



WesternEnergy
INSTITUTE

PROGRAMS BROCHURE

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EXECUTIVE LEADERSHIP SUMMITS

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

ANNUAL MEETING

Meets annually in September. This three-day event brings together the gas and electric utility executive community to encourage discussion and foster new opportunities. This program is intended for executive level leadership and emerging leaders, as well as professionals responsible for company strategy, and is open to all members.

BOARD OF DIRECTORS

Meets biannually in January. This event combines a full day of panels and networking opportunities with our semi-annual WEI Board business meeting. Participation is restricted to current board members and special invited guests to ensure a diverse mix of industry representation and perspectives as our members build meaningful relationships that increase understanding and accelerate progress.

BUSINESS ACUMEN ALUMNI SUMMIT

Meets annually in the fall. The Business Acumen Alumni Summit is designed to reconnect Business Acumen for Emerging Leaders alumni. This program is offered once a year and is exclusive to those that have completed the Business Acumen for Emerging Leaders Program.

BUSINESS ACUMEN FOR EMERGING LEADERS

Runs February - September. This year-long program is designed by a utility-driven Curriculum Development Team, and directed by facilitators, and executive and alumni mentors. The program concludes with 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. This program is reserved for energy members and Platinum and Gold service company members.

EXECUTIVE PLANNING COMMITTEE

Meets annually in Portland, OR the second week in May. The Executive Planning Committee (EPC) is a distinct group of senior energy leaders who meet annually to bridge the strategic vision of the WEI Board of Directors and Board Committees to plan the tracks for the upcoming Customer + Corporate Symposium and the Operations Conference.

WOMEN IN LEADERSHIP: MENTORING + DEVELOPMENT

Runs November - September. 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. Mentors and mentees are matched up across companies, and then connect over a ten-month period with two in-person meetings. This program is by invitation for mentors and application for mentees.

EXECUTIVE FORUMS

Peer-to-peer sharing around specific functional areas.

CHIEF INFORMATION OFFICER

Meets biannually in March + September. This biannual forum provides a unique opportunity for utility CIOs to come together in an exclusive peer-to-peer environment to network and share best practices. Participation is restricted to Chief Information Officers or senior leaders responsible for the management of their utility's technology and information systems at WEI member energy companies.

CORPORATE COMMUNICATIONS

Meets biannually in February + September. This biannual forum provides an exclusive, collaborative space for leaders in corporate communications to discuss these challenges and exchange best practices. Participants will gain a new understanding of executive communications strategies, employee communication, branding for recruitment and onboarding, and crisis communication through interactive sessions and roundtable discussions led by WEI member energy companies. This program is intended for corporate communications senior leaders, directors, and managers.

CUSTOMER STRATEGIES

Meets annually in the spring. This annual executive forum meets in person and is focused on conversation interspersed with presentations on topics which include, but aren't limited to, call center leadership, IT strategies, and workforce solutions. The small size of this program provides a unique environment for sharing with peers and building

long-term relationships. This program is intended for executive level leadership responsible for customer strategy and policy and is open to WEI member energy companies.

ENERGY MANAGEMENT

Meets biannually in May + November. This collaborative atmosphere, combined with the attendee's high level of expertise, leads to complex and analytical discussions regarding long-term forecasts, international energy demand, H2/RNG/LNG updates, the price of carbon, renewable developments, electric/gas convergence issues, and the influence of storage and infrastructure projects. This program is intended for senior level management who are responsible for energy supply, storage, transportation, trading, marketing, transmission, or business development. Electric utilities with gas generation are encouraged to attend.

FACILITIES + OFFICE SAFETY

Meets annually in June. This program is intended for Facilities Directors or the top manager responsible for facilities and office space reintegration plans and re-entry planning. In response to the COVID-19 pandemic, this forum will be a chance to collaborate and share information with other utilities on how they are approaching office workspace.

GENERAL COUNSEL

Meets biannually in February/March + September. As the legal landscape of the utility industry continues to change in the face of decarbonization, regulatory policy, budget pressures, and risk assessment, this biannual forum provides a unique and collaborative space for utility General Counsels to share new insights and opportunities through networking and roundtable discussions. Participation is restricted to General Counsels or senior leaders responsible for the management of legal functions at WEI member energy companies.

HUMAN RESOURCES

Meets biannually in May + November. This semi-annual program provides a roundtable opportunity for human resource leadership to address contemporary, strategic issues in human resource management. The program considers strategic inclusions such as collective bargaining agreements, benefits, employee diversity, performance management, compensation policies and change management. This program is intended for senior leaders responsible for management of human resources functions at WEI energy member companies.

INTEGRATED RESOURCE PLANNING

Meets biannually in April + October/November. An integrated resource plan (IRP) is more than just a plan; it's an involved process with multiple evaluation criteria that helps to determine both short- and long-term load growth. Planning professionals gather twice a year, both in-person and virtually, to better understand the challenges facing electric and natural gas providers in Western North America. This program is for directors, senior leaders and key organizational contributors who manage the aspects and objectives of their utility's integrated resource plan.

KEY ACCOUNTS

Meets biannually in April/May + October/November. Bringing together Key Accounts directors and managers to share best and practices and develop creative solutions to KA challenges, this bi-annual meeting features a keynote from the host utility, dedicated roundtable conversations, and breakout sessions designed for focused discussions between members. This program is for utilities and designed for key accounts directors and managers.

OPERATIONS BUSINESS STRATEGIES - ELECTRIC

Meets biannually in March/April + October. Designed for electric utility executives, participants engage in best practice roundtables to address electric distribution system and substation reliability and safety. This program is intended for senior leaders of WEI energy member companies: vice presidents, directors of electric operations and general managers responsible for maintaining system reliability.

STRATEGIC PLANNING

Meets annually in November/December. WEI's Strategic Planning program provides a forum for members responsible for their company's strategic plan to come together to discuss common challenges and opportunities. This annual forum provides a collaborative space for members to focus on strategic issues and compare the planning processes at different companies. This program is intended for directors or senior managers with strategic responsibilities in supply chain business functions.

SUPPLY CHAIN STRATEGIES

Meets annually in May/June. Focusing on the role of supply chain leadership, this forum provides an environment for strategic thinkers to discuss supply chain management responsibilities. This program is intended for Directors or Senior Managers with strategic responsibilities.

TALENT MANAGEMENT

Meets annually in September. Energy companies face core challenges to recruit, retain, develop and train their workforce. This forum brings together employee development and training experts to share case studies and proven best practices. This program is intended for key energy company contributors who lead aspects and objectives of their company's talent recruitment, retention, development and training.

WESTERN REGION MUTUAL ASSISTANCE AGREEMENT (WRMAA) ANNUAL MEETING

Meets annually in the fall. In 2003 the Western Region Mutual Assistance Agreement (WRMAA) was created and adopted by gas and electric utilities throughout Western North America to support one another in the event of emergencies affecting generation, transmission, distribution, or other business operations. Signatories meet in person annually to share best practices, discuss key emergency response issues, and elect new members of the Executive Committee and the custodian of the agreement. This program is open to signatories of the Western Region Mutual Assistance Agreement or by invitation.

WESTERN UTILITIES FINANCIAL FORUM

Meets annually in August. This annual forum is a place for Chief Financial Officers, senior accountants, and finance leaders from western North American to come together to address common challenges and explore best practices in everyday obstacles ranging from financial reporting, rate design, cost management strategies, and beyond. This program is open to both WEI energy members and non-members.

WILDFIRE PLANNING + MITIGATION

Meets annually in August. This program will bring together senior leaders responsible for wildfire planning and mitigation strategies at WEI member companies for an interactive peer to peer session. We will focus on sharing and discussing best practices around strategies for planning, operations, technology and various other tactics to mitigate and plan for wildfires.

INDUSTRY FORUMS

Peer-to-peer sharing for energy and service companies around broader functional areas.

CLAIMS + DAMAGE RECOVERY

Meets annually in April. This annual 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. Participants will learn about and discuss issues common to Western utilities such as fire and storm recoveries, inverse condemnation, settlement and negotiations, and proper record keeping from industry professionals. This program is open to both WEI members and non-members.

CUSTOMER + CORPORATE SYMPOSIUM

Meets annually in March. Join over 250 energy professionals to discuss the latest trends, ongoing developments, and best practices impacting the industry now and in the future. This annual event, offered in-person and virtually, brings together specialists, coordinators, supervisors, managers, and directors responsible for a variety of functional areas across corporate services and customer connections. The diverse mix of presentations, panels, roundtable discussions, and networking opportunities allow attendees to share their experiences and develop contacts within the industry. This program is open to both WEI members and non-members and is an excellent professional development and organizational team-building opportunity.

EMERGENCY RESPONSE + ASSISTANCE PRACTICES

Meets annually in March. This forum provides an open discussion on pressing topics surrounding utility emergency planning and operations and offers leaders a platform to develop relationships and share insights that prove beneficial in an emergency. The Emergency Response + Assistance Practices program is open to utilities and service providers.

FLEET MANAGEMENT

Meets biannually in February + August. This biannual forum provides fleet leadership professionals an opportunity to discuss best practices and share new processes and technologies. Participants will work collaboratively to select topics that are relevant to all participating organizations. This program is intended for fleet leadership professionals.

HYDROGEN ENGINEERS

Meets biannually. Hydrogen is one of the next steps in the evolution of the energy grid in North America as we strive to decarbonize and combat climate change. This program intends to connect technical professionals within the utility industry and allow them to begin to build a network of colleagues working within this ever-changing landscape. This program is intended for hydrogen engineers, utility business development professionals, engineering consultants, and product manufacturers.

JOINT USE CONFERENCE

Meets annually, month varies. New technology, new regulations and an aging infrastructure continue to change the landscape of joint use. This annual forum features a unique mix of presentations, dynamic power table topics, vendor displays, and networking opportunities to exchange information and best practices. Considered the premier joint use conference, content is designed for utility, telecomm, wireless and broadband companies; as well as consultants and service companies who deal with joint use, pole ownership and attachments.

OPERATIONS CONFERENCE

Meets annually in April. The Operations Conference is WEI's largest event. The annual in-person conference brings together hundreds energy industry professionals for three days of education and networking. In addition to general sessions with industry leaders and keynote speakers, the Operations Conference offers fifteen tracks with breakout sessions targeted to specific operations functions. Tracks: Asset Management, Damage Prevention, Electric Distribution, Electric Substation, Electric Transmission, Grid of the Future, Grid Resilience, Low Carbon Fuels, Natural Gas Emergency Response + Restoration, Natural Gas Integrity Management, Natural Gas Operational Excellence, Operational Leadership, Safety + Health, Safety Management Systems, and Workforce Development. This program is open to anyone in the energy industry.

OVERHEAD/UNDERGROUND ELECTRIC DISTRIBUTION

Meets biannually in April/May + October. The technology, application, and specifications for designing, building, and maintaining overhead and underground lines are constantly evolving. This biannual forum brings together electric utility professionals to discuss current standards, materials, and maintenance for distribution operations. Attendees will be given the opportunity to submit questions and receive feedback from their peers, and will leave with practical knowledge to reduce costs and improve efficiency and safety.

This program is intended for operations and maintenance personnel, standards and design engineers, line technicians, as well as T&D supervisors, and suppliers of distribution and substation products and services.

PROCUREMENT MANAGEMENT

Meets annually in September. Successful procurement management relies on a well-developed infrastructure, appropriate tactical resources, and thorough analysis. This forum offers an opportunity for procurement managers and specialists to come together with industry partners and suppliers for roundtable discussions and expert presentations. Topics include KPIs, supplier relationship management, sustainability, and best practices in purchasing and contracting. This program is intended for professionals responsible for supply chains, inventory, and purchasing.

PROJECT MANAGEMENT + UTILITIES

Meets annually in September. WEI's Project Management Forum brings together gas and electric utility project, program and portfolio management leadership and practitioners to discuss the latest industry trends and best practices. There will be three foci for the breakout rooms: PMO Leadership, Construction, and IT. This program is an excellent professional development and organizational team-building opportunity.

SAFETY SUMMIT

Meets annually in August/September. This summit is designed for gas and electric utility safety professionals, and spans across three unique, topical tracks: Safety Strategy + 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 strategy. This program is intended for managers, supervisors, trainers, safety advocates and anyone responsible for safety work methods (gas and electric) or safety strategy and policy.

SECONDARY NETWORK

Meets annually in September. This annual forum addresses the reliability, safety and protection challenges of spot networks and grid systems that comprise the secondary network. This program is intended for utility professionals involved with power distribution reliability planning, engineering, operation, standardization, protection and control, power quality analysis of secondary spot network and grid systems, also service company professionals who offer support to any aspect of the secondary network system are welcome to attend.

UTILITY POLE + OVERHEAD SYSTEMS

Meets biannually in September. Utility pole structures and related overhead systems provide a unique set of challenges. This biennial program offers over 14 sessions to highlight new technologies, best practices, and to address those unique challenges. This program also features over 25 vendors that offer hands-on demonstrations of the latest pole products and innovations in the industry. This program will best serve engineers, operations, and purchasing personnel from utilities and service companies.

WOMEN IN ENERGY SYMPOSIUM

Meets annually in November. This program addresses some of the evolving opportunities and challenges that women face and advocates for workplace inclusion and teamwork across gender, racial, and generational demographics. Everyone is invited to attend the Women in Energy Symposium whether or not you identify as a woman. This program is open to anyone in all facets of the utility industry.

SKILLS DEVELOPMENT

Hands-on training schools and workshops to teach essential skills. Open to energy and service companies.

DUAL UTILITY FUNDAMENTALS + INSIGHTS

This course is customized by WEI and hosted by Members for their employees throughout the year. WEI's Dual Utility Fundamentals + Insights course delivers an overview of electric and natural gas systems, from generation and extraction, through transmission and transportation, and ultimately distribution to end-use customers. We also discuss emerging issues and educate employees on how utilities make money. Members have the option for this class to be delivered on-site in a one-day format at their chosen facility or virtually over two half-days.

ELECTRIC UTILITY FUNDAMENTALS + INSIGHTS

This course is hosted by Members for up to 30 of their employees approximately thirty-five times per year and hosted by WEI, open to all energy industry employees, four times annually. The electric industry is changing every day and today's challenges require employees to develop a broad understanding of how the industry operates and the interplay between business functions – truly, how the pieces fit together. Topics include: Fundamentals of Electricity, Generation Choices, How Utilities Make Money, Western North American Transmission and Electricity Markets, Customers + Emerging Opportunities, Distributed Energy Resources, and Integrated Resource Planning. This program will best serve employees expanding their career opportunities, those seeking to understand how the pieces of the business fit together, newly hired managers and leaders from outside the utility industry, service providers who want to learn more about their customers, and anyone seeking to understand how the pieces of the energy business fit together.

GAS UTILITY FUNDAMENTALS + INSIGHTS

This course is hosted by Members for up to 30 of their employees approximately fifteen times per year and hosted by WEI, open to all industry employees, four times annually. The gas industry is entering an age of transformation. Business decisions must consider political pressure and regulatory requirements, operational and asset challenges, and customer preference. WEI's GUF course provides Members an overview of operations from well extraction to burn tip, and regulations from PPE in the field to the regulated utility business model, and the interplay between them all. Topics include: Extraction + Pipelines, Distribution Operations, How Utilities Make Money, Customers + Usage, Regulations, Codes, and Safety, and Emerging Issues. This program will best serve employees expanding their career opportunities, those

seeking to understand how the pieces of the business fit together, newly hired managers and leaders from outside the utility industry, service providers who want to learn more about their customers, and anyone seeking to understand how the pieces of the energy business fit together.

HANDS-ON RELAY SCHOOL

Meets annually in March. A truly unique educational experience, offering students the opportunity to network with and learn from leading experts in the field of system protection to exchange ideas, resolve problems and learn preventative and corrective methods through hands-on labs. Eight tracks are available: Basic, Distribution, Transmission, Generation, Electromechanical, Automation/Integration, Computerized 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. This program is designed for relay technicians, electrical/power plant technicians, engineers and protective relay test specialists. The school is sponsored by Western Energy Institute. CEU credits available.

INCIDENT COMMAND SYSTEM (ICS)

Meets annually, month varies. WEI's ICS Leadership program brings together utilities from the US and Canada to share best practices, provide practical information on ICS training and implementation, and learn of initiatives at the federal, state and local levels. This annual in-person program is open to anyone.

NORTHWEST ELECTRIC METER SCHOOL

Meets annually in August. Quality technical training spanning the basics of metering theory, AMI and high-end meter applications offering students the opportunity to network and learn from leading experts in the field of metering by developing skills, to exchange ideas, resolve problems and learn through hands-on labs. With over 66 years of operation, the school curriculum addresses the need for quality technical training with six tracks available: Single Phase Metering, Polyphase Metering, Solid State Metering, Advanced Metering + Communications, Hot Topic Roundtable/Supervisory and Substation/Generation Metering while also integrating fresh technological trends and perspectives. This course is designed to serve metering apprentices and journeymen in the electric utility industry. Students should select their preferred track according to their level of experience. CEU credits available.

POWER QUALITY SCHOOL

Meets biannually in June + September. This course provides students with the fundamental skills to facilitate, quantify, investigate, monitor and solve electrical system problems. Content is taught by industry experts through a combination of presentations, exercises and unique hands-on labs. Building these skills allow utilities and their customers to save money in avoided equipment outages and damage, costly improper solutions, damage claims and lost production. CEU credits available. This program is designed for utility technicians, engineers and managers in the private sector to provide hands-on experience and practical information that can be applied to troubleshoot, prevent and solve power quality and reliability issues

PROFESSIONAL DEVELOPMENT SERIES

Meets multiple times throughout the year. This suite of programs provides energy and service company employees with professional development tools, resources and experiences to be more effective leaders. Members will learn new skills through facilitated information from experts in the area of focus and will interact with other members to practice new skills and build a network. Courses are typically delivered virtually over a four hour period. Example topics include; leading through coaching, negotiating to create value, and emotional intelligence.

WEI WEBINAR SERIES

Meets multiple times throughout the year. In this constantly changing environment of the energy industry the webinar offerings provide you the opportunity to stay engaged and updated on emerging topics along with staying connected with leading industry experts. The various webinars will be a collaboration with energy and/or service company providers on a wide range of timely and relevant topics to provide value to our members.