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Lindsay A. Berkstresser

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File #: 200815

August 10, 2023

***VIA ELECTRONIC FILING***

Rosemary Chiavetta, Secretary  
Pennsylvania Public Utility Commission  
Commonwealth Keystone Building  
400 North Street, 2nd Floor North  
P.O. Box 3265  
Harrisburg, PA 17105-3265

**Re: PA PUC, *et al.* v. UGI Utilities, Inc. - Gas Division  
Docket Nos. R-2023-3040290, *et al.***

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Dear Secretary Chiavetta:

Attached for filing is the Motion for Protective Order on behalf of UGI Utilities, Inc. – Gas Division in the above-referenced proceeding. Copies will be provided as indicated on the Certificate of Service.

Respectfully submitted,



Lindsay A. Berkstresser

LAB/kl  
Attachments

cc: The Honorable Dennis J. Buckley (*via email; w/attachments*)  
The Honorable John M. Coogan (*via email; w/attachments*)  
Certificate of Service

## CERTIFICATE OF SERVICE

I hereby certify that a true and correct copy of the foregoing has been served upon the following persons, in the manner indicated, in accordance with the requirements of 52 Pa. Code § 1.54 (relating to service by a participant).

### VIA EMAIL

Scott Granger, Esquire  
Bureau of Investigation and Enforcement  
Commonwealth Keystone Building  
400 North Street  
Harrisburg, PA 17120  
[sgranger@pa.gov](mailto:sgranger@pa.gov)

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*Consultant for OCA*

Steven C. Gray, Esquire  
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Forum Place  
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Harrisburg, PA 17101  
[sgray@pa.gov](mailto:sgray@pa.gov)

Aron J. Beatty, Esquire  
Christopher M. Andreoli, Esquire  
Office of Consumer Advocate  
Forum Place  
555 Walnut Street, 5<sup>th</sup> Floor  
Harrisburg, PA 17101-1923  
[abeatty@paoca.org](mailto:abeatty@paoca.org)  
[candreoli@paoca.org](mailto:candreoli@paoca.org)

Date: August 10, 2023



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Lindsay A. Berkstresser

**BEFORE THE  
PENNSYLVANIA PUBLIC UTILITY COMMISSION**

Pennsylvania Public Utility Commission	:	R-2023-3040290
Office of Consumer Advocate	:	C-2023-3040778
Office of Small Business Advocate	:	C-2023-3041089
v.	:	
	:	
UGI Utilities, Inc. – Gas Division	:	
1307(f) Proceeding	:	

**MOTION FOR PROTECTIVE ORDER**

**TO ADMINISTRATIVE LAW JUDGES DENNIS J. BUCKLEY AND JOHN COOGAN:**

UGI Utilities, Inc. – Gas Division (“UGI Gas” or the “Company”) hereby requests that the Honorable Administrative Law Judges Dennis J. Buckley and John Coogan (the “ALJs”) enter a Protective Order in this proceeding pursuant to the provisions of 52 Pa. Code §§ 5.362(a)(7) and 5.365, and in support thereof represents as follows:

1. On May 1, 2023, the Company made its 30-day pre-filing (“Book 1”) with the Pennsylvania Public Utility Commission (“Commission”) (containing data related to the recovery of purchased gas costs) pursuant to Section 1307(f) of the Public Utility Code, 66 Pa. C.S. § 1307(f), and in accordance with the Commission’s regulations at 52 Pa. Code §§ 53.64 and 53.65. On June 1, 2023, UGI Gas filed its definitive PGC filing (“Book 2”), including supporting information required by the Commission’s regulations, the Company’s direct testimony and exhibits, and Pro Forma Tariff Supplements reflecting actual and projected changes in natural gas costs.

2. Proprietary Information, as described in 52 Pa. Code §§ 5.362(a)(7) and 5.365, has been requested and exchanged during the course of this proceeding pursuant to protective agreements between the parties. Proprietary Information will be presented for admission to the

evidentiary record in this proceeding, which justifies the issuance of a Protective Order. For example, parties have sought and exchanged information that customarily is treated as sensitive, proprietary, or highly confidential, and have included certain portions of that information in their pre-served statements. Treatment of such information as set forth in the attached proposed Protective Order is justified because unrestricted disclosure of such information would not be in the public interest. These considerations constitute cause for the restrictions specified in 52 Pa. Code § 5.365 and in Administrative Law Judge or Commission Orders granting relief pursuant to said regulation.

3. Under 52 Pa. Code §§ 5.362(a)(7) and 5.365, the Office of Administrative Law Judge or the Commission may issue a Protective Order to limit or prohibit disclosure of confidential commercial information where the potential harm to a participant would be substantial and outweighs the public's interest in having access to the confidential information. In applying this standard, relevant factors to be considered include: the extent to which disclosure would cause unfair economic or competitive damage; the extent to which the information is known by others and used in similar activities; and the worth or value of the information to the party and to the party's competitors. 52 Pa. Code §§ 5.365(a)(1)-(3).

4. The attached proposed Protective Order defines two categories of protected information. The first is "CONFIDENTIAL" information, which is defined in Paragraph 3 of the attached proposed Protective Order as "those materials which customarily are treated by that party as sensitive or proprietary, which are not available to the public, and which, if disclosed freely, would subject that party or its clients to risk of competitive disadvantage or other business injury." The second is "HIGHLY CONFIDENTIAL" information, which is also defined in Paragraph 3 of the attached proposed Protective Order as "those materials that are of such a commercially

sensitive nature among the parties or of such a private, personal nature that the producing party is able to justify a heightened level of confidential protection with respect to those materials.”

5. Paragraph 17 of the attached proposed Protective Order protects against overly broad designations of protected information by giving all parties the right to question or challenge the confidential or proprietary nature of the information deemed “CONFIDENTIAL” or “HIGHLY CONFIDENTIAL.”

6. Limitation on the disclosure of information deemed “CONFIDENTIAL” or “HIGHLY CONFIDENTIAL” will not prejudice the rights of the participants, nor will such limitation frustrate the prompt and fair resolution of this proceeding. The proposed Protective Order balances the interests of the parties, the public, and the Commission.

7. The attached Protective Order sought by UGI Gas will protect the proprietary nature of competitively valuable information submitted for the record in the instant litigation. The proposed Protective Order applies the least restrictive means of limitation that will provide the necessary protections from disclosure.

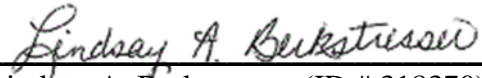
8. UGI Gas has shared the proposed Protective Order with parties to this proceeding.<sup>1</sup> UGI Gas is not aware of any objections to the Protective Order.

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<sup>1</sup> The parties to this proceeding are the Bureau of Investigation and Enforcement (“I&E”), the Office of Consumer Advocate (“OCA”) and the Office of Small Business Advocate (“OSBA”).

WHEREFORE, for all the reasons set forth above, UGI Utilities, Inc. – Gas Division respectfully requests that Your Honors issue the attached Protective Order.

Respectfully submitted,



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E-mail: mchught@ugicorp.com

Of Counsel:

Post & Schell, P.C.

*Attorneys for UGI Utilities, Inc. – Gas Division*

Date: August 10, 2023

**BEFORE THE  
PENNSYLVANIA PUBLIC UTILITY COMMISSION**

Pennsylvania Public Utility Commission	:	R-2023-3040290
Office of Consumer Advocate	:	C-2023-3040778
Office of Small Business Advocate	:	C-2023-3041089
v.	:	
	:	
UGI Utilities, Inc. – Gas Division	:	
1307(f) Proceeding	:	

**PROTECTIVE ORDER**

Upon consideration of the Motion for a Protective Order that was filed by UGI Utilities, Inc. – Gas Division on August 10, 2023:

**IT IS ORDERED THAT:**

1. The Motion is hereby granted with respect to all materials and information identified in Paragraphs 2 – 3 below.

2. The information subject to this Protective Order is all correspondence, documents, data, information, studies, methodologies and other materials, furnished in this proceeding, which are believed by the producing party to be of a proprietary or confidential nature, and which are so designated by being marked “CONFIDENTIAL” or “HIGHLY CONFIDENTIAL.” Such materials will be referred to below as “Proprietary Information.” When a statement or exhibit is identified for the record, the portions thereof that constitute Proprietary Information shall be designated as such for the record.

3. This Protective Order applies to the following categories of materials: (a) a producing party may designate as “CONFIDENTIAL” those materials which customarily are treated by that party as sensitive or proprietary, which are not available to the public, and which, if disclosed freely, would subject that party or its clients to risk of competitive disadvantage or

other business injury; (b) a producing party may designate as “HIGHLY CONFIDENTIAL” those materials that are of such a commercially sensitive nature among the parties or of such a private, personal nature that the producing party is able to justify a heightened level of confidential protection with respect to those materials. A producing party shall endeavor to limit their designation of information as HIGHLY CONFIDENTIAL.

4. Proprietary Information shall be made available to counsel for a party, subject to the terms of this Protective Order. Such counsel shall use or disclose the Proprietary Information only for purposes of preparing or presenting evidence, cross examination, argument, or settlement in this proceeding. To the extent required for participation in this proceeding, counsel for a party may afford access to Proprietary Information subject to the conditions set forth in this Protective Order.

5. Information deemed as “CONFIDENTIAL” shall be made available to a “Reviewing Representative” who is a person that has signed a Non-Disclosure Certificate attached as **Appendix A or Appendix B**, and who is:

- (a) An attorney for a statutory advocate (as defined in 52 Pa. Code § 1.8) or a counselor who has entered an appearance in this proceeding for a party;
- (b) Attorneys, paralegals, and other employees associated for purposes of this case with an attorney described in Paragraph (a);
- (c) An expert or an employee of an expert retained by a party for the purpose of advising, preparing for or testifying in this proceeding; or
- (d) Employees or other representatives of a party appearing in this proceeding with significant responsibility for this docket.

With regard to the Bureau of Investigation and Enforcement (“I&E”), information deemed as “CONFIDENTIAL” shall be made available to I&E Prosecutors subject to the terms of this Protective Order. I&E Prosecutors shall use or disclose the CONFIDENTIAL information only for purposes of preparing or presenting evidence, cross examination, argument, or settlement in this proceeding. To the extent required for participation in this proceeding, the I&E Prosecutor

may afford access to CONFIDENTIAL information only to I&E's experts, without the need for the execution of a Non-Disclosure Certificate, who are full-time employees of the Commission and bound by all the provisions of this Protective Order by virtue of the I&E Prosecutor's execution of a Non-Disclosure Certificate.

With regard to the Office of Consumer Advocate ("OCA") and Office of Small Business Advocate ("OSBA"), counsel for the OCA and OSBA may afford access to CONFIDENTIAL information to the Consumer Advocate, Deputy Consumer Advocate, and Small Business Advocate, respectively, without the need for execution of a Non-Disclosure Certificate. The Consumer Advocate, Deputy Consumer Advocate, and Small Business Advocate are bound by all of the provisions of the Protective Agreement by virtue of the OCA counsel's and OSBA counsel's execution of a Non-Disclosure Certificate.

6. Information deemed as "HIGHLY CONFIDENTIAL" may be provided to a "Reviewing Representative" who has signed a Non-Disclosure Certificate attached as **Appendix B** and who is:

- (a) An attorney for a statutory advocate (as defined in 52 Pa. Code § 1.8) or a counselor who has entered an appearance in this proceeding for a party;
- (b) Attorneys, paralegals, and other employees associated for purposes of this case with an attorney described in Paragraph (a);
- (c) An outside expert or an employee of an outside expert retained by a party for the purposes of advising, preparing for or testifying in this proceeding; or
- (d) A person designated as a Reviewing Representative for purposes of HIGHLY CONFIDENTIAL information.

With regard to I&E, information deemed as "HIGHLY CONFIDENTIAL" shall be made available to the I&E Prosecutors subject to the terms of this Protective Order. The I&E Prosecutors shall use or disclose the HIGHLY CONFIDENTIAL information only for purposes of preparing or presenting evidence, cross examination, argument, or settlement in this proceeding. To the

extent required for participation in this proceeding, the I&E Prosecutor may afford access to HIGHLY CONFIDENTIAL information without the need for the execution of a Non-Disclosure Certificate, only to I&E's experts who are full-time employees of the Commission and who are bound by all the provisions of this Protective Order by virtue of the I&E Prosecutor's execution of a Non-Disclosure Certificate.

With regard to the OCA and OSBA, counsel for the OCA and OSBA may afford access to HIGHLY CONFIDENTIAL information to the Consumer Advocate, Deputy Consumer Advocate, and Small Business Advocate, respectively, without the need for the execution of a Non-Disclosure Certificate. The Consumer Advocate, Deputy Consumer Advocate, and Small Business Advocate are bound by all of the provisions of the Protective Agreement by virtue of the OCA counsel's and OSBA counsel's execution of a Non-Disclosure Certificate.

Provided, further, that in accordance with the provisions of Sections 5.362 and 5.365(e) of the Commission's Rules of Practice and Procedure, 52 Pa. Code §§ 5.362, 5.365(e), any party may, by subsequent objection or motion, seek further protection with respect to HIGHLY CONFIDENTIAL information, including, but not limited to, total prohibition of disclosure or limitation of disclosure only to particular parties.

7. For purposes of this Protective Order, a Reviewing Representative may not be a "Restricted Person."

- (a) A "Restricted Person" shall mean: (i) an officer, director, stockholder, partner, or owner of any competitor of the parties or an employee of such an entity if the employee's duties involve marketing or pricing of the competitor's products or services; (ii) an officer, director, stockholder, partner, or owner of any affiliate of a competitor of the parties (including

any association of competitors of the parties) or an employee of such an entity if the employee's duties involve marketing or pricing of the competitor's products or services; (iii) an officer, director, stockholder, owner or employee of a competitor of a customer of the parties if the Proprietary Information concerns a specific, identifiable customer of the parties; and (iv) an officer, director, stockholder, owner or employee of an affiliate of a competitor of a customer of the parties if the Proprietary Information concerns a specific, identifiable customer of the parties; provided, however, that no expert shall be disqualified on account of being a stockholder, partner, or owner unless that expert's interest in the business would provide a significant motive for violation of the limitations of permissible use of the Proprietary Information. For purposes of this Protective Order, stocks, partnership or other ownership interests valued at more than \$10,000 or constituting more than a 1% interest in a business establishes a significant motive for violation.

- (b) If an expert for a party, another member of the expert's firm or the expert's firm generally also serves as an expert for, or as a consultant or advisor to, a Restricted Person, said expert must: (i) identify for the parties each Restricted Person and each expert or consultant; (ii) make reasonable attempts to segregate those personnel assisting in the expert's participation in this proceeding from those personnel working on behalf of a Restricted Person; and (iii) if segregation of such personnel is impractical, the expert shall give to the producing party written assurances that the lack of

segregation will in no way jeopardize the interests of the parties or their customers. The parties retain the right to challenge the adequacy of the written assurances that the parties' or their customers' interests will not be jeopardized. No other persons may have access to the Proprietary Information except as authorized by order of the Commission.

- (c) The OSBA's consultant, Mr. Mark Ewen, will not be considered a Restricted Person, and Paragraphs 7(a) and 7(b) will not apply to Mr. Ewen, provided that Mr. Ewen does not share or discuss the Proprietary Information with any person except authorized OSBA representatives.

8. In the event that a party wishes to designate as a Reviewing Representative a person not described in Paragraphs 5(a) through 5(d) or 6(a) through 6(c) above, or a person that is a Restricted Person under Paragraph 7, the party shall seek agreement from the party providing the Proprietary Information. If an agreement is reached, that person shall be a Reviewing Representative with respect to those materials. If no agreement is reached, the party shall submit the disputed designation to the presiding Administrative Law Judge for resolution.

9. A qualified "Reviewing Representative" for "HIGHLY CONFIDENTIAL" information may review and discuss "HIGHLY CONFIDENTIAL" information with their client or with the entity with which they are employed or associated, to the extent that the client or entity is not a "Restricted Person," but may not share with or permit the client or entity to review the "HIGHLY CONFIDENTIAL" information. Such discussions must be general in nature and not disclose specific "HIGHLY CONFIDENTIAL" information, provided, however, that counsel for I&E, the OCA, and OSBA may share proprietary information with the I&E Director, Consumer Advocate, Deputy Consumer Advocate, Small Business Advocate, respectively, without obtaining

a Non-Disclosure Certificate from these individuals, so long as these individuals otherwise abide by the terms of the Protective Order.

10. Information deemed Proprietary Information shall not be used except as necessary for the conduct of this proceeding, nor shall it be disclosed in any manner to any person except a Reviewing Representative who is engaged in the conduct of this proceeding and who needs to know the information in order to carry out that person's responsibilities in this proceeding. Reviewing Representatives may not use information contained in any Proprietary Information obtained through this proceeding to give any party or any competitor of any party a commercial advantage.

11. Reviewing Representatives shall execute a Non-Disclosure Certificate in order to obtain access to Proprietary Information, and will be subject to the following conditions:

- (a) A Reviewing Representative shall not be permitted to inspect, participate in discussions regarding, or otherwise be permitted access to Proprietary Information pursuant to this Protective Order unless that Reviewing Representative has first executed a Non-Disclosure Certificate, provided that if an attorney qualified as a Reviewing Representative has executed such a certificate, the paralegals, secretarial and clerical personnel under the attorney's instruction, supervision or control need not do so, nor do Commission employees assisting I&E as noted above in Paragraphs 5 and 6. A copy of each Non-Disclosure Certificate shall be provided to counsel for the party asserting confidentiality prior to disclosure of any Proprietary Information to that Reviewing Representative.

(b) Attorneys and outside experts qualified as Reviewing Representatives are responsible for ensuring that persons under their supervision or control comply with the Protective Order.

12. None of the parties waive their right to pursue any other legal or equitable remedies that may be available in the event of actual or anticipated disclosure of Proprietary Information.

13. The producing party shall designate data or documents as constituting or containing Proprietary Information by marking the documents “CONFIDENTIAL” or “HIGHLY CONFIDENTIAL.” Where only part of data compilations or multi-page documents constitutes or contains Proprietary Information, the producing party, insofar as reasonably practicable within discovery and other time constraints imposed in this proceeding, shall designate only the specific data or pages of documents that constitute or contain Proprietary Information. The Proprietary Information shall be served upon the parties hereto only and the materials shall be conspicuously marked “CONFIDENTIAL” or “HIGHLY CONFIDENTIAL.” For filing purposes, Proprietary Information shall be filed separately from the nonproprietary materials and conspicuously marked “CONFIDENTIAL” or “HIGHLY CONFIDENTIAL.”

14. The parties will consider and treat the Proprietary Information as within the exemptions from disclosure provided in Section 335(d) of the Public Utility Code, 66 Pa.C.S. § 335(d), and the Pennsylvania Right-to-Know Act, 65 P.S. §§ 67.101 *et seq.*, until such time as the information is found to be non-proprietary. In the event that any person or entity seeks to compel the disclosure of Proprietary Information, the non-producing party shall promptly notify the producing party in order to provide the producing party an opportunity to oppose or limit such disclosure.

15. Any public reference to Proprietary Information by a party or its Reviewing Representatives shall be to the title or exhibit reference in sufficient detail to permit persons with access to the Proprietary Information to understand fully the reference and not more. The Proprietary Information shall remain a part of the record, to the extent admitted, for all purposes of administrative or judicial review.

16. Part of any record of this proceeding containing Proprietary Information, including but not limited to all exhibits, writings, testimony, cross examination, argument, and responses to discovery, and including reference thereto as mentioned in Paragraph 15 above, shall be sealed for all purposes, including administrative and judicial review, unless such Proprietary Information is released from the restrictions of this Protective Order, either through the agreement of the parties to this proceeding or pursuant to an order of the Commission.

17. The parties shall retain the right to question or challenge the confidential or proprietary nature of Proprietary Information and to question or challenge the admissibility of Proprietary Information. If a party challenges the designation of a document or information as proprietary, the party providing the information retains the burden of demonstrating that the designation is appropriate.

18. The parties shall retain the right to question or challenge the admissibility of Proprietary Information; to object to the production of Proprietary Information on any proper ground; and to refuse to produce Proprietary Information pending the adjudication of the objection.

19. Within thirty (30) days after a Commission final order is entered in the above-captioned proceeding, or in the event of appeals, within thirty (30) days after appeals are finally decided, the parties, upon request, shall either destroy or return to the parties all copies of all documents and other materials not entered into the record, including notes, which contain any

Proprietary Information. In the event that a party elects to destroy all copies of documents and other materials containing Proprietary Information instead of returning the copies of documents and other materials containing Proprietary Information to the parties, the party shall certify in writing to the producing party that the Proprietary Information has been destroyed.

Dated: \_\_\_\_\_

\_\_\_\_\_  
The Honorable Administrative Law Judges  
Dennis J. Buckley and  
John Coogan

**APPENDIX A**  
**BEFORE THE**  
**PENNSYLVANIA PUBLIC UTILITY COMMISSION**

Pennsylvania Public Utility Commission	:	R-2023-3040290
Office of Consumer Advocate	:	C-2023-3040778
Office of Small Business Advocate	:	C-2023-3041089
v.	:	
	:	
UGI Utilities, Inc. – Gas Division	:	
1307(f) Proceeding	:	

**NON-DISCLOSURE CERTIFICATE**  
**FOR CONFIDENTIAL MATERIALS**

TO WHOM IT MAY CONCERN:

The undersigned is the \_\_\_\_\_ of \_\_\_\_\_ (the retaining party). The undersigned has read and understands the Protective Order and the required treatment of “CONFIDENTIAL” information as defined in the Protective Order. The undersigned agrees to be bound by and comply with the terms and conditions of said Protective Order.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME (Printed)

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
EMPLOYER

**APPENDIX B**  
**BEFORE THE**  
**PENNSYLVANIA PUBLIC UTILITY COMMISSION**

Pennsylvania Public Utility Commission	:	R-2023-3040290
Office of Consumer Advocate	:	C-2023-3040778
Office of Small Business Advocate	:	C-2023-3041089
v.	:	
	:	
UGI Utilities, Inc. – Gas Division	:	
1307(f) Proceeding	:	

**NON-DISCLOSURE CERTIFICATE FOR**  
**HIGHLY CONFIDENTIAL MATERIALS**

TO WHOM IT MAY CONCERN:

The undersigned is the \_\_\_\_\_ of \_\_\_\_\_ (the retaining party). The undersigned has read and understands the Protective Order and the required treatment of “CONFIDENTIAL” and “HIGHLY CONFIDENTIAL” material as defined in the Protective Order. The undersigned agrees to be bound by and comply with the terms and conditions of said Protective Order. The undersigned understands and agrees that, pursuant to Paragraph 6, a party providing HIGHLY CONFIDENTIAL material may seek further protection, including, but not limited to, total prohibition of disclosure as to particular individuals, even where Appendix B has been executed.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME (Printed)

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
EMPLOYER