

MISSOURI PUBLIC SERVICE COMMISSION

STAFF'S DIRECT REPORT

APPENDIX 1

Staff Credentials

SPIRE MISSOURI, INC., d/b/a SPIRE

CASE NO. GO-2018-0309
Spire Missouri East Service Territory

CASE NO. GO-2018-0310
Spire Missouri West Service Territory

Jefferson City, Missouri
May 2020

APPENDIX 1
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STAFF CREDENTIALS

CASE NOS. GO-2018-0309 and GO-2018-0310

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Jeremy Juliette

Educational and Employment Background and Credentials

I am currently employed as a Utility Regulatory Auditor II for the Missouri Public Service Commission (“Commission”). I began my employment with the Commission in April 2019. I earned a Bachelor of Science degree in Accounting from Western Governors University in July 2019.

As a Utility Regulatory Auditor, I perform rate audits and prepare miscellaneous filings as ordered by the Commission. In addition, I review all exhibits and testimony on assigned issues, develop accounting adjustments and issue positions which are supported by work papers and written testimony. For cases that do not require prepared testimony, I prepare Staff Recommendation Memorandums.

Cases I have been assigned are shown in the following table:

Company Name	Case Number	Case Type/Issue
Spire Missouri, Inc. d/b/a Spire	GO-2018-0309 & GO-2018-0310 (Remand Cases)	Infrastructure System Replacement Surcharge (ISRS) - Direct
Raytown Water Company	WR-2020-0264	Water Rate Case (Pending)
Spire Missouri, Inc., d/b/a Spire	GO-2020-0230	Infrastructure System Replacement Surcharge (ISRS) – Staff Memorandum
Spire Missouri, Inc., d/b/a Spire	GO-2020-0229	Infrastructure System Replacement Surcharge (ISRS) – Staff Memorandum
Elm Hills Utility Operating Company, Inc.	SA-2020-0152	Certificate of Convenience and Necessity (CCN) – Staff Memorandum
Elm Hills Utility Operating Company, Inc.	SM-2020-0146	Certificate of Convenience and Necessity (CCN) – Staff Memorandum
Spire Missouri, Inc., d/b/a Spire	GA-2020-0105	Certificate of Convenience and Necessity (CCN) – Staff Memorandum
Union Electric Company, d/b/a Ameren Missouri	ER-2019-0335	Electric Rate Case – Filed Direct (Cash Working Capital & Rate Case Expense Adjustment)

Company Name	Case Number	Case Type/Issue
Spire Missouri, Inc., d/b/a Spire	GO-2019-0357	Infrastructure System Replacement Surcharge (ISRS) – Staff Memorandum
Spire Missouri, Inc., d/b/a Spire	GO-2019-0356	Infrastructure System Replacement Surcharge (ISRS) – Staff Memorandum
Missouri American Water Company	WA-2019-0364 & SA-2019-0365	Certificate of Convenience and Necessity (CCN)

Educational and Employment Background and Credentials

of

Karen Lyons

I am currently employed as a Utility Regulatory Auditor V for the Missouri Public Service Commission (“Commission”). I was employed by the Commission in April 2007. Previously, I was employed by AT&T as a Regulatory Complaint Manager from December 1999 to February 2007. In that capacity I was responsible for addressing consumer and business complaints filed with various state and federal regulatory agencies. I earned a Bachelor of Science degree in Management Accounting and a Master’s in Business Administration from Park University.

As a Utility Regulatory Auditor V, I perform rate audits and prepare miscellaneous filings as ordered by the Commission. In addition, I review all exhibits and testimony on assigned issues, develop accounting adjustments and issue positions which are supported by workpapers and written and oral testimony. For cases that do not require prepared testimony, I prepare Staff Recommendation Memorandums.

Cases I have been assigned are shown in the following table:

Date Filed	Case/Tracking Number	Company Name - Issue
05/13/2020-Direct	GO-2018-0309 and GO-2018-0310 (Remand Cases)	Spire Missouri-Infrastructure System Replacement Surcharge (ISRS)
	WR-2020-0264 (Pending)	The Raytown Water Company (Water Rate Case)
04/03/2020 Staff Memorandum 04/17/2020-Direct	GO-2020-0230 (Stipulated)	Spire West-Infrastructure System Replacement Surcharge (ISRS)
04/03/2020 Staff Memorandum 04/17/2020-Direct	GO-2020-0229 (Stipulated)	Spire East-Infrastructure System Replacement Surcharge (ISRS)
04/24/2019 Staff Memorandum	GA-2020-0251	Summit Natural Gas of Missouri Certificate of Convenience and Necessity (CCN)
	WM-2020-0174 (Pending)	Liberty Utilities (Missouri Water) Acquisition

Date Filed	Case/Tracking Number	Company Name - Issue
12/13/2019 Staff Memorandum	GA-2020-0105	Spire Missouri, Inc Certificate of Convenience and Necessity (CCN) Supervisory Oversight
	ER-2019-0374 (Pending)	Empire District Electric Company (Electric Rate Case) Supervisory Oversight
12/04/2019-Direct 01/21/2020-Rebuttal	ER-2019-0335 (Stipulated)	Union Electric Company, d/b/a Ameren Missouri (Electric Rate Case)
9/27/2019 Proceedings Stayed	WA-2019-0364 & SA-2019-0365	Missouri American Water Company-Certificate of Convenience and Necessity (CCN)
10/24/2019 Dismissed	WA-2019-0366 & SA-2019-0367	Missouri American Water Company-Certificate of Convenience and Necessity (CCN)
9/13/2019 Staff Memorandum 9-27-2019-Direct	GO-2019-0357 (Contested)	Spire West-Infrastructure System Replacement Surcharge (ISRS)
9/13/2019 Staff Memorandum 9/27/2019-Direct	GO-2019-0356 (Contested)	Spire East-Infrastructure System Replacement Surcharge (ISRS)
3/26/2019 Staff Memorandum	WO-2019-0184 (Contested)	Missouri American Water Company (ISRS)
3/26/2019 Staff Memorandum	SA-2019-0161	United Services, Inc. (CCN)
2/11/2019 Staff Memorandum	SA-2019-0183	Missouri American Water Company (CCN)
6/19/2018-Direct 7/27/2018-Rebuttal 9/4/2018-Surrebuttal and True-up Direct	ER-2018-0145 (Stipulated)	Kansas City Power & Light Company (Electric Rate Case)
6/19/2018-Direct 7/27/2018-Rebuttal 9/4/2018-Surrebuttal and True-up Direct	ER-2018-0146 (Stipulated)	KCP&L Greater Missouri Operations Company (Electric Rate Case)

Date Filed	Case/Tracking Number	Company Name - Issue
9/08/2017-Direct 10/17/2017-Rebuttal 11/21/2017-Surrebuttal 11/28/2017-True-Up Direct	GR-2017-0215 and GR-2017-0216-Contested	Laclede Gas and Missouri Gas Energy (Gas Rate Case)
11/30/2016-Direct 12/30/2016-Rebuttal 1/27/2017-Surrebuttal 3/01/2017-True-Up Direct 3/10/2017-True-Up Rebuttal	ER-2016-0285-Contested	Kansas City Power & Light Company (Electric Rate Case)
7/15/2016-Direct 8/15/2016-Rebuttal 9/02/2016-Surrebuttal	ER-2016-0156-Stipulated	KCP&L Greater Missouri Operations Company (Electric Rate Case)
2/09/2016-Deposition	EA-2015-0256-Contested	KCP&L Greater Missouri Operations Company (Solar CCN)
12/29/2015 Staff Memorandum	WO-2016-0098	Missouri American Water Company- Infrastructure Service Replacement Surcharge (ISRS)
4/02/2015-Direct 5/07/2015-Rebuttal 6/05/2015-Surrebuttal 7/15/2015-True Up Rebuttal	ER-2014-0370-Contested	Kansas City Power & Light Company (Electric Rate Case)
5/01/2014-Direct	HR-2014-0066-Stipulated	Veolia Energy Kansas City, Inc. (Steam Rate Case)
1/23/2014-Direct 4/01/2014-Surrebuttal	GR-2014-0007-Stipulated	Missouri Gas Energy Company (Gas Rate Case)
4/09/2013 Staff Memorandum	GO-2013-0391	Missouri Gas Energy - Infrastructure Service Replacement Surcharge (ISRS)
2/01/13 Staff Memorandum	WM-2013-0329	Bilyeu Ridge Water Company, LLC (Water Sale Case)

Date Filed	Case/Tracking Number	Company Name - Issue
8/09/2012-Direct 9/12/12-Rebuttal 10/10/12-Surrebuttal	ER-2012-0175-Contested	KCP&L Greater Missouri Operations Company (Electric Rate Case)
8/02/2012-Direct 9/05/2012-Rebuttal 10/08/2012-Surrebuttal	ER-2012-0174-Contested	Kansas City Power & Light Company (Electric Rate Case)
4/20/2012 Staff Memorandum	WM-2012-0288	Valley Woods Water Company, Inc. (Water Sale Case)
1/06/2012 Staff Memorandum	GO-2012-0144	Missouri Gas Energy - Infrastructure Service Replacement Surcharge (ISRS)
8/08/2011-Direct	HR-2011-0241-Stipulated	Veolia Energy Kansas City, Inc. (Steam Rate Case)
11/17/2010-Direct 12/15/2010-Rebuttal 1/05/2011-Surrebuttal	ER-2010-0356-Contested	KCP&L Greater Missouri Operations Company (Electric Rate Case)
11/10/2010-Direct 12/08/2010-Rebuttal 1/05/2011-Surrebuttal	ER-2010-0355-Contested	Kansas City Power & Light Company (Electric Rate Case)
12/22/2011 Staff Memorandum	SA-2010-0219	Canyon Treatment Facility, LLC (Certificate Case)
6/07/2010 Staff Memorandum	WR-2010-0202	Stockton Water Company (Water Rate Case)
4/02/2010 Staff Memorandum	SR-2010-0140	Valley Woods Water Company (Water Rate Case)
4/02/2010 Staff Memorandum	WR-2010-0139	Valley Woods Water Company (Sewer Rate Case)
1/14/2010-Direct	SR-2010-0110	Lake Region Water and Sewer (Sewer Rate Case)
1/14/2010-Direct	WR-2010-0111	Lake Region Water and Sewer (Water Rate Case)

Date Filed	Case/Tracking Number	Company Name - Issue
8/12/2009-Direct	GR-2009-0355-Stipulated	Missouri Gas Energy (Gas Rate Case)
2/13/2009-Direct 3/13/2009-Rebuttal 4/09/2009-Surrebuttal	ER-2009-0090-Global Settlement	KCP&L Greater Missouri Operations Company (Electric Rate Case)
2/13/2009-Direct 3/13/2009-Rebuttal 4/09/2009-Surrebuttal	HR-2009-0092-Global Settlement	KCP&L Greater Missouri Operations Company (Steam Rate Case)
2/11/2009-Direct 3/11/2009-Rebuttal 4/07/2009-Surrebuttal	ER-2009-0089-Global Settlement	Kansas City Power & Light Company (Electric Rate Case)
8/01/2008	HR-2008-0300-Stipulated	Trigen Kansas City Energy Corporation (Steam Rate Case)
4/28/2008	QW-2008-0003	Spokane Highlands Water Company (Water Rate Case)
12/17/2007	GO-2008-0113	Missouri Gas Energy - Infrastructure Service Replacement Surcharge (ISRS)

David M. Sommerer

Educational Background and Work Experience

In May 1983, I received a Bachelor of Science degree in Business and Administration with a major in Accounting from Southern Illinois University at Carbondale, Illinois. In May 1984, I received a Master of Accountancy degree from the same university. Also, in May 1984, I sat for and passed the Uniform Certified Public Accountants examination. I am currently a licensed CPA in Missouri. Upon graduation, I accepted employment with the Commission.

From 1984 to 1990 I assisted with audits and examinations of the books and records of public utilities operating within the state of Missouri. In 1988, the responsibility for conducting the Actual Cost Adjustment (ACA) audits of natural gas utilities was given to the Accounting Department. I assumed responsibility for planning and implementing these audits and trained available Staff on the requirements and conduct of the audits. I participated in most of the ACA audits from early 1988 to early 1990. On November 1, 1990, I transferred to the Commission's Energy Department. Until November of 1993, my duties consisted of reviews of various tariff proposals by electric and gas utilities, Purchased Gas Adjustment (PGA) reviews, and tariff reviews as part of a rate case. In November of 1993, I assumed my present duties of managing a newly created department called the Procurement Analysis Department. This Department was created to more fully address the emerging changes in the gas industry especially as they impacted the utilities' recovery of gas costs. My duties have included managing the Procurement Analysis staff, reviewing ACA audits and recommendations, participating in the gas integrated resource planning project, serving on the gas project team, serving on the natural gas commodity price task force, and participating in matters relating to natural gas service in the state of Missouri. In July of 2006, the Federal Issues/Policy Analysis Section was transferred to the Procurement Analysis Department. That group analyzes filings made before the Federal Energy Regulatory Commission (FERC). During the reorganization in August 2011, the Federal Issues/Policy Analysis Section was transferred to the Secretary/ General Counsel Division. In 2015, I assumed the responsibility for the rate design aspects of the Gas Infrastructure System Replacement Surcharge (ISRS) process. The Gas ISRS allows for a more expedited process of including eligible pipeline replacements in rates prior to general rate cases.

**CASES WHERE TESTIMONY
WAS FILED
DAVID M. SOMMERER**

COMPANY	CASE NO.	ISSUES
Spire East	GO-2019-0356	ISRS rates
Spire West	GO-2019-0357	ISRS rates
Spire East	GO-2019-0115	ISRS rates
Spire West	GO-2019-0116	ISRS rates
Spire East	GO-2018-0309	ISRS rates
Spire West	GO-2018-0310	ISRS rates
Missouri Gas Energy	GO-2017-0201	ISRS rates
Laclede Gas Company	GO-2017-0202	ISRS rates
Missouri Gas Energy	GR-2017-0216	Gas Inventory Carrying Cost and Service Agreements
Laclede Gas Company	GR-2017-0215	Gas Inventory Carrying Cost and Service Agreements
Laclede Gas Company	GO-2016-0333	ISRS rates
Missouri Gas Energy	GO-2016-0332	ISRS rates
Laclede Gas Company (MGE)	GO-2016-0197	ISRS rates
Laclede Gas Company	GO-2016-0196	ISRS rates
Liberty Utilities (Midstates Natural Gas) Corp d/b/a Liberty Utilities	GR-2014-0152	Special Contact Customers Gas Contract
Missouri Gas Energy	GR-2014-0007	Gas Supply Incentive Plan Property Tax PGA Recovery
Laclede Gas Company	GR-2010-0171	Bad Debt in PGA, CAM
Atmos Energy Corporation	GR-2009-0417	Affiliated Transactions

COMPANY	CASE NO.	ISSUES
Atmos Energy Corporation	GR-2008-0364	Affiliated Transactions
Missouri Gas Energy	GR-2009-0355	PGA tariff
Laclede Gas Company	GT-2009-0026	Tariff Proposal, ACA Process
Missouri Gas Utility	GR-2008-0060	Carrying Costs
Laclede Gas Company	GR-2007-0208	Gas Supply Incentive Plan, Off-system Sales, Capacity Release
Laclede Gas Company	GR-2005-0284	Off-System Sales/GSIP
Laclede Gas Company	GR-2004-0273	Demand Charges
AmerenUE	EO-2004-0108	Transfer of Gas Services
Aquila, Inc.	EF-2003-0465	PGA Process, Deferred Gas Cost
Missouri Gas Energy	GM-2003-0238	Pipeline Discounts, Gas Supply
Laclede Gas Company	GT-2003-0117	Low-Income Program
Laclede Gas Company	GR-2002-356	Inventory, Off-System Sales
Laclede Gas Company	GR-2001-629	Inventory, Off-System Sales
Laclede Gas Company	GR-2001-387	ACA Price Stabilization
Missouri Gas Energy	GR-2001-382	ACA Hedging/Capacity Release
Laclede Gas Company	GT-2001-329	Incentive Plan
Laclede Gas Company	GO-2000-394	Price Stabilization
Laclede Gas Company	GT-99-303	Incentive Plan
Laclede Gas Company	GC-99-121	Complaint PGA
Laclede Gas Company	GR-98-297	ACA Gas Cost
Laclede Gas Company	GO-98-484	Price Stabilization
Laclede Gas Company	GR-98-374	PGA Clause

COMPANY	CASE NO.	ISSUES
Missouri Gas Energy	GC-98-335	Complaint Gas Costs
United Cities Gas Company	GO-97-410	PGA Clause
Missouri Gas Energy	GO-97-409	PGA Clause
Missouri Gas Energy	GR-96-450	ACA Gas Costs
Missouri Public Service	GA-95-216	Cost of Gas
Missouri Gas Energy	GO-94-318	Incentive Plan
Western Resources Inc.	GR-93-240	PGA tariff, Billing Adjustments
Union Electric Company	GR-93-106	ACA Gas Costs
United Cities Gas Company	GR-93-47	PGA tariff, Billing Adjustments
Laclede Gas Company	GR-92-165	PGA tariff
United Cities Gas Company	GR-91-249	PGA tariff
United Cities Gas Company	GR-90-233	PGA tariff
Associated Natural Gas Company	GR-90-152	Payroll
KPL Gas Service Company	GR-90-50	Service Line Replacement
KPL Gas Service Company	GR-90-16	ACA Gas Costs
KPL Gas Service Company	GR-89-48	ACA Gas Costs
Great River Gas Company	GM-87-65	Lease Application
Grand River Mutual Tel. Company	TR-87-25	Plant, Revenues
Empire District Electric Company	WR-86-151	Revenues
Associated Natural Gas Company	GR-86-86	Revenues, Gas Cost
Grand River Mutual Telephone	TR-85-242	Cash Working Capital
Great River Gas Company	GR-85-136	Payroll, Working Capital
Missouri-American Water Company	WR-85-16	Payroll