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CO-HOST



September 15 - 18
2019

THE ACADEMY
**Business
& Financial
Conference**

Minneapolis, Minnesota



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 with other utility professionals – both veterans and those new to the electric industry – and share experiences and strategies.

Get ideas and inspiration from experts and your utility peers in:

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

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?

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

Sign Up to Connect

Ask for a conference mentor or volunteer to serve as one – check the box when you register, email EducationInfo@PublicPower.org, or call 202-467-2965.

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Sessions at a Glance

With more than 60 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 for updates and to register.

Monday, September 16		9:15 – 10:15 a.m.	10:30 – 11:45 a.m.	1:30 – 3 p.m.	3:15 – 4:30 p.m.
 All Tracks		Joint Action Agency/State and Regional Association Roundtable			
	Customer Accounting and Services	Customer Accounting and Services Roundtable	AMI: Don't Hesitate, It's Great	Enabling Customer Engagement Through AMI	Building an Effective Training Program
	General Accounting, Finance & Audit	Internal Audit: Your Best Offense Giving the Green Light: The Rise of the Environmentally Friendly Bond Market	Small Utility Roundtable Large Utility Roundtable	Welcome to the Wonderful World of Leases Pay Now, Save Later: The Benefits of Tax-Exempt Prepayments	We Need Closure What's in Your Piggy Bank?
	Human Resources & Training	Human Resources & Training Roundtable	Attracting, Inspiring, and Retaining Millennial Talent	Doing More with Less: Adding HR Support Without Adding Headcount	The Business Case for Diversity and Inclusion
	Information Technology	Information Technology Roundtable		Enabling Customer Engagement Through AMI	ISACs & Cyber Mutual Assistance: Information Before, Aid After
	Pricing & Market Analysis	Thinking Outside the Box on Rate Design	Behind-the-Meter Storage: Market Evolution, Customer Economics, and Utility Impacts	The Right Rate at the Right Time: Lessons Learned from Time-Varying Rates	Rate Design: Don't Forget About Commercial and Industrial Customers
	Risk Management & Insurance	Contractual Risk Considerations:	Risk Management & Insurance Roundtable	Business Continuity 101: Ready for the Storm	Balancing the Rewards and Risks of the Energy Markets
Tuesday, September 17		8:30 - 10 a.m.	10:15 - 11:45 a.m.	1:30 - 3 p.m.	3:15 - 4:30 p.m.
	Customer Accounting and Services	Getting the Best Out of Your CSRs	Maximize Your Customer Adoption of Electronic Billing and Payments	Telecommuting: There's No Place Like Home	Improve Collections with AMI & System Integration
	General Accounting, Finance & Audit	The Great GASB Are You Working for Your Bank or Are They Working for You?	The Great GASB, the Sequel Forecasting Your Utility's Financial Future	The Power of Data Analytics Rating Agency Panel	Fraud Alert: Today's Biggest Security Threats Directors and Officers Insurance: It's Not Just About Mergers and Acquisitions
	Human Resources & Training	Networking Discussion: Hot Topics in HR	Supercalifragilisticexpialidocious! A Discussion on All Things Health Insurance	Evolving Employment Liability Trends: There's No Such Thing as a Risk-Free Workplace	Develop and Implement a Compensation Plan That Works
	Information Technology	Knowbe4: Cyber Safety for Employees	Cybersecurity Roundtable	You Can't Do It All: The MSP Experience	Life After Email
	Pricing & Market Analysis	Load Forecasting and Strategic Rate Design	Electric Vehicles: How Much Will Demand Change?	Beyond Billing: Getting the Most from AMI	Pricing & Market Analysis Roundtable
	Risk Management & Insurance	Evaluating and Quantifying Your Reputational Risk	What's Happening in the Insurance Market	Evolving Employment Liability Trends: There's No Such Thing as a Risk-Free Workplace	Directors and Officers Insurance: It's Not Just About Mergers and Acquisitions
Wednesday, September 18		8:30 - 10 a.m.			
	Customer Accounting and Services	Supporting Low-Income Customers Through Creative Programs			
	General Accounting, Finance & Audit	Change Management: Countering 'That's the Way We've Always Done It!'			
	Human Resources & Training				
	Information Technology	What is Your Cyber Responsibility?			
	Pricing & Market Analysis	New Ideas for Recovering Fixed Costs			
	Risk Management & Insurance	What is Your Cyber Responsibility?			



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. Our members strengthen their communities by providing superior service, engaging citizens, and instilling pride in community-owned power.



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

CONFERENCE AGENDA

Sunday September 15

8 a.m. – 6:30 p.m.

8:30 a.m. – Noon
1:30 – 5 p.m.
5 – 6:30 p.m.

Registration open

Morning preconference seminars
Afternoon preconference seminars
Welcome Reception

PRECONFERENCE SEMINARS

Preconference seminars offer longer class times, smaller class sizes, interactive formats, and experienced instructors. Dive deep into hot topics to add value to your conference experience.

Each preconference seminar requires separate registration.

8:30 a.m. – Noon

Distributed Energy Resources: Overview of Financial Risk and Opportunities

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

Advances in distributed energy resources present several opportunities as well as risks to your utility. Load management and cost recovery challenges loom large. How can you manage growth in behind-the-meter technologies and maintain customer relationships? Examine case studies to see how "business as usual" analytical methods can be improved to identify and manage risks. Discuss the effects of integrating distributed energy resource technologies on your utility's load, operations, resource management, and financial planning. Understand how you can mitigate financial risk through strategic rate design.

Course Topics

- Identify key risk areas resulting from growth in distributed solar, electric vehicles, and behind-the-meter energy storage
- Recognize the role an integrated rate strategy can play in managing load shapes
- Develop strategies to mitigate DER risk
- Alternative rate design solutions

Scott Burnham, Executive Consultant, Tony Georgis, President, Energy Practice, and Andy Reger, Senior Consultant, NewGen Consulting, Denver, Colorado



"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**

8:30 a.m. – Noon

Performing a Utility Financial Check-Up

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

Get a refresher on accounting and budgeting best practices and find out how to set and achieve key financial targets—cash reserves/requirements, rate of return, debt coverage ratio, age of system, capital re-investment, debt policies, transfers to the city, rate structures for revenue stability, accounting and budgeting practices.

Review best practices for capital planning and debt issuance, and when and how to review rate structures. Get practical insights from other utilities and gain a deeper understanding of the short and long-term implications of financial decisions on your utility's financial health. Learn how to communicate utility financial performance and rate changes to governing bodies and customers. Go beyond the basics to discuss strategies for increasing liquidity and other factors to consider outside of cash reserves.

Course Topics

- Monitoring a utility's financial health
- Setting proper revenue requirements
- What should be reported to management and governing bodies
- Key financial targets and indicators to guide strategic decision making
- Identifying rate structure risk and methods to minimize and control risk
- Social, environmental, and political risks to consider when establishing financial policies
- Proper capital planning
- Monitoring, exposure, and methods to control the utility's revenue stability
- Communicating utility financial performance, rate changes, and the need for increasing liquidity to policymakers and customers

Dawn Lund, Vice President, Utility Financial Solutions, Leland, Michigan

8:30 a.m. – Noon

Talent Wars: Are You Ready for the Next Generation?

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

FREE (Offered as part of the Association's Supporting Workforce Development strategic initiative)

Can public power attract and retain tech-savvy employees with the talent to power our smart world? See how others are building the energy workplace of the future and closing the gaps in diversity and inclusion. Explore generational differences in career expectations and workplace behaviors. Prepare for increased Baby Boomer retirement, manage the forgotten Gen Xers, and engage the Millennials. Build a comprehensive plan of action to take on the increasing industry competition for new talent. Discuss the real cost of attrition and retention and ways our industry can modernize its message and work environments to attract and engage this new digital talent.

Janet Kieffer, Principal, INFLUENCE, Austin, Texas

1:30 – 5 p.m.

Trending Complexities in Public Utility Accounting

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

Get an update on accounting guidance and interpretations issued to keep up with changes in energy markets, technology, and reporting requirements. Learn about trending topics such as accounting for renewable energy projects and joint ventures and public-private partnerships. Review recent GASB pronouncements and potential impacts on utility reporting. Get tips on preparing informative and efficient presentations to the utility board at monthly meetings.

Tom Unke, Partner, Baker Tilly, Madison, Wisconsin

1:30 – 5 p.m.

Utility Rates at the Crossroad: Emerging Rate Designs

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

Utilities must learn how to bridge the span between the rate and regulatory framework of yesterday and tomorrow. Explore how utilities are changing up the approach to customer charges, demand charges, time of use rates, and distributed generation rates, and discuss how these approaches can strengthen financials, meet customer needs, and support regulatory or policy initiatives. Examine which emerging trends in rate design are the best fit for your utility, and how you might educate community stakeholders about recommended changes and options.

Course Topics

- The Role of Demand in Cost-of-Service Two-Part Rate vs. Three-Part Rate
- Alignment of Wholesale and Retail Rates
- Rate Design & Billing Impacts
- Utility Implementations of Emerging Rate Designs
- Public Perception & Reception
- Regulatory and Political Initiatives
- Emerging Issues & Trends
- Rate Design Options for Emerging Trends
- Customer Offerings: TOU, DG, EDRs, & More
- Challenges, Advantages & Disadvantages

John Wolfram, Principal, Catalyst Consulting, Louisville, Kentucky



5 – 6:30 p.m.

Welcome Reception

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

Monday September 16

7 a.m. – 5 p.m. Registration Open

7 – 8 a.m.

Networking Continental Breakfast

Make the most of your time at this informal breakfast — visit with your peers and conference sponsors.

8 – 8:45 a.m.

OPENING GENERAL SESSION

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

Chair's Address

Decosta Jenkins, President & CEO, Nashville Electric Service, Tennessee; and Chair, American Public Power Association

State of Public Power

Sue Kelly, President & CEO, American Public Power Association

8:45 – 9:15 a.m.

Break with Sponsors



Decosta Jenkins



Sue Kelly

9:15 – 10:15 a.m.

BREAKOUT SESSIONS

Recommended CEUs .1 / PDHs 1 / CPEs 1.2



Customer Accounting and Services Roundtable

CPE Field of Study: Specialized Knowledge

Bring your issues in customer accounting and services to the table and discuss potential solutions and strategies with peers from utilities like yours.



Internal Audit: Your Best Offense

CPE Field of Study: Auditing

Hear how you can use the internal audit function to identify bottlenecks in your utility's processes, modify ineffective controls, and better prepare for your annual external audit.

Renee Vines, Senior Internal Auditor, City Utilities of Springfield, Missouri; Eric J. Overman, President-Elect, The Institute of Internal Auditors, Twin Cities Chapter, and Managing Director, Advisory Services, Ernst & Young LLP



Giving the Green Light: The Rise of the Environmentally Friendly Bond Market

CPE Field of Study: Finance

Investors are turning attention to social impact and green bonds – and the growth in these options has an impact on your utility's transactions. Learn about the different green bond designations and the value each conveys to investors. Understand how social impact metrics get included in investor offering documents and suggested ongoing disclosure. Using recent transactions, learn to quantify the financial benefit of these bonds.

Edward Meyers, Managing Director, and Jeb Spengler, Senior Vice President, Public Finance Investment Banking, Piper Jaffray, New York, New York

Key to Sessions



Customer Accounting & Services



General Accounting, Finance & Audit



Human Resources & Training



Information Technology



Pricing & Market Analysis



Risk Management & Insurance



Human Resources & Training Roundtable

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

Meet with peers from other utilities to discuss current issues in human resources and training. Come prepared to participate and bring examples of successful training programs to share.



Information Technology Roundtable

CPE Field of Study: Specialized Knowledge

Join this ice breaker session to network with and learn more about your peers in public power and discuss your current initiatives and challenges.



Thinking Outside the Box on Rate Design

CPE Field of Study: Specialized Knowledge

With new technology comes new ways to design and recover rates. Some new rate structures, such as energy service subscription pricing and performance-based rates, would be stark departures from traditional methods. Can these alternatives work for public power? Judge for yourself as a pair of experts discuss alternative rate designs.

Lon Huber, Director, and Matthew McDonnell, Associate Director, Navigant, New York, New York



Contractual Risk Considerations

CPE Field of Study: Management Services

Learn how you can plan and manage risk transfer to protect against losses caused by third party vendors. Go over how to review contracts for potential risks, determine the insurance and indemnification requirements of vendors, and track certificates of insurance. Discuss how to establish minimum insurance requirements for onsite vendors and determine when to request extra coverage.

Daniel S. McGarvey, CPCU, ARM, Managing Director, U.S. Power and Utility Practice, Marsh, Greenville, South Carolina; and Heath Silvey, Manager-Risk/Damage Prevention, City Utilities of Springfield, Missouri

10:15 – 10:30 a.m.

Break with Sponsors

Key to Sessions



Customer Accounting & Services



General Accounting, Finance & Audit



Human Resources & Training



Information Technology



Pricing & Market Analysis



Risk Management & Insurance

10:30 – 11:45 a.m.

BREAKOUT SESSIONS

Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5



AMI: Don't Hesitate, It's Great

CPE Field of Study: Specialized Knowledge

If your utility is in the process of implementing AMI or will be soon, then join this session to learn what public power utilities have done to get the most out of their AMI implementation. Review what to expect throughout the process, how to start preparing for the transition, what you can look forward to, and the positive impacts it will have on your customer service.



Small Utility Roundtable

CPE Field of Study: Accounting

Meet with peers to network and to discuss the accounting and finance topics that small utilities face. Come prepared to participate and bring your successes and challenges to the table.



Large Utility Roundtable

CPE Field of Study: Accounting

Meet with peers from other large utilities to network and discuss the accounting and finance topics that are important to your work. Come prepared to participate and bring your successes and challenges to the table.



Attracting, Inspiring, and Retaining Millennial Talent

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

Within the next year, millennials will comprise 50% of the U.S. workforce. Public power utilities can attract tech-savvy employees from this purpose-driven, social tribe generation to fill critical IT and technical labor roles. The digital grid, distributed energy resources, energy storage, and the Internet of Things require advanced computer engineering, data analytics, and technical expertise. Join us for a tangible, hands-on session on what to do now (and what to stop doing) to spark attention among millennials of the power industry and the career opportunities it offers.

Janet Kieffer, Principal, INFLUENCE, Austin, Texas



Behind-the-Meter Storage: Market Evolution, Customer Economics, and Utility Impacts

CPE Field of Study: Specialized Knowledge

As storage prices continue to decline, behind-the-meter storage is becoming more economically viable. Join this session to explore the potential financial impact of increased adoption of behind-the-meter energy storage on your utility and learn how you can mitigate the impact. For those not yet convinced that storage will increase, get the latest data about the emerging market, including costs, and how storage adoption will impact load shapes and rate design.

Andy Reger, Senior Consultant, NewGen Consulting, Denver, Colorado; and Paul Zummo, Director, Policy Research & Analysis, American Public Power Association, Arlington, Virginia



Risk Management & Insurance Roundtable

CPE Field of Study: Management Services

Meet with peers from utilities like yours to discuss current issues in risk management and insurance. Come prepared to participate and bring your successes and challenges to the table.



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 your most pressing challenges and share successful strategies in business and finance.

11:45 a.m. – 1:30 p.m.

Lunch on your own

Key to Sessions



Customer Accounting & Services



General Accounting, Finance & Audit



Human Resources & Training



Information Technology



Pricing & Market Analysis



Risk Management & Insurance

1:30 – 3 p.m.

BREAKOUT SESSIONS

Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8



Enabling Customer Engagement Through AMI

CPE Field of Study: Specialized Knowledge

Advanced metering infrastructure provides comprehensive data that brings new opportunities for customer engagement and enhanced customer service. Come learn how AMI data can help you reach customers through customer portals, new bill presentment, and new payment options.

Pasi Miettinen, CEO, Sagewell, Woburn, Massachusetts



Welcome to the Wonderful World of Leases

CPE Field of Study: Accounting (Governmental)

GASB standard #87 for leases significantly changes accounting for leases for governmental entities. Delve into the details of the standard and how it can affect your utility. Learn what you should be doing now and, in the future, to set up a proper system of controls and communication to your governing body.

Bethany Ryers, Director, and Gwen Zech, Manager, Baker Tilly, Madison, Wisconsin



Pay Now, Save Later: The Benefits of Tax-Exempt Prepayments

CPE Field of Study: Accounting

The Internal Revenue Code and Treasury Regulations allow municipal utilities to issue tax-exempt municipal bonds to prepay for long-term natural gas and power contracts – which can save your customers from significant costs down the line. In 2018, almost \$10 billion in prepaid contracts originated in twelve transactions, some involving innovative gas to power tolling or gas to power switching arrangements. Take an in-depth look at the history behind prepay legislation and regulations, new innovative prepay structures, and the savings potential of these structures for public power.

James Choukas-Bradley, Partner, McCarter & English, LLP, Washington, D.C.; and John Norman, Managing Director, Municipal Capital Markets Group, Inc., Greenwood Village, Colorado



Doing More with Less: Adding HR Support Without Adding Head Count

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

Not enough time or resources to dedicate to addressing your workforce development challenges? As an HR practitioner, do you need ideas on how to build an effective talent pipeline, or want to know about resources specific to the public administration of retirement plans? Join this session to get the inside scoop on resources and strategies that can help you get more done with less time.

Beth Britt, Midwest Region Consultant, Center for Energy Workforce Development, Charlotte, North Carolina; and **Matthew Petersen**, Executive Board Advisor, National Association of Government Defined Contribution Administrators, Inc., Lexington, Kentucky



The Right Rate at the Right Time: Lessons Learned from Time-Varying Rates

CPE Field of Study: Specialized Knowledge

Look at what utilities that have implemented residential time-varying rates have learned about the process. Hear about the changes in customer behavior utilities have seen in moving from pilot rates to default rates and what the data show thus far about the effectiveness of time-varying rates.

Mark Brown, Utilities Rate Analyst, Fayetteville Public Works Commission, North Carolina; **Jennifer Restivo**, Director, Planning, Pricing, and Enterprise Performance, Sacramento Municipal Utility District, California; and **Randy Reuscher**, Utilities Rate Analyst, Fort Collins Utilities, Colorado



Business Continuity 101: Ready for the Storm

CPE Field of Study: Specialized Knowledge

If you are responsible for business continuity, then don't miss this session to get a grounding on the basics of what you need to know and do to keep your utility running during catastrophic events. Learn how to create plans to enact before, during, and after a loss, and the importance of involving a network of subject matter experts when notice of an event is received. Hear from risk managers who have lived through large catastrophic events and the valuable lessons they learned.

Isaac Copeland, MS, ARM-P, Director of Legal, Risk and Procurement Services, Fayetteville Public Works Commission, North Carolina; and **Dennis Snook**, Emergency Preparation and Business Continuity Manager, Omaha Public Power District, Nebraska

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



Building an Effective Training Program

CPE Field of Study: Specialized Knowledge

Your customer service is only as good as your customer service representatives. Having the right people – and equipping them to do their job well – is essential to your utility's success. Learn how other utilities have developed effective in-house training programs at each progressive level for CSRs to ensure these critical employees put the best face forward for your customers.



We Need Closure

CPE Field of Study: Accounting

This session is designed to help utilities large and small improve their financial closing process by providing useful tips and tools to make the approach smoother and more efficient.

Chris Linder, Partner, BKD CPAs & Advisors, Lincoln, Nebraska



What's in Your Piggy Bank?

CPE Field of Study: Finance

How do you determine how much cash reserves your utility should hold? Learn why having a formal cash policy is important and how it can relate to the overall health of the electric fund. Discuss key financial risk areas, steps to establishing minimum amount of reserves, and how a formal cash reserve policy can guide your debt issuances.

Dawn Lund, Vice President, Utility Financial Solutions, Leland, Michigan



The Business Case for Diversity and Inclusion

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

Organizations that don't understand how to leverage diversity are taking a loss in revenue, productivity, creativity and efficiency. Many organizations are touting the financial benefits of a focus on diversity and inclusion, and while you may be a not-for-profit entity, you are also not for loss. Increased revenues are a natural byproduct of the real benefits of a workforce that embraces diversity and inclusion. Join this session to learn how to leverage D&I for optimal workforce performance.

Dethra Giles, Consultant, Author and Speaker, ExecuPrep, Atlanta, Georgia



ISACs & Cyber Mutual Assistance: Information Before, Aid After

CPE Field of Study: Information Technology

It can be a challenge to stay current with emerging threats. However, you are not alone, and there are groups who can help you with awareness and preparation – and can help if things do go wrong. Explore some of those different sources, and share your own in this session



Rate Design: Don't Forget About Commercial and Industrial Customers

CPE Field of Study: Specialized Knowledge

Despite often being the largest share of your load and revenue, commercial and industrial customers can get lost in the discussion of rate redesign. Hear from public power utilities that have implemented new rates for their C&I customers about what you need to do to get your rates right – from making sure you recover your costs to meeting customers' expectations.

Dave Berg, Principal, Dave Berg Consulting, Rosemount, Minnesota



Balancing the Rewards and Risks of the Energy Markets

CPE Field of Study: Specialized Knowledge

The intersection of asset management processes, equipment performance, and wholesale energy markets can have tremendous influence on utility risk exposures. Explore opportunities to reduce both risk and costs through improved integration of asset protection, operating processes, and risk analysis. Best practices and the pros/cons of partnering with 3rd party service providers for energy transacting and risk management activities and loss control's critical role in partnering with utilities to identify and mitigate adverse conditions with cost effective solutions will also be covered in this session.

Joshua Fleischer, Vice President, Loss Control Property Operations, AEGIS Insurance, and Howard Somers, P.E., CSP, Senior Vice President/Chief Technical Officer, Loss Control, AEGIS Insurance, East Rutherford, New Jersey; P. Glen Justis, Senior Partner, Experience On Demand, Chesterfield, Missouri; and Jeff Parkison, CPA, CGMA, Director - Forecasting and Power Marketing, City Utilities of Springfield, Missouri

6 p.m.

Young Professionals Happy Hours

Meet up with other young professionals from public power utilities, affiliates, and partner organizations at a relaxing, fun, pay-your-own-way happy hour. Share a drink and discuss how to take on the future.

Tuesday, September 17

7 a.m. – 3:30 p.m. Registration open

7 – 8:15 a.m.

Women in Public Power Networking Breakfast

Creating Influence by Stepping into Your Authentic Leadership Style

Spend any amount of time in an organization and you'll quickly realize that authority and influence are not the same thing. This is actually a great opportunity for the majority of us who need to influence a change in our departments, teams, or organizations. Creating influence - regardless of where you are in an organization - is a hallmark of successful leaders and something that can be learned and developed as you define your unique leadership style. Hear strategies and practical tips for building your authentic leadership style and influencing positive change no matter where you sit in your organization.

Kate Leese, Co-Founder, Ambitious Women Association, and Managing Partner, Kinetics Consulting, Detroit, Michigan



Kate Leese

7:30 – 8:30 a.m.

Networking Continental Breakfast

Power up with coffee and connections at this informal breakfast. Visit with your peers and chat with sponsors.

8:30 – 10 a.m.

BREAKOUT SESSIONS

Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8



Getting the Best Out of Your CSRs

CPE Field of Study: Specialized Knowledge

Training your CSRs is just the first step. Continually getting the best out of them requires a commitment to coaching and ongoing support. Learn which measurements your peers use to assess CSR performance, how to use those assessments to coach positive agent behavior, and how to reevaluate the data to improve your process.

Justin Anderson, Manager, Customer Care Training Delivery, Spectrum, Rochester, Minnesota; Krista Boston, Director of Customer Relations, Rochester Public Utilities, Minnesota; and Toni Van Esch, Customer Service Supervisor, Owatonna Public Utilities, Minnesota



The Great GASB

CPE Field of Study: Accounting (Governmental)

Ask and get answers to your questions about the Governmental Accounting Standards Board (GASB), including its history, structure, and functions. Learn about the latest standards, what's coming down the pipeline, and how the standards might affect your utility. *(continues at 10:30 a.m.)*

David Bean, Director of Research Technical Activities, Governmental Accounting Standards Board, Norwalk, Connecticut



Are You Working for Your Bank or Are They Working for You?

CPE Field of Study: Management Services

Your bank should be more than a place that sends you monthly statements, it should be a partner in supporting your utility's finances. Learn from the experts and get new ideas for reviewing your bank analysis statements, taking advantage of offerings such as PCard, and preparing an RFP for a new banking partner.

Richard Long, Jr., Manager, Valley View Consulting, LLC, Huddleston, Virginia; and Emily Upshaw, Consultant, Valley View Consulting, LLC, Austin, Texas



Networking Discussion: Hot Topics in HR

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

Join your human resources and training colleagues for knowledge sharing on hot topics including workplace flexibility policies, succession planning, knowledge transfer, strategic planning, new benefit programs, and learning and development updates.



Knowbe4: Cyber Safety for Employees

CPE Field of Study: Information Technology

Cyber safety, like physical safety, is everyone's responsibility. Learn about Knowbe4, one of the best tools available to help your organization stay safe.

Erich Kron, Security Awareness Advocate, Knowbe4, Clearwater, Florida.



Load Forecasting and Strategic Rate Design

CPE Field of Study: Specialized Knowledge

Historically, load forecasts were tightly correlated to economic growth. Now, energy efficiency, demand-side management, distributed energy resources, new building standards, and innovative technologies have a greater impact on load forecasts. Learn some new modeling techniques for load forecasting and discuss how to overcome the special challenges in rate design in this operating environment.

Zoe Dadap, Energy Analyst, Austin Energy, Texas; Alcides Hernandez, Supervisor, Pricing, Sacramento Municipal Utility District, California; and Mark Beauchamp, President, Utility Financial Solutions, Michigan



Evaluating and Quantifying Your Reputational Risk

CPE Field of Study: Management Services

As a public-facing entity, your utility has special responsibilities and duties in communicating with and educating your various customer groups. Learn basic principles to assist your utility in evaluating and quantifying this exposure as an enterprise risk. Gain an awareness of how to manage social media, public safety announcements, and post-event clean-up.

Scot Macomber, Vice President - Loss Control Utility Operations, AEGIS Insurance Services, Inc., Bergen, New Jersey; Sandy Meyers, Director — Risk Management, City Utilities of Springfield, Missouri; and Amy Rosenkrantz, Director, Strategic Services, Culver Company, San Francisco, California

10 – 10:15 a.m.

Break with Sponsors

Key to Sessions



Customer Accounting & Services



General Accounting, Finance & Audit



Human Resources & Training



Information Technology



Pricing & Market Analysis



Risk Management & Insurance

10:15 – 11:45 a.m.

BREAKOUT SESSIONS

Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8



Maximize Your Customer Adoption of Electronic Billing and Payments

CPE Field of Study: Specialized Knowledge

You might offer customers paperless billing and online payments, but your customers have become accustomed to even more technology to manage their bills – mobile applications, e-billing, text messaging. Learn creative ideas and best practices to increase adoption rates and customer satisfaction of your automated programs all while trying to navigate the complex world of payment processing services, PCI compliance, and tight budgets.

Nicole Haskins, Vice President of Sales, Paymentus, Charlotte, North Carolina; *Peter Kiley*, Director of IT, North Attleborough Electric Department, Massachusetts; *Kathy Smith*, Customer Service Supervisor, Jonesboro City Water & Light, Arkansas



The Great GASB, the Sequel

CPE Field of Study: Accounting (Governmental)

Ask and get answers to your questions about the Governmental Accounting Standards Board (GASB), including its history, structure, and functions. Learn about the latest standards, what's coming down the pipeline, and how the standards might affect your utility. (*continued from 8:30 a.m. session*)

David Bean, Director of Research Technical Activities, Governmental Accounting Standards Board, Norwalk, Connecticut



Forecasting Your Utility's Financial Future

CPE Field of Study: Finance

Are you using the most appropriate key performance indicators to measure your utility's financial health? Whether you are new or seasoned, or at a utility large or small, if you're focused on forecasting, join this session to learn about tools to plan your utility's future. From aligning financial goals across departments to effectively using your data and partnering with your governing body – review what you can do both in the short-term and long-term for success.

Maxwell Bernt, Director, and *Michael Lane*, Director, NewGen Strategies & Solutions, Brentwood, Tennessee



Supercalifragilisticexpialidocious! A Discussion on All Things Health Insurance

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

As health insurance options evolve, utilities need to keep up. Compare the pros and cons of options such as self-funded versus fully insured and broker versus benefits consultant relationship. Discuss cost containment measures including pharmacy and other trending hot topics in health insurance.

Wes Hartig, Chief Executive Officer, MedOne, Dubuque, Iowa; *John Holt*, National Sales Director, Auxiant, Wauwatosa, Wisconsin; and *Kipp Kissinger*, Vice President, UNICO, Lincoln, Nebraska,



Cybersecurity Roundtable

CPE Field of Study: Information Technology

Meet with peers from utilities like yours to discuss current issues in cybersecurity. Bring your issues to the table on policy, NERC/CIP frameworks, training, third party security, and more.



Electric Vehicles: How Much Will Demand Change?

CPE Field of Study: Specialized Knowledge

With the past few years seeing record sales of electric vehicles, more of your customers will be increasing their demand to charge their vehicles. Learn how you can forecast realistic EV loads and energy sales and get techniques to manage peak load growth through demand management and strategic rate design.

Adam Young, Project Manager, Burns & McDonnell, Kansas City, Missouri



What's Happening in the Insurance Market

CPE Field of Study: Management Services

Learn how a number of trends – such as increasing regulation, dramatic advancements in technology, growing cybersecurity threats, changing customer behaviors, and new competition – are disrupting the insurance market. Gain an understanding of the effects of these trends on insurance pricing and availability so you can better negotiate terms and contracts for your utility.

Michael Durning, Senior Director, Energy, Power and Utilities, AJ Gallagher, Avondale, Pennsylvania; *Cynthia Fee*, Senior Casualty Power Specialist, AON Risk Services, Sacramento, California; and *Pete McGoldrick*, Senior Vice President – Lockton Power, Lockton Companies, Tampa, Florida

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



Telecommuting: There's No Place Like Home

CPE Field of Study: Specialized Knowledge

Telecommuting used to be an occasional thing that a few employees would be allowed to do on a summer Friday. Thanks to advances in technology, more people are working remotely more often or even on a full-time basis – including CSRs. Learn how to implement an effective telework policy and hear about the benefits of telecommuting as well as its growing pains and challenges for employers.

Dwayne J. Chapel, Supervising Customer Service Representative, Sacramento Municipal Utility District, Sacramento, California



The Power of Data Analytics

CPE Field of Study: Specialized Knowledge

In the ever-changing world of data, understanding, interpreting and analyzing your data is becoming increasingly important. Predictive analytics are seldom used in utilities but have the power to identify areas of concern well before traditional comparisons. Learn about the power of predictive analytics and how your utility can leverage its data in an efficient and effective manner.

Olga Darlington, Business Assurance Senior Manager, Moss Adams, LLP, Everett, Washington; and Julie Desimone, Business Assurance Partner, Moss Adams, LLP, Portland, Oregon



Rating Agency Panel

CPE Field of Study: Specialized Knowledge

Hear from representatives from the premier rating agencies as they share their outlook for public power and the electric utility industry and discuss which factors may influence the utility industry's ratings in the future.

David Bodek, Senior Director, Standard & Poor's Rating Services, New York; Dennis Pidherny, Managing Director, Fitch Ratings, New York; and A.J. Sabatelle, Associate Managing Director, Moody's Investors Service, New York



Evolving Employment Liability Trends: There's No Such Thing as a Risk-Free Workplace

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

Diverse workforces, remote employees, and the "Me Too" movement have broadened the liability exposures for employers. Learn more about employment practices liability insurance (EPLI) coverage and what protection it can provide. Also hear from an attorney and a risk manager about recent trends with employment claims and best practices for mitigating these sensitive risks.



You Can't Do It All: The MSP Experience

CPE Field of Study: Specialized Knowledge

Join us for a panel discussion on utilities' experiences with managed service providers – and hear about the ups, downs, and everything in-between of what to expect in working with these vendors.

Clayton Dowell, Director of Engineering, Bristol Tennessee Essential Services



Beyond Billing: Getting the Most from AMI

CPE Field of Study: Specialized Knowledge

You've invested in AMI, but are you taking full advantage of the data it provides? AMI data can inform load management and research, help in planning for the future, advise city council and board members, and create innovative solutions. Explore best practices for maximizing your AMI investment for market analysis.

Bill Clarke, Executive Director, Strategic Innovations & Analytics, The Energy Authority, Jacksonville, Florida; Jose Lara, Energy Analyst, Austin Energy, Texas; and Dale Pennington, Managing Director, Utiliworks Consulting, LLC, Miami Beach, Florida

3 – 3:15 p.m.

Break with Sponsors

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

Key to Sessions



Customer Accounting & Services



General Accounting, Finance & Audit



Human Resources & Training



Information Technology



Pricing & Market Analysis



Risk Management & Insurance

3:15 – 4:30 p.m.

BREAKOUT SESSIONS

Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5



Improve Collections with AMI & System Integration

CPE Field of Study: Specialized Knowledge

Advanced metering infrastructure and system integration can save your utility considerable resources through remote billing, connect/disconnect, and payment and collection options. Find out how other utilities are saving with AMI-enabled technologies. Apply lessons learned to build a seamless collections processes with improved efficiencies, stronger controls, and less customer traffic to the utility. Ensure timely and accurate control of collections. Avoid shutting off a customer that has already paid.

Corey Brown, Manager, Meter Services, **Michael Molina**, MDM/RNI Operations Supervisor, and **Lucille Phillips**, Service Delivery Manager, Fayetteville Public Works Commission, North Carolina



Fraud Alert: Today's Biggest Security Threats

CPE Field of Study: Accounting

Advances in technology have brought more sophisticated fraud schemes perpetrated by tech-savvy criminals. Hear about various fraud threats that pose a risk to your organizations, such as business email compromise and online account takeover. Share solutions and best practices to identify fraud and protect your utility's corporate assets, information, and reputation.

John Kolar, Fraud Prevention Manager, Wells Fargo Bank, New York, New York



Directors and Officers Insurance: It's Not Just About Mergers and Acquisitions

CPE Field of Study: Specialized Knowledge

Your directors and officers are at risk from a variety of threats: derivative claims, natural catastrophes, fatalities, cyber-attacks, and more. Dive in deeper to the potential director and officer liability exposures for your utility and gain valuable insight on how to mitigate and transfer these risks. Also discuss how to educate your board on its responsibilities in preventing unintended liability exposure.

Alan Peterson, Senior Vice President, McGriff, Seibels & Williams, Inc., Atlanta, Georgia; and **Marcia Philpott**, Manager, Insurance Services, Salt River Project, Phoenix, Arizona



Develop and Implement a Compensation Plan that Works

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

Can management explain, and HR administer your compensation plan, or is it a point of confusion? Discuss how to conduct a comprehensive compensation study, create an implementation plan, and keep stakeholders informed throughout the process. Hear how two utilities partnered with a vendor to put their plans into motion.

Ashley Thomalla, Senior Consultant – HR Consulting, SilverStone Group, Omaha, Nebraska; **Mel Palmer**, Manager, Human Resources, Lincoln Electric System, Nebraska; and **Tammie Krumm**, Manager, Human Resources, Missouri River Energy Services, Sioux Falls, South Dakota



Life After Email

CPE Field of Study: Specialized Knowledge

Email is ubiquitous, but has problems with deliverability, security, and volume. Learn to shore up your system to prevent spoofing and discuss alternatives for effective internal and external communication.

Alan Thompson, Director, Information Technology, American Public Power Association, Arlington, Virginia



Pricing & Market Analysis Roundtable

CPE Field of Study: Specialized Knowledge

Meet with peers from utilities like yours to discuss current issues in pricing and market analysis. Bring your issues to the table on intraclass subsidies, demand rates, electric vehicle charging station rates, and the impact of technology on rates.

6 – 7:30 p.m.

Reception

Join your colleagues for an evening reception. You are welcomed to bring a guest.

Wednesday, September 18

7:45 – 8:30 a.m. **Networking Continental Breakfast**
8:30 – 10 a.m. **Breakout Sessions**
10:15 – 11:30 a.m. **Closing General Session**

“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

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



Supporting Low-Income Customers Through Creative Programs

CPE Field of Study: Specialized Knowledge

Learn about creative programs you can institute to assist low-income customers, including building healthy energy-saving habits and offering meaningful incentives.

Francine Artis, Customer Solutions Manager, Tacoma Public Utilities, Washington; and Ronnie Mendoza, Manager of Customer Care, Austin Energy, Texas



Change Management: Countering 'That's the Way We've Always Done It!'

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

Change is necessary for survival, however, implementing a new system or process or adjusting staff responsibilities can be filled with challenges. Discover how to deal with change and use it to fuel a highly productive team.

Kevin Cornish, Senior Managing Director, Growth & Performance, Black & Veatch, Overland Park, Kansas



What is Your Cyber Responsibility?

CPE Field of Study: Specialized Knowledge

Whether you are a manager, director, or front-line employee, you have obligations regarding cyber risk. Everyone must play a role in creating a culture of cyber safety. Explore both internal and third-party cyber risks and potential mitigation efforts that should be implemented across your organization. Discover risk transfer options and learn how this exposure must be managed globally at your organization to avoid liability.

Michael Gaudet, RPLU, Managing Director, FINPRO U.S. Industry Practice Leader, Marsh USA, Inc., Philadelphia, Pennsylvania; and Jason Holcomb, Director, OT Security Services, Revolutionary Security, Springfield, Missouri



New Ideas for Recovering Fixed Costs

CPE Field of Study: Specialized Knowledge

The misalignment of fixed costs and rates is a perpetual issue for many utilities. Increasing your monthly customer charge might not be sufficient from a cost-of-service perspective — and might not be feasible from a political perspective. Explore innovative alternative ways utilities are attempting to recover their fixed costs.

Carl Baker, Senior Electric Utility Analyst, Lakeland Electric, Florida; Emily Koenig, Director of Finance & Rates, Lincoln Electric System, Nebraska; and Brian Seinturier, Fiscal Manager, Riverside Public Utilities, California

10 – 10:15 a.m.
Break

10:15 – 11:30 a.m.

Closing General Session

Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5 CPE

Field of Study: Specialized Knowledge, Personal Development

Leading the .01%

Greg "Boss" Wooldridge is the only commanding officer to lead The Blue Angels for three separate tours. He was first selected because of his demonstrated ability to build teams where communication, trust and teamwork took precedence over rank and status. His heart-driven approach proved a perfect match for the Blue Angel's culture of excellence.

Greg will take you on an incredible journey as he leads the world's preeminent pilots, who must land on an aircraft carrier's pitching deck at night, to a level of skill seemingly unachievable flying safely and steadily 18" apart at 400 miles per hour. Beginning with a culture that is founded on a sense of gratitude and trust, "Boss" will guide you through a performance-elevating framework that can be applied to any enterprise. You will learn the way in which exceptional growth in team and personal performance can be dramatically achieved even though your journey, like his, may be "littered with rose thorns and not rose pedals."

Greg "Boss" Wooldridge, Three-time Commander of The Blue Angels

11:30 a.m.

Conference adjourns



Greg Wooldridge

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.nasbaregistry.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, please contact 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, please visit the HR Certification Institute homepage at 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 American Public Power 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 conferences and seminars offered by the American Public Power Association's Academy is an easy way to earn points toward the Reliable Public Power Provider (RP3®) designation. RP3 is the Association's program to recognize and reward public power utilities that demonstrate basic proficiency in four important disciplines: reliability, safety, workforce development, and system improvement. For more information, visit www.PublicPower.org/RP3.

MINNEAPOLIS



Minneapolis is a major city in Minnesota that forms the “Twin Cities” with neighboring state capital St. Paul. Bisected by the Mississippi River, it’s known for its parks and lakes. Minneapolis is also home to many cultural landmarks such as the Walker Art Center, a contemporary art museum, and the adjacent Minneapolis Sculpture Garden, famed for Claes Oldenburg’s “Spoonbridge and Cherry” sculpture.

LOCATION & HOTEL

Conference Location

The 2019 Business & Financial Conference will be held at the Hyatt Regency Minneapolis. Conference attendees get discounts for the Association’s room block at this hotel only.

Hyatt Regency Minneapolis

1300 Nicollet Mall
Minneapolis, MN 55403

Room Rates

- Group rate: Single/Double \$215 per night (plus 13.15% tax)
- Check in: 3 p.m. / Check out: Noon
- Main telephone: 612-370-1234
- Complimentary standard wireless internet

Reservations

- Online: www.PublicPower.org/BandF under “Hotel”
- Attendee group code: G-PPWR
- Reservation telephone: 888-591-1234
- Reservation cut-off date: August 23, 2019

Scam Alert

Make your reservations only at www.PublicPower.org/BandF

Do not make hotel reservations through any third party that may contact you by phone or email. Use only the online reservation link or the phone numbers and codes provided in brochures from the American Public Power Association.

REGISTRATION

www.PublicPower.org/BandF

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

REGISTRATION FEES

American Public Power Association Member

	Through August 16	After August 16
Business & Financial Conference	\$775	\$825
Preconference Seminar (each)	\$350	\$400

Not Yet a Member

	Through August 16	After August 16
Business & Financial Conference	\$1,550	\$1,600
Preconference Seminar (each)	\$700	\$750

Not yet a member? Join today and save \$775 on your conference registration. Call us at 202-467-2926 or email Membership@PublicPower.org to learn more.

CONTACT US

Visit www.PublicPower.org/BandF for program updates and to register online.

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