretch those funds. However, to ensure that ratepayers paying for all or a part of this infrastructure get the most benefits for their cost, charging infrastructure should be placed in high-traffic areas and convenient locations for EV users to maximize usage. To ensure these deciding factors are considered, regulators and utilities must partner with local traffic planners to determine if and where optimal traffic-based locations also have minimal grid upgrades and associated costs. Panelists discussed the issues mentioned above and offered an opportunity for the audience to ask questions.

Looking Back--and Forward--at FERC-State Engagement

Managing energy policies that affect the entire nation is a daunting but necessary task for regulators. This session looks at the relationship between state regulators and the Federal Energy Regulatory Commission in recent history, often with NARUC as an essential facilitator in these dialogues. We have reached a point where communication and engagement have increased, with all players having to, at times, navigate through an atmosphere of politics while staying focused on serving the public interest. Managing and respecting different and competing priorities is not a simple feat, and we've reached this point through intentional measures. The panelists, all former members of FERC, discussed how the relationships with state regulators have evolved and offered insight on how to ensure that the relationship continues in the right direction.

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

Participating in NARUC's Winter Policy Summit helps me stay current on utility regulatory issues. It also benefits the commission by allowing commissioners to access utility regulatory information and discuss utility regulatory issues in an academic setting.

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

I spent 3 days out of the office during the rating period to complete this program.

2. Participation in organizations.

Provide the following information regarding your participation in organizations:

- A. The name of the organization, position held, and committee served on;
- B. A description of the organization's function;
- C. How did 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.

National Association of Regulatory Utility Commissioners (NARUC). Currently, I am a member of the electricity committee.

NARUC is a non-profit organization dedicated to representing the state public service commissions who regulate the utilities that provide essential services such as energy, telecommunications, power, water, and transportation.

NARUC's members include all 50 states, the District of Columbia, Puerto Rico, and the Virgin Islands. Most state commissioners are appointed by their governor or legislature, whereas commissioners in 11 states are elected by the public and in two states by the general assembly.

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.

Participation in NARUC helps me stay knowledgeable and informed on various utility issues that impact South Carolina, the Southeast, and the rest of the United States.

I was out of the office for three days to attend NARUC's Winter Policy Summit.

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. Leadership South Carolina Natural Resources Session;
 - B. Leadership South Carolina;
 - C. Oral presentation on the history and purpose of the Public Service Commission of South Carolina.
 - D. I spent 1 day out of the office to attend this event.
-
- A. HBCU Energy Pathways Energy Panel;
 - B. E4 Carolinas;
 - C. Oral presentation on my path to working in the energy industry.
 - D. I spent 2 hours out of the office to attend this event.

- A. HBCU Energy Pathways Energy Competition;
- B. E4 Carolinas;
- C. Provided feedback on student case studies that resolved an energy and environmental issue.
- D. I spent 1 day out of the office to attend this event.

- A. Energy Efficiency and Demand Side Management Panel (during lunch at the NARUC Winter Policy Summit);
- B. Edison Foundation Institute for Electric Innovation;
- C. Oral presentation on how energy efficiency and demand side management programs work in South Carolina
- D. I did not spend additional time out of the office for this event as I was already attending the NARUC Winter Policy Summit.

4. Notable Cases.

In your own words, describe three cases you participated in that you believe were the most significant during the review period. Provide a summary of the case, including the case name, the docket number, and the issues and outcome (two to 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 experience as a commissioner benefitted your decisions in each case.

2023-89-E: Duke Energy Progress, LLC's Petition for a Storm Securitization Financing Order ("Phase II")

Duke Energy Progress, LLC filed a petition before the commission requesting permission to securitize storm costs and up-front financing costs associated with the issuance of storm recovery bonds, approval of their securitization financing structure, approval to issue storm recovery bonds, approval of financing costs, and approval to create storm recovery property. This case was significant because it was the first petition for a storm securitization financing order in South Carolina and the result of the commission's approval of the petition will deliver \$35 million in savings to ratepayers. The educational programs I attended during the review period gave me insight into long-term planning, innovative problem-solving, and best practices in the utility regulatory space, making it easier for me to understand, appreciate, and grant the petition.

2024-34-E: Application of Dominion Energy South Carolina, Inc. for Authority to Adjust and Increase Its Retail Electric Rate Schedules, Tariffs, and Terms and Conditions

Dominion Energy South Carolina, Inc. filed an application to adjust and increase its retail electric rates. Notwithstanding the unopposed settlement agreement, the applicant presented the most robust and transparent rate case I witnessed as a commissioner. This case was significant because it demonstrated the applicant's willingness to be accountable, forthright, and transparent with the commission, parties to the processing, and ratepayers. The educational programs that I attended during the review period, especially the education at Duke University and the United States Army Command and General Staff College, exposed me to various leadership methods, risks associated with utility operation and regulation, and the ability to learn from past mistakes without being crippled from moving forward towards a better future.

**2023-242-E: Johnny Hedwin, Complainant/Petitioner v. Duke Energy Progress, LLC
Defendant/Respondent**

Johnny Hedwin filed a complaint against Duke Energy Progress, LLC (Company) alleging that the Company overcharged his electricity account. The commission conducted a hearing where Mr. Hedwin appeared as a pro se litigant. While working through this case, the commission identified a billing discrepancy on Mr. Hedwin's account, resulting in the company overcharging Mr. Hedwin. This case is significant because it demonstrates the commission's commitment to giving ratepayers access and due process as the commission worked with Mr. Hedwin so that he could appear virtually. While it may seem like a small accomplishment, the commission's staff worked very hard to make sure Mr. Hedwin could "have his day in court" without having to drive to Columbia, S.C. Additionally, this case is significant because it proves that when ratepayers have access and due process before the commission, the commission is empowered to better serve ratepayers by adjudicating matters that it would not know of without hearing the ratepayers case. In this case, the Company realized that Mr. Hedwin was not the only customer overcharged and was in the process of issuing refunds. The educational programs that I attended during the review period helped strengthen my ability to resolve unconventional issues involving parties with various backgrounds through a collaborative process that focuses on problem-solving rather than finger-pointing and casting blame.

5. Accomplishments of the Public Service Commission

Describe what you believe are the most significant accomplishments of the commission during the review period.

During this review period, the commission's most significant accomplishments were its continued commitment to demonstrated results in increasing access to the commission and protecting the due process of ratepayers, utilities, and interested parties. The commission has leveraged technology to allow ratepayers, utilities, and interested parties to appear in proceedings remotely, telephonically, and in person.

6. Work Schedule and Preparation.

- A. The average work week included a commission business meeting briefing on Mondays and commission business meetings on Thursdays at a minimum. Most weeks during the review period included a hearing or a hearing briefing. After the commission business meeting briefing, professional staff and commissioners prepare motions for each item. On average, I was in the office four days a week during the review period. When I was not in the office, I was telecommuting using my government-issued laptop, the docket management system, or performing reading and mental preparation for an upcoming matter.
- B. During this review period, I have worked closely with the Special Counsel to prepare for hearings. First, I prepared individually by reading the application/petition, the applicable law and regulations, and the pre-filed testimony and discussing my questions with the Special Counsel and other commissioners.

7. Effects of the 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.

I constantly check my words and deeds against the Code of Judicial Conduct and the Ethics Laws to ensure that I meet both standards. Strictly adhering to these Laws is the only way to maintain public trust and afford all parties due process.

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.

Internal case management – The commission has many open complex dockets and double-digit filings are made in commission dockets daily. This creates an overwhelming number of matters to manage for commissioners and staff, and sometimes, filings fall through the cracks. The commission is managing this issue through new docket management software and continuing to refine the Docket Management System.

Understanding our purpose – The commission’s mission is “[t]o regulate just and reasonable rates and services of public utilities in the state of South Carolina.” Regulating utilities according to the applicable laws and regulations is not the same as managing a utility in the way that we believe is appropriate. The commission is managing this issue by focusing on understanding our limited role in the regulatory process by focusing on better understanding our laws and regulations.

Commissioner and staff efficiency and effectiveness – Since my election to the commission, the commission has increased its operational tempo every year. With the requirements of new laws and the filing of more cases, the commission is still working to identify the best commissioner and staff model that allows the commission to operate at maximum efficiency and effectiveness.

9. Recusal

If there was a matter in which you were recused during the review period, provide a brief description of the matter and the reason(s) for the recusal.

Not applicable for this review period.

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

Ethics Statement: I, Commissioner Justin T. 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: 11/17/2024