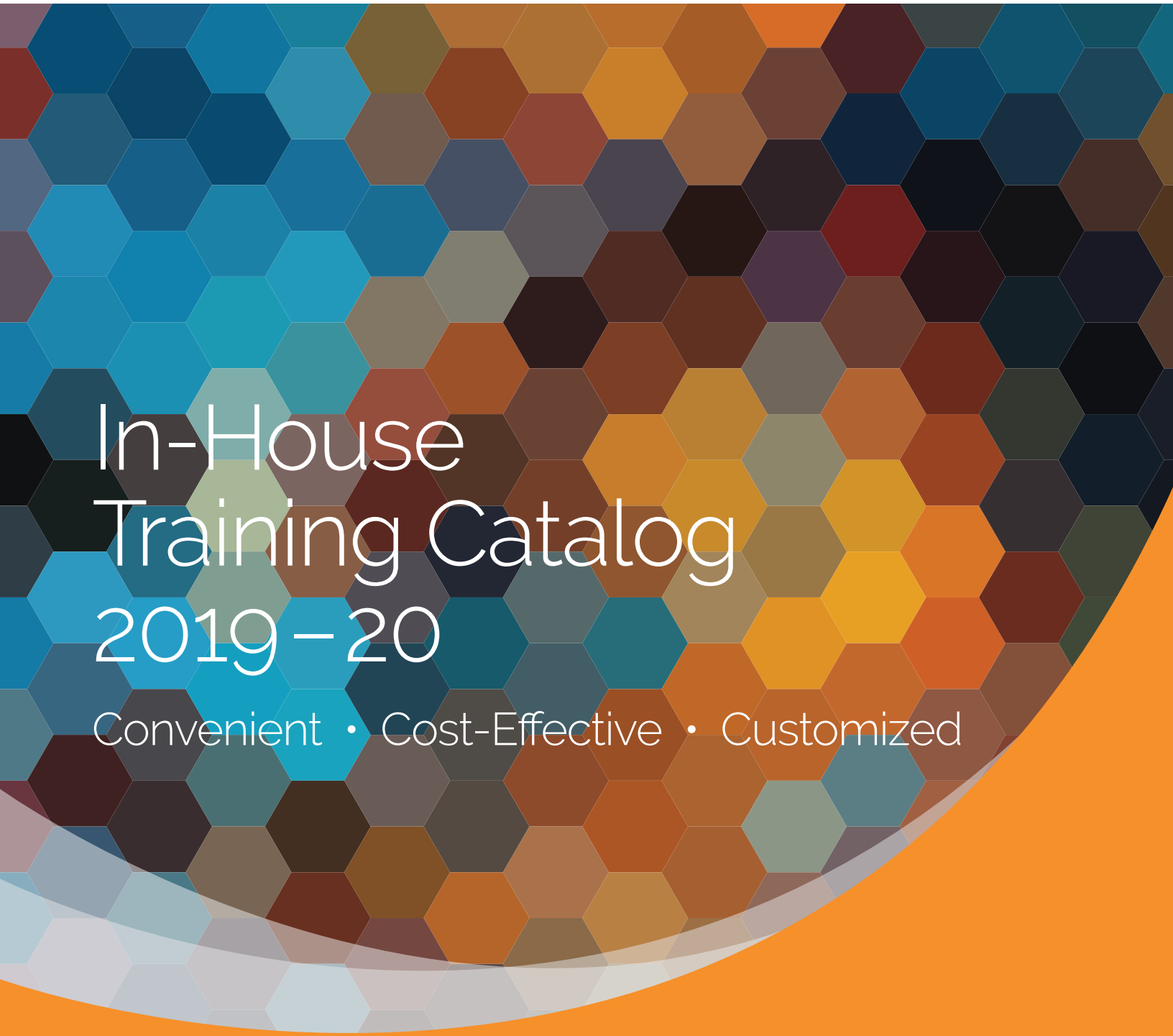
THE ACADEMY | AMERICAN PUBLIC POWER ASSOCIATION



In-House Training Catalog 2019–20

Convenient • Cost-Effective • Customized

PublicPower.org/Academy

AMERICAN PUBLIC POWER ASSOCIATION

In-House Training

If it's difficult for your staff and governing board to attend education courses outside of the office, let us come to you! The Association's Academy can deliver the training you need, when and where you need it—an ideal option for groups of eight or more. We can bring any existing course to your facility or customize an agenda based on your needs.

Fees

Base fee + Instructor travel expenses = Total cost of in-house training

Base fee
Starts at $4,500 per teaching day (covers course development, instruction, materials and shipping expenses)

Travel expenses
Costs include: airfare, lodging, meals, incidentals, ground transportation

Onsite Expenses
The host organization is also responsible for securing a training room and covering all on-site expenses (e.g., AV equipment, refreshments, etc.).

Most classes have a base price of $4,500 per teaching day, though that fee may fluctuate based on the instructor's fee structure and in cases where there's a significant level of customization.

Benefits of In-house Training

There are many advantages to holding an Academy in-house training program, including:

Cost and time savings
Minimize employee out-of-office time and travel expenses.

Customized training
Choose from our catalog of courses, mix and match agenda items, or tailor course content to meet your specific goals.

Expert instructors
Learn from seasoned trainers who have decades of experience with public power utilities.

Continuing education credits
Meet staff's yearly training goals and certification requirements by earning continuing education units (CEUs), professional development hours (PDHs), continuing professional education credits (CPEs), and earn points towards the Reliable Public Power Provider (RP_3) designation.

Foster teamwork
Encourage a collegial work environment through a team approach to learning that reaches for common goals and sets organizational direction.

Staff development and retention
Providing practical, targeted training shows staff that you care about their development and helps employees realize their importance within the organization.

Current Course List

Course descriptions, sample agendas, learning outcomes, and speaker bios are available upon request. Content can be modified to fit your needs and schedule.

Course Topics
Offering training for all skill levels—basic, intermediate and advanced—in key utility operational areas including:

- Accounting
- Cost of Service and Rate Design
- Customer Service
- Cybersecurity
- Distributed Energy Resources
- Electric Utility 101
- Energy Efficiency
- Governance and Strategic Planning
- Financial Planning
- Key Accounts
- Leadership
- Safety and Disaster Planning
- Technical Training
- Certification Programs
- Custom topics available on request

More Information

Contact EducationInfo@PublicPower.org or 202/467-2921.

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Accounting

Public Utility Accounting

Work Order and
Asset Management Accounting

Advanced Public Utility
Accounting

Public Utility Accounting

Length
2 days

Accreditation
Recommended CEUs 1.3/PDHs 13/CPEs 15
Field of Study: Accounting

Course Overview
This course highlights the development of a utility accounting system that is compatible with Federal Energy Regulatory Commission (FERC) guidelines. It examines accounting theory, the role of accounting in public utilities, FERC accounting procedures, the uniform systems of accounts, and utility accounting subsystems.

Course Topics
- Accounting for operating revenues and expenses
- Introduction to utility property and plant accounting
- Introduction to FERC uniform system of accounts
- Applicability of generally accepted accounting principles to public utilities
- Financial statement structure and presentation
- Capital vs. expense determination
- Allocation of indirect or common costs
- Accounting for unbundled services

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for those who are new to public utility accounting practices or unfamiliar with the FERC accounting structure.

Instructor
Jerry McKenzie, Senior Associate, MGT of America, Inc., Maize, Kansas

Work Order and Asset Management Accounting

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Accounting

Course Overview
Utility construction is one of the major activities at your utility and has a significant impact on developing equitable rates for your customers. This interactive course covers basic and intermediate utility work asset management accounting concepts and applications. Work through the necessary steps to report utility construction costs and differentiate between capital construction and maintenance costs. Learn about practical industry processes, through real-world utility examples of accounting for utility construction costs.

Course Topics
- Work order and asset management processes and the importance of accurate plant accounting and reporting
- Accounting for utility construction and impacts on customer rates
- Accounting standards that apply to work order accounting
- Using construction standards and compatible units
- Evaluating construction accounting business processes
- Methods of allocating overhead costs
- Unitizing construction costs and closing work orders
- Developing capital budgets and capital retirement accounting
- Software selection and implementation considerations
- Process improvement and personnel training
- Developing informative reporting to help implement strategy
- Overcoming organizational barriers

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for utility accounting, finance and operations personnel who are part of the work order process.

Instructor
Russ Hissom, CPA, CIA, CISA, Partner, Energy and Utilities Group, Baker Tilly Virchow Krause, Madison, Wisconsin

Advanced Public Utility Accounting

Length
2 days

Accreditation
Recommended CEUs 1.3/PDHs 13/CPEs 15
Field of Study: Accounting

Course Overview
Most of the crucial decisions that electric utilities make require financial information. Utility accounting staff must understand how accounting principles and practices impact financial reporting to internal and external stakeholders. This course examines complicated aspects of accounting theory and practice to inform planning and decision-making by management.

Course Topics
- Using regulatory accounting to mitigate ratepayer and financial reporting impacts
- Presentation of financial statements
- Using benchmarking and key performance indicators
- Strategies to maintain or improve your utility's bond rating
- Capital structure and its importance in utility strategic planning
- Utility debt options
- Establishing strong internal controls to efficiently allocate resources and deter fraud
- Governmental accounting pronouncements update
- Accounting for contingencies, capitalized interest, asset impairments and asset retirement obligations
- Update on implementing the new GASB Pension Standard

Course Level
Intermediate/Advanced. Recommended as a follow up to the Public Utility Accounting course.

Who Should Attend
Designed for accounting and finance personnel with a basic knowledge of utility accounting theory and practice.

Instructors
Russ Hissom, CPA, CIA, CISA, Partner or **Bethany Ryers, CPA,** Senior Manager

Both with the Energy and Utilities Group at Baker Tilly Virchow Krause, Madison, Wisconsin

Cost of Service & Rate Design

Basic Cost of Service:
Concepts and Rate Planning

Intermediate Cost of Service:
Implementation and Best Practices

Advanced Cost of Service:
Rate Trends and Distributed Generation Impacts

Basic Cost of Service: Concepts and Rate Planning

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Explore the ins and outs of cost of service—from basic concepts to leveraging data for decision making. Learn how to determine revenue requirements and key financial targets and relate them to cost of service. Find out how to develop a long-term rate plan and use financial targets to determine customer rates, borrowing needs, and capital improvements.

Course Topics

- Basic cost of service concepts, terminology, and processes
- Collect and use of cost of service data
- Determine revenue requirements using cash and utility-based approaches
- Set key financial targets related to cost of service
- Develop a cash reserve policy
- Determine rate policies and long-term rate plans
- Communicate rate changes to policymakers and customers
- Use customer rates to fund infrastructure replacements

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
General managers, finance and accounting personnel, rate analysts, financial planners, as well as policymakers.

What to Bring
Participants are encouraged to bring a laptop to work through in-class exercises.

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

Intermediate Cost of Service: Implementation and Best Practices

Length
2 days

Accreditation
Recommended CEUs 1.3/PDHs 13/CPEs 15
Field of Study: Specialized Knowledge

Course Overview
Understand how to apply cost of service and rate design principles and processes to electric, water, sewer, gas, and other municipal services. Develop a fully functional and unbundled cost of service study. Do a cost analysis deep dive and learn from real-world examples and best practices.

Course Topics
- Identify, collect, and organize costs
- Allocate municipal facilities and expenses
- Classify generation, transmission, and distribution expenses
- Categorize generation types and primary cost components
- Collect and apply load research data
- Develop cost allocation factors
- Gauge customer voltage levels and cost allocation
- Apply cost allocation factors in a cost of service model
- Determine monthly customer facilities and billing costs
- Identify bundled and unbundled primary cost components
- Apply cost of service components to rate designs
- Understand the limitations of a traditional cost-of-service model

Course Level
Basic/Intermediate. Recommended as a follow-up to APPA's Basic Cost of Service course and as a prerequisite to the Advanced Cost of Service class.

Who Should Attend
General managers, finance and accounting personnel, rate analysts, financial planners, policymakers, and others who want to learn how the cost of service process is completed and applied.

What to Bring
Participants are required to bring a laptop with Excel and PowerPoint, to work through in-class exercises.

Instructors
Mark Beauchamp, CPA, CMA, MBA, President, Utility Financial Solutions, Holland, Michigan

Dan Kasbohm, Rates Manager, Utility Financial Solutions, Grand Rapids, Michigan

Advanced Cost of Service: Rate Trends and Distributed Generation Impacts

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Review the latest industry rate trends, evaluate new rate structures, and learn how to recover fixed costs and fund infrastructure investments. Hear how other utilities are integrating distributed energy resources and restructuring rates. Gain hands-on experience by designing rates for a sample utility.

Course Topics
- Analyze industry rate trends and future rate structures
- Determine the role of a monthly customer charge in rate design
- Develop rates that reflect utility costs, maintain financial stability, and promote energy conservation
- Develop time-of-use rate structures and real-time pricing rates
- Develop marginal cost-based price signals
- Design economic development rates
- Understand power cost adjustment mechanisms
- Determine the value of renewable generation
- Design rates that recover utility costs for rooftop solar installations
- Develop standby rates for customers installing combined heat and power generators
- Get buy-in from governing bodies and the public on rate designs

Course Level
Intermediate/Advanced. Recommended as a follow-up to APPA's Basic and Intermediate Cost of Service courses.

Who Should Attend
General managers, finance and accounting personnel, rate analysts, financial planners, policymakers, and others looking for advanced knowledge of cost of service and ratemaking processes.

Instructor
Mark Beauchamp, CPA, CMA, MBA, President, Utility Financial Solutions, Holland, Michigan

Customer Service

Strategies for Successful Customer Service Operations

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
In a time of unprecedented industry changes and evolving consumer expectations, a utility's most important strategic asset is its relationship with its customers. This course defines good customer service, how to identify and meet the needs of different types of customers, and how to create a culture of commitment to excellence in customer service across all areas of utility management, operations and customer interactions.

Course Topics
- Defining good customer service
- Segmenting customers into categories and identifying their specific requirements: residential, business, commercial and industrial key accounts
- Identifying the utility's internal customers and other stakeholders and why they're important
- Managing your physical facilities to create a safe and welcoming environment
- Operating with the customers' needs in mind when determining service hours, locations, payment policies/options, web-based access to account info, etc.
- The role of utility governing officials, policymakers, and senior managers in creating a culture of customer service excellence

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Customer Service Management Certificate Program.

Who Should Attend
This course focuses on developing a culture of excellence in customer service among all public power utility employees and governing officials. Therefore, while the course content is designed for customer service managers, supervisors, and representatives, the course will also benefit utility management, staff, and governing board representatives.

Instructor
Steve VanderMeer, Senior Vice President, Hometown Connections, Fort Collins, Colorado

Utility Collections: Trends and Challenges

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Based on the best practices of public power utilities across the United States, this course reviews the policies and procedures that foster an efficient and effective collections process. The instructor will cover a variety of examples from across the industry and use recent Association survey information to examine industry norms and best practices.

Course Topics
- The basics of customer service/call center operations
- What makes a good customer service operation, including fair and consistent collections policies and procedures
- Policies and procedures for setting up new accounts and security deposit requirements
- Meter reading, billing, and payment schedules
- Understanding the basics of utility service costs and ratemaking, for effective response to customer queries
- How to handle overdue accounts, including skip tracking, liens, and credit agencies
- Handling collections in-house vs. outsourcing
- Open discussion on specific issues/challenges and strategies for resolving them

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Customer Service Management Certificate Program.

Who Should Attend
This course focuses on developing a culture of excellence in customer service among all public power utility employees and governing officials. Therefore, while the course content is designed for customer service managers, supervisors, and representatives, the course will also benefit utility management, staff, and governing board representatives.

Instructor
Steve VanderMeer, Senior Vice President, Hometown Connections, Fort Collins, Colorado

Modeling Customer Service in Your Leadership Style

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Ensuring that all utility employees and governing officials subscribe to a culture of excellence in customer service requires very specific leadership skills and strategies. Identify the qualities of a good leader and learn the steps to transforming your utility culture to improve performance.

Course Topics
- Differences between good and bad leaders, and between leaders and managers
- Leading during times of change
- Identify the leader's customers
- Fostering a culture of leadership throughout the organization
- Key activities of a customer service leader, including employee recruitment and selection, new employee orientation, ongoing training and education, performance monitoring, setting compensation and rewards, empowering employees, and gathering feedback from customers

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Customer Service Management Certificate Program.

Who Should Attend
This course focuses on developing a culture of excellence in customer service among all public power utility employees and governing officials. Therefore, while the course content is designed for customer service managers, supervisors, and representatives, the course will also benefit utility management, staff, and governing board representatives.

Instructors
Steve VanderMeer, Senior Vice President, Hometown Connections, Fort Collins, Colorado or **Patricia Cruz,** Vice President of Consulting & Training, Hometown Connections, Austin, Texas

Utilizing Technology to Enhance Customer Service

Length
Half day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
As our industry continues to change, so does the need for new technology solutions to meet evolving customer needs. New technological advancements are providing opportunities for utilities to enhance their operations and services, including customer information systems, smart meters, integrated voice response, outage management systems, hosted and cloud-based services, and more. Customer service managers are often tasked with evaluating, purchasing and deploying these new tools and information systems to support the functions of their departments. Learn about the latest technology options (including bitcoin and blockchain), what other public power utilities around the country are using, and how to develop a technology roadmap for the future.

Course Topics
- Assess the current technology level for customer service at your utility
- Learn about information and operational technologies impacting how the utility does business today and provides service to customers
- Review the need for an information technology roadmap
- Discuss today's workforce challenges including recruitment and retention
- Explore technology platforms for future service offerings

Who Should Attend
This course focuses on developing a culture of excellence in customer service among all public power utility employees and governing officials. Therefore, while the course content is designed for customer service managers, supervisors, and representatives, the course will also benefit utility management, staff, and governing board representatives.

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Customer Service Management Certificate Program.

Instructor
Patricia Cruz, Vice President of Consulting & Training, Hometown Connections, Austin, Texas

Conduct a Customer Service Check Up

Length
Half day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
Competitive rates and high reliability are not the only drivers of customer satisfaction. Well-run customer service and billing operations are critical in building strong relations with customers. This course explores the many different customer interfaces and how to identify the organization's strengths and weaknesses in customer service management, operations, and communications.

Course Topics
Attendees receive detailed guidance on conducting internal assessments in key operational areas:

- Customer Service: business processes, staffing, technology, metrics, satisfaction
- Community Outreach: how effectively the utility communicates with its customers and community
- Governance and Strategic Planning: organizational direction of the board and implications for customer service
- Rates: options, policies, performance, clarity
- Internal Services in support of Customer Service: budgeting, human resources and payroll, IT support, purchasing

Who Should Attend
Customer service managers and supervisors, as well as other utility management and staff.

Course Level
Basic. No prerequisites; no advance preparation.

Instructor
Patricia Cruz, Vice President of Consulting & Training, Hometown Connections, Austin, Texas

Cybersecurity

Municipal Cyber Academy:
The Fundamentals of Cybersecurity

Cybersecurity Training
for Management and Boards

Intermediate Cyber Training
for IT/OT Employees

Municipal Cyber Academy: The Fundamentals of Cybersecurity

Length
3 days (15 modules)

Accreditation
Recommended CEUs 2/PDHs 20/CPEs 22.5
Field of Study: Specialized Knowledge

Course Overview
Understanding and improving your cybersecurity posture is increasingly important in the face of new cyber threats to the electricity sector. This course is based on the American Public Power Association's Public Power Cybersecurity Scorecard—an online self-assessment tool for public power utilities to assess cyber risk, plan improvements, prioritize investments, and benchmark their security posture. Modeled on the DOE Electricity Subsector Cybersecurity Capability Maturity Model (ES-C2M2), the Cybersecurity Scorecard provides utilities with a starting point to address cyber risks. Utilities start by completing a simple self-assessment of their cybersecurity program. From there, get guidance, reports, and tools to help improve your cybersecurity.

This course walks attendees through the ES-C2M2 and provides an in-depth review of the various areas and practices that must be implemented to reach a basic maturity level of cyber security. Attendees will complete the APPA Cybersecurity Scorecard at the beginning and end of course, to measure cybersecurity growth.

Course Topics
- Building and maintaining a cyber asset inventory
- Establishing a configuration baseline
- Controlling both physical and electronic access
- Tracking and managing vulnerabilities
- Identifying and managing threats
- Managing cyber risk
- Detecting cyber events
- Responding to cyber events

- Building operational resiliency into your network
- Monitoring cyber system activity
- Sharing cyber threat and event information
- Understanding and managing supply chain risk
- Managing the contract and direct workforce for cyber security
- Cyber security program management

Course Level
Basic. No prerequisites; no advanced preparation.

Who Should Attend
This foundational course is focused on developing a culture of cyber security among all public power utility employees and policymakers, so staff in various departments and levels of experience are encouraged to attend. This training is specifically helpful for small and mid-sized utilities.

What to Bring
Attendees are required to bring a tablet or laptop to class to complete the Cybersecurity Scorecard exercise.

Instructor
Stephen Strom, GSEC, GCIA, GCIH, GWEB, GCFA, GCPM, GICSP, Owner/CTO, Custom Internet Services, Winfield, Kansas

Cybersecurity Training for Management and Boards

Length
Half day or full day

Accreditation
Dependent on length
Field of Study: Specialized Knowledge

Course Overview
Cybersecurity is among the top concerns that keep public power leaders up at night. This course provides the foundational knowledge necessary to help utilities develop a holistic cyber and physical security program. Learn the fundamental concepts of cybersecurity, threat vectors, and risks to your utility. Discuss the key elements that are integral to adopting and implementing a sound cybersecurity framework and applicable practices and standards. Learn from real-world examples by working through a utility case study to build awareness and apply concepts learned in class.

Course Topics
- Learn key cyber and physical security concepts
- Develop a holistic cybersecurity program
- Review cyber risks, trends and recent incidents in the utility industry
- Discuss the necessary philosophy, culture of security and involvement of teams, including roles and responsibilities
- Best practices for using a security blueprint for effective cyber risk management
- Review a high-level roadmap for a cybersecurity program and mitigation plan
- Develop a next-steps plan with headcount and budgeting

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Public power executive management, supervisors, policy-makers, operations and communications executives, security officers, IT/OT managers, and others interested in learning more about cybersecurity.

Instructor
Doug Westlund, MBA, P.Eng., Senior Vice President, AESI, Inc., Ontario, Canada

Intermediate Cyber Training for IT/OT Employees

Length
2-3 days (six modules—can be taken together or separately)

Module Overview
Taken separately or collectively, each of the six modules will cover both IT and OT fundamental concepts and best practices, including utility-specific examples for enacting cybersecurity measures. These modules are designed for operations administrators and IT/OT managers to provide the technical foundation for developing a comprehensive utility cybersecurity program. Learn about cyber and physical security risk-based mitigation strategies and develop a foundation for implementing a basic security operations maintenance plan.

Module #1: Fundamentals of IT/OT Cybersecurity Risk Management

Length
2.5 hours

Course Overview
This fundamental course is designed to provide the essential concepts that form a successful cybersecurity program. The course expands upon a foundation of risk management basics with an emphasis on understanding cybersecurity risk and the difference between IT and OT security risks, including the risk implications of integration. Participants learn how to create and apply cybersecurity policies and governance structures to manage risks, and about asset and information management concepts and practices.

Course Topics
- Cybersecurity, privacy and risk management basics
- Differences between IT and OT security risks
- The impact and risks of IT/OT integration
- Developing sound security policy and governance models based on risk assessment
- Strategies for deploying cybersecurity governance and policy
- Integrate risk-based policies with legal and regulatory requirements
- Asset and information concepts and practices
- Implement on-going risk management through asset management strategies

Course Level
Intermediate. No prerequisites; no advance preparation.

Who Should Attend
IT/OT managers and staff from small, medium and large public power utilities and Joint Action Agencies accountable for system/cyber risk, and policymakers.

Potential Instructors
Kim Grosskurth, Senior Consultant, AESI-US Inc., Tucker, GA

Edvard Lauman, P.Eng., GCIA, Vice President Operational Technology, AESI-US Inc., Tucker, GA

Mark McKinney, MSIM, CISSP, CISA, CFE, CCFE, Director Cyber Security, AESI-US Inc., Tucker, GA

Todd Ponto, MSIS, CISSP, CISA, GCIP, Chief Technology Officer, AESI-US Inc., Tucker, GA

Module #2: Network Architecture Risk-Based Mitigation Strategies

Length
2.5 hours

Course Overview
Take network architecture risk-based cybersecurity mitigation strategies to the next level. In this course, technical security concepts and technologies, such as firewalls, VLANs, VPNs, IDS/IPS, NAC, Layer 2 and 3 redundancy, and Wi-Fi security are reviewed, along with a discussion on the importance of out-of-band management. During the session, participants create a sample risk-based network security architecture applying IT/OT cybersecurity risk mitigation strategies.

Course Topics
- Review key network architecture tools/concepts used to mitigate risk
- Discuss network architecture-based cybersecurity risk mitigation strategies
- Examine strategies for successful IT/OT integration
- Create a sample risk-based network security architecture
- Discuss residual risk which architecture alone cannot address

Course Level
Intermediate. No prerequisites; no advance preparation.

Who Should Attend
IT/OT managers and staff from small, medium and large public power utilities and Joint Action Agencies accountable for system/cyber risk, and policymakers.

Potential Instructors
Edvard Lauman, P.Eng., GCIA, Vice President Operational Technology, AESI-US Inc., Tucker, GA

Mark McKinney, MSIM, CISSP, CISA, CFE, CCFE, Director Cyber Security, AESI-US Inc., Tucker, GA

Todd Ponto, MSIS, CISSP, CISA, GCIP, Chief Technology Officer, AESI-US Inc., Tucker, GA

Module #3: Access Management Concepts & Technical Deployment

Length
2.5 hours

Course Overview
Acquire additional technical knowledge on key access management concepts, such as the principle of least privilege, separation of duties, and role-based access controls. Participants learn to recognize how to deploy technology to implement these concepts and help minimize the impact of user error or malicious acts. This course examines technologies such as centralized user management for both individual and shared accounts, multifactor authentication systems and the benefits and pitfalls of single sign-on systems.

Course Topics
- Review user related risks and mitigation strategies
- Acquire key identity and access management concepts
- Technical deployments/solutions that help minimize the impact of user error or malicious acts
- Examine the benefits and pitfalls of single sign on systems
- Discuss best practices for user management processes

Course Level
Intermediate. No prerequisites; no advance preparation.

Who Should Attend
IT/OT managers and staff from small, medium and large public power utilities and Joint Action Agencies accountable for system/cyber risk, and policymakers.

Potential Instructors
Edvard Lauman, P.Eng., GCIA, Vice President Operational Technology, AESI-US Inc., Tucker, GA

Mark McKinney, MSIM, CISSP, CISA, CFE, CCFE, Director Cyber Security, AESI-US Inc., Tucker, GA

Todd Ponto, MSIS, CISSP, CISA, GCIP, Chief Technology Officer, AESI-US Inc., Tucker, GA

Module #4: Securing Individual Hosts / Endpoints

Length
2.5 hours

Course Overview
If you are responsible for deploying technology, this technical workshop is for you. Taking a bottom-up approach, starting with the hardware/firmware, and progressing through the operating system and applications; receive an overview of the concepts and technologies used to secure each host. Technical areas covered include BIOS/Secure Boot, full-disk encryption, host-based firewalls, hardening practices and group policy, users, removable media, malware prevention, patch management, and logging. Learn how to apply a multi-layered approach to deploying technologies to secure individual hosts/endpoints, as well as, the benefits of a Virtual Desktop Infrastructure.

Course Topics
- Technologies to secure individual hosts/endpoints
- Industry insight for applying a multi-layered approach to technical deployments
- Discover the benefits of a Virtual Desktop Infrastructure

Course Level
Intermediate. No prerequisites; no advance preparation.

Who Should Attend
IT/OT managers and staff from small, medium and large public power utilities and Joint Action Agencies accountable for system/cyber risk, and policymakers.

Potential Instructors
Edvard Lauman, P.Eng., GCIA, Vice President Operational Technology, AESI-US Inc., Tucker, GA

Mark McKinney, MSIM, CISSP, CISA, CFE, CCFE, Director Cyber Security, AESI-US Inc., Tucker, GA

Todd Ponto, MSIS, CISSP, CISA, GCIP, Chief Technology Officer, AESI-US Inc., Tucker, GA

Module #5: Security Operations Maintenance Plan Best Practices

Length
2.5 hours

Course Overview
Using a sample architecture to demonstrate technologies in practice, participants move from theoretical topics into a process flow on how to implement basic security practices that emphasize proper IT/OT "hygiene". In this course, proactive security operations practices and technologies, such as training programs, change and configuration management, patch management, account management, backup and recovery, continuous vulnerability management and data loss prevention are reviewed, and best practices are presented.

Course Topics
- Criteria for a cybersecurity maintenance plan – change and configuration management, patch management, account management, continuous vulnerability management and data loss prevention processes
- Make-up of an employee cybersecurity training program
- Implementation requirements for a cybersecurity incident response plan
- Backup and recovery plan(s)
- A disaster recovery process

Course Overview
Intermediate. No prerequisites; no advance preparation.

Who Should Attend
IT/OT managers and staff from small, medium and large public power utilities and Joint Action Agencies accountable for system/cyber risk, and policymakers.

Potential Instructors
Edvard Lauman, P.Eng., GCIA, Vice President Operational Technology, AESI-US Inc., Tucker, GA

Mark McKinney, MSIM, CISSP, CISA, CFE, CCFE, Director Cyber Security, AESI-US Inc., Tucker, GA

Todd Ponto, MSIS, CISSP, CISA, GCIP, Chief Technology Officer, AESI-US Inc., Tucker, GA

Module #6: Technical Make-up of a Monitoring and Response Program

Length
2.5 hours

Course Overview
No system is 100% secure; therefore, a successful cybersecurity program must incorporate a continuous monitoring and response component to detect, contain, and recover from cyber attacks. In this workshop, examine the technical make-up of a cybersecurity monitoring program, including technologies, such as log servers and SIEMs IDS/IPS, NetFlow, and configuration monitoring. Within a sample architecture, participants walk through the crucial technical components of a cybersecurity monitoring program and the critical mechanisms required to invoke an efficient response plan in the event of a cyber breach.

Course Topics
- Realize the criteria for a technically sound monitoring program
- Key topics and tools to include in an incident response plan/team
- Identify the tools and processes for incident detection, containment, eradication and recovery

Course Level
Intermediate. No prerequisites; no advance preparation.

Who Should Attend
IT/OT managers and staff from small, medium and large public power utilities and Joint Action Agencies accountable for system/cyber risk, and policymakers.

Potential Instructors
Kim Grosskurth, Senior Consultant, AESI-US Inc., Tucker, GA
Edvard Lauman, P.Eng., GCIA, Vice President Operational Technology, AESI-US Inc., Tucker, GA

Mark McKinney, MSIM, CISSP, CISA, CFE, CCFE, Director Cyber Security, AESI-US Inc., Tucker, GA

Todd Ponto, MSIS, CISSP, CISA, GCIP, Chief Technology Officer, AESI-US Inc., Tucker, GA

Distributed Energy Resources

Distributed Energy Resources: Strategic Rate Design and Transition Planning

Custom topics available on request

Distributed Energy Resources: Strategic Rate Design and Transition Planning

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
The future financial health of utilities requires a balance between fairness in customer rates, integration of energy efficiency and distributed generation programs, and room for expansion of carbon-free resources. These objectives are dependent on the price signals and policies established by the utility including: 1) utility financial policies that ensure financial stability, 2) rate strategies that offer customers appropriate pricing and incentives, 3) technology to achieve these rate strategies, and 4) rate transition plans to accommodate these changes. These programs and strategies are critical to achieving community objectives, reliability of the electric infrastructure, and ultimately customer satisfaction. Review the latest industry rate trends, develop a strategic rate strategy and technology plan, and learn how to educate and communicate with the public and governing bodies on these issues.

Course Topics
- Industry rate trends and future rate structures
- Identifying gaps between current and future rate structures
- Determining proper pricing
- Developing strategic rate strategies consistent with customer, utility, and community objectives
- Assessing technology needs to achieve new goals
- Evaluating existing billing software capabilities
- Educating utility staff, policymakers, and customers
- Developing and implementing transition strategies for new rate structures

Who Should Attend
General managers, finance, and accounting personnel, rate analysts, financial planners, as well as policymakers.

Course Level
Basic. No prerequisites; no advance preparation.

Instructor
Mark Beauchamp, CPA, CMA, MBA, President, Utility Financial Solutions, Holland, Michigan

Electric Utility 101

Electric Utility Industry Overview: Strategic Challenges and Trends

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
This course provides a largely non-technical overview of the public power system in its broader operating and business management context. Learn about the electric utility system infrastructure from power grid to meter, its operation, performance, and development. Strategic issues and industry trends that are impacting utilities and challenging the traditional public power business model will also be discussed. Each attendee will receive a copy of APPA's Electric Utility Basics handbook.

Course Topics
- Electric utility industry regulation and market restructuring
- Understanding the generation and regional transmission grid
- Developments in local transmission and distribution infrastructure
- Strategic issues and challenges for electric utilities
- The public power business model
- Keeping pace with utility trends adn technologies

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's four certification programs (customer service, key accounts, energy efficiency and public power leadership).

Who Should Attend
Designed for utility staff and policymakers looking for a comprehensive overview of the electric utility industry.

Instructor
R. John Miner, President, Collaborative Learning, Inc., Austin, Texas

Energy Efficiency

Energy Efficiency: Concepts and Strategies

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Receive a comprehensive introduction to energy efficiency, load management, and energy conservation concepts, from lighting and weatherization to heating and cooling options. Learn about federal, state and municipal utility energy efficiency policies and programs. Hear about measures that help residential, commercial, and industrial customers save energy and position your utility to provide a high level of customer service and reliability. Review strategic planning tools and best practices to align your energy efficiency program goals and strategies with your utility's goals.

Course Topics
- Defining energy efficiency, load management, conservation and associated concepts
- Common and emerging efficiency measures — lighting, heating, ventilation, air conditioning, smart thermostats, and controls
- Federal, state, and local landscape and policies driving energy efficiency
- Ways to assess energy efficiency potential
- Strategic planning approaches to use energy efficiency programs to support utility goals, such as reducing peak load, improving customer service, and promoting economic development

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Energy Efficiency Management Certificate Program.

Who Should Attend
Staff from small, medium, and large public power utilities that want to start an energy efficiency program, already manage energy efficiency programs but want to scale them up, are interested in various aspects of energy efficiency, or want to earn a professional credential.

Instructor
Rebecca Foster, Director, Vermont Energy Investment Corporation, Burlington, Vermont

Designing Efficiency Programs to Serve Your Customers

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Learn how to design an energy program that achieves your utility's strategic goals while serving your customer base. Integrate Design Thinking exercises and other program planning tools to generate ideas and insights to inform program design. Effectively engage your customers with behavioral and marketing strategies.

Course Topics
- Market assessment — identifying customer barriers and motivations and using market research techniques to inform program design
- Program design — selecting a program approach to match utility and customer goals and resources to overcome customer barriers
- Cost-effective programs for different customer classes — prescriptive and custom rebates, upstream programs, financing, etc.
- Design Thinking exercises to generate ideas and insights to inform program design
- Behavioral science insights and marketing techniques to effectively engage customers

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Energy Efficiency Management Certificate Program.

Who Should Attend
Staff from small, medium, and large public power utilities that want to start an energy efficiency program, already manage energy efficiency programs but want to scale them up, are interested in various aspects of energy efficiency, or want to earn a professional credential.

Instructor
Elizabeth Palchak, Consultant, Vermont Energy Investment Corporation, Burlington, Vermont

Energy Efficiency Program Implementation, Reporting and Evaluation

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Create an implementation plan for successful program execution. Gain tools and techniques to track and evaluate energy savings and cost-effectiveness. Create a right-size data tracking plan that fits your utility's needs, based on goals, reporting requirements, budget, and staff availability.

Course Topics
- Program implementation — developing a plan that includes all aspects of program delivery, including goal-setting, incentives, marketing, and outreach
- Tools, resources, and templates to support program planning, reporting, and budgeting
- Techniques to measure energy and demand savings, participation and cost-effectiveness
- Evaluation, measurement and verification (EM&V) approaches to evaluate program results, including process evaluation, impact evaluation, and savings verification
- Right-sizing your data tracking and reporting system based on utility goals and resources

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Energy Efficiency Management Certificate Program.

Who Should Attend
Staff from small, medium, and large public power utilities that want to start an energy efficiency program, already manage energy efficiency programs but want to scale them up, are interested in various aspects of energy efficiency, or want to earn a professional credential.

Instructor
Carol Weston, Director, Programs and Implementation, Vermont Energy Investment Corporation, Burlington, Vermont

Emerging Trends and Opportunities in Energy Efficiency and Distributed Energy Resources

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Learn about industry trends in energy efficiency, including the rapid transformation of the lighting market and the rise of connected devices. Learn the benefits of distributed energy resources (DER) and key opportunities for municipal utilities to improve customer service, increase reliability and reduce costs through a range of DER activities.

Course Topics
- Impact of rapid market transformation on energy efficiency programs and savings opportunities
- Capturing behavioral and operational savings through connected devices
- Latest trends in real-time EM&V and measuring savings at the meter
- Demand reduction and load management opportunities through energy efficiency, demand response, battery storage, and electric vehicles
- Integrating DERs into utility and power system planning

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Energy Efficiency Management Certificate Program.

Who Should Attend
Staff from small, medium, and large public power utilities that want to start an energy efficiency program, already manage energy efficiency programs but want to scale them up, are interested in various aspects of energy efficiency, or want to earn a professional credential.

Instructor
Damon Lane, Lead Analyst, Vermont Energy Investment Corporation, Burlington, Vermont

Financial Planning

Performing a Utility Financial Check-Up

Performing a Utility Financial Check-Up

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Assess your utility's financial health and find out how to set and achieve key financial targets—cash 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. Get practical insights from examples of other utilities across the country on using key targets to improve or maintain your utility long-term financial health. Understand the short and long-term implications of financial decisions. Learn how to communicate utility financial performance and rate changes to governing bodies and customers.

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
- Determining cost drivers and allocations
- Proper capital planning
- Monitoring, exposure, and methods to control the utility's revenue stability
- Timing of rate structure reviews
- Communicating utility financial performance and rate changes to policymakers and customers

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
General managers, finance and accounting personnel, rate analysts, financial planners, as well as policymakers.

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

Governance & Strategic Planning

Conduct a Governance Check-Up

Governance Workshop:
Sustaining Public Power's Value
through Effective Governance

Understand the Value of
Long-Term Strategic Planning

Strategic Planning:
A Step-by-Step Approach

2-hour sessions also available
on the topics listed above

Conduct a Governance Check-Up

Length
Half day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
To be effective, today's public power governing boards and city council members should maintain a clear understanding of complex issues, including new federal regulations, emerging technologies, volatile wholesale energy markets, state and local government budget pressures, and the need to attract younger workers with the right skill sets. They also need to understand their roles and responsibilities as stewards of the electric utility. Through this course, public power governing officials will learn how to assess the effectiveness of the utility's policy-making, strategic focus, communications, and oversight of utility operations and customer service. Receive a brief overview of industry conditions and then learn how to work with, and guide, the utility staff through the governance check-up process.

Course Topics
- How to develop and sustain an environment of trust and involvement between the governing body and utility staff to allow the utility to accomplish its strategic plan
- Understanding of roles for the governing body and staff
- Providing policy and strategic direction for utility operations
- Ensuring good communications and working relationship between utility and city officials
- Monitoring utility performance
- Board's role in identifying and advocating for the needs of customers
- Board's role in establishing comprehensive cybersecurity program

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for public power policymakers, utility managers, and others involved in strategic planning activities. This course is often paired with elements of the Governance Workshop: Sustaining Public Power's Value through Effective Governance course, to provide a full day of training.

Instructor
Tim Blodgett, President & CEO, Hometown Connections, Golden, Colorado

Governance Workshop: Sustaining Public Power's Value through Effective Governance

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Protecting the many benefits of living and working in a public power community requires excellence in utility governance. Yet, most citizens serving in governance roles come to the board, commission, or city council without utility or governance experience. This workshop provides detailed training on understanding and communicating the value of public power, strategies for successful board operations, the duties and legal obligations of governing officials, and techniques for providing effective oversight, direction, and support to utility management.

Course Topics
Communicate the Public Power Advantage
- Understanding the public power business model
- Strategic roadmap for success
- Capturing and communicating your utility's value

Understand Board Roles and Responsibilities
- Characteristics of high performing governing boards
- Duties, roles, and responsibilities of utility boards
- Assuring effective communication and board-management relations
- Anatomy of a successful board meeting

Know Your Statutory and Fiduciary Duties
- Understanding board/management policy responsibilities
- Complying with statutory and fiduciary duties
- Ensure duty of care, establish duty of loyalty and maintain duty of obedience
- Representing the interests of, and communicating with, customers and other stakeholders

Measure and Improve Performance
- Managing the CEO: hiring, firing, and performance evaluation/management
- Evaluating governing board performance: what and how to measure
- Utility performance: identifying key performance areas, indicators, and metrics
- Methods for measuring utility performance and communicating performance to stakeholders

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for newly elected or appointed policymakers, though experienced policy officials will also benefit. Utility managers are encouraged to attend with their commissioners, utility board or council members.

Instructors
Tim Blodgett, President & CEO, Hometown Connections, Denver, Colorado

Steve VanderMeer, Senior Vice President, Hometown Connections, Fort Collins, Colorado

Understand the Value of Long-Term Strategic Planning

Length
Half day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
New federal regulations, evolving technologies, volatile wholesale energy markets, budget pressures, workforce issues, and rising customer expectations mean the status quo is no longer good enough. Today's environment demands that public power utilities give careful consideration of the roles that they play and the value they bring to their customers and their communities. Among the most important aspects of utility governance are identifying the organizational priorities and setting the utility's strategic direction, usually through a strategic-planning process. This course explores the values that must be present in strategic planning in a public organization, outlines one process for utility strategic planning, and the governing board's role in that process.

Course Topics
- What does a good strategic planning process include? Who should participate?
- Governing board's role and the importance of engagement
- Capturing the voice of the customer
- Translating community/customer values, concerns and priorities into strategic objectives

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for public power policymakers, utility managers, and others involved in strategic planning activities. This course is often paired with Strategic Planning: A Step-by-Step Approach, to provide a full day of training.

Instructor
Steve VanderMeer, Senior Vice President, Hometown Connections, Fort Collins, Colorado

Strategic Planning: A Step-by-Step Approach

Length
Half day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
This is not your father's electric industry; significant change is not only coming, it's here. Public power has a decision to make: will it stay the course and continue doing what it's always done? Or will it take a hard look at how it can and should serve its communities? Review the nuts and bolts of a strategic planning process and how your utility can navigate the industry's uncertain future, brought on by new technologies, power sources, competitors and changing customer expectations. Walk through what a strategic planning process for public power can look like and how a utility can take control of its future.

Learn how to design and implement a successful strategic plan for a public power electric utility, state association, or joint action agency. Review a process to identify operational strengths and weaknesses, build organizational consensus and create alignment around key utility and community priorities.

Course Topics
- Facilitating the development of a strategic plan with (and getting buy-in from) organization staff and governing officials
- Communicating the goals of the plan within the organization and to the community
- Tracking the deployment of the plan elements and measuring their effectiveness
- Create a step-by-step blueprint for adapting to utility market conditions, regulatory changes, and the evolving expectations of customers

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for public power policymakers, utility managers, and others involved in strategic planning activities. This course is often paired with Understand the Value of Long-Term Strategic Planning, to provide a full day of training.

Instructor
Steve VanderMeer, Senior Vice President, Hometown Connections, Fort Collins, Colorado

Key Accounts

Implementing a Customer-Focused Key Accounts Program

Developing Your Key Accounts Representative

The Effective Key Accounts Toolbox

Certificate Program:
Electric Utility Industry Overview
+ 3 classes above

Implementing a Customer-Focused Key Accounts Program

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
The electric industry is in constant flux and changes are causing many large commercial and industrial customers to modify their operations. Public power utilities need to stay ahead of these decisions and position themselves as customized service providers for key account customers.

Discover how to engage key accounts customers and build programs around their needs, while focusing on the strategic needs of the utility. Learn how to build and implement a successful key accounts program—develop a clear and concise plan of action, assure adequate resources, get leadership and business community support, and procure commitment to maintaining and growing the program.

Course Topics
- Identify key accounts and their value to the utility
- Determine financial, budget and resource requirements
- Conduct customer research to determine needs and expectations
- Obtain buy-in from management, colleagues, and the business community
- Develop measurable program goals
- Launch a key accounts program
- Apply the four phases of key accounts program development
- Revitalize an existing key accounts program

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Key Accounts Certificate Program.

Who Should Attend
Designed for public power key account managers and representatives. Other utility staff involved in key accounts, or those looking for professional development credentials, will also benefit.

Instructor
Erick Rheam, Vice President, Automated Energy, Bloomington, Indiana

Developing Your Key Accounts Representative

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Simply having a key accounts program does not ensure success. As customers become more sophisticated, trained account executives offer the utility a competitive advantage in managing and retaining key accounts. Learn essential account management and customer relationship skills.

Course Topics
- Identify the characteristics of a successful key accounts representative
- Assemble an effective key accounts team
- Create strong relationships between key account staff and customers
- Establish account-specific goals and strategies
- Develop an action plan to meet with customers and solve operational issues
- Lead an effective on-site customer meeting
- Review communications and follow-up
- Get tips and techniques for focus and organization

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Key Accounts Certificate Program.

Who Should Attend
Designed for public power key account managers and representatives. Other utility staff involved in key accounts, or those looking for professional development credentials, will also benefit.

Instructor
Erick Rheam, Vice President, Automated Energy, Bloomington, Indiana

The Effective Key Accounts Toolbox

Length
1.5 days

Accreditation
Recommended CEUs 1/PDHs 10.25/CPEs 12.2
Field of Study: Specialized Knowledge

Course Overview
As public power utilities face increasing competition, it is important to leverage every resource to obtain a competitive advantage. Key account staff must understand the challenges business customers are facing and partner to develop solutions and strategies. Learn about resources and tools you can use to build relationships, provide customized services, and add value for your key accounts.

Complete the post-course exam and work through a template to start building your customer action plan. Bring information on one key account — contact and business information and relevant contact history — to include in your customer action plan.

Course Topics
- Determine where you stand with the customer
- Use customer relationship management tools and surveys to measure and enhance relationships
- Facilitate a key accounts annual meeting
- Leverage the power of customer advocacy
- Evaluate the latest key accounts programs and tools
- Work with other utility departments and associations, power suppliers, and joint action agencies
- Develop and review your own customer action plan

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Key Accounts Certificate Program.

Who Should Attend
Designed for public power key account managers and representatives. Other utility staff involved in key accounts, or those looking for professional development credentials, will also benefit.

Instructor
Erick Rheam, Vice President, Automated Energy, Bloomington, Indiana

Leadership

Financial Planning, Management and Budgeting: What Managers Need to Know

Strategic Leadership for Public Power

Certificate Program: Electric Utility Industry Overview + 2 classes above

Financial Planning, Management and Budgeting: What Managers Need to Know

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
A critical aspect allowing managers to complete projects and programs is the ability to fund system improvements with a limited impact on customers and elected officials. This program gives managers insight and understanding on financial management, budgeting techniques, long-term financial planning methods and an understanding of the various forms of electric rates. The course also addresses how to convey these methods to utility policymakers.

Course Topics
- Bond rating agencies
- Determining revenue requirements
- Contributions to city governments
- Financial targets
- Developing a long-term financial plan
- Cost of service studies and information
- Electric rate designs and significant factors affecting rates

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Public Power Manager Certificate Program.

Who Should Attend
Designed for mid-level public power managers and supervisors interested in improving their management, communications, leadership knowledge and skills. New senior managers, and those with experience, who wish to refresh or enhance their knowledge and skills by participating in a highly interactive program that has been developed specifically for public power, will also benefit from this course.

Instructor
Mark Beauchamp, CPA, CMA, MBA, President, Utility Financial Solutions, Holland, Michigan

Strategic Leadership for Public Power

Length
3 days

Accreditation
Recommended CEUs 2/PDHs 20/CPEs 22.5
Field of Study: Specialized Knowledge

Course Overview
This course will provide participants with an in-depth perspective on public power leadership by focusing on the development of the individual leader and the leader's role in guiding and developing their organization and its workforce. Participants will use the DiSC Work of Leaders profile as a source of personal information that will be used during the course to increase awareness of their predominant leadership style and its impact on others. Each of the following dimensions of leadership will be presented in separate course modules of approximately three hours each: awareness, character, community, empowerment, service, sustainability.

Course Topics
Module One: Awareness
- Setting purpose
- Seeing and influencing organizational realities
- Recognizing and managing larger system influences

Module Two: Character
- Driving values
- Meeting expectations for ethical behavior
- Developing yourself

Module Three: Community
- Building relationships
- Moving beyond differences
- Communicating effectively

Module Four: Empowerment
- Sharing power
- Empowering teams and groups
- Developing people for the future

Module Five: Service
- Serving customers
- Understanding constituents
- Driving performance and accountability

Module Six: Sustainability
- Setting a vision for the future
- Fostering innovation
- Leading change

Course Level
Basic. No prerequisites; no advance preparation. This course is a requirement for the Association's Public Power Manager Certificate Program.

Who Should Attend
Designed for mid-level public power managers and supervisors interested in improving their management, communications, leadership knowledge and skills. New senior managers, and those with experience, who wish to refresh or enhance their knowledge and skills by participating in a highly interactive program that has been developed specifically for public power, will also benefit from this course.

Instructors
Betsy Aylin, Ph.D., Executive Consultant, Collaborative Learning, Inc., Austin, Texas

R. John Miner, P.E., President, Collaborative Learning, Inc., Austin, Texas

Safety & Disaster Planning

2017 American Public Power Association Safety Manual

Accident Investigation and Near Miss Reporting

Best Practices in Mutual Aid and Disaster Planning

FEMA Basics for Public Power

Overview and Practical Applications of the 2017 National Electrical Safety Code

The 2017 American Public Power Association Safety Manual

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Get up to speed with safety best practices with the 2017 American Public Power Association's Safety Manual (16th edition). The new edition of the manual has been expanded to include OSHA and other federal and industry standards. It features revisions to definitions and general rules, health and environmental control, chemical and physical hazard control, personal protective equipment, and electric utility operations. Interpret the new rules and understand how they apply to your utility. Benefit from a deep dive into changes in the electric utility operations section and overhead T&D topics such as working near exposed and de-energized lines, pole work, grounding, and more. All attendees will receive a copy of the 2017 Safety Manual.

Course Topics
- APPA Safety Manual application, organization and purpose
- Significant revisions contained in the 2017 edition including all new OSHA regulations
- Rule intents and interpretations; rule interpretation questions and issues contributed by course participants
- In-depth review of Overhead Distribution and Transmission (Section 507). This section includes topics such as:
  - Working on or Near Exposed Energy Lines and Equipment
  - Climbing and Working on Poles
  - Working on Energized Lines Barehanded and with Live-Line Tool
  - Working on De-Energized Lines and Equipment
  - Grounding
  - Hazardous Energy Control

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Managers, safety professionals, electric utility engineers, designers, technicians, field personnel and utility staff who are responsible for or who make decisions concerning safety within transmission and distribution systems.

Instructor
Mike Willetts, Director of Training and Safety, Minnesota Municipal Utilities Association, Marshall, Minnesota

Accident Investigation and Near Miss Reporting

Length
Half-day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
Conducting accident investigations and developing a platform for reporting and recording near misses are critical practices that can prevent future incidents from unsafe behavior or conditions. This course will highlight the important role of near-miss reporting in the culture of safety at a utility; developing a positive platform for reporting and recording near misses to prevent them from escalating to lost-time incidents; conducting accident investigations with emphasis on root cause analysis; and how to use this information to prevent future incidents. The instructor will discuss step-by-step reporting methods for near misses and how to educate employees on the importance of training documentation. Participants will also work through practical group exercises, using utility case studies, to learn how to investigate and perform a root cause analysis.

Course Topics
- Goals of accident investigation and prevention
- Value of reporting and recording near misses
- Importance of maintaining training records
- Accident prevention through education
- Performing an accident investigation
- Root cause analysis methods
- Real-life case study exercises

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Managers, safety professionals, electric utility engineers, designers, technicians, field personnel and utility staff who are responsible for or who make decisions concerning safety within transmission and distribution systems.

Instructor
Marc Machacek, Regional Safety Coordinator, Minnesota Municipal Utilities Association, Marshall, Minnesota

Best Practices in Mutual Aid and Disaster Planning

Length
Half-day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
2017 brought four major back-to-back hurricanes — Harvey, Irma, Maria, and Jose. Clearly, natural disasters are increasing in frequency and severity, while customer tolerance for outages is declining. No utility, regardless of its location, can afford to remain unprepared. Join the authors and experts for an in-depth look at the new public power storm restoration guide. Share lessons learned and identify best practices in power restoration. Explore the full range of issues involved in disaster response and recovery — emergency planning, mitigation and preparedness, maintenance and engineering, damage assessment, crew staging and deployment, and the scalability of outage management systems. Learn how to estimate when power can be restored and how to communicate with customers and other stakeholders in emergencies. Understand how best you can mobilize mutual aid to supplement your restoration efforts.

Course Topics
- Emergency planning
- Mitigation and preparedness
- Maintenance and engineering
- Damage assessment and wires down
- Response and recovery, including estimated restoration time
- Customer information
- Emergency communication
- Mutual assistance
- IT: outage management systems scalability

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Public power managers, safety professionals and utility staff who are responsible for or who make decisions concerning safety within transmission and distribution systems.

Instructors
Anthony Hurley, Director, Utility Practice, Witt O'Brien's, Houston, Texas

Charlie Fisher, Senior Managing Director, Witt O'Brien's, Washington, D.C.

FEMA Basics for Public Power

Length
Half-day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
FEMA's Public Assistance Grant Program provides reimbursement of costs associated with debris removal, emergency protective measures, and the repair and restoration of damaged facilities. But, this disaster assistance is subject to eligibility rules applicable to the applicant, facility, work, and cost. Receive an overview of FEMA's Public Assistance Program and learn how to best position your utility to maximize FEMA disaster grant funding. Explore issues faced by public power utilities when recovering from a major disaster, the process of documenting your damages, and the steps that can be taken before a disaster strikes that will make recovery efforts easier for your utility.

Learn about federal procurement guidelines and requirements, how to avoid common mistakes that can lead to disallowance of funding, hear about FEMA's appeals process, and what to expect if you are targeted for an audit. Discover ways to improve regulatory compliance when designing and executing procurement and contracting processes involved in FEMA disaster grant funding.

Course Topics
- FEMA eligibility
- FEMA public assistance grant process
- Project worksheet development
- Five helpful tips for dealing with FEMA
- Overview of federal procurement regulations
- Procurement and contracting methods
- Procurement checklist
- Avoiding deobligation
- Common reasons for deobligation
- Interacting with FEMA and Homeland Security's Office of the Inspector General

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for utility managers, operations, finance, procurement, legal, and accounting staff, as well as others interested in learning more about FEMA eligibility, procurement requirements, processes and procedures.

Instructor
Bill Riley, Managing Director, Witt O'Brien's, Washington, D.C.

Overview and Practical Applications of the 2017 National Electrical Safety Code

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
The 2017 edition of the National Electrical Safety Code (NESC), published by the Institute of Electrical and Electronics Engineers (IEEE), is the national standard for safety in the design, construction, operation, and maintenance of electric and communication systems. This course will address the origins of the NESC and its fundamental applications to electric utility transmission and distribution systems. It will highlight the important changes that are effective with the 2017 edition.

Course Topics
- NESC purpose, organization and application
- Significant revisions contained in the 2017 NESC (Sections 1-3 and 9; Parts 1-4)
- NESC compliance, legal liability and risk management
- Rule interpretations and sources of help for compliance
- Recognition and correction of code violations
- Code interpretation questions and compliance issues contributed by course participants

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Managers, safety professionals, electric utility engineers, designers, technicians, and all field personnel who are responsible for or who make decisions concerning transmission and distribution systems.

What to Bring
Participants are required to bring a copy of the 2017 National Electric Safety Code.

Instructor
John Miner, President, Collaborative Learning, Inc., Austin, Texas

Technical Training

Overhead Distribution Systems

Length
3 days

Accreditation
Recommended CEUs 2/PDHs 20/CPEs 22.5
Field of Study: Specialized Knowledge

Course Overview
Learn about the planning, design, installation, and maintenance principles that drive today's overhead distribution practices. Learn how to update your utility's overhead line design and construction standards, make better design decisions, reduce construction costs, and enhance safety and service reliability.

Course Topics
- Overview of overhead distribution
- Overhead conductors
- NESC general requirements for overhead lines
- Overhead line clearances and structure loading (with NESC requirements)
- Overhead line structure types and design
- Guying and anchoring for overhead line structures
- Insulation, insulation coordination and lightning protection
- Basic calculations related to overhead distribution systems
- Overhead line grounding

Course Level
Basic/Intermediate. No prerequisites; no advance preparation.

Who Should Attend
Designed for public power professionals and skilled personnel including: engineers, designers, technicians and field personnel, as well as for all those involved in the management, construction, safety and operational aspects of transmission and distribution systems.

What to Bring
Participants are required to bring a calculator and a copy of the 2017 National Electric Safety Code.

Instructor
John Miner, President, Collaborative Learning, Inc., Austin, Texas

Best Practices in Overhead Distribution Line Design

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Proper engineering design of overhead lines is essential to public and employee safety, as well as to reliable and cost-effective operation and maintenance. This practical one-day course explores the legal, regulatory and ethical requirements applicable to the professional practice of overhead line design. Through presentations, examples, and exercises, learn how to assess and improve your line design process by incorporating modern design tools and best practices. Review examples of the many National Electrical Safety Code (NESC) violations that can be found on most overhead distribution systems (inadequate clearances and separations, excessive tensions, and structural overloads) and learn how to avoid or correct them.

Course Topics
- Federal and state public utilities laws and regulations that apply to overhead lines (including NESC and OSHA)
- Typical state engineering practice laws and regulations
- Professional engineering ethics and standards of conduct for distribution engineers and designers
- Line design protocols (design criteria, construction standards, documentation, joint use attachment standards, engineering reports, and records management policies and practices)
- Line design software applications
- The line design process and how to improve it
- Line designer training and continuing education

Course Level
Basic Level. No prerequisites; no advance preparation. It is highly recommended that you attend this course in conjunction with the Overhead Distribution Systems class.

What to Bring
Bring examples of distribution design criteria, construction standards, work order packages, and joint-use agreements, as well as position descriptions and training/continuing education requirements for distribution engineers and designers. You are also encouraged to bring your state professional engineering practice law and regulations for discussion.

Instructor
R. John Miner, President, Collaborative Learning, Inc., Austin, Texas

Constructing, Operating and Maintaining Underground Distribution Systems

Length
3 days

Accreditation
Recommended CEUs 2/PDHs 20/CPEs 22.5
Field of Study: Specialized Knowledge

Course Overview
Learn all about the effective design, construction, operation and maintenance of underground electric distribution systems. Review critical factors involved in the conversion of overhead systems to underground. Discuss real-life examples and work through practical design problems.

Course Topics
- Policy and service guidelines
- Underground distribution planning, design and layout
- Maintenance practices
- Operations, safety and regulatory requirements
- Cable design and application
- Terminating underground cable
- Fusing, fuse coordination, fault location and surge protection techniques
- Review of the 2017 NESC that pertains to underground systems (Part 3) and work practices (Part 4)

Course Level
Basic/Intermediate. No prerequisites; no advance preparation.

Who Should Attend
Designed for public power professionals and skilled personnel including: engineers, designers, technicians and field personnel, as well as for all those involved in the management, construction, safety and operational aspects of transmission and distribution systems.

Instructors
Larry Koshire, P.E., President, Koshire Consulting, LLC, Rochester, Minnesota

Mark Swan, P.E., Principal, MDS Engineering Consulting, LLC, Colorado Springs, Colorado

Advanced Topics in Underground Distribution Systems

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Underground distribution continues to be the installation method of choice in many applications on public power utilities. Although the initial installation cost of underground distribution is almost always greater than equivalent overhead distribution, if offers a wide range of advantages, including greater operating reliability, lower operating and maintenance costs, better public safety and, of course, reduced visibility and greater public acceptance. This course will cover current and emerging topics in underground distribution.

Course Topics
- How to make the decision between overhead and underground distribution alternatives, including customer expectations
- How to ensure long-life cable installations
- State-of-the-art cable specification, purchasing, handling and installation (including cable pulling calculations)
- Extending the life of in-service cable through improved lightning protection and thermal loading
- Underground distribution service considerations for commercial customers
- Customer load estimation
- Transformer sizing, loading, and specification features
- Steady-state and transient voltage considerations
- Methods for prioritizing capital and operating expenditures for underground distribution
- Implications of smart grid and other new technologies

Course Level
Basic/Intermediate. No prerequisites; no advance preparation. Some previous knowledge of and experience with underground distribution systems is helpful.

Who Should Attend
Designed for public power professionals and skilled personnel including: engineers, designers, technicians and field personnel, as well as for all those involved in the management, construction, safety and operational aspects of transmission and distribution systems.

Instructor
R. John Miner, President, Collaborative Learning, Inc., Austin, Texas

Distribution System Economics: Making the Business Case

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
As the bread and butter of all public power systems, the distribution system is essential to business success. Is your distribution system reliable; resilient; and nimble enough to meet changing policies, technologies, and customer expectations? Does your utility have a plan and budget for expansion, renovation, and replacement of aging components?

Dive into the business management side of electrical distribution. Learn how to present a compelling business case to your management and board for effective distribution management and investment. Review the basics of distribution management, then work through exercises and case studies to identify the key factors that will ensure your system's continued success through the evolutionary years ahead.

Course Topics
- Business and regulatory imperatives and best practices for a safe and functional distribution system
- Fiduciary responsibility for managing distribution assets
- Engineering economics applied to loss evaluation, investment alternatives, financial risk management, customer contributions, etc.
- Application exercises — transformer purchasing with loss evaluation, circuit reconductoring economics, customer contributions for line extensions, etc.

Course Level
Basic. No prerequisites; no advance preparation.

What to Bring
Attendees are required to bring a calculator.

Who Should Attend
Designed for public power professionals and skilled personnel including: engineers, designers, technicians and field personnel, as well as for all those involved in the management, construction, safety and operational aspects of transmission and distribution systems.

Instructor
R. John Miner, President, Collaborative Learning, Inc., Austin, Texas

Applied Electrical Distribution Theory

Length
1 day

Accreditation
Recommended CEUs .7/PDHs 6.5/CPEs 7.8
Field of Study: Specialized Knowledge

Course Overview
Learn the fundamentals of electric circuit theory and the application of theory to electric utility distribution systems. Review the relationships between voltage, current, resistance and reactance, real and reactive power in single-phase and three-phase alternating current (AC) circuits. Perform some commonly encountered AC circuit calculations that are used to determine conductor and equipment ampacity ratings, circuit voltage drop, power factor, energy losses, and customer load estimation.

Course Topics
- Direct and alternating current circuit elements (energy sources, conductors, loads, voltage, current, opposition to current flow)
- Alternating current principles in single and three-phase circuits (Kirchoff's voltage and current laws, Ohm's law, impedance, phase angle, voltage/current relationship, reactance and phase angle, real and reactive power)
- Circuit component ratings (voltage, current, power, thermal limits)
- Common circuit calculations (current flow, voltage drop, power, power factor, energy losses)
- Customer load estimation

Course Level
Basic. no prerequisites; no advance preparation.

Who Should Attend
Designed for utility distribution engineers, technicians, designers, construction and operations personnel, and professionals looking to increase their understanding of electric utility distribution.

What to Bring
Participants are required to bring their own scientific calculator.

Instructor
Mark Swan, P.E., Principal, MDS Engineering Consulting, LLC, Colorado Springs, Colorado

Electrical Distribution Principles, Applications and Improvements

Length
3 days

Accreditation
Recommended CEUs 2/PDHs 20/CPEs 22.5
Field of Study: Specialized Knowledge

Course Overview
Receive a comprehensive and practical overview of electric utility distribution. Learn about electrical distribution system planning, design and operating criteria, as well as principles and practices related to customer loads and services, grounding, voltage regulation, insulation coordination, overvoltage protection, and overcurrent protection. Review overhead, underground, and network distribution characteristics, advantages and disadvantages, components, and equipment. Because the distribution system is the heart of a public power utility, you'll also hear about business imperatives for distribution system performance and performance improvement.

Course Topics
- Overhead, underground, and network distribution systems
- Distribution system components and equipment
- Distribution system planning, design, and operating criteria
- Distribution standards and regulatory requirements
- Customer loads and services
- Grounding
- Voltage regulation
- Insulation coordination and overvoltage protection
- System faults, overloads, and overcurrent protection
- Business imperatives for distribution system performance
- Distribution performance measurement
- Distribution economics and system improvements

Course Level
Basic/Intermediate. No prerequisites; no advance preparation.

What to Bring
Participants are required to bring their own scientific calculator and are encouraged to bring copies of distribution planning criteria and design guides from their respective utilities for class reference and discussion.

Instructor
M. Thomas Black, P.E., Management Consultant, Collaborative Learning, Inc., Phoenix, Arizona

Improving the Reliability of Your Distribution System

Length
Half-day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
Reliability is one of the most important attributes of electric utility distribution systems. Today's regulators, customers, and prospective customers are more astute about measuring reliability and know what to look for when evaluating electric reliability. Public power providers typically outperform electric cooperatives and investor-owned utilities when it comes to reliability, but they must be diligent about preventing service interruptions and respond promptly when interruptions occur.

Course Topics
- Explore reliability from the perspective of regulators, customers, and utility employees, with a focus on improving service reliability
- Gain a deeper understanding of the indices that are used to measure reliability and the factors to consider when setting performance targets and comparing performance with others
- Learn best practices that support reliable systems and operations and specific initiatives for performance improvement
- Learn how to build an organizational culture that supports a reliable infrastructure, operation, and customer service
- Review elements of the Association's RP_3 program

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for public power professionals and skilled personnel including: engineers, designers, technicians and field personnel, as well as for all those involved in the management, construction, safety and operational aspects of transmission and distribution systems.

Instructor
R. John Miner, President, Collaborative Learning, Inc., Austin, Texas

Maintenance of High Voltage Electrical Distribution Systems

Length
Half-day

Accreditation
Recommended CEUs .3/PDHs 3.25/CPEs 3.5
Field of Study: Specialized Knowledge

Course Overview
This course provides the perspective needed to develop or enhance and carry out an effective program of maintenance for both overhead and underground high voltage electric utility distribution systems. Topics include principles and elements of corrective, preventive and predictive maintenance programs as well as specific activities related to the inspection, testing and maintenance of distribution lines and equipment. Also included is coverage of NESC maintenance requirements, risk management, cost accounting and evaluation of maintenance programs using productivity and service level measures and benchmarks.

Course Topics
- Overview of distribution maintenance
- Regulatory aspects of distribution maintenance
- Maintenance management
- Overhead line maintenance practices
- Underground line maintenance practices
- Equipment maintenance practices

What to Bring
Participants are required to bring a calculator and are encouraged to bring sample T&D maintenance management for class reference and discussion.

Course Level
Basic. No prerequisites; no advance preparation.

Who Should Attend
Designed for public power professionals and skilled personnel including: engineers, designers, technicians and field personnel, as well as for all those involved in the management, construction, safety and operational aspects of transmission and distribution systems.

Instructor
R. John Miner, President, Collaborative Learning, Inc., Austin, Texas

Certificate Programs

Customer Service Management Certificate Program

Length
4-5 days

Program Overview
Nurturing customer relationships and meeting customer needs are as critical to your utility's success as keeping the lights on. Customer preferences are evolving, and expectations for instant access to information and support are increasing. As a public power utility, your organization needs the support and goodwill of the communities you serve. The Association's Customer Service Management Certification Program® provides practical training and guidance on how to build and sustain a culture of outstanding customer service involving all stakeholders—utility employees, governing board members, and city officials. This program explores the mainstays of good customer service and how everyone at your organization can uphold them.

Program Requirements
To earn this certificate, participants must complete the following requirements within one year:

Complete the five required courses

- Electric Utility Industry Overview*
- Strategies for Successful Customer Service Operations
- Utility Collections: Trends and Challenges
- Modeling Customer Service in Your Leadership Style
- Utilizing Technology to Enhance Customer Service

*A 5-part webinar series can also be taken in place of this class. Participants who can demonstrate knowledge of the utility industry, through work experience or coursework, may also opt-out of this course.

Pass an online exam

- Consists of multiple choice questions, based on the required coursework.

Submit a plan for a customer service department assessment or service improvement project

- Complete a project that focuses on evaluating and improving the customer service culture and operations of your organization.

Who Should Attend
This program focuses on developing a culture of excellence in customer service among all public power utility employees and governing officials. Therefore, while the course content is designed for customer service managers, supervisors, and representatives, the course is also recommended for utility senior managers with cross-departmental responsibilities, governing board representatives, and senior officials.

Energy Efficiency Management Certificate Program

Length
4-5 days

Program Overview
Who manages energy efficiency programs at your utility? Are they up to speed with the latest trends, technologies, policies, and requirements? Successful programs do not happen by accident—they require an understanding of the industry, marketplace, customers and many other elements. When done well, energy efficiency can play an important role in achieving utility goals and improving customer service.

The Energy Efficiency Management Certificate Program covers all aspects of energy efficiency portfolio and program planning, implementation, and evaluation, preparing you to help residential, commercial, and industrial customers save energy, while enjoying high reliability and quality service.

Program Requirements
To earn this certificate, participants must complete the following requirements within one year. Courses can also be taken individually:

Complete the five required courses

- Electric Utility Industry Overview*
- Energy Efficiency: Concepts and Strategies
- Designing Efficiency Programs to Serve Your Customers
- Energy Efficiency Program Implementation, Reporting and Evaluation
- Emerging Trends and Opportunities in Energy Efficiency and Distributed Energy Resources

*A 5-part webinar series can be taken in place of the Industry Overview class. Participants who can demonstrate knowledge of the industry, through work experience or coursework, may also opt-out of this course.

Pass an online exam

- Consists of multiple choice questions, based on the required coursework.

Submit a plan for an energy efficiency program business plan

- The plan will be a model for any energy efficiency program your utility undertakes. It will include all topics, actions, and issues that a project manager must address while managing an energy efficiency project.

Who Should Attend
Staff from small, medium, and large public power utilities that want to start an energy efficiency program, already manage energy efficiency programs but want to scale them up, are interested in various aspects of energy efficiency, or want to earn a professional credential.

Key Accounts Certificate Program

Length:
3-4 days

Program Overview
Discover how to support and grow businesses in your community to enhance your reputation and revenue. Your commercial and industrial key accounts need special attention—the Key Accounts Certificate Program is designed to show you how to nurture strategic relationships and build trust and loyalty. Whether you plan to start a utility key accounts program or want to take your current program to the next level, this curriculum provides the skills, knowledge and tools for success. Join the program to learn from real-world examples, get tools and templates, practice skills, and network with public power peers from across the nation.

Program Requirements
To earn this certificate, participants must complete the following requirements within one year. Courses can also be taken individually:

Complete the four required courses

- Electric Utility Industry Overview*
- Implementing a Customer-Focused Key Accounts Program
- Developing Your Key Accounts Representative
- The Effective Key Accounts Toolbox

*A 5-part webinar series can be taken in place of the Industry Overview class. Participants who can demonstrate knowledge of the industry, through work experience or coursework, may also opt-out of this course.

Pass an online exam

- Consists of 100 multiple choice questions, based on the required coursework.

Submit a customer action plan

- Demonstrate how your utility plans to address the needs of a selected account.

Who Should Attend
Designed for public power key account managers and representatives. Other utility staff involved in key accounts, or those looking for professional development credentials, will also benefit.

Public Power Manager Certificate Program

Length
4-5 days

Program Overview
With ever-increasing pressures and challenges on utilities from heightened customer expectations, changing regulations, technology advances, and a changing workforce, those who lead and manage public power utilities must be equipped with the knowledge and skills to create an effective and sustainable organization with engaged, skilled and committed employees. The Public Power Manager Certificate Program is designed for a new generation of leaders as well as existing supervisors and managers. It will help these leaders provide organizational direction as they navigate a changing and complex industry environment.

Program Requirements
To earn this certificate, participants must complete the following requirements within one year. Courses can also be taken individually:

Complete the three required courses

- Electric Utility Industry Overview*
- Financial Planning, Budgeting and Performance: What Managers Need to Know
- Strategic Leadership for Public Power
  Focused on six key leadership areas: awareness, character, community, empowerment, service and sustainability

*A 5-part webinar series can be taken in place of the Industry Overview class. Participants who can demonstrate knowledge of the industry, through work experience or coursework, may also opt-out of this course.

Post-course Project

- Complete a post-course project that applies principles from the six key leadership dimensions learned in class.
- Participants may choose to complete one of three project types.

Who Should Attend
Designed for mid-level public power managers and supervisors interested in improving their management, communications, leadership knowledge and skills. New senior managers, and those with experience, who wish to refresh or enhance their knowledge and skills by participating in a highly interactive program that has been developed specifically for public power, will also benefit from this course.

THE ACADEMY

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