

Strategic Rate Design: Trends and Distributed Generation Impacts

Recommended CEUs .6/PDHs 6/CPEs 7.2

Field of Study: Specialized Knowledge

Tuesday, May 6

- | | |
|-------------------|---|
| 8:30 a.m. | Introduction <ul style="list-style-type: none">• Course Overview and Expectations |
| 8:45 a.m. | Section One <ul style="list-style-type: none">• Industry Rate Design Challenges• Developing Rate Design Objectives |
| 9 a.m. | Section Two <ul style="list-style-type: none">• Understanding Residential Rate Structures• Pros and Cons of Inclining, Declining, and Inverted Block Rate Structures• Pros and Cons of Increasing Customer Charges |
| 10 a.m. | Break |
| 10:15 a.m. | Section Three <ul style="list-style-type: none">• Small, Medium, and Large General Service Rate Design Strategies• Economic Development Rates• Commercial EV Charging Station Rates |
| Noon | Lunch |
| 1:30 p.m. | Section Four <ul style="list-style-type: none">• Modernizing Utility Rates• Types of Dynamic Rate Structures |
| 2 p.m. | Section Five <ul style="list-style-type: none">• Residential Demand Charges• Developing Marginal Cost Based Rates |
| 3 p.m. | Break |
| 3:15 p.m. | Section Six, Seven, Eight <ul style="list-style-type: none">• Private Charging Stations• Solar and Avoided Costs• Power Cost Adjustment• Line Extension Costs |
| 4:15 p.m. | Recap/Q&A/Evaluation |
| 4:30 p.m. | Course Adjourns |

Strategic Rate Design: Trends and Distributed Generation Impacts

Recommended CEUs .6/PDHs 6/CPEs 7.2

Field of Study: Specialized Knowledge

Upon completion of this course, participants will be able to successfully:

1. Learn industry factors affecting our industry and rate design trends
2. Understand pros and cons of different structures
3. Implementation of the three rate structures for preparation of EV rates
4. Define what costs a customer charge is designed to recover
5. Explain the types of rates used for general service customers
6. Discuss how to establish economic development rates
7. Understand the development of time-based rate structures
8. Learn how to modernize rate structures and prepare for the future



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

Mark is president of Utility Financial Solutions. He has more than 40 years of experience in electric utility consulting and management. In his previous positions, Mark has assisted with improvements to accounting and operation practices, risk assessments, cost of service, and competitive rate designs. He is a frequent speaker at national and regional conferences and has taught a variety of courses for the Association. He holds degrees in water purification technology and accounting, as well as a master's degree in business.

About Utility Financial Solutions LLC

Utility Financial Solutions specializes in electric, water, wastewater, telecommunications and gas cost of service studies, unbundling studies, competitive rate designs, financial projections and special financial analysis. They are one of the largest providers of financial services to utilities across the United States. Their team of professionals includes engineers, accountants and economists that have completed hundreds of cost of service studies, rate studies, and financial projections for utilities in 39 states, Canada, Guam, and the British Grand Cayman Island. They also teach a variety of in-depth financial planning courses and speak at events across the country, providing expert insights on key industry topics and trends.