

# BUSINESS & FINANCIAL Conference

September, 17-20, 2017

Nashville Convention Center | Nashville, Tennessee

## ENSURING STABILITY, EMPOWERING COMMUNITIES

50+ SESSIONS BRING YOU  
THE LATEST IN

- Accounting & Finance
- Customer Accounting & Services
- Human Resources & Training
- Information Technology
- Pricing & Market Analysis

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# Worth the money

"We can all learn something from attending the Business & Financial Conference, whether we have been in the industry for 30 days or 30 years. For me, just talking with other attendees about how they do things and the experiences they have had as well as 'best practices' is worth the money."

Kelli Nugent, CFO  
Carthage Water & Electric Plant

## Find Your COMMUNITY

Join fellow professionals for updates on all areas of utility business and administration. You'll have plenty of opportunities to compare notes, discover best practices, and learn from case studies.

Network and learn from other utility business and finance professionals—both veterans and those new to the electric utility industry—who are interested in professional development and networking in the areas of:

- Accounting & Finance
- Customer Accounting & Services
- Human Resources & Training
- Information Technology
- Pricing & Market Analysis

BE EMPOWERED

[www.PublicPower.org/BandF](http://www.PublicPower.org/BandF)

## Conference MENTOR PROGRAM

Need help navigating the conference as a first-timer? Want someone to compare notes with because you're the only one from your organization attending? Eager to share your knowledge and experience as a long-time conference attendee?

Sign up for the conference mentor program. We'll pair up new attendees with seasoned conference-goers. You'll meet up at the Welcome Reception and stay in touch throughout the conference.

Ask for a conference mentor or volunteer to serve as one — check the box when you register, email [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org), or call 202-467-2965.

# SPONSORS

AS OF JULY 3, 2017

The American Public Power Association thanks all conference sponsors who provide financial support to help us offer the best possible experience to attendees while keeping costs low.

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# SESSIONS at a Glance

With more than 50 sessions to choose from, you'll get up to speed on new trends and technologies, learn from the experts, and exchange ideas with peers. And you'll leave with strategies and resources to deal with the issues that keep you up at night.

Visit [www.PublicPower.org/BandF](http://www.PublicPower.org/BandF) for updates and to register.



The American Public Power Association is the voice of not-for-profit, community-owned utilities that power 2,000 towns and cities nationwide. We represent public power before the federal government to protect the interests of the more than 49 million people that public power utilities serve, and the 93,000 people they employ. Our association advocates and advises on electricity policy, technology, trends, training, and operations.



The Academy is public power's complete resource for professional education and certification, helping electric industry employees stay abreast of rapidly evolving technologies, regulations and customer needs. Learn more about our conferences, webinars, special events, continuing education, and custom in-house trainings at [www.PublicPower.org/Academy](http://www.PublicPower.org/Academy).

## Can apply to real life

"This conference is a great opportunity to meet people in my industry and get problem solving ideas that I can apply to real life."

Becky Lehman, Technology Director  
Holland Board of Public Works

# BREAKOUT SESSIONS

## at a Glance

| <b>MONDAY, Sept. 18</b>                        |   |  |
|--|---|--|
|  | 9:15–10:15 A.M.   | 10:30–11:45 A.M.                                 |
| <b>Customer Accounting &amp; Services</b>      | Customer Accounting & Services Roundtable                           | Social Media: Who's Controlling Your Messages?   |
| <b>General Accounting, Finance &amp; Audit</b> | Construct with Caution: Beware of Fraud                             | Large Public Power Utility Roundtable            |
|  | Show Me the Money: Best Practices in Treasury                       | Small Public Power Utility Roundtable            |
| <b>Human Resources &amp; Training</b>          | HR & Training Roundtable  | Managing Costs, Engaging Employees               |
| <b>Information Technology</b>                  | To Cloud or Not to Cloud  | Moving the Needle on Data                        |
| <b>Pricing &amp; Market Analysis</b>           | Prepaid Metering: Designing for Success                             | Fairer Rates through Customer Segmentation       |
| <b>Open to All Groups</b>                      |   | Joint Action Agency Roundtable                   |
| <b>TUESDAY, Sept. 19</b>                       |   |  |
|  | 8:30–10:00 A.M.   | 10:15–11:45 A.M.                                 |
| <b>Customer Accounting &amp; Services</b>      | Educating your Employees and Customers on the Value of Public Power | Self-Service: Helping Customers Help Themselves  |
| <b>General Accounting, Finance &amp; Audit</b> | New and Upcoming GASB Accounting Standards                          | Disaster Recovery: Navigating FEMA Assistance    |
|  | Strategic Planning: Charting Your Utility's Future                  | #EMMA #What Happens When Audited                 |
| <b>Human Resources &amp; Training</b>          | Social Media: What HR Can and Cannot Control                        | Knowledge Transfer: Train Your Future Leaders    |
| <b>Information Technology</b>                  | Creating a Cybersecurity Culture                                    | The Challenges of Going AMI-less in an AMI World |
| <b>Pricing &amp; Market Analysis</b>           | You Have AMI...Now What?  |  |
| <b>WEDNESDAY, Sept. 20</b>                     |   |  |
|  | 8:30 –10 A.M.   |  |
| <b>Customer Accounting &amp; Services</b>      | Customer Accounting & Services Roundtable                           |  |
| <b>General Accounting, Finance &amp; Audit</b> | Before & After the Breach   |  |
| <b>Human Resources &amp; Training</b>          | Breaking Barriers, Cultivating Collaboration                        |  |
| <b>Information Technology</b>                  | Elevating IT in the Decision-Making Process                         |  |
| <b>Pricing &amp; Market Analysis</b>           | Economics of Community Solar Implementation                         |  |

| 1:30–3 P.M.        |   | 3:15–4:30 P.M. |   | 4:30–5:30 P.M. |                         |
|--------------------|---|----------------|---|----------------|-------------------------|
|                    | Customer Service in Community Solar   |                | Navigating the New World of Prepaid Metering  |                |                         |
|                    | Effectively Presenting the Results of Analysis  |                | Capital Improvement Projects: Best Practices  |                |                         |
|                    | What's the Score: Outlook from Rating Agencies  |                | Enterprise Risk Management: Tools and Tips    |                |                         |
|                    | Best Practices in Workforce Development   |                | How Technology is Transforming Training       |                |                         |
|                    | Leveraging Business Intelligence to Maximize the Value of Your Data                                     |                | Everything Integrated, Everything Improved    |                |                         |
|                    | Evolving the Public Power Utility Business Model  |                | Rate Design Trends Roundtable: Fad or Future? |                |                         |
|                    |   |                |   |                | The Power of Membership |
| 1:30–3 P.M.        |   | 3:15–4:30 P.M. |   |                |                         |
|                    | Tell Me What You Want... What You Really, Really Want   |                | Customer Service During Disaster Recovery     |                |                         |
|                    | Ethics... 50 Shades of Gray   |                | Internal Audit Roundtable                     |                |                         |
|                    | Enterprise Value: By the Numbers and Beyond   |                | Issuing Municipal Bonds: Closing the Deal!    |                |                         |
|                    | The Importance of Competitive Pay   |                | Ask the HR Attorney                           |                |                         |
|                    | Utilizing GIS to Maximize Your Mobile Workforce   |                | Business Continuity in the Face of Disaster   |                |                         |
|                    | Cost of Service: Transforming Theory into Reality   |                | Pricing and Market Analysis Roundtable        |                |                         |
| 10:15 – 11:30 A.M. |   |                |   |                |                         |
|                    | <b>Closing General Session:</b> Dedication, Pride & Commitment: Leadership Lessons from Black Hawk Down |                |   |                |                         |
|                    |   |                |   |                |                         |
|                    |   |                |   |                |                         |
|                    |   |                |   |                |                         |

## CONFERENCE AGENDA

# SUNDAY September 17

8 A.M. – 6:30 P.M. Conference Registration

### PRECONFERENCE SEMINARS

With longer class times, smaller class sizes, interactive formats, and experienced instructors, preconference seminars help you add value to your conference experience.

*Each preconference seminar requires separate registration.*

8:30 A.M. – NOON

## Get Your Head in the Cloud

***Recommended CEUs .3/PDHs 3.25/CPEs 3.8, Information Technology***

Cloud technologies are proving viable for utility mission critical system software — customer information, enterprise resource planning, financial management, meter data management, work management, AMI, etc. Cloud solutions require new criteria — for statements of work, service agreements, capitalization analysis, purchasing contracts, and more. They usher in new regulatory implications, system integration needs, and even business model changes. Learn how utilities like yours are leveraging the cloud.

### Topics

- Emerging cloud offerings and how to evaluate
- Utility concerns and objections
- Regulatory and financial implications
- Implementing and integrating cloud solutions
- Statement of work and contractual considerations
- Business model implications and value propositions

***Rick Cutter • Managing Partner, AAC Utility Partners,  
Columbia, South Carolina***



8:30 A.M. – NOON

## Assessing Your Utility's Revenue Sufficiency in Light of Exposure to Distributed Generation

**Recommended CEUs .3/PDHs 3.25/CPEs 3.8, Specialized Knowledge**

Discover ways to maintain revenue stability as distributed energy resources continue to proliferate. Work through real-world examples and apply progressive corporate and rate design policies to your business model. Respond to financial and rate design challenges. Develop actionable strategies to mitigate negative impacts from distributed energy resources through rate design. Instructors will demonstrate methods and key concepts for ensuring a financially sustainable utility of the future.

### Topics

- Financial basics for public power utilities (utility accounting concepts, sources of income, expenditures and cash flow concepts)
- Long-term financial planning (general utility planning financial balancing act, challenges and direction)
- Funding sources (things that drive capital needs including system growth or decline, aging infrastructure, new growth, upgrade projects, and R&R projects; planning documents, CIP and sources of funding for public utilities)
- Traditional rate structures and revenue impacts (rate analysis and various rate designs; common key performance indicators)
- DER rate structures (net energy metering, value of solar tariffs) and revenue impacts
- Financial toolkit for long term revenue adequacy

**Dave Buemi • Senior Vice President**, Clean Energy Programs, Willdan Energy Services, Washington, D.C.; **Jolynn Rains • Principal Consultant**, Willdan Energy Services, Eloy, Arizona; and **Lisa Vedder • MPA, CIA, CCSA, Principal Consultant**, Willdan Energy Services, Orlando, Florida



1:30 – 5 P.M.

## Informed Decision-Making: Financial Trends and Impacts on Municipal Utilities

**Recommended CEUs .3/PDHs 3.25/CPEs 3.8, Specialized Knowledge**

Discover how economic and market conditions influence and inform everyday financial decisions at your utility. Discuss the Trump Administration's budget priorities and the impact on bond pricing and utility finances. See how utilities across the nation are adapting to changing market forces and distributed generation penetration. Learn how to communicate utility financial performance and potential rate changes to board/council members and customers.

### Topics

- Review of market conditions and expectations for public power
- Pricing your bonds
- Rating agency trends and new rate structures
- Incorporating cost-effective renewables
- Communicating with investors
- Policy issues and developments to watch

**Chris Lover • Director, and Mike Mace • Managing Director, Public Financial Management, Charlotte, North Carolina**

1:30 – 5 P.M.

## Communicating for Better Work Relationships

**Recommended CEUs .3/PDHs 3.25/HRCI 3.25/CPEs 3.8, Personal Development**

Your utility can achieve goals and succeed if you focus on building strong relationships among team members. And strong work relationships are built on effective communications. You need to understand and leverage the differences among multiple generations and personalities in your workforce and develop appropriate communication styles and processes. Strong communication can improve staff performance, break down departmental silos, and build trust to enhance the work environment and customer service across your organization.

### Topics

- Understanding communication and personality styles
- Working with different generations and overcoming resistance to change
- Avoiding and resolving conflicts from misinterpretation
- Using feedback and questioning skills
- Coaching for improved performance
- Improving internal customer service

**David Saxby • President, Measure-X, Phoenix, Arizona**

**5 – 6:30 P.M.**

## **Welcome Reception**

Visit with colleagues and learn about the products and services that conference sponsors offer.



# MONDAY September 18

7 A.M. – 5 P.M. Conference Registration

7 – 8 A.M.

## Networking Continental Breakfast

Make the most of your time at this informal breakfast. No speakers or moderators — just visit with your peers and conference sponsors.

8 – 8:45 A.M.

## Opening General Session

**Recommended CEUs .1 / PDHs .75 / CPEs .9, Specialized Knowledge**

### Board Chair Address

**Wally Haase • Chair**, American Public Power Association and, **General Manager**, Navajo Tribal Utility Authority, Fort Defiance, Arizona

### An Update from Washington

Hear from an expert on Capitol Hill about the current state of Washington and what's being discussed in the nation's capital. Get an update on current priorities, implications for public power and how they may impact your utility.

**Marty Kanner • President**, Kanner & Associates, LLC, Washington, D.C.



**Wally  
HAASE**



**Marty  
KANNER**

8:45 – 9:15 A.M.

## Break with Sponsors

All roundtable discussions are limited to employees of public power utilities, state and regional associations, and joint action agencies.

## Have topics you'd like to discuss at any roundtable?

Email [BusinessandFinance@PublicPower.org](mailto:BusinessandFinance@PublicPower.org) before the conference.

9:15 – 10:15 A.M.

## Breakout Sessions

Recommended CEUs .1 / PDHs 1 / CPEs 1.2



### Customer Accounting & Services Roundtable

CPE Field of Study: Specialized Knowledge

Join your peers for a discussion of customer accounting and services topics. Learn what other utilities are doing to help customers. Find others that might be using the same billing platform as you. Discuss issues ranging from enterprise-wide integration to measuring benchmarks in the back office and customer fraud.



### Construct with Caution: Beware of Fraud

CPE Field of Study: Auditing (Governmental)

This session will outline key fraud risks for construction projects from the bid to build stage, focusing on recent real-life examples. Considering the scrutiny associated with various funding sources for construction projects (federal grants, insurance proceeds, private investors, etc.), it is critical to ensure that funds are spent appropriately. Guidance will be provided on controls that can be implemented to deter fraud to the extent possible, and quickly detected in the event that it occurs.

**Matt Jadacki • Executive Director, and Reena Panchal • Senior Manager, Ernst & Young, Chicago, Illinois**

#### KEY TO SESSIONS



Customer Accounting & Services



General Accounting, Finance & Audit



Human Resources & Training



Information Technology



Pricing & Market Analysis



## **Show Me the Money: Best Practices in Treasury**

**CPE Field of Study: Finance**

This session will discuss best practices and help finance personnel better understand policies, procedures and optimal techniques related to cash management and investment duties.

**Chad Cowen • Director**, Hilltop Securities, Charlotte, North Carolina; and **Lora Prisock • Sr. Client Manager**, Bank of America Merrill Lynch, Greensboro, North Carolina



## **HR & Training Roundtable**

**HRCI: 1 / CPE Field of Study: Personnel/HR**

Get together with human resources and training professionals from other public power utilities. Learn from one another's experiences through a facilitated roundtable conversation. Explore the gamut from managing a multi-generational workforce to diversity and competitive pay.



## **To Cloud or Not to Cloud**

**CPE Field of Study: Information Technology**

Should you move all utility applications to the cloud? Or just some? There are no canned answers — you have many critical factors to consider. You have to factor in operational vs. capital expenses, broadband capabilities and redundancy, service level agreements, and more. Learn how to collect and analyze information for decision making.

**Edwin Crow • Managing Partner**, AAC Utility Partners, Columbia, South Carolina



## **Prepaid Metering: Designing for Success**

**CPE Field of Study: Specialized Knowledge**

Prepaid metering programs are popular with participating customers. However, such programs create ratemaking challenges for utilities. How can these programs be designed to ensure recovery of fixed costs? How do utilities providing multiple services — electricity, gas, water, wastewater — create a cross-departmental allocation policy?

**Thomas McNulty • Director**, Transaction Advisory Services, Navigant, Houston, Texas

**10:15 – 10:30 A.M.**

**Break with Sponsors**

10:30 – 11:45 A.M.

## Breakout Sessions

*Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5*



### **Social Media: Who's Controlling Your Messages?**

**CPE Field of Study: Communications and Marketing**

How can you manage your brand online and address negative customer comments? How do you balance the time and resources to talk to customers via multiple platforms — in person, phone, social media, etc.? Get answers through utility case studies of social media communications during outages, rate changes, and community events.

**Crystal Kemp • Manager, Marketing and Public Relations, Conway Corp., Arkansas**



### **Large Public Power Utility Roundtable**

**CPE Field of Study: Accounting**

Meet with peers from other large utilities to discuss current issues in accounting and finance.



### **Small Public Power Utility Roundtable**

**CPE Field of Study: Accounting**

Meet with peers from other small utilities to discuss current issues in accounting and finance.



### **Joint Action Agency/State and Regional Association Roundtable**

**CPE Field of Study: Specialized Knowledge**

Meet with representatives from other joint action agencies and state and regional associations to discuss hot topics in business and finance.



### **Managing Costs, Engaging Employees**

**HRCI: 1.25 / CPE Field of Study: Personnel/HR**

Utilities are looking at stabilizing labor costs through pay for performance, healthcare cost management, and elimination or limitation of retiree benefits. What are “best-in-class” employers doing? How are they hiring to replace the retiring boomer workforce? Learn the secrets to ensuring employee well-being, managing compensation and benefit costs, and engaging employees to boost performance.

**Scott Hamilton • North American Managing Director, Human Resources & Compensation Consulting, Arthur J. Gallagher & Co., Rolling Meadows, Illinois**



## **Moving the Needle on Data**

**CPE Field of Study: Information Technology**

Utilities collect a significant amount of data but how can they use it to improve customer service and revenues? Data analytics can be daunting and it's hard to know where to start. Learn efficient ways to identify and use the data you already have. Leave with a framework to implement analytics back at your utility.

**Jeremy Clopton • Director**, *Forensics & Valuation Services, BKD, LLP, Lincoln, Nebraska*



## **Fairer Rates through Customer Segmentation**

**CPE Field of Study: Specialized Knowledge**

Customers in the same class impose different demands on the system, and incur different costs. Yet they are all billed the same way. This leads to inefficiencies and cross subsidies. How can you better segment customers while keeping things simple for customers and less challenging for rate analysts?

**Scott Burnham • Executive Consultant**, *NewGen Strategies & Solutions LLC, Brentwood, Tennessee;*  
and **Ted Kelly • Business Development Manager**, and  
**Steven Greene • Project Analyst**, *Burns & McDonnell, Kansas City, Missouri*

11:45 A.M. – 1:30 P.M.

## **Lunch on your own**

1:30 – 3 P.M.

## **Breakout Sessions**

**Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8**



## **Customer Service in Community Solar**

**CPE Field of Study: Specialized Knowledge**

Hear from utilities that have deployed solar in public power communities. Understand how community solar impacts customer accounting and services. See what these utilities are doing to entice customers to participate in community solar. Get tips on billing, allocating workforce, and tracking credits and usage.

**Scott Benson • Manager**, *Resource & Transmission Planning, Lincoln Electric System, Nebraska;* and **Danielle Murray • Solar Programs Manager**, *Austin Energy, Texas*





## **Effectively Presenting the Results of Analysis**

**CPE Field of Study: Communications and Marketing**

Whether you are presenting the analysis of financial results, rate options, operational improvements, or customer characteristics, effective communication is crucial for achieving the organization's goals. Learn about the GPS approach to plan your presentation so it has a clear message, focused content, and gives the audience access to the details without overwhelming them during the presentation.

**Dave Paradi • Owner, ThinkOutsideTheSlide.com, Ontario, Canada**



## **What's the Score: Outlook from Rating Agencies**

**CPE Field of Study: Specialized Knowledge**

Hear from representatives from the premier rating agencies about the outlook for public power and the electric utility industry. Learn how changing policies and threats such as tax exemption on bonds could impact your utility and any projects you may be planning.

**Dan Aschenbach • Senior Vice President, Moody's Investors Service, New York, New York; and Jeff Panger • Director, U.S. Public Finance Infrastructure, Standard & Poor's, New York, New York; and Dennis Pidherny • Managing Director, Fitch Ratings, New York, New York**



## **Best Practices in Workforce Development**

**HRCI: 1.5 / CPE Field of Study: Personnel/HR**

The American Public Power Association's Reliable Public Power Provider Program (RP3) recognizes best practices in four areas, one of which is workforce development. Applying for the RP3 designation drives utilities to evaluate and improve their workforce practices. Hear from utilities that have been recognized for their workforce practices and take away new ideas to boost employee performance.

**Charlotte Bradley • Assistant General Manager, Administrative Services, Hope Water & Light, Arkansas; Janet McTague • Project Engineering Manager, Fort Collins Light and Power, Colorado; and Christina Ospina • Energy & Environmental Services Coordinator, American Public Power Association, Arlington, Virginia**



## **Leveraging Business Intelligence to Maximize the Value of Your Data**

**CPE Field of Study: Information Technology**

Utilities today are collecting more data about their services and how their customers interact with those services than ever before, but many find it challenging to turn that data into actionable intelligence. Learn how to make the most of your data to inform business decisions, create workflow efficiencies, and apply predictive analysis.

**Jaya Bajpai • Strategic Advisor**, Risk Oversight, Seattle City Light, Washington; **Tim Wilkinson • Enterprise Account Executive**, System Integrators, Tableau, Austin, Texas; and a representative from Microsoft



## **Evolving the Public Power Utility Business Model**

**CPE Field of Study: Specialized Knowledge**

There has been much discussion about the utility of the future, but what does that mean for you? Can traditional rate design and ways of doing business help you survive and thrive in the face of change? Do you have to consider wholesale changes in your approach? Explore how technological innovation is forcing utilities to rethink their business model to meet changing customer expectations.

**Chris Villareal**, Plugged in Strategies, Eden Prairie, Minnesota; and **Paul Zummo • Director of Policy Research and Analysis**, American Public Power Association, Arlington, Virginia

**3 – 3:15 P.M.**

## **Break with Sponsors**

**3:15 – 4:30 P.M.**

## **Breakout Sessions**

**Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5**



## **Navigating the New World of Prepaid Metering**

**CPE Field of Study: Specialized Knowledge**

Prepaid metering is becoming popular with the growth of smart meters. Customers are seeing it as a way to better manage budgets and energy consumption. Experts walk you through the full process of offering prepaid metering at your utility — research, planning, implementation, and customer communications. Discover the benefits and the pitfalls to avoid.

**James Barnes • Chief Customer Officer**, City of Tallahassee, Florida; and **Ronnie Mendoza • Manager**, Customer Solutions, Austin Energy, Texas



## **Capital Improvement Projects: Best Practices**

**CPE Field of Study: Accounting**

Is your utility considering a capital project? What can you learn from complex projects built by or for utilities across the nation? Discover best practices to ensure that estimates are accurate and reliable, that all expenses are monitored and tracked, and that the project will be completed on time and on budget.

**Olga Darlington • Partner**, Moss Adams LLP, Everett, Washington; and **Julie Desimone • Partner**, Moss Adams LLP, Portland, Oregon



## **Enterprise Risk Management: Tools and Tips**

**CPE Field of Study: Management Services**

An enterprise risk management tool can create a risk-focused culture at your utility and standardize compliance and reporting. Learn how to select and use the right ERM tools to consolidate risk management functions and better manage market and economic conditions that impact your utility.

**Joe Daggett • Risk Manager**, WPPI Energy, Sun Prairie, Wisconsin; and **Russ Hissom • CPA, Partner**, Baker Tilly, Madison, Wisconsin



## **How Technology is Transforming Training**

**HRCI: 1.5 / CPE Field of Study: Personnel/HR**

New online, social media, and interactive technologies are connecting the workforce like never before and opening up new possibilities for how content and skills can be created, distributed, and consumed. See how technology can take training and instruction to new levels. Explore, through demos, how you can leverage technology for training at your utility.

**Matt Johnston • Director**, Consumer Experience, Design Interactive, Inc., Orlando, Florida



## **Everything Integrated, Everything Improved**

**CPE Field of Study: Information Technology**

Discover how utilities like yours are integrating metering, meter data management, mobile workforce management, outage management, interactive voice response, billing, and other information and communication systems to improve operations and customer service. Understand when integration makes sense and how you can phase it in.

**Steve Collier • Vice President of Business Development**, Milsoft Utility Solutions, Austin, Texas; and **Pat Corrigan • Consultant**, Katama Technologies, Wake Forest, North Carolina



## **Rate Design Trends Roundtable: Fad or Future?**

**CPE Field of Study: Specialized Knowledge**

Dynamic pricing, rate decoupling, time-of-use rates, residential demand charges, and more. Do these new rate design trends represent the future, or are they just fads? What has your utility tried? What should you focus on for the future? Come prepared to discuss the pros and cons of new rate options.

**Moderator: Ted Kelly • Business Development Manager,  
Burns & McDonnell, Kansas City, Missouri**

4:30 – 5:30 P.M.

## **Breakout Session**

**Recommended CEUs .1 / PDHs 1 / CPEs 1.2,  
Specialized Knowledge**



### ***The Power of Membership***

Come discover how the American Public Power Association can go to work for you. Find out about resources, and get tips on how you can leverage them to make your job easier. Ask questions, get answers, and share your ideas on what the Association can do to help you succeed.

**Jeff Haas • Vice President, Membership & Strategic  
Development; and Ursula Schryver • Vice President,  
Education & Customer Programs, American Public Power  
Association, Arlington, Virginia**

ENSURING STABILITY, EMPOWERING COMMUNITIES

# TUESDAY

## September 19

7 A.M. – 4 P.M. Conference Registration

7 – 8:15 A.M.

### Women in Public Power Networking Breakfast

Join your colleagues to discuss the growing influence of women in public power and share common challenges and opportunities.

7:30 – 8:30 A.M.

### Networking Continental Breakfast

Power up with coffee and connections at this informal breakfast. There are no speakers or moderators. Just visit with your peers and chat with sponsors.

8:30 – 10 A.M.

### Breakout Sessions

**Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8**



#### ***Educating your Employees and Customers on the Value of Public Power***

**CPE Field of Study: Specialized Knowledge**

Hear how you can partner with your employees to enhance your community's public power awareness and realize the benefits of your municipal utility. Discover how to turn employees into community ambassadors who can tell your story. Learn from case studies and get ideas on how to nurture community loyalty.

**Cheryl Anderson • Executive Director of Education,  
Member Services, Facilities and Mutual Aid, Florida Municipal  
Electric Association, Inc., Tallahassee, Florida; and Chris Gent •  
Vice President, Corporate Communications, Kissimmee Utility  
Authority, Florida**



## **New and Upcoming GASB Accounting Standards**

**CPE Field of Study: Accounting (Governmental)**

Get up to speed on the latest standards from the Governmental Accounting Standards Board. Understand how the standards may affect your utility. Get a preview of new standards coming down the pipeline so you can prepare for compliance.

**Wes Galloway • Project Manager, Governmental Accounting Standards Board, Norwalk, Connecticut**



## **Strategic Planning: Charting Your Utility's Future**

**CPE Field of Study: Business Management & Organization**

As we navigate through the dynamic changes of today's electric utility industry, creating a clear and compelling strategic roadmap is critical. The goal is to engage and align an organization's talent and resources toward a shared vision of and journey toward the future. Hear how one utility is "leading the way" in its strategic planning efforts and learn from their experiences.

**Scott Focht • Director of Business Strategy & Deployment, Omaha Public Power District, Nebraska**



## **Social Media: What HR Can and Cannot Control**

**HRCI: 1.5 / CPE Field of Study: Business Law**

Employees are probably sharing work-related news and views on their social media. None of your business? Or is it? What areas are protected under the National Labor Relations Act? Understand what social media content HR can influence, when to act, and how to avoid workplace issues.

**Emily Garner • Public Information Specialist, Greenville Utilities Commission, North Carolina; and Jody Lamar Finklea • Deputy General Counsel/Manager of Legal Affairs, Florida Municipal Power Agency, Tallahassee, Florida**



## **Creating a Cybersecurity Culture**

**CPE Field of Study: Information Technology**

Learn why cybersecurity is a big concern and explore how you can create a culture of cyber awareness at your utility. Get tips to mitigate cyber risk, plan cyber insurance coverage, monitor your systems, and train your staff. Find out what resources the American Public Power Association offers under a DOE grid security grant.

**George Adkins • Managing Director, Wortham Power Gen Insurance, Houston, Texas; Brad Luna • Senior Vice President of Sales, N-Dimension Solutions, Addison, Texas; and Sam Rozenberg • Engineering Services Security Manager, American Public Power Association, Arlington, Virginia**



## **You Have AMI... Now What?**

**CPE Field of Study: Specialized Knowledge**

You've installed, or will soon install, smart meters in your service territory. Great—but what's next? How do you maximize return on your investment? Get a handle on all the data coming from these meters and see how to leverage it for business planning. Discover rate design options made possible by smart meters. Learn how to use the data for load forecasting and load profiling.

**Alcides Hernandez • Rate/Pricing Advisor**, *Resource Planning & Pricing, Sacramento Municipal Utility District, California*; **Nathan Shannon, Deputy Director**, *Smart Grid Consumer Collaborative, Atlanta, Georgia*; and **David Werley, Group Manager**, *Business and Customer Operations, Bryan Texas Utilities*

10 – 10:15 A.M.

## **Break with Sponsors**

10:15 – 11:45 A.M.

## **Breakout Sessions**

**Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8**



## **Self-Service:**

### **Helping Customers Help Themselves**

**CPE Field of Study: Specialized Knowledge**

Are you ready to invest in self-service options that customers expect of all providers — kiosks, online bill pay, pay stations, mobile apps, and more? Reap the rewards in terms of a positive customer experience. Learn from other utilities that are using technologies to help customers help themselves.

**Atineh Haroutunian • Public Benefits Marketing Manager**, *Glendale Water & Power Department, California*; and **Steve Schuler • Supervisor**, *Remittance Processing, Lansing Board of Water & Light, Michigan*



## **Disaster Recovery:**

### **Navigating FEMA Assistance**

**CPE Field of Study: Specialized Knowledge**

The FEMA Public Assistance Grant Program helps you get the lights back on after a disaster and supports financial recovery by reimbursing all eligible disaster-related costs. Learn how to navigate the complex process of getting FEMA assistance when recovering from a major disaster. And see what you can do before disaster strikes to make recovery easier.

**Bill Riley • Managing Director**, *Witt O'Brien's, LLC, Washington, D.C.*



## #EMMA #What Happens When Audited

CPE Field of Study: Auditing

The Electronic Municipal Market Access system is the official repository for public information on all municipal securities. You may need to submit official documents for your new and reissued bonds as well as disclosure documents through the life of a bond. And your disclosures could be audited. Hear from an EMMA representative who will discuss current regulations and their potential impacts. Then learn from an industry expert on how you can maintain up-to-date records and prepare for a potential audit.

**Priya Ghosh Ahola • Outreach Manager, Municipal Securities Rulemaking Board, Washington, D.C.**



## Knowledge Transfer: Train Your Future Leaders

HRCI: 1.5 / CPE Field of Study: Personnel/HR

Many of your veteran employees are probably due to retire soon. How do you capture their wealth of experience to pass on to future generations in the workforce? Should you document best practices? What type of training will be most effective? Learn from utilities that have succeeded in succession planning.

**Richie Shreves • Director of Human Resources, Greenville Utilities Commission, North Carolina**



## The Challenges of Going AMI-less in an AMI World

CPE Field of Study: Specialized Knowledge

Installing AMI is NOT a no-brainer—even in today's digital era. Before going the smart meter route, ask the tough questions. What are the consequences of staying AMI-less? Do you risk third parties filling that space? Can you extrapolate data through traditional metering? What types of rate designs are available without AMI? Hear a panel of utility experts share how they addressed these and related questions.

**Neil Guglielmo • Chief Financial Officer, Los Angeles Department of Water & Power, California**

11:45 A.M. – 1:30 P.M.

**Lunch on your own**

1:30 – 3 P.M.

**Breakout Sessions**

**Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8**





## **Tell Me What You Want... What You Really, Really Want**

**CPE Field of Study: Specialized Knowledge**

What can you really learn from customer satisfaction surveys? Do customers really know what they want, and will they tell you? See how other utilities are using different survey methods for effectiveness. Learn how to analyze and act on your survey data. Get real results to inform your strategic planning and business forecasting.

**Liz Jambor • Manager, Data Analytics & Business Intelligence, Austin Energy, Texas; and Michael Vigeant • Chief Operating Officer, Great Blue Research, Inc., Hartford, Connecticut**



## **Ethics... 50 Shades of Gray**

**CPE Field of Study: Regulatory Ethics**

Ethics are an integral component of the decision-making process. This session will focus on providing a heightened awareness of ethical guidelines for accounting and finance professionals. Learn and review the applicable standards of ethics and hear how one utility has integrated ethics into its organizational culture.

**Cal Christian, CPA, PhD, East Carolina University, Greenville, North Carolina; and Shelley Sahling-Zart • Vice-President & General Counsel, Lincoln Electric System, Nebraska**



## **Enterprise Value: By the Numbers and Beyond**

**CPE Field of Study: Specialized Knowledge**

What's the real value of your utility? How would a prospective buyer assess your financial strengths and weaknesses? If you were bought by a private entity, how would it impact your rates and customers? Can you quantify what your utility gives back to the community? Get help with answering the tough questions. And get ready to demonstrate your utility's full worth to all stakeholders.

**Mike Mace • Managing Director, Public Financial Management, Inc., Charlotte, North Carolina**



## **The Importance of Competitive Pay**

**HRCI: 1.5 / CPE Field of Study: Personnel/HR**

Public power utilities often pay less than cooperatives and investor-owned utilities, so skilled employees that you've worked hard to train can easily be enticed away by the competition. And prospects may not even consider working for public power. Examine the pay disparities among electric utilities and explore strategies to make your salaries competitive so you can attract and retain the best.

**Paul Zummo • Director of Policy Research and Analysis, American Public Power Association, Arlington, Virginia**



## **Utilizing GIS to Maximize Your Mobile Workforce**

**CPE Field of Study: Information Technology**

GIS technology is enhancing field efficiency, utility planning, data collection and validation, asset inspection, and inventory management. Mobile workforce tools are creating efficiencies and improving operations. Learn how to combine GIS and mobile tools to help your utility monitor systems, direct field staff, and resolve customer issues.

**Robert Dreskai • Director of Sales**, *Clevest, Richmond, British Columbia*



## **Cost of Service: Transforming Theory into Reality**

**CPE Field of Study: Specialized Knowledge**

As a public power utility, you set rates to recover costs, not to reap profits. Yet no matter how robust your cost of service analysis—customers don't care. When you announce rate changes, reactions can be extreme. Should you change the way you perform cost of service analyses to keep up with industry trends? If so, how? How can you balance cost recovery with meeting customer expectations?

**Rich Macke • Vice President**, *Economics, Rates and Business Planning, Power Systems Engineering, Inc., Minneapolis, Minnesota*

**3 – 3:15 P.M.**

## **Break with Sponsors**

Take advantage of this final opportunity to network with conference sponsors.

**3:15 – 4:30 P.M.**

## **Breakout Sessions**

**Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5**



## **Customer Service During Disaster Recovery**

**CPE Field of Study: Specialized Knowledge**

How comprehensive is your emergency preparedness plan? Does it just address operations—turning the lights back on—or does it cover customer service, too? Get tips and examples for customer service during disaster recovery from fellow utilities. Define, document, and drill what the customer service team should do after a disaster.

**Tyson Lin • Communications and Public Affairs**, Seattle City Light, Washington; **Scott Mullis, Assistant Director of Customer Relations**, Greenville Utilities Commission, North Carolina; and **David Werley • Group Manager of Business and Customer Operations**, Bryan Texas Utilities



## **Internal Audit Roundtable**

**CPE Field of Study: Auditing**

Join your peers in an open forum to discuss internal audit issues and challenges. Exchange survival tips.

**Moderator: Jason Briggs • Internal Auditor**, Public Works Commission, Fayetteville, North Carolina



## **Issuing Municipal Bonds: Closing the Deal!**

**CPE Field of Study: Finance**

Learn more about the role of the underwriter, financial adviser, and bond counsel and best practices from a public power utility perspective. Understanding the connections between these three groups could assist with managing your issued debt.

**Elizabeth Columbo • Partner**, Nixon Peabody LLP, New York, New York; **Christopher Fink • Managing Director**, Head of Public Power, Bank of America Merrill Lynch, New York, New York; and **Harris Kretsge • Managing Director**, Hilltop Securities, New York, New York



## **Ask the HR Attorney**

**HRCI: 1.5 / CPE Field of Study: Business Law**

Get answers to your questions on employment law. Labor attorneys will field questions collected throughout the conference. Come prepared to ask questions, engage, and learn.

**Christopher P. Hammon • Shareholder**, Ogletree Deakins, Miami, Florida; and **Jonathan O. Harris • Shareholder**, Ogletree Deakins, Nashville, Tennessee



## ***Business Continuity in the Face of Disaster***

**CPE Field of Study: Information Technology**

From natural disasters to acts of terrorism, many elements could bring utility operations to a grinding halt. IT staff must identify critical functions and find ways to keep systems operational when disaster strikes. Learn how to draw up a business continuity plan and practice so you can put it into operation when needed.

***Erika Hurd • Vice President of Information Technology,  
Nashville Electric Service, Tennessee***



## ***Pricing and Market Analysis Roundtable***

**CPE Field of Study: Specialized Knowledge**

Join your peers to discuss a range of rate and related topics—migrating from one default rate design to another, dynamic pricing, rate stabilization measures, value of solar, and the impact of electrification.

**6 – 7:30 P.M.**

## **Reception**

Join your colleagues for an evening reception. You're welcome to bring a guest.

*Entertainment will be provided by Jenn Schott,  
Nashville singer and songwriter.*



**Jenn  
SCHOTT**

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# WEDNESDAY

## September 20

7:45 – 8:30 A.M.

### Networking Continental Breakfast

Network with your peers at this informal breakfast. There are no speakers or moderators.

8:30 – 10 A.M.

### Breakout Sessions

*Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8*



#### **Customer Accounting & Services Roundtable**

**CPE Field of Study: Specialized Knowledge**

Join your peers to continue conversations and discuss critical customer accounting and services issues.



#### **Before & After the Breach**

**CPE Field of Study: Specialized Knowledge**

Explore best practices for protecting your organization from a data breach and learn the effects a breach could have from an audit perspective. If a breach does occur, how do you message the event to staff, external customers and your board? Hear from a fellow utility that managed to navigate through it.

**Sandy Meyers • Director, Risk Management, City Utilities of Springfield, Missouri;** and **Ryan Weber • Account Executive, Power & Utility Practice, Wortham Power Gen Insurance, Houston, Texas**



#### **Breaking Barriers, Cultivating Collaboration**

**HRCI: 1.5 / CPE Field of Study: Personnel/HR**

Does your organizational culture truly support diversity and inclusion? Do you suffer from silos and cliques? Is everyone truly empowered? Seek answers from the experts and your peers. Explore how to bridge all divides and foster a culture in which people across the utility are communicating and collaborating to achieve success, knowing they are stronger together.

**Michelle Smith Lambert • Chief Change Officer, Gainesville Regional Utilities, Florida**



## ***Elevating IT in the Decision-Making Process***

**CPE Field of Study: Specialized Knowledge**

Technology empowers decision making, departmental interactions, and relevant data analysis. Making high-level, far-reaching decisions at your utility? Break down silos and include IT early on in the process to avoid costly pitfalls. Experts share insights from case studies and from the recent IT Benchmarking Survey conducted by the American Public Power Association.

***Stacey Gill • Consulting Manager, and Russ Hissom • Partner, Baker Tilly, Madison, Wisconsin***



## ***Economics of Community Solar Implementation***

**CPE Field of Study: Specialized Knowledge**

Considering community solar to better engage customers? Do you know the real costs? Learn the gamut of financial and rate considerations — financing the project, how to charge and credit participants, early withdrawal penalties, etc. Hear from public power utilities that have implemented community solar programs, and how and why they made the decisions they did.

***Kirsty Grainger • Finance Director, Seattle City Light, Washington; and Scott Jackson • Pricing & Rates Supervisor, Nebraska Public Power District, Columbus, Nebraska***

**10 – 10:15 A.M.**

**Break**

10:15 – 11:30 A.M.

## Closing General Session

**Recommended CEUs .1/PDHs 1.25/CPEs 1.5, Personal Development**

### **Dedication, Pride & Commitment: Leadership Lessons from Black Hawk Down**

As an Army Ranger deployed to Somalia in 1993, First Sergeant Matt Eversmann experienced the horrors of war when he and his fellow soldiers were trapped in a hostile district of Mogadishu and marked for death by an angry mob. His inspiring story of survival was immortalized in the epic film, “Black Hawk Down,” which recounts the harrowing experience. First Sergeant Eversmann will recount these events which powerfully demonstrate the horrors of war, and the human qualities essential to survive it, and will reinforce the three attributes that brought him home alive: leadership, courage, and selfless service.

***First Sergeant Matt Eversmann (Ret.), Decorated War Hero and Military Leader***

11:30 A.M.

## Adjourn



**Matt  
EVERSMANN**

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# NASHVILLE



## **Nashville**

Frommers designates Nashville as one of the best places to go to in 2017. It's authentic, accessible, accommodating. The Music City can do a lot more than carry a tune. It's a leading foodie destination and a treasure trove for history buffs. You can even tell your Facebook friends you went to Greece with pictures at the world's only full-scale replica of the Parthenon—complete with a 42-foot-tall statue of Athena—at Nashville's Centennial Park!

## **Hotel**

The 2017 Business & Financial Conference will be held at the Nashville Convention Center. Conference attendees should stay in the APPA room block at the Renaissance Nashville Hotel.

Renaissance Nashville Hotel  
611 Commerce Street  
Nashville, TN 37203

- Group rate: \$235 per night Single/Double, plus tax
- Check in: 4 p.m. / Check out: Noon
- Main telephone: 615-255-8400
- Parking fee: \$38/day valet parking
- Complimentary wireless standard internet access in guestrooms and main lobby

## **Reservations**

- Online: [www.PublicPower.org/BandF](http://www.PublicPower.org/BandF) under "Hotel"
- Attendee group code: APPA Business and Financial Conference
- Reservation telephone: 877-901-6632
- Reservation cut-off date: August 25, 2017

## **Scam Alert**

Make your reservations only at [www.PublicPower.org/BandF](http://www.PublicPower.org/BandF)

Please note: Do not make hotel reservation through any third party that may contact you by phone or email. Use only the online reservation links, phone numbers, and codes provided directly from the Association, in conference brochures and at [www.PublicPower.org](http://www.PublicPower.org).



# REGISTRATION

[www.PublicPower.org/BandF](http://www.PublicPower.org/BandF)

Register online or download a registration form you can email or mail.

## Registration Fees

### Conference Registration Fees

|                     | By Aug 18 | After Aug 18 |
|---------------------|-----------|--------------|
| Association Members | \$745     | \$795        |
| Nonmembers          | \$1,490   | \$1,540      |

### Preconference Seminar Fees (each class)

|                     | By Aug 18 | After Aug 18 |
|---------------------|-----------|--------------|
| Association Members | \$325     | \$375        |
| Nonmembers          | \$650     | \$700        |

**Not yet a member?** *Join today and save \$745 on your conference registration. Call us at 202-467-2926 or email [Membership@PublicPower.org](mailto:Membership@PublicPower.org) to learn more.*

## Contact Us

Visit [www.PublicPower.org/BandF](http://www.PublicPower.org/BandF) for program updates and to register online.

### Registration Questions

[Registration@PublicPower.org](mailto:Registration@PublicPower.org)  
202-467-2941

### Hotel Assistance

[Meetings@PublicPower.org](mailto:Meetings@PublicPower.org)  
202-467-2941

### Program Questions

[BusinessandFinance@PublicPower.org](mailto:BusinessandFinance@PublicPower.org)  
202-467-2919

### Sponsor Questions

Pamela Cowen  
[PCowen@PublicPower.org](mailto:PCowen@PublicPower.org)  
202-467-2903

# ACCREDITATION & Certification



## **Continuing Professional Education (CPE) Credits**

The American Public Power Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Ave. N., Suite 700, Nashville, TN 37219-2417. Website: [www.nasbregistry.org](http://www.nasbregistry.org).

Earn up to 15.5 CPE credit hours for attending the conference, or up to 23 CPEs for also attending preconference seminars. All sessions are intermediate-level, group-live offerings with no prerequisites and no advance preparation required. Hours and areas of study are subject to change based on the final course agenda. For more information regarding administrative policies, such as clarification of requirements, complaints, and refunds, contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org).



## **Human Resources Certification Institute (HRCI) Credits**

The American Public Power Association is an approved provider of recertification credit hours through the HR Certification Institute. The Association will apply to the HR Certification Institute to grant recertification credit for select conference sessions. For more information about certification or recertification, visit [www.hrci.org](http://www.hrci.org).



## **Continuing Education Units (CEUs)**

The American Public Power Association is accredited by the International Association for Continuing Education and Training (IACET) and is authorized to issue the IACET CEU.

### **Professional Development Hours (PDHs)**

The Association's educational practices are consistent with the criteria for awarding Professional Development Hours (PDHs) as established by the National Council of Examiners for Engineering and Surveying (NCEES). Course eligibility and number of PDHs may vary by state.



### **Reliable Public Power Provider (RP3) Designation**

Participating in the Academy's conferences and seminars is an easy way to earn points toward the American Public Power Association's Reliable Public Power Provider (RP3®) designation which recognizes and rewards public power utilities that demonstrate basic proficiency in four important disciplines: reliability, safety, workforce development, and system improvement. Utilities that meet the guidelines in each of the four areas are designated as Reliable Public Power Providers. For more information, visit [www.PublicPower.org/RP3](http://www.PublicPower.org/RP3).

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# BUSINESS & FINANCE Conference

September, 17-20, 2017

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