



2017

All Programs  
Brochure

WesternEnergy  
INSTITUTE



# WE ARE COMMITTED TO HELPING OUR MEMBERS THRIVE IN INCREASINGLY COMPETITIVE ENERGY MARKETS.

Western Energy Institute (WEI) facilitates meaningful, long-term relationships by directly connecting utility professionals with their exact counterparts in the electric and natural gas industry. Members are freed from their utility silos and given the chance to build an invaluable support network of like-minded counterparts capable of troubleshooting, collaborating and discussing issues central to their specific position.



## ANNUAL MEETING

This three-day event brings together the West's natural gas and electric utility executive community to encourage discussion and foster new opportunities. Learn from subject matter experts regarding imminent opportunities and the challenges pressing utilities to adapt and flex in uncharted territories for best-in-class utility management. Topics covered in recent years include customer relations, global economic insights, new business models for utilities in a carbon constrained world, opportunities and challenges of big data, energy supply and demand forecasting, and visions for the utility of the future. This meeting coincides with the semi-annual WEI Board Meeting and the Business Acumen for Emerging Leaders team presentations.

## BOARD OF DIRECTORS

The Board of Directors convene twice a year to evaluate WEI's accomplishments and determine the direction of the association. The first meeting is held in January/February, where the Board Chair announces the yearly theme, and the second meeting coincides with the WEI Annual Meeting to evaluate the organization as a whole. Both agendas are developed by the WEI President and the Board Chair to deliver proactive discussions and identify strategic drivers that influence energy utilities in Western North America. These meetings serve as educational sessions, business meetings and opportunities to network with the West's natural gas and electric utility executive community.

## BUSINESS ACUMEN FOR EMERGING LEADERS

An intensive training program for high potential managers and supervisors through exposure to broad perspectives of the utility business, its interrelationships and successful leadership strategies. This program is designed by a utility-driven Curriculum Development Team, and directed by facilitators and executive and alumni mentors. Program sessions are hosted by member utilities and topics are presented by executives, subject matter experts and formal instructors. The first four sessions focus on leadership development, industry perspectives, customer connections and communications, and strategic planning. The program includes a capstone project which is delivered to industry leaders at the WEI Annual Meeting. Participants build a broad peer network that continues well into their future careers.

## EXECUTIVE PLANNING COMMITTEE

The Executive Planning Committee (EPC) is a distinctive group of senior energy leaders who meet annually to bridge the strategic vision of the WEI Board of Directors and Board Committees, with content and planning for individual programs. Attendees work together on how to best combine efforts and leverage resources into creating educational track content at both the Customer + Corporate Symposium and the Operations Conference. EPC Members are a critical link between WEI and their own organizations, helping match the right people with existing WEI programs and recommending new programs to help meet their organizations' needs.

**BUSINESS ANALYTICS**

Utilities find themselves inundated with a huge diversity of data across all lines of their business. Business analytics professionals are a critical link to analyzing and interpreting information in order to improve systems and operations, maintain organizational health and ultimately improve the bottom line. These professionals gather semi-annually to discuss asset management, business intelligence, call center metrics and dashboard insights, enterprise risk management, key metrics, pricing and rate strategies for leveraging smart grid investments, and project management best practices.

**CHIEF INFORMATION OFFICER**

CIOs navigate everyday challenges related to grid implementation, cybersecurity and data integrity. In addition to the natural leadership pressures of any executive position, CIOs lead the charge for building visionary plans to embrace emerging technology, oversee policy development, and direct the implementation of systems and processes for the control and exchange of information. As such, CIOs increasingly seek novel approaches to enhance efficiency, responsiveness, innovation and adaptability. This forum provides a unique opportunity for utility CIOs to come together in an exclusive peer environment to address these challenges.

**CORPORATE COMMUNICATIONS**

As the industry transforms, the ability to effectively communicate business needs to all stakeholders – customers, regulators, owners, employees and the media – has become increasingly important. This program provides senior leaders in communications with an exceptional opportunity to meet their energy company peers and discuss the most effective communication methods needed to support their organizations’ strategic plans.

**CORPORATE PERFORMANCE MANAGEMENT**

Today’s energy businesses face increasing competition and must constantly improve operational excellence and efficiency. Corporate Performance Management participants represent leaders in the strategic planning of performance metrics and long-term performance improvement. Discussions occur at the strategic-level and focus on developing benchmarking and key performance indicators, as well as managing cross-functional corporate initiatives and promoting performance culture.

**CUSTOMER CONNECTIONS**

Customer-focused utility executives gather annually to discuss current topics and best practices surrounding pressing issues in their departments. Roundtable topics from recent offerings include CIS implementations, satisfaction surveys, customer experience, multi-generational workforce, migration to online self-serve options, outage restoration communications, outsourcing call center care, social media strategies, and employee safety and comfort.

**ENERGY MANAGEMENT**

Professionals in natural gas energy supply, transportation and storage gather for presentations and roundtable discussions focused on Western North America’s demand outlook and factors expected to influence the cost of delivering natural gas. This collaborative atmosphere, combined with attendees’ high levels of expertise, leads to complex and analytical discussions regarding long-term forecasts, international energy demand, LNG updates, the price of carbon, renewable developments, electric/gas convergence issues, and the influence of storage and infrastructure projects.



**GENERAL COUNSEL**

This forum provides a unique, collaborative space for engaged dialogue between energy company general counsels. Content includes traditional challenges common to all executives including managing legal teams, budget pressures, succession planning and risk management. In addition to sharing best practices for the traditional executive role, the program regularly invites guest speakers to discuss specific contemporary legal issues relevant to the energy industry and the effective use of outside counsel. Specific topics are chosen directly by program participants in advance of each meeting.

**INTEGRATED RESOURCE PLANNING**

An integrated resource plan (IRP) isn't just a plan: it's an involved process with multiple evaluation criteria that helps to determine both short and long term load growth. Through a broad analysis of supply-side and customer service options, an integrated resource plan comes into fruition. IRP professionals gather for peer support of this process and to better understand the challenges facing electric and natural gas providers in Western North America. Designed as a mix of interactive roundtable discussions and information-rich presentations, forum participants address topics such as resource management, data analysis and modeling, and stakeholder engagement.

**HUMAN RESOURCES**

This semi-annual program provides a roundtable opportunity for human resource leadership to address contemporary, strategic issues for human resource management. Regardless of company size or structure, energy industry human resource professionals face complex challenges related to recruitment and retention, employee assessment and training, succession planning, and maintaining safe and compliant business practices. This program considers strategic inclusions such as collective bargaining agreements, benefits, employee diversity, performance management, compensation policies and change management.

**KEY ACCOUNTS**

Utilities proactively partner with key accounts in their service territories to better understand customer needs, improve services and maintain a competitive edge. Join key accounts directors and managers to share best practices and develop creative solutions to current challenges. General session presentations from industry leaders include ample Q&A time to offer insightful and relevant conversation, and concurrent breakout sessions for Key Account Team Directors/Managers and for Account Managers/Reps provide for a more intimate and focused conversation with peers. Overall program content covers a wide range of topics, including: alternative energy; customer appreciation and education; organizational approaches and metrics for managing KA departments; setting goals; business and economic development; and succession planning.



**OPERATIONS BUSINESS STRATEGIES - ELECTRIC**

Designed for electric utility executives, participants engage in best practice roundtables to address electric distribution system and substation reliability and safety. Members share benchmarking and performance study results spanning safety, workforce management, infrastructure improvements and overall performance excellence. The small size of this program provides a unique environment for collaborative thinking, open discourse and building long-term relationships.

**SUPPLY CHAIN STRATEGIES**

Focusing on the role of utility supply chain leadership, this forum provides an exclusive environment for strategic thinkers and policy-makers to discuss comprehensive supply chain management responsibilities. Topics include category management, vendor and contract management, use of technology, and organizational structures and workforce management. Supply chains are increasingly complex and challenging to manage, yet are essential for maintaining compliance, incident preparedness and major project timelines.

**TALENT MANAGEMENT**

Energy companies face core challenges to recruit, retain, develop and train their workforce. With changing demographics and a need to identify and develop talent from within, successful organizations are careful to invest in proven development programs for individual contributors and managers. This forum brings together employee development and training experts to share case studies and proven best practices.

**CLAIMS + DAMAGE RECOVERY**

This program focuses on sharing best practices and building relationships with other leaders in claims and collection management, and offers insights from guest speakers who have been expert witnesses in claims investigations. Discussions address a wide variety of issues around balancing the need to protect utility assets with the ever-increasing priorities of providing an excellent customer experience. Participants learn from industry professionals who provide services to our members, and discuss issues common to Western utilities, such as fire and storm recoveries, inverse condemnation, settlement and negotiations, and proper record keeping.

**CUSTOMER + CORPORATE SYMPOSIUM**

Join over 250 energy professionals to discuss the latest industry trends and best practices in corporate and customer services. The diverse mix of presentations, Q&A panels, roundtable discussions, and networking allow attendees to share their experiences and develop contacts throughout the industry. Expect to gain applicable insights on a variety of topics including: customer experience; human resources; business intelligence; emerging technology; products and services; communications; and community relations. This program is an excellent professional development and organizational team-building opportunity. Vendors are encouraged to display.

**EMERGENCY RESPONSE + ASSISTANCE PRACTICES**

Emergency preparedness and business continuity planning is crucial to a timely response in the event of a disaster. This forum allows for open discussion on pressing topics surrounding utility emergency planning and operations. There is also ample time for networking to develop relationships that will prove beneficial to members in an emergency. Many participants of this meeting also attend the Western Region Mutual Assistance Agreement (WRMAA) each fall.

**FLEET MANAGEMENT**

This program provides fleet leadership professionals with an opportunity to discuss best practices, and share new processes and technologies. Participants work collaboratively to select topics that are relevant to all organizations with vehicle and equipment fleets. Strategic questions are addressed surrounding staff management, alternative fuel technology, vehicle replacement policy, the role of fleet within an organization, and tactical solutions for managing ever-changing fleet operations and administrative functions.



**JOINT USE**

As new technology, new regulations and aging infrastructure continue to change the landscape of joint use, it becomes increasingly important for key stakeholders to foster open dialogue and collaborate to solve shared problems, focus on safety goals, and ensure the equitability of poles and other utility assets. Considered the premier joint use conference, content is designed for representatives from utility, telecom, wireless and broadband companies, as well as consultants and service companies who deal with joint use, pole ownership and attachments. The conference format provides a unique mix of presentations, dynamic power table topics, vendor displays and networking opportunities to exchange information and best practices.

**OPERATIONS CONFERENCE**

This program unites over 500 electric and natural gas energy operations managers, supervisors and front line employees for four days of education and networking across 15 different tracks: Customer-Focused Opportunities; Operational Leadership; Environmental; Safety; Natural Gas Pipeline Safety Management Systems; Natural Gas Distribution + Transmission Integrity Management; Natural Gas Operational Excellence; Natural Gas Distribution + Transmission Emergency Response; Natural Gas Customer Field Services; Electric Asset Management; Electric Grid Modernization; Electric Substation; Electric Transmission; Electric Distribution Operations; and Electric Distribution Planning Design + Construction. Engaging workshops and breakout sessions are complemented by thought-provoking general sessions. This conference is a must for any upper-level manager, and many choose to bring their direct reports. Vendors are encouraged to display.



**OVERHEAD/UNDERGROUND ELECTRIC DISTRIBUTION**

Electric utility professionals meet to discuss current standards, materials and maintenance for distribution operations. Agendas feature extensive roundtable discussion so that each delegate has an opportunity to submit questions and receive feedback from their peers. Presentations focus on new technologies, applications and specifications available for designing, building and maintaining overhead and underground lines. Case studies highlight best practices and lessons learned, and attendees leave with the practical knowledge to improve efficiency, safety and reduce costs. Participants also have the opportunity to preview vendor products and services. Vendors are encouraged to display.

**PROCUREMENT MANAGEMENT**

Successful supply chain management relies on a well-developed infrastructure, appropriate tactical resources and thorough analysis. This process is multi-faceted and involves solid relationships within the utility, as well as strategic relationships with vendors to mitigate risk to the overall supply chain. This forum offers an opportunity for supply chain procurement managers and specialists to come together with their industry partners and suppliers for roundtable discussions and expert presentations. Topics include KPIs, supplier relationship management, sustainability, and best practices in purchasing and contracting. CEHs are offered for CPSMs through the Institute for Supply Management.

**PROJECT MANAGEMENT**

This conference provides an opportunity for project management leaders to share trade techniques, tools, practices, and change management and risk management methodologies, as well as real examples of representative projects, including those that were successful and those that did not achieve set goals. The event is hosted annually and led by a planning team who meet periodically throughout the year for roundtable discussions on current issues.

**SAFETY SUMMIT**

Safety is a paramount issue within the utility industry. Safety professionals work tirelessly to manage risk, avoid incidents and ensure safety through a variety of programs and initiatives geared toward employees and consumers. This summit is designed for gas and electric utility safety professionals, and spans across three unique, topical tracks: Safety Strategy and Policy, Electric Safety Work Methods, and Gas Safety Work Methods. Content is designed to promote safety culture through discussions related to the education and training that can influence utility operations, as well as address some of the challenges and successes associated with developing strategies.

**SECONDARY NETWORK**

Secondary networks are vital to systems that support power needs in urban areas. These interconnected pathways improve reliability, but are also complex to inspect and maintain. This annual forum addresses the reliability, safety and protection challenges of spot networks and grid systems that comprise the secondary network. Designed as an open forum, attendees are encouraged to bring their challenges and opportunities for discussion and to share best practices. Attendees also get the chance to tour the local vaults of the host organization.

**ELECTRIC UTILITY FUNDAMENTALS + INSIGHTS**

This program provides utility and service company employees with a broad understanding of how the electric utility industry works, as well as with a better awareness of their own roles within their organizations. Designed for new, seasoned and emerging employees, participants will explore the critical issues affecting the electric industry and the interaction between utilities and their stakeholders. This program is offered as a general session for individual registrations and is held throughout the year as a one-day eight-hour class at the WEI office in Portland, Oregon. Additionally, it is offered with a customizable curriculum and hosted by WEI Member Companies in order to address their specific organizational needs and provide a unique, individualized training experience for their employees.

**UTILITY POLE + OVERHEAD SYSTEMS**

This biennial program pairs informative educational sessions presented by industry experts with a trade show. More than 14 sessions are offered over two days to highlight new technologies and best practices, and to address challenges found with utility pole structures and related overhead systems. Engineers, operations and purchasing personnel from utilities and service companies across Western North America have the opportunity to network at the interactive trade show open throughout the conference. The trade show features more than 40 vendors offering hands-on demonstrations of the latest pole products and innovations in the industry. Vendors encouraged to display.

**GAS UTILITY FUNDAMENTALS + INSIGHTS**

This program provides utility and service company employees with a broad understanding of how the gas utility industry works, as well as with a better awareness of their own roles within their organizations. Designed for new, seasoned and emerging employees, participants will explore the critical issues affecting the natural gas industry and the interaction between utilities and their stakeholders. This program is offered as a general session for individual registrations and is held throughout the year as a one-day eight-hour class at the WEI office in Portland, Oregon. Additionally, it is offered with a customizable curriculum and hosted by WEI Member Companies in order to address their specific organizational needs and provide a unique, individualized training experience for their employees.

**WESTERN REGION MUTUAL ASSISTANCE AGREEMENT (WRMAA)**

In 2003, the Western Region Mutual Assistance Agreement was signed as an effort for gas and electric utilities throughout Western North America to support one another in the event of an emergency affecting generation, transmission, distribution and/or services. Parties involved in the WRMAA convene every year to share best practices, discuss key emergency response issues, review the agreement itself, and name the annual custodian. If your employer is a party to the WRMAA, take advantage of this annual meeting to develop relationships and network with others involved in emergency response. Many participants also attend the Emergency Response + Assistance Practices program each spring.

**WOMEN IN ENERGY SYMPOSIUM**

Women are traditionally underrepresented in the energy industry, with an extreme disparity continuing into both leadership and trade positions. This program addresses some of the opportunities and challenges that women face working in the energy industry and advocates for workplace inclusion and teamwork. Open to both women and men, WEI members will join together for leadership training, education, networking and mentorship. Sessions include executive panels with both men and women, and roundtable discussions on internal support programs for diversity. With a growing emphasis on cross-functional teams and diverse skill sets, this program will support utility directives to build a cohesive workforce.



### HANDS-ON RELAY SCHOOL

This professional training course is designed for relay technicians, electrical/power plant technicians, engineers and protective relay test specialists and offers students the opportunity to exchange ideas, resolve problems in open forums, and learn preventative and corrective methods through hands-on labs. Seven tracks are available: Basic, Distribution, Transmission, Generation, Electromechanical, Automated Relay Testing and Theory. Students also attend six hours of open classroom lectures covering system protection topics, where they can select from 12 topic choices. The school is co-sponsored by Western Energy Institute and Washington State University. CEU credits are available.

### NORTHWEST ELECTRIC METER SCHOOL

Operating in its 63rd year, the school curriculum emphasizes the need for quality technical training as it relates to metering, while also integrating fresh technological trends and perspectives. This course is designed to serve metering apprentices and journeymen in the electric utility industry by developing skills through expert lectures and hands-on laboratory training spanning the basics of metering theory, AMI and high-end meter applications. Students should select their preferred track according to their level of experience: Single Phase Metering; Polyphase Metering; Solid State Metering; Advanced Metering and Communications; and Hot Topic Roundtable. The school accommodates 260 students and is co-sponsored by Western Energy Institute and North Seattle College. CEU credits available. Vendors encouraged to display.



### POWER QUALITY SCHOOL

The complexity of the system that moves electric energy from the point of production to the point of consumption — combined with variations in weather, generation, demand and changing customer loads — provide many opportunities for the quality of the power supply to be compromised. This course provides students with the fundamental skills needed to facilitate, quantify, investigate, monitor and solve electrical system problems. Content is taught through a combination of presentations, exercises and unique hands-on labs. Building these skills allow utilities and their customers to save money by avoiding equipment outages and damage, costly improper solutions, damage claims and lost production. CEU credits are available.

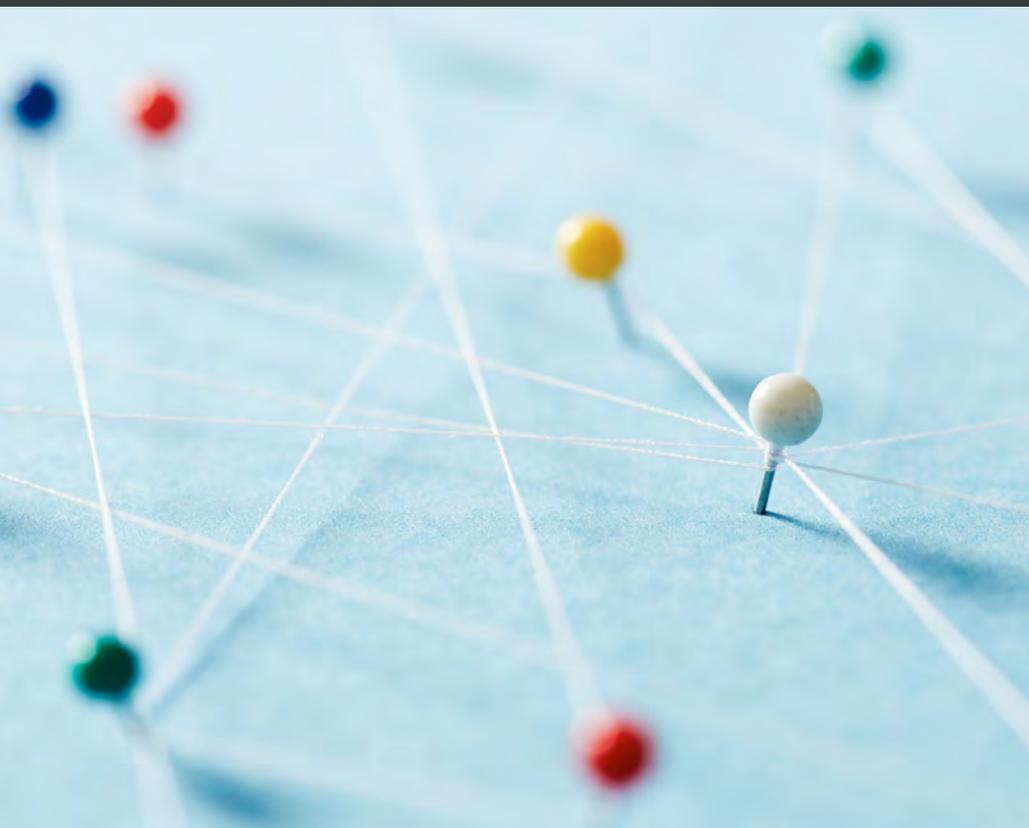
### UTILITY ICS TRAINING

This program is the first in the country to provide Incident Command System training and educational services designed specifically for utilities. The course offers utilities new training in incident management and emergency response practices, and helps strengthen the industry's sharing of instructional resources, best practices and mutual assistance. The course is offered on-site at host utilities, as well as annually in Portland, Oregon as an open event.

### WOMEN IN LEADERSHIP: MENTORING + DEVELOPMENT

The utility energy workforce is typically only about 25 percent women, as compared to the general population where women make up roughly half of the total workforce. Organizational efficiency is characterized by a balanced workforce in terms of both skill sets and perspectives. This mentorship program addresses some of the opportunities and challenges that women face working in the energy industry, advocates for workplace inclusion and teamwork, and discusses critical issues related to attracting and maintaining a diverse workforce. Formal opportunities for mentorship provide women in the industry with support for increased retention and satisfaction. Mentors and mentees are matched up across utilities and then connect over an eight-month period with two in-person meetings: once at an executive forum in May and once at the WEI Annual Meeting in September.

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