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.

EXECUTIVE LEADERSHIP SUMMITS

Strategic executive-level programs and development opportunities for WEI Members.

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 CERTIFIED LEADERS

Business Acumen for Certified Leaders is a continuing leadership program bringing together past alumni of the esteemed Business Acumen for Emerging Leaders program.

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.

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ACCOUNTING LEADERSHIP

Accounting leaders play a pivotal role in the strategic direction and growth of their utilities. This forum provides a unique opportunity for leaders to come together in an exclusive peer-to-peer environment to address challenges and explore best practices in all issues related to accounting management.

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

Internal and external communication professionals in the utility industry face a variety of challenges in supporting their organizations’ strategic plans, particularly as the utility workforce undergoes significant transformation, communication channels multiply, and utilities face increasing competition. This semiannual forum provides a unique, collaborative space for leaders in corporate communications to discuss these challenges and communications best practices. Recent topics of discussion include executive communications strategy, communicating with employees in the field, stakeholder engagement, crisis communication and communicating strategic plans.
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.

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.

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.

KEY ACCOUNTS

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.
### OPERATIONS BUSINESS STRATEGIES - NATURAL GAS

Designed for natural gas utility executives, participants engage in discussion addressing operational best practices and contemporary experiences surrounding changes in regulation and safety, with emphasis on challenges related to transmission and distribution pipeline integrity.

### RENEWABLE NATURAL GAS

Renewable Natural Gas (RNG) technologies present an opportunity for our Members to produce a renewable product from organic material to their end use customers. Join professionals responsible for RNG efforts at their company as we discuss a wide range of strategic topics from policies, regulatory framework, and economics to gas quality, and operational issues related to these efforts.

### STRATEGIC PLANNING

WEI’s Strategic Planning program provides a forum for members responsible for their companies strategic plan to come together to discuss opportunities and threats, alternate business models, and tools and techniques for getting leadership to engage in strategic issues. This semiannual forum provides a collaborative space for members to share best practices and current issues, and to gain an enhanced perspective of strategic issues around the region.

### 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.
## INDUSTRY FORUMS

**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 equitably 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 600 electric and natural gas energy operations managers, supervisors and front line employees for four days of education and networking across 14 different tracks: Operational Leadership; Environmental; Safety; NG Pipeline Safety Management Systems; NG Distribution + Transmission Integrity Management; NG Operational Excellence; NG Distribution + Transmission Emergency Response; NG 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. 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.

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.

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.
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.

ELECTRIC 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.

GAS UTILITY FUNDAMENTALS + INSIGHTS

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.

HANDS-ON RELAY SCHOOL

Operating in its 64th 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.

NORTHWEST ELECTRIC METER SCHOOL

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.
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. 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.

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.
ENERGY MEMBERS

The Pieces are in Place for Success.

Western Energy Institute (WEI) delivers an aggregation of talent across energy companies. We help energy professionals throughout the Western United States and Canada identify and connect with their counterparts — essentially pairing you and your employees with individuals handling the same problems, in the same job — at another company. WEI provides a relaxing environment to exchange wins and losses, discuss emerging issues and ultimately cultivate professional relationships that encourage problem solving and innovative ideas.

To view all WEI programs, visit: westernenergy.org/programs

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westernenergy.org/programs

UPCOMING PROGRAMS
March – September 2019

Mar 10-15 | Pullman, WA
Hands On Relay School
Contact: Diana Zoren
zoren@westernenergy.org

Mar 12-13 | Hollywood, CA
Customer Connections
Contact: Joshua Baker
baker@westernenergy.org

Mar 13-15 | Hollywood, CA
Customer + Corporate Symposium
Contact: Joshua Baker
baker@westernenergy.org

Mar 25-26 | Tucson, AZ
Business Analytics
Contact: Amy Nye
nye@westernenergy.org

Mar 25-26 | Rosemead, CA
Corporate Performance Management
Contact: Christopher Lee
lee@westernenergy.org

Apr 1-3 | Boise, ID
Overhead Underground Electric Distribution
Contact: Kris Taylor
taylor@westernenergy.org

Apr 3-4 | Santa Ana Pueblo, NM
Operations Business Strategies – Electric
Contact: Beverly Jones Woolf
joneswoolf@westernenergy.org

Apr 10-12 | San Diego, CA
Claims + Damage Recovery
Contact: Amy Nye
nye@westernenergy.org

Apr 15-16 | Las Vegas, NV
Renewable Natural Gas
Contact: Kris Taylor
taylor@westernenergy.org

Apr 22-23 | Vancouver, BC
Chief Information Officer
Contact: Amy Nye
nye@westernenergy.org

Apr 23-26 | Vancouver, BC
Operations Conference
Contact: Eric Christenson
christenson@westernenergy.org

Apr 29-30 | Tucson, AZ
Integrated Resource Planning
Contact: Joshua Baker
baker@westernenergy.org

May 7-8 | Portland, OR
Supply Chain Strategies
Contact: Christopher Lee
lee@westernenergy.org

May 14-15 | Portland, OR
Executive Planning Committee
Contact: Kevin Sullivan
sullivan@westernenergy.org

May 21-22 | Seattle, WA
Human Resources
Contact: Amy Nye
nye@westernenergy.org

Aug 19-23 | Seattle, WA
NW Electric Meter School
Contact: Diana Zoren
zoren@westernenergy.org

Aug 27-29 | Calgary, AB
Safety Summit
Contact: Beverly Jones Woolf
joneswoolf@westernenergy.org

Sep 15-17 | Carlsbad, CA
Annual Meeting
Contact: Anna Sanger Reed
sangerreed@westernenergy.org

Sep 25-27 | Bellevue, WA
Project Management
Contact: Joshua Baker
baker@westernenergy.org