



*Network & Grow Together*

# Business & Financial Conference



September 16-19, 2018



Anaheim, California



ELITE SPONSOR



CO-HOSTS



# BREAKOUT SESSIONS AT A GLANCE

MONDAY	9:15 - 10:15 A.M.	10:30 - 11:45 A.M.	1:30 - 3 P.M.	3:15 - 4:30 P.M.
<b>Customer Accounting &amp; Services</b>	Grow Houses: High Demand, New Challenges	Engaging Customers in Energy Wellness	A Safe Space for Customer Service	Cross-Train to Retain: Future Proofing Your Staff
<b>General Accounting, Finance &amp; Audit</b>	Tax on Fringe, Don't Cringe	Small Utility Roundtable	Beyond Numbers: Budgeting for Success	Asset Management: Overcoming the Ten Sins
	Utility Value: To Your Community and/or to Potential Buyers	Large Utility Roundtable	Behind the Ratings Hear from the Big Three	No Advance Refunding: What's the Alternative?
<b>Human Resources &amp; Training</b>	Human Resources & Training Roundtable	How to Become a Destination Employer, Part 1: Engagement	How to Become a Destination Employer, Part 2: Healthcare Costs	Key Elements of an Effective Talent Acquisition Strategy
<b>Information Technology</b>	IT Kickoff Roundtable	Using Data to Meet Unspoken Customer Needs	ERP: Is It for Me?	Cybersecurity Roundtable
<b>Pricing &amp; Market Analysis</b>	Rate Design: What's New, What's Right for You	Customer Engagement in Rate Design	Value of Solar: A Spectrum of Approaches	Load Analysis for Rate Makers
<b>Risk Management &amp; Insurance</b>	Insurance Basics: Part 1 - Fundamentals of Insurance	Insurance Basics: Part 2 - Insurance 101	Risk Management & Insurance Roundtable	What's Happening in the Insurance Market
<b>All Groups</b>		Joint Action Agency Roundtable		
TUESDAY	8:30 - 10 A.M.	10:30 - 11:45 A.M.	1:30 - 3 P.M.	3:15 - 4:30 P.M.
<b>Customer Accounting &amp; Services</b>	Communicating with Customers, Beyond Outages	Customer Self-Service 2.0: How Far Do You Go?	Pay as You Please: More Options for Customers	Improve Collections with AMI & System Integration
<b>General Accounting, Finance &amp; Audit</b>	Keep Calm and Comply with GASB	Blockchain 101: Threats and Opportunities	Internal Audit: Can Your Organization Afford to be Without It?	ROI: Recruit, Onboard, Inspire your Accounting Team
	No Utility is Too Big or Too Small for Solid Internal Controls	(Joint GAFA & IT)	Moving on Up: Investment Planning Tips	#What's Up DC
<b>Information Technology</b>	The Public Power Association Security Journey		Mobilize to Optimize: Gathering the Forces	Shared Technologies, Multiplied Benefits
<b>Human Resources &amp; Training</b>	HR's Fiscal Responsibility: Employee Financial Wellness & Retirement Plan Fees	Expanding Your Talent Pool Troops to Energy Jobs	Understanding Diversity and Inclusion with Emotional Intelligence	Ask the HR Attorney
<b>Pricing &amp; Market Analysis</b>	Charging Ahead: Special Rates for Electric Vehicles	Don't Just Give it Away Charge Something	Flex Your Rate Muscles, Shape Your Load	Pricing & Market Analysis Roundtable
<b>Risk Management &amp; Insurance</b>	Managing Your Broker Relationship	Risk Assessments and Loss Control Activities	Anatomy of a Claim	The Damage is Done (Third Party Recovery)
WEDNESDAY	8:30 - 10 A.M.			
<b>Customer Accounting &amp; Services</b>	Customer Accounting & Services Roundtable			
<b>General Accounting, Finance &amp; Audit</b>	Building a Culture of Credibility			
<b>Human Resources &amp; Training</b>	Becoming a Mindful Leader			
<b>Information Technology</b>	#CyberReady: Utilizing the Public Power Cybersecurity Scorecard			
<b>Pricing &amp; Market Analysis</b>	Change and Challenge: Keeping the Lights On at Your Utility			
<b>Risk Management &amp; Insurance</b>	Contractual Risk Considerations (Fortifying Your Contractual Risk Transfer Program)			

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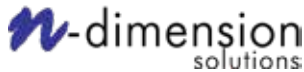
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- Learn about sponsors and exhibitors

Complimentary WiFi will be available throughout the conference. Log in to the "Hilton Meeting" Network, and use the Passcode: Academy18

## CONFERENCE AGENDA

# SUNDAY September 16

8 A.M. – 6:30 P.M. REGISTRATION • CALIFORNIA FOYER

## PRECONFERENCE SEMINARS

Preconference seminars are intensive how-to sessions that offer expert insights, case studies, and practical DIY strategies and tactics on critical utility business and finance areas.

*Each preconference seminar requires separate registration.*

8:30 A.M. – NOON

### SIMPLE STEPS TO FAST TRACK AN ERM PROGRAM

ROOM: SAN SIMEON AB

*Recommended CEUs .3/PDHs 3.25/CPEs 3.9; Field of Study: Management Services*

Discover how to identify the most significant risks facing your utility and make your executives and board aware of them. Learn the basic processes to create a dialog around risk tolerance, identify key risks, designate key risk categories for continuous monitoring, build a scoring process, and map a risk matrix. Evaluate and discuss major risk categories with the experts. Leave with a simple, practical framework that you can apply to outline the most critical risks that your utility needs to address right away.

**Sandy Meyers**, Director, Risk Management, and **Heath Silvey**, Manager-Risk/Damage Prevention, City Utilities of Springfield, Missouri; **Malinda Prudencio**, Chief Risk Officer, The Energy Authority, Jacksonville, Florida; and **Bryan Willnerd**, Manager, Treasury & Risk Management, Lincoln Electric System, Nebraska

8:30 A.M. – NOON

### STRATEGIC RATE DESIGN: TRENDS AND CASE STUDIES

ROOM: AVILA AB

*Recommended CEUs .3/PDHs 3.25/CPEs 3.9; Field of Study: Specialized Knowledge*

Can you design rate strategies that balance utility and customer interests? Learn from case studies from utilities like yours across the country. See how rates can be modified or restructured over 5 to 10 years to keep your utility financially viable and competitive, while recovering costs. Get tips for evaluating customer and demand charges, time-of-use rates, real-time pricing, and coincident peak demand rates and for setting proper price signals. Examine special rates for economic development, large customers, standby rates, etc. Get ideas to educate staff, management, governing bodies, customers and third parties on your long-term rate strategies.

**Mark Beauchamp**, President, Utility Financial Solutions, Holland, Michigan

1:30 – 5 P.M.

## HOW TO MEET NEW GASB STANDARDS

ROOM: AVILA AB

*Recommended CEUs .3/PDHs 3.25/CPEs 3.9; Field of Study: Accounting (Governmental)*

Many new governmental accounting standards have been put in place in the past two years, with significant impact on utility and governmental financial statements. Learn, through real-life examples, about new standards that affect your utility. Learn how to communicate the changes to your governing body, and how to interpret your financial statements post-implementation. Examine key standards — GASB 67/68 on pensions, GASB 74/75 on other postemployment benefits, GASB 83 on asset retirement obligations, and GASB 87 on leases.

**Bethany Ryers**, CPA, Sr. Manager, Baker Tilly, Madison, Wisconsin

1:30 – 5 P.M.

## HOW TO ASSESS YOUR CYBER HEALTH AND BUILD RESILIENCE

ROOM: SAN SIMEON AB

*Recommended CEUs .3/PDHs 3.25/CPEs 3.8; Field of Study: Information Technology*

Identify where your IT and OT networks are vulnerable to cyber-attacks and define a path to cyber resilience. Go through a complete check-up with an operational survey; testing of high-risk web applications; and review of your cybersecurity-related policies and procedures. Assess your cybersecurity posture based on the ten domains described in the Department of Energy's Electricity Subsector Cybersecurity Capability Maturity Model including workforce, asset, and supply chain management. Learn how to respond to cyber incidents and maintain continuity of operations. Learn how best to explain cybersecurity to your executives and board.

**Phillip Peerman**, Supervisor of Cybersecurity and Infrastructure, Easton Utilities Commission, Maryland; and **Doug Westlund**, Senior Vice President, AESI-US, Inc.

5 - 6:30 P.M.

## WELCOME RECEPTION

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

ROOM: CALIFORNIA A

## CONFERENCE AGENDA

# MONDAY

## September 17

7 A.M. – 5 P.M. REGISTRATION • CALIFORNIA FOYER

7 – 8 A.M.

### NETWORKING CONTINENTAL BREAKFAST

ROOM: CALIFORNIA A

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

8 – 8:45 A.M.

### OPENING GENERAL SESSION

ROOM: CALIFORNIA C

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

### PUBLIC POWER MATTERS

*Coleman F. Smoak, Jr., Chair, American Public Power Association and General Manager, Piedmont Municipal Power Agency, Greer, South Carolina*

### CALIFORNIA'S QUEST TO DECARBONIZE AND THE IMPACT ON THE WORLD (AND YOU)

*Barry Moline, Executive Director, California Municipal Utilities Association, Sacramento, California*

8:45 – 9:15 A.M.

### BREAK WITH SPONSORS

ROOM: CALIFORNIA A

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

9:15 – 10:15 A.M.

## BREAKOUT SESSIONS

Recommended CEUs .1 / PDHs 1 / CPEs 1.2



### Grow Houses: High Demand, New Challenges

ROOM: SAN SIMEON

CPE Field of Study: Specialized Knowledge

Electric utilities across the country are dealing with load from grow houses, legal and illegal. Grow houses are usually located in residential areas and consume significant amounts of energy to produce marijuana and other plants. Learn how other utilities like yours are taking on the challenges of this new load — managing high demand, setting appropriate rates, and countering energy theft.

**Carl Christian**, Electric Department Superintendent; and **Tracy Tillman**, Field Engineer, City of Fountain, Colorado



### Tax on Fringe, Don't Cringe

ROOM: HUNTINGTON

CPE Field of Study: Accounting

How do tax laws affect the treatment of fringe benefits and other compensation policies at your utility? Are you aware of all the guidelines for valuing fringe benefits and for withholding, depositing, and reporting taxes on the range of noncash benefits you offer? Come and discuss potential tax law traps and how your utility can remain compliant, while taking care of employees.

**Robert Delgado**, Principal in Charge, National Tax, Compensation & Benefits, KPMG LLP, San Diego, California



### Utility Value: To Your Community and/or to Potential Buyers

ROOM: LAGUNA

CPE Field of Study: Specialized Knowledge

CLOSED TO PRESS

Hear recent developments concerning the value of public power and IOU valuations in the current market, as well as considerations that will affect valuations, or that should be considered in comparing valuations. Learn about resources available through the American Public Power Association to assist communities in evaluations.

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



### Human Resources & Training Roundtable

ROOM: PALOS VERDES

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

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

#### KEY TO SESSIONS



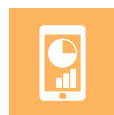
Customer Accounting & Services



General Accounting, Finance & Audit



Human Resources & Training



Information Technology



Pricing & Market Analysis



Risk Management & Insurance



### IT Kickoff Roundtable

ROOM: CALIFORNIA B

CPE Field of Study: Information Technology

Join us for a conference ice breaker session where we will learn more about each other and our current major initiatives. Get data from a 2017 APPA sponsored benchmarking survey; discuss the potential for a new survey; consider future topics of interest for the conference; and get an update on APPA's listserves for member communications.



### Rate Design: What's New, What's Right for You

ROOM: AVILA

CPE Field of Study: Specialized Knowledge

As electricity load patterns change significantly in quantity and quality, how can you design rates to fully recover costs? Hear from one of public power's most sought-after rate experts on emerging trends in rate design such as demand, standby, and customer charges. Get tips for designing your long-term rate strategy to be in tune with changing technologies and customer preferences.

**Mark Beauchamp**, President, Utility Financial Solutions, Holland, Michigan



### Insurance Basics: Part 1 - Fundamentals of Insurance

ROOM: CARMEL

CPE Field of Study: Management Services

Get a grounding in terminology and the components of a comprehensive insurance and risk management program. Learn more about the risk management process, including risk identification, measurement and techniques for managing risk.

**Janet E. Barnes**, Risk Manager, Snohomish County PUD, Everett, Washington; and **Cynthia J. Fee, J.D.**, Senior Casualty Power Specialist, Aon Risk Solutions, Aon Global Power, Sacramento, California

PART 2 AT 10:30 A.M.

10:15 – 10:30 A.M.

### Break with Sponsors

ROOM: CALIFORNIA A

10:30 – 11:45 A.M.

## BREAKOUT SESSIONS

Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5



### Engaging Customers in Energy Wellness

ROOM: SAN SIMEON

CPE Field of Study: Specialized Knowledge

Learn how to encourage low-income and commercial customers to participate in community initiatives for use of renewable energy sources like solar. See how you can get them to adopt energy efficiency programs for savings and a positive environmental impact. From behavior change to incentives and marketing techniques, learn tips and tricks to educate and engage all customers in programs to build a better community.

**Justin Chamberlain**, Manager of Energy Efficiency and Demand Response, CPS Energy, San Antonio, Texas; and **Gail Cohen**, Support Services Manager, Braintree Electric Light Department, Massachusetts, and Vice Chair, Customer Accounting & Services Committee



### Small Utility Roundtable

ROOM: HUNTINGTON

CPE Field of Study: Accounting

Meet with peers from other small utilities to discuss current issues in accounting and finance. Come prepared to participate and bring your successes and challenges to the table.



### Large Utility Roundtable

ROOM: LAGUNA

CPE Field of Study: Accounting

Meet with peers from other large utilities to discuss current issues in accounting and finance. Come prepared to participate and bring your successes and challenges to the table.





## Joint Action Agency Roundtable

ROOM: MONTEREY

**CPE Field of Study: Specialized Knowledge**

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

**Phil Bisesi**, Supervisor, Residential Energy Service, *Electricities of North Carolina, Inc.*, Raleigh, North Carolina



## How to Become a Destination Employer, Part 1: Engagement

ROOM: PALOS VERDES

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

Discover how you can be a "destination employer." See how successful organizations are connecting the dots between reward programs and increased employee engagement. Understand what new generations expect in terms of a respectful workplace, cultural norms, and corporate social responsibility. See how you can mesh these expectations with effective communication and reward programs to recruit and retain the best talent for your utility.

**Chris Dustin**, Managing Director, Employee Engagement Surveys, and **Scott Hamilton**, Global Managing Director, Human Resources & Compensation Consulting, *Gallagher Benefit Services, Inc.*, Rolling Meadows, Illinois

**PART 2 AT 1:30 P.M.**



## Using Data to Meet Unspoken Customer Needs

ROOM: CALIFORNIA B

**CPE Field of Study: Specialized Knowledge**

Customer lifestyles and expectations are changing fast. While most may not expressly state their needs and preferences for electric utility service, there is much you can learn from data on how your customers use energy. Discover the sources for this data and how you can mine and use it appropriately, while respecting data privacy, to better understand and serve customer needs.

**Fred Christie**, Chief Information Officer, *Easton Utilities Commission*, Maryland



## Customer Engagement in Rate Design

ROOM: AVILA

**CPE Field of Study: Specialized Knowledge**

Public power utilities are owned by and accountable to customer-owners, not remote shareholders. How do you meet the expectations of these customers with utility cost recovery while setting rates? How best can you inform and involve customers in the rate-setting process? Come and get answers from the experts. And learn to communicate about rates to policymakers and other stakeholders to gain buy-in.

**Ted Kelly**, Senior Project Manager of Regulatory Services, *Burns & McDonnell*, Kansas City, Missouri; and **Michael Vigeant**, CEO, *GreatBlue Research, Inc.*, Cromwell, Connecticut



## Insurance Basics: Part 2 – Insurance 101

ROOM: CARMEL

**CPE Field of Study: Management Services**

Dive in deeper to the basics of insurance with a discussion of the baseline insurance policies you need and how to determine the high-level coverage provided in each policy. Determine the limits to adequately protect your utility and understand how this is impacted by sovereign immunity. Get benchmarks on limits, sub-limits, and deductibles.

**Lisa Hough JD, MBA**, Manager, Risk Management, Business Strategy & Deployment, *Omaha Public Power District*, Nebraska; and **Sandy Meyers**, CPA, CPCU, ARM-E, AINS, Director-Risk Management, *City Utilities of Springfield*, Missouri

**11:45 A.M. – 1:30 P.M.**

**Lunch on your own**

1:30 – 3 P.M.

## BREAKOUT SESSIONS

Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8



### A Safe Space for Customer Service

ROOM: SAN SIMEON

CPE Field of Study: Specialized Knowledge

Safety is as important for customer service personnel as it is for line workers and technical staff. Learn what other utilities are doing to secure their customer service centers and operations against physical and cyber-attacks. Find best practices you can replicate to keep your customer service representatives safe and productive, while empowering them to take the best care of customers.

*Jim Boyle, Information Technology Manager, Braintree Electric Light Department, Massachusetts; and Phillip Peerman, Supervisor of Cybersecurity and Infrastructure, Easton Utilities Commission, Maryland*



### Beyond Numbers: Budgeting for Success

ROOM: HUNTINGTON

CPE Field of Study: Accounting

Is budget-setting a mere exercise on paper or does it inform a clear plan of action for your utility and provide metrics that matter? Find out how you can use budgeting to help run your utility efficiently. Gather best practices to prepare your budget, get approvals, track performance, and improve management. See how your budget can be an effective tool for success.

*Jonathan Jakub, P.E., Manager, Enterprise Solutions and Emily Koenig, Director of Finance & Rates, Lincoln Electric System, Nebraska; and Kim McCleskey, Budget Administer, Northern Virginia Regional Park Authority, Fairfax, Virginia*



### Behind the Ratings: Hear from the Big Three

ROOM: LAGUNA

CPE Field of Study: Specialized Knowledge

Get the inside scoop on the outlook for public power and the electric utility industry directly from the "big three" agencies that rate your credit and bonds. Learn about trends and threats that your utility needs to watch out for. See what factors work for and against you as your utility is rated for financial strength in a competitive market.

*Dan Aschenbach, Senior Vice President, Moody's Investors Service, New York, New York; David Bodek, Senior Director, S&P Global, New York, New York; and Dennis Pidherny, Managing Director, Fitch Ratings, New York, New York*



### How to Become a Destination Employer, Part 2: Healthcare Costs

ROOM: PALOS VERDES

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

Healthcare benefits go a long way in attracting and retaining employees. Learn how successful organizations are revisiting traditional health plan designs in the face of an aging workforce and increasing costs. Get insights from Gallagher's 2018 National Benefit Benchmark and Strategy Report. Discover approaches to employee well-being and engagement to help you manage costs and increase employee accountability for a culture of health and productivity.

*Jill Goldstone, Area Vice President, Innovation, and Kathleen Schulz, MS, CHES, Regional Vice President, Wellbeing & Engagement Practice Leader, Northeast & Southeast, Gallagher Benefit Services, Inc. Mt. Laurel, New Jersey*



## ERP: Is It for Me?

ROOM: CALIFORNIA B

**CPE Field of Study: Computer Software & Applications**

An enterprise resource planning system helps to integrate utility business and operations across inventory and order management, accounting, human resources, customer relationship management, and beyond. It allows for shared databases and dashboards. Does your utility need an ERP? How will it help? And where do you start to set up such a system? Come and discuss answers with experts and peers.

**Julia Anderson**, Senior Manager, Controller, Auditor, Snohomish County PUD, Everett, Washington; and **Amanda Lasinski**, Consulting Manager, Baker Tilly, Madison, Wisconsin



## Value of Solar: A Spectrum of Approaches

ROOM: AVILA

**CPE Field of Study: Specialized Knowledge**

Debate over the value of solar generation to the grid has been a source of contention for a number of years, and studies have produced widely disparate results. Hear from a diverse panel discussing their perspectives not just on the value of solar to the grid, but the value of the grid to distributed solar generators.

**Ashley Brown**, Executive Director, Harvard Electric Policy Group, John F. Kennedy School of Government, Harvard University, Cambridge, Massachusetts; and **John Cruz**, Manager, Strategic Planning & Operations, Guam Power Authority, Barrigada, Guam



## Risk Management & Insurance Roundtable

ROOM: CARMEL

**CPE Field of Study: Management Services**

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

3:15 – 4:30 P.M.

## BREAKOUT SESSIONS

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



## Cross-Train to Retain: Future Proofing Your Staff

ROOM: SAN SIMEON

**CPE Field of Study: Specialized Knowledge**

Training your key staff to take on functions other than their own will help your utility be better prepared for emergencies, improve productivity, and encourage collaboration. Effective cross-training must be done horizontally and vertically throughout the utility. See how other utilities are cross-training the workforce through job rotation. Take home all you need to design, implement, and track a cross-training program at your utility.

**Ricardo Ferrell**, Training Manager, Customer Services, Tacoma Public Utilities, Washington; and **Chris Parker**, Manager, Training & Development, Salt River Project, Phoenix, Arizona



## Asset Management: Overcoming the Ten Sins

ROOM: HUNTINGTON

**CPE Field of Study: Finance**

Learn how you can identify the gaps in your asset management plan and improve on it. Discover the secrets to adequate oversight, controls, tracking, and verification. Glean best practices to assess asset lifecycle costs and risks of failure. See how to develop options, get the support of senior leadership for proper asset maintenance and planning, and develop a long-term asset management plan to align with utility strategy and goals.

**Jonathan Jakub**, Manager, Enterprise Solutions, Lincoln Electric Systems, Nebraska; and **Gareth M. Lifton**, Managing Director, U.S. National Lead for Asset Management, KPMG LLP, Austin, Texas

3 – 3:15 P.M.

## Break with Sponsors

ROOM: CALIFORNIA A



## No Advance Refunding: What's the Alternative?

ROOM: LAGUNA

*CPE Field of Study: Accounting (Governmental)*

The 2017 Tax Cuts and Jobs Act has prohibited the issue of tax-exempt advance refunding bonds. What does this mean for your utility? Join us to hear about alternatives and how you must prepare to lock in interest rates in advance of the call date of municipal bonds. Hear about workarounds used by other public power utilities. Learn about the potential for future policy changes and strategies for advocacy.

**Jon Anderson**, Assistant Treasurer, Sacramento Municipal Utility District, California; and **Chris Fink**, Managing Director, Bank of America Merrill Lynch, New York, New York



## Key Elements of an Effective Talent Acquisition Strategy

ROOM: PALOS VERDES

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

With U.S. unemployment at a historically low rate, the competition for talent is heating up. What can your utility do to attract the best and brightest to work for you? And how do you keep them? Join us to review six elements for success — workforce planning, brand building, sourcing and recruiting, new technologies, comprehensive onboarding, and use of data analytics. Develop a comprehensive strategy to nurture the next generation in your workforce.

**Jon Decoteau**, Divisional Director West, Society for Human Resource Management, Sacramento, California



## Cybersecurity Roundtable

ROOM: CALIFORNIA B

*CPE Field of Study: Information Technology*

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



## Load Analysis for Rate Makers

ROOM: AVILA

*CPE Field of Study: Specialized Knowledge*

Electricity demand from traditional sources is declining while new uses like transportation, heating, and bitcoin mining are growing. Finance and rate staff must be able to accurately assess and analyze retail load. Learn the basics of load analysis — why, what, when, and how. Hear how other public power utilities are analyzing load and using the results in decision making. See how you can impact product planning and pricing at your utility.

**Carsten Croff**, Principal Economist, Seattle City Light, Washington; and **Mandip Samra**, Power Resource Planning Manager, Pasadena Water & Power, California



## What's Happening in the Insurance Market

ROOM: CARMEL

*CPE Field of Study: Management Services*

Increasing regulation, dramatic advancements in technology, growing cybersecurity threats, changing customer behaviors, and competition from new market entrants are disrupting the market for all lines of insurance. How does it impact insurance pricing and availability for your utility? Understand what's going on so you can better negotiate terms and contracts.

**George Adkins**, Managing Director, U.S. Power and Utility Practice, Marsh Wortham, a division of Marsh USA Inc., Houston, Texas; **Rob S. Logan**, Senior Vice President, Energy & Marine Division, McGriff, Seibels & Williams, Inc., Dallas, Texas; and **Kaitlin Upchurch**, FINPRO, Marsh Wortham, a division of Marsh USA Inc., Dallas, Texas

4:45 – 5:15 P.M.

## BREAKOUT SESSION

*Recommended CEUs .1 / PDHs 1 / CPEs 1.2*

### Resource Central: Association Benefits for You

ROOM: SAN SIMEON

*CPE Field of Study: Specialized Knowledge*

Your utility is a member of the American Public Power Association — so what does that mean for you? Are you taking advantage of all the member benefits and resources available to you as staff? Find out about new and popular resources and how you can leverage them to make your job easier. Discover programs and tools that can be customized for your needs. Get answers to your questions and share ideas about what else we can do to help you succeed.

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

4:45 P.M.

## YOUNG PROFESSIONALS HAPPY HOUR

ROOM: MIX LOUNGE (HOTEL BAR)

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

# TUESDAY

## September 18

7 a.m. – 3:30 p.m. • CONFERENCE REGISTRATION • ROOM: CALIFORNIA FOYER

7 – 8:15 A.M.

### Women in Public Power Networking Breakfast

ROOM: EL CAPITAN

Hear from a leading industry recruiter about trends pertaining to women in public power. Come with your questions, share experiences and make connections.

*Jennifer Rockwood, Russell Reynolds Associates, Miami, Florida*

7:30 – 8:30 A.M.

### Networking Continental Breakfast

ROOM: CALIFORNIA A

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

8:30 – 10 A.M.

## BREAKOUT SESSIONS

Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8



### Communicating with Customers, Beyond Outages

ROOM: SAN SIMEON

CPE Field of Study: Communications & Marketing

Are you communicating with customers every day, even when there are no outages? Learn how to spread the word about utility events and programs. Understand why it's important to communicate the benefits of public power and help customers feel a sense of ownership in your utility. See how you can use social media and other evolving platforms to engage customers and win their loyalty.

**David Blaylock**, Senior Manager, Integrated Media and Communications, American Public Power Association, Arlington, Virginia; and **Erica Manuel**, Manager of Community Development, Outreach & Education, Sacramento Municipal Utility District, California



### Keep Calm and Comply with GASB

ROOM: HUNTINGTON

CPE Field of Study: Accounting (Governmental)

Many new governmental accounting standards have been put in place in the past two years — on pensions, other postemployment benefits, asset retirement, and leases. Learn, through real-life examples, how these new standards affect your utility. See how you can remain compliant and communicate the impact of changes to your executives and governing body. Learn how you can monitor changes in standards so you're not caught by surprise.

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



### No Utility is Too Big or Too Small for Solid Internal Controls

ROOM: LAGUNA

CPE Field of Study: Specialized Knowledge

No matter the size of your utility, good internal controls help protect your customers and assets. Done wisely, they can create customer goodwill while reducing business and legal risks. Join us for a discussion on the challenges and solutions to implementing a solid program for organizations of any size.

**Matt Barton**, Chief Information Officer, Eugene Water & Electric Board, Oregon; and **Weston Nelson**, IT Consulting Director, Moss Adams LLP, Portland, Oregon



### HR's Fiscal Responsibility - Employee Financial Wellness and Retirement Plan Fees

ROOM: PALOS VERDES

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

Financial Wellness may be one of the hottest topics among employees and human resource professionals today. Financial wellness impacts employee productivity, absenteeism, and stress management when at work. Part of this session will explore the business case for offering a financial wellness program for employees and how to evaluate and initiate a successful financial wellness program. Retirement Plan Fees affect every retirement plan participant, and can damage an employer's bottom line if not consistently monitored. During the second half of this session, we will discuss the importance of benchmarking your plan's fees and explore the evolution of retirement plan fees, pricing models, and fiduciary best practices.

**Michael Amberger**, Senior Consultant, and **Attila Toth**, Partner and Co-Founder, Portfolio Evaluations, Inc., Warren, New Jersey



## The American Public Power Association Security Journey

ROOM: CALIFORNIA B

*CPE Field of Study: Information Technology*

In 2017, the American Public Power Association thoroughly reviewed its cybersecurity maturity. Learn how the new policies, techniques and tools implemented since then have moved the organization up the road to a stronger security culture and discuss how these are relevant to your utility.

**Matt Mitchell**, Vice President, Cyber Resilience, Stroz Friedberg, an Aon Company, Washington D.C.; and **Alan Thompson**, Director, Information Technology, American Public Power Association, Arlington, Virginia



## Charging Ahead: Special Rates for Electric Vehicles

ROOM: AVILA

*CPE Field of Study: Specialized Knowledge*

Electric vehicles are becoming more affordable. While EVs increase the demand for electricity, they also pose challenges to utilities for cost recovery and peak load management. Hear from utilities that have implemented special EV rates, usually based on time of day pricing. Gauge the pros and cons of adopting such rates. Plan for a future where vehicle-grid integration technologies will enable public power utilities to manage anticipated load growth, while providing net benefits to customers.

**George Chen**, Rates Manager, Los Angeles Department of Water and Power, California; **Gail Cohen**, Support Services Manager, Braintree Electric Light Department, Massachusetts; and **Shannon Laney**, Managing Consultant, Red Clay Consulting, Atlanta, Georgia



## Managing Your Broker Relationship

ROOM: CARMEL

*CPE Field of Study: Management Services*

*Limited to employees of public power utilities, state and regional associations, and joint action agencies*

Learn from experienced risk managers how to find an insurance broker that is right for your utility. Discuss what to expect in a successful relationship with a broker. Review selection criteria and fee arrangements. Leave with a template for your RFP and fresh perspectives on how to find the right partner. Bring your questions for answers from the experts.

**Kelley McCall**, Director of Finance & Administration, Columbia Power & Water Systems, Tennessee; **Anthony J. Werland**, Sr. Manager, Risk Management Services, Enterprise Risk Management & Solutions, CPS Energy, San Antonio, Texas; and **Bryan Willnerd**, Manager, Treasury & Risk Management, Lincoln Electric System, Nebraska

10 – 10:15 A.M.

## Break with Sponsors

ROOM: CALIFORNIA A

10:15 – 11:45 A.M.

## BREAKOUT SESSIONS

Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8



### Customer Self-Service 2.0: How Far Do You Go?

ROOM: SAN SIMEON

CPE Field of Study: *Specialized Knowledge*

Customer expectations today are driven by the Alexa and Amazon culture. They want instant responses and solutions to problems — and 40 percent prefer self-service to human contact. In this roundtable discussion, learn what other utilities are doing to provide web, IVR, text and live chat options. Come to this session prepared to share your challenges in self-service for bill payment, account setup, prepay, and connect/disconnect. Discuss how to minimize calls and service center traffic while enhancing the customer experience.



### Blockchain 101: Threats and Opportunities

ROOM: HUNTINGTON

CPE Field of Study: *Specialized Knowledge*

Blockchain is defining the future in every industry and electric utilities are no exception. Tomorrow, customers could use blockchain to sell power to one another without the utility even knowing about it. On the flip side, some public power utilities are using blockchain to get generation assets working together across the grid and to manage supply and demand in real-time. How will this impact your services and business model? Come and explore your future.

**Robert Trinnear**, Managing Director, The Energy Authority, Jacksonville, Florida



### Expanding Your Talent Pool: Troops to Energy Jobs

ROOM: PALOS VERDES

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

From the front lines to power lines, the Center for Energy Workforce Development's Troops to Energy Jobs program opens a natural employment pipeline between the military and the energy sector. You need a skilled workforce and trained and qualified veterans are looking for jobs — so connecting creates a "win-win" for all. Learn from other public power utilities how you can expand your talent pool with a strategy to recruit veterans.

**Gary King**, Chief Workforce Officer, Sacramento Municipal Utility District, California; and **Rosa Schmidt**, Consultant, Center for Energy Workforce Development, Washington, D.C.



### Don't Just Give It Away: Charge Something

ROOM: AVILA

CPE Field of Study: *Specialized Knowledge*

With more EVs on the road, charging stations are in demand. What role should your utility play? What's your strategy for developing charging station infrastructure to meet the needs of your community? Should you invest directly in the charging station, or contract out to a third party? Should you have demand charges for charging stations? Should you develop incentive rates to influence commercial customer behavior? Discuss options with the experts and examine other utility case studies.

**Bryan Cope**, Director of Program Development, Southern California Public Power Authority, Glendora, California; **Jason McBride**, Strategic Planning Manager, Anaheim Public Utilities, California; and **Ted Siler**, Business Services Director, Holland Board of Public Works, Michigan





## Risk Assessments and Loss Control Activities

ROOM: CARMEL

*CPE Field of Study: Management Services*

Get help in understanding and managing your risk. Start with an independent evaluation to identify risks and get suggestions for improvements. Find out about services offered by insurers to help you assess and reduce loss exposures for savings and better operations. Learn how you can control your liability with baseline programs for safety, loss prevention, and public safety awareness.

**Scot Macomber**, CGE, Vice President Loss Control Utility Operations, AEGIS Insurance Services, Inc., East Rutherford, New Jersey; **Jennifer K. Housel**, Sr. Account Manager, FM Global, St. Louis, Missouri; and **Sandy Meyers**, CPA, CPCU, ARM-E, AINS, Director-Risk Management, City Utilities of Springfield, Missouri

11:45 A.M. – 1:30 P.M.

### Lunch on your own

1:30 – 3 P.M.

## BREAKOUT SESSIONS

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



## Pay as You Please: More Options for Customers

ROOM: SAN SIMEON

*CPE Field of Study: Specialized Knowledge*

Today, customers place a premium on convenience and one-stop digital shopping. They're looking for new ways to pay their electricity bills. Find out what options other public power utilities are offering. Learn how you can institute multiple pay channels with proper physical and financial controls. See how to provide the best customer service while ensuring security. Review how to select vendors, process electronic files, and manage options efficiently on the back end.

**Jolisa Bagley**, Customer Account Manager, Credit & Collections and Remittance Processing, Austin Energy, Texas



## Internal Audit: Can Your Organization Afford to be Without It?

ROOM: HUNTINGTON

*CPE Field of Study: Auditing*

Do you need an internal audit team? This presentation will discuss analyzing the need for an internal audit team and how to develop a team that will add value to the organization by improving operations. Properly directed internal audit program resources can help an organization uncover new improvement opportunities.

**Scott McKay**, CPA, CFE, CIA, Partner, Advisory Services, Cherry Bekaert, LLP, Raleigh, North Carolina; **Claire Rogers**, Director, Audit Services, Sacramento Municipal Utility District, California; and **Ofelia Tamayo**, Vice President, Internal Audit, Bandai Manco Holdings USA Inc., Mission Viejo, California



## Moving on Up: Investment Planning Tips

ROOM: LAGUNA

*CPE Field of Study: Specialized Knowledge*

CLOSED TO THE PRESS

What does the market look like for investments? What is the short and long-term forecast? How do you maintain accountability while leveraging the market to your benefit? Come and get insights on investments that will add value to your utility. Get strategies to develop an effective investment policy. Understand what goes into decision making. Consult with the experts and put your investment ideas and plans to the test.

**Stephen Faber**, Managing Director, PFM Asset Management LLC, Princeton, New Jersey; and **Gray Lepley**, Senior Analyst, PFM Asset Management LLC, Harrisburg, Pennsylvania



## Understanding Diversity and Inclusion with Emotional Intelligence

ROOM: PALOS VERDES

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

Do your utility's mission, strategies, and practices support and value differences between your employees? Do you have a collaborative, respectful environment that increases the participation and contribution of all employees? Discover how diversity and inclusion can make your organization a high-performing one that excels in customer service, innovation, and employee retention. Learn how you can help your staff become culturally attuned to diversity by applying emotional intelligence and intentional self-reflection techniques.

**Dr. Helen Abdali Soosan Fagan**, Ph.D., Principal, Founder, Global Leadership Group, Lincoln, Nebraska; and **S. Yvette Carter**, Community and Government Relations Officer, Gainesville Regional Utilities, Florida



## Mobilize to Optimize: Gathering the Forces

ROOM: CALIFORNIA B

*CPE Field of Study: Specialized Knowledge*

How can you leverage technology and mobile platforms to dispatch your utility crews every day as well as in outage situations? Find out how other utilities like yours are mobilizing field crews in a vendor neutral manner to implement service orders and other day-to-day tasks. Discover how to mobilize so you can increase worker productivity and safety, improve operational efficiency, and respond to emergency situations with the ability to transfer information in real-time.

**Kelly Laurie**, Director, IT Applications, City Utilities of Springfield, Missouri



## Flex Your Rate Muscles, Shape Your Load

ROOM: AVILA

*CPE Field of Study: Specialized Knowledge*

Thoughtfully designed rate structures can send price signals to change customer behaviors in consuming electricity or adopting distributed energy resources. Join us to review various rate design options and how they could impact load patterns. Explore what type of rate designs — such as time of use rates combined with other varying rate elements — encourage energy efficiency and reduce peak demand. Understand how you can shape load to help customers save while ensuring your utility's financial health.

**Scott Burnham**, Executive Consultant, NewGen Strategies & Solutions, LLC, Lakewood, Colorado; **Mariko Geronimo**, Senior Associate, The Brattle Group, San Francisco, California; **Andrew Reger**, Senior Consultant, Energy Practice, NewGen Strategies & Solutions, LLC, Denver, Colorado; and **Tracy Sato**, Utility Integrations Manager, Riverside Public Utilities, California



## Anatomy of a Claim

ROOM: CARMEL

*CPE Field of Study: Management Services*

When you are hit by a loss, claiming on your insurance is never easy. From the initial notification until the final payment is disbursed, learn how best to gather evidence, document costs, and communicate with claims representatives and insurers to speed the recovery process along. Find out how to negotiate a preliminary distribution of funds as soon as possible. Get tips on how to work with operations personnel and engineering experts. Take home a claims checklist.

**Josh Collier**, CPCU, AIC, Senior Consultant, Aon Risk Solutions, Global Risk Consulting, Property Risk Consulting, Boston, Massachusetts; **Isaac "Ike" Copeland** MS, ARM-P, Director of Legal, Risk and Procurement Services, Fayetteville Public Works Commission, North Carolina; and **Heath Silvey**, Manager, Risk/Damage Prevention, City Utilities of Springfield, Missouri

3 – 3:15 P.M.

## Break with Sponsors

ROOM: CALIFORNIA A

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

3:15 – 4:30 P.M.

## BREAKOUT SESSIONS

Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5



### Improve Collections with AMI & System Integration

ROOM: SAN SIMEON

CPE Field of Study: *Specialized Knowledge*

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

**Corey Brown**, Manager, Meter Services, **Mark Brown**, Senior Customer Programs Officer, **Mike Molina**, MDM/RNI Operations Supervisor, and **Lucille Phillips**, Manager Service Delivery, Fayetteville Public Works Commission, North Carolina



### ROI: Recruit, Onboard, Inspire your Accounting Team

ROOM: HUNTINGTON

CPE Field of Study: *Personnel/Human Resources*

The skills required to be an accountant today have changed significantly—and they're continuing to evolve. Recruiting qualified and experienced accounting staff is getting more difficult, especially as employment rates rise. Join your peers to discuss recruiting ideas, how to successfully onboard your new accounting staff and develop a succession plan that inspires each individual to be an accounting superstar.

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



### #What's Up DC

ROOM: LAGUNA

CPE Field of Study: *Specialized Knowledge*

The new administration is continually evolving, and each development could potentially change how we do business. Come learn about potential changes in legislation that may impact your utility, your state and the economy.

**John Godfrey**, Senior Government Relations Director, American Public Power Association, Arlington, Virginia



### Ask the HR Attorney

ROOM: PALOS VERDES

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

Legal advice without a fee? It may sound too good to be true! Bring your most pressing HR legal questions to this session and receive input from two employment attorneys. Hear challenges and questions from other utility HR colleagues at this tried and true session led by the experts.

**Emily J. Fox**, Esq., Attorney at Law, and **Michael S. Kalt**, Partner, Wilson Turner Kosmo LLP, San Diego, California



### Shared Technologies, Multiplied Benefits

ROOM: CALIFORNIA B

CPE Field of Study: *Information Technology*

Public power utilities are coming together to share software to manage operations and business functions. They are taking advantage of hosted solutions to save costs while keeping up with new technologies and stepping up customer service. Learn how the collaboration works and what you can learn from other utilities that have walked down this road. Dive into a case study of one utility that pursued a hosted solution for meter data management.

**Steve Dalon**, Director, Sales and Marketing, ElectSolve Technology Solutions, Shreveport, Louisiana; and **Branndon Kelley**, Chief Information Officer at American Municipal Power, Inc., Columbus, Ohio



### Pricing & Market Analysis Roundtable

ROOM: AVILA

*CPE Field of Study: Specialized Knowledge*

Meet with peers from utilities like yours to discuss current issues in pricing and market analysis. Bring your issues to the table on electrification, mitigating sales loss, demand charges, standby rates, economic development rates, and net metering 2.0.



### The Damage is Done (Third Party Recovery)

ROOM: CARMEL

*CPE Field of Study: Management Services*

If utility equipment or facilities have been damaged by a third party, what material and labor expenses can you recover? What are some Best Practices for investigating, documenting, and collecting? Get tips from experts with their boots on the ground who work through these issues every day. Learn to work with insurers and internal and external customers to minimize financial impact to the utility ratepayers.

**Nichole Magnifico**, CPCU, Assistant Vice President, Assistant Claims Manager, Claim Strategies, East Providence, Rhode Island; and **Heath Silvey**, MBA, CPCU, ARM, Manager-Risk/Damage Prevention, City Utilities of Springfield, Missouri



6 - 7:30 P.M.

## RECEPTION

ROOM: SUNSET DECK

(In Case of Rain reception will be held in: California A)

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

# WEDNESDAY

## September 19

7:45 – 8:30 A.M.

### Networking Continental Breakfast

ROOM: CALIFORNIA FOYER

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

8:30 – 10 A.M.

### BREAKOUT SESSIONS

Recommended CEUs .2 / PDHs 1.5 / CPEs 1.8



#### Customer Accounting & Services Roundtable

ROOM: SAN SIMEON

CPE Field of Study: Specialized Knowledge

Meet with peers from utilities like yours to discuss current issues in customer accounting and services. Bring your issues to the table.



#### Building a Culture of Credibility

ROOM: HUNTINGTON

CPE Field of Study: Personnel/Human Resources (HRCI credits not available)

Credibility positions leaders as a highly dependable source of expertise, information, and decision making. Credible leaders create win-win situations for all and help to build workplace cultures that foster excellence, productivity, and profits. Credibility = (Curiosity + Initiative + Excellence) \* Relationships. See how this simple equation can change your mindset on what it takes to be a leader and contribute to a culture in which everyone all team members can trust one another and thrive.

*Jeff Shannon, Partner, Bravium Human Development, Omaha, Nebraska*



#### Becoming a Mindful Leader

ROOM: PALOS VERDES

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

In a world of distractions and information overload, mindfulness can reduce stress and burnout, preventing turnover. Being a mindful leader makes you a deeper listener, more values-focused, less reactive, and more empathetic. You'll have greater access to the parts of your brain that are responsible for creativity, productivity, problem solving, and effective leadership. Don't miss this interactive session where you can learn transformational mindfulness practices to incorporate into your everyday life.

*Stacy Kesten, Transformational Leadership Consultant, Integrated Leader, Los Angeles, California*



#### #CyberReady: Utilizing the Public Power Cybersecurity Scorecard

ROOM: CALIFORNIA B

CPE Field of study: Information Technology

Due to the recent surge of cyber threats in the energy sector, understanding and improving your utility's cybersecurity posture is increasingly important. This session will guide attendees through the first phase of a new Public Power Cybersecurity Scorecard which enables utilities to complete cybersecurity assessments and receive targeted feedback about their cybersecurity readiness. Attendees will have an opportunity sign up for the online platform free of charge after the session.

*Dan Phillips, Director, Cyber Risk Engineering, Axio, New York, New York*



### Change and Challenge: Keeping the Lights On at Your Utility

ROOM: AVILA

CPE Field of Study: *Specialized Knowledge*

Just because you've been around for decades does not mean your utility business model is secure. Technology and lifestyles are changing the way electricity is produced, delivered, and used. The growth of distributed energy resources is making it harder to maintain revenue and forecast load. Find out how you can effectively recover costs and develop strategies to manage a range of growing risks — loss of load, privatization or sale of your utility, infrastructure obsolescence, third party competition, etc.

**Glen Justis**, Partner, Experience on Demand, Chesterfield, Missouri; and **Paul Zummo**, Director, Policy Research & Analysis, American Public Power Association, Arlington, Virginia



### Contractual Risk Considerations (Fortifying Your Contractual Risk Transfer Program)

ROOM: CARMEL

CPE Field of Study: *Management Services*

Effective risk transfer allocates risk equitably to parties that can control the risk. Learn how you can plan and manage risk transfer to protect against losses caused by third parties you work with. Understand how to review contracts for potential risks, determine the insurance and indemnification requirements of vendors, and track certificates of insurance. Establish minimum insurance requirements that all onsite vendors should be required to carry and see where extra coverage should be added.

**Lisa Hough** JD, MBA, Manager, Risk Management, Business Strategy Deployment, Omaha Public Power District, Nebraska; and **Dan McGarvey**, Managing Director, U.S. Power & Utilities Practice, Greenville, South Carolina

10 – 10:15 A.M.

### Break

10:15 – 11:30 A.M.

### CLOSING GENERAL SESSION

### Failure is Not an Option: Leadership Lessons from Space

ROOM: CALIFORNIA A

CPE Field of Study: *Specialized Knowledge, Personal Development; Recommended CEUs .1 / PDHs 1.25 / CPEs 1.5*

Fred Haise served as the lunar module pilot during the ill-fated 1970 Apollo 13 space mission, for which he was honored with the Presidential Medal of Freedom. Soon after, he survived another harrowing ordeal — in 1973, he was burned over 65 percent of his body following an aircraft crash during filming of the Pearl Harbor epic, *Tora! Tora! Tora!* But Haise went on to become one of the first astronauts to pilot the space shuttle in test missions. He was inducted into the U.S. Astronaut Hall of Fame on October 4, 1997. Come and be inspired by Haise's courage and belief that there is no achievement without risk. See why teamwork is a critical component of success in any undertaking, great or small. Discover the value of good communication, individual responsibility, and trust for strong leadership.

**Fred Haise**, Apollo 13 Astronaut and Recipient of the Presidential Medal of Freedom



Fred Haise

11:30 A.M.

### Adjourn



# 2017 – 2018 OFFICERS APPA BUSINESS & FINANCIAL SECTION

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# KEY FACTS

**Conference Sessions:** All conference sessions will be located in the Hilton Anaheim (777 Convention Way, Anaheim, California 92802).

**Badges:** Please wear your badge to all conference and social events.

**Cell Phone Request:** Please silence all mobile devices when in sessions so they do not interrupt speakers and distract the audience.

**Conference Evaluation:** A link to an online survey about the conference will be emailed to attendees after the conference. We appreciate your valuable feedback.

**Conference Presentations:** Copies of the speakers' presentations are available on the American Public Power Association's website here: <https://www.publicpower.org/business-financial-conference-past-presentations>.

**Dress:** The attire for the conference is business casual. Since meeting room temperatures vary, please prepare to dress for cool conditions.

**Guest Activities:** Conference registrants may bring a guest to the Sunday and the Tuesday evening receptions.

**Restricted Sessions:** APPA reserves the right to designate any APPA meeting or session open only to APPA regular members (public power utilities, rural electric cooperatives, joint action agencies and state/regional associations). Please inquire at the registration desk if you have any questions.

**APPA Antitrust Statement:** APPA reminds all those attending the Business & Financial Conference that various state and federal laws prohibit the exchange of information among competitors regarding matters pertaining to price, refusals to deal, market division, tying relationships and other topics that might infringe upon antitrust laws and regulations. No such exchange or discussion will be tolerated during the meeting. A copy of APPA's Statement of Compliance with the Antitrust Laws is available upon request.

# MARK YOUR CALENDAR

## Accounting & Finance Spring Meeting

April 25-26, 2019

Office of the American Public Power Association  
Arlington, Virginia

## Business & Financial Conference

September 15-18, 2019

Hyatt Regency  
Minneapolis, Minnesota

## Business & Financial Conference

September 13-16, 2020

Hyatt Regency Savannah  
Savannah, Georgia



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



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



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