

October 4 - 8  
2021

THE ACADEMY  
Fall Education  
Institute

Seattle, Washington

In person in Seattle!

## Courses

Accounting **HYBRID FORMAT!**

Cost of Service Workshop

Financial Planning & Rate Design

Overhead Distribution Systems

Strategic Leadership for Public Power

## Certificate Program

Public Power Manager **HYBRID FORMAT!**

[PublicPower.org](https://PublicPower.org)

AMERICAN  
**PUBLIC POWER**  
ASSOCIATION  
Powering Strong  
Communities



# Learn Together, Grow Together

Join us as we return to face-to-face meetings! The APPA Academy's Education Institutes offer in-depth training courses for all skill levels. Institutes allow attendees to focus on a single topic or spend the week in multiple classes for more comprehensive training.

6 courses in one location:

- Accounting
- Cost of Service Workshop
- Financial Planning & Rate Design
- Overhead Distribution Systems
- Strategic Leadership for Public Power

	Monday 10/4	Tuesday 10/5	Wednesday 10/6	Thursday 10/7	Friday 10/8
<b>Accounting</b>	Public Utility Accounting Virtual (Sept.)	Work Order & Asset Management Accounting	Advanced Public Utility Accounting		
<b>Financial Planning, Rate Design, &amp; Cost of Service</b>	Financial Planning and Future Rate Design Strategies		Cost of Service Workshop: Implementation and Applications		
<b>Overhead Distribution Systems</b>	Overhead Distribution Principles and Applications				
<b>Public Power Manager Certificate Program</b>	Courses 1 and 2 of the program will be offered virtually	Strategic Leadership for Public Power (3.5 days)			

# Accounting

Earn CPE credits

● **VIRTUAL:**

## Public Utility Accounting

**Sept. 14, 16, 28, 30**

**1 – 3:30 p.m. Eastern**

This foundational course is designed around the Federal Energy Regulatory Commission Uniform System of Accounts, covering every relevant FERC account. Learn about the role of accounting in public utilities, FERC accounting procedures, the uniform systems of accounts, and utility accounting subsystems. Review the proper usage of each account, preparing FERC-based income statements and balance sheets, the supporting charts of accounts, and proper coding for all FERC account activities. Earn 10.8 CPEs for attending.

**Instructor:** Jerry McKenzie, Senior Associate, MGT Consulting Group

● **IN-PERSON:**

## Work Order & Asset Management Accounting

**Tuesday, Oct. 5 (1 day)**

This interactive course covers basic and intermediate utility work asset management accounting concepts and applications. Learn how to coordinate operations and finance processes to accurately account for projects. 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 the day-to-day realities of accounting for utility construction costs. Earn 7.8 CPEs for attending.

**Instructor:** Russ Hissom, CPA, Baker Tilly

● **IN-PERSON:**

## Advanced Public Utility Accounting

**Wednesday, Oct. 6 – Thursday, Oct. 7 (2 days)**

This practical course examines the more complicated aspects of accounting theory and practice to inform planning and decision-making and help execute your day-to-day work more efficiently and effectively. Discuss how accounting principles and practices impact financial reporting to internal and external stakeholders. Learn about industry trends, new accounting standards, and strategies for ensuring future financial success. Earn 13.8 CPEs for attending.

**Instructors:** Russ Hissom, CPA, and Bethany Ryers, CPA, Firm Director—Baker Tilly

# Certificate Program

Develop specialized skills

## Public Power Manager Certificate Program **HYBRID FORMAT!**

**Tuesday, Oct. 5 – Friday, Oct. 8 (3.5 days)**

Featuring a new hybrid model—with virtual and in-person training components! This program is designed specifically for public power managers and supervisors interested in improving their management, communications, leadership knowledge and skills. Learn how to provide organizational direction, while navigating a changing and complex industry environment. Earn your Public Power Manager Certificate by completing the three required courses and then submit a project that applies principles from the six key leadership dimensions learned in class.

### Curriculum

Courses can be taken individually or together as part of the certificate program:

● **VIRTUAL:**

#### **Strategic Challenges and Trends for Public Power**

**Sept. 21: Noon – 4 p.m. Eastern**

Learn about the strategic issues and industry trends that are impacting public power utilities and challenging the traditional business model.

**Instructor:** R. John Miner, P.E., President, Collaborative Learning, Inc.

● **VIRTUAL:**

#### **Financial Planning, Budgeting, and Cost of Service Studies: What Managers Need to Know**

**Sept. 28: Noon – 3:30 p.m. Eastern**

Gain insight and understanding on financial management, budgeting, cost of service studies, and various forms of electric rates.

**Instructor:** Dawn Lund, Vice President, Utility Financial Solutions

● **IN-PERSON:**

#### **Strategic Leadership for Public Power Tuesday, Oct. 5 – Friday, Oct. 8 (3.5 days)**

This highly interactive program provides an in-depth perspective on public power leadership by focusing on six key areas: awareness, character, community, empowerment, service, and sustainability. Complete the DiSC Work of Leaders® profile and discover other tools and techniques to enhance your leadership knowledge and skills.

**Instructors:** Betsy Aylin, Ph.D., Executive Consultant, and R. John Miner, P.E., President—Collaborative Learning, Inc.

# Financial Planning, Rate Design & Cost of Service

Interactive courses full of real-world examples and exercises

## Financial Planning and Future Rate Design Strategies

**Monday, Oct. 4 – Tuesday, Oct. 5 (2 days)**

How electricity gets generated, distributed, and used has changed—and utility policies and rate structures must be updated accordingly. Learn how to assess your utility's financial stability against industry guidelines and set key financial targets to put a plan in place to reach your goals. Review cost of service and rate design fundamentals, trends, options, and strategies.

From how to send proper price signals to finding meaning in customer usage patterns, learn how to take a proactive approach to restructuring rates to recover fixed and variable costs and develop a long-term financial strategy for your utility that aligns with utility and community objectives. Get practical insights on how other utilities are integrating distributed energy resources and restructuring rates for electric vehicles and solar valuation.

**Instructors:** Dawn Lund, Vice President, and Mark Beauchamp, CPA, CMA, MBA, President—Utility Financial Solutions

## Cost of Service Workshop: Implementation and Applications

**Wednesday, Oct. 6 – Thursday, Oct. 7 (2 days)**

Explore the ins and outs of cost of service—from key concepts to the nuts and bolts of working through a cost of service model. Get hands-on experience working with an actual Excel model to apply cost of service and rate design principles and processes to electric, water, sewer, gas, and other municipal services. Complete the step-by-step process of putting a cost of service study together and review how to develop a fully functional and unbundled cost of service study. As you explore what it takes to do a thorough cost analysis, gain lessons learned from real-world examples.

**Instructors:** Phil Euler, P.E., President, Euler Consulting; and Dan Kasbohm, Rates Manager, Utility Financial Solutions

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For detailed course and instructor information, visit [www.PublicPower.org/Academy](http://www.PublicPower.org/Academy) under Institutes & Certificates

# Technical Training

Earn PDH credits



## Overhead Distribution Principles and Applications

**Monday, Oct. 4 – Wednesday, Oct. 6 (3 days)**

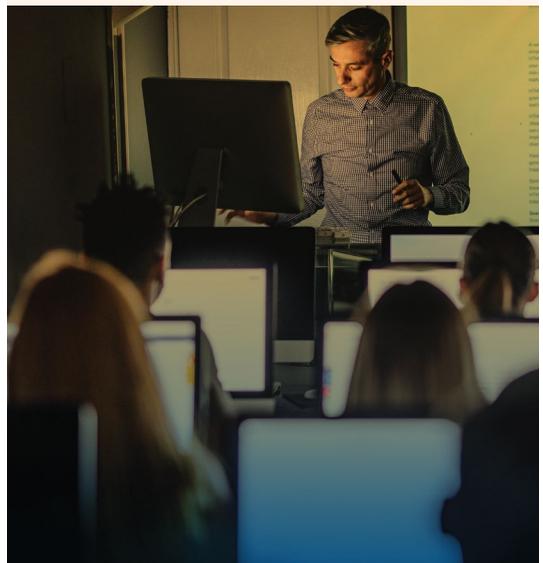
Build your knowledge of overhead distribution system components, along with basic design principles and practical applications. Learn about the legal, regulatory and business requirements that drive today's overhead distribution planning, design, installation, and maintenance practices. Learn how to review and improve your utility's overhead line design criteria and construction standards, make better design decisions, and enhance safety and service reliability.

**Instructors:** M. Thomas Black, P.E., and R. John Miner, P.E., President—Collaborative Learning, Inc.; and Ted Dimberio, P.E., President and CFO, Utility Line Design University

## THE ACADEMY In-House Training

# 2021

We can bring these courses to your location—either virtually or in-person—a convenient and cost-effective option for groups. Contact APPA's Education Department for details ([EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org)).



# Registration Fees

Register online at [www.PublicPower.org/Academy](http://www.PublicPower.org/Academy) under Institutes & Certificates.

## Pricing\*

Individual course prices increase by \$50 after Sept. 13.

	APPA Members	Nonmembers
1 day class	\$675	\$1,350
2 day class	\$1,050	\$2,100
3 day class	\$1,650	\$3,300
3.5 day class	\$1,900	\$3,800
Full certificate program**	\$2,800	\$5,600

\*Visit the course web pages for virtual class pricing.

\*\*Everything you need to participate in and graduate from the Public Power Manager Certificate Program (registration for 3 courses: virtual and in-person; program enrollment fee; materials; post-course project grading; and graduation plaque).



## Hotel Information

All in-person courses will be held at the Renaissance Seattle hotel (515 Madison St, Seattle, WA 98104).

### APPA Room Rate/Cut-off Date

\$239 per night (plus tax) before Sept. 13

## More Information

Visit [www.PublicPower.org/Academy](http://www.PublicPower.org/Academy) under Institutes & Certificates

## Registration Discounts

- Save \$50 (per class) by registering before Sept. 13
- Group pricing is available when you register 5+ people
- NWPPA discount: All NWPPA members receive the APPA member rate, plus an extra \$50 discount (per class). Contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org) to receive the discounted rate.

## Meals

A continental breakfast, beverage breaks, and an afternoon snack are included in the registration fee. All other meals are on your own.

## Questions?

Email [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org) or call 202-467-2997