



2022 FORUM

AGENDA*



THURSDAY, October 13th

8:00am – 9:00am **Breakfast & Registration**

9:00am – 10:00am **The State of CIS**
Mario Bauer, Chief Executive Officer, TMG

Mario Bauer, CEO of TMG, will present the 2022 Top Ten CIS Considerations. In this presentation, Bauer will provide a brief history of the pricing model, the mechanics of the model, the definition of project events, and how utility tiers are defined in the Database. The pricing components are presented, which include software, infrastructure, solution/system integrator, utility labor, third party, other, contingency, and this year's new components and changes will be highlighted, including the renewed emphasis on Add-on/Extended Pricing and Operational Costs which include the application of maintenance and subscription fees incurred during project months. This year's pricing is presented in four views, 1) an overall view with all project events, 2) only Tier 1 utilities serving over 1 million customers, 3) Tier 2 utilities serving under 1 million customers and over 100k customers and 4) Tier 3 serving under 100k customers and over 25k customers plus a cloud pricing model will be presented and discussed for all three Tiers.

10:00am – 11:15am **Keynote: Optimizing Opportunities Around Unprecedented Challenges**

Drew Murphy, Senior Vice President, Edison International
Simon Zewdu, Director of Regulatory Compliance and Specifications Division, LADWP
Marty Rosenberg, Session Moderator, Host of GridTalk

Drew Murphy, Edison International Senior Vice President of Strategy and Corporate Development and Sustainability, will set the stage for considering how investor-owned utilities optimize opportunities around unprecedented challenges. Edison International serves 15 million customers and owns Southern California Edison, one of the largest electric utilities in America.

Simon Zewdu, Los Angeles Department of Water and Power Director of Transmission Planning, Regulatory Processes, and Innovation, will be on hand to report how LA is planning to be one of the leading cities on earth in its pursuit of carbon emissions reductions. LADWP is the nation's largest municipal power utility serving four million residents.

Mr. Murphy and Mr. Zewdu will kick off a high-level discussion of what is causing utility business disruption and - more importantly - how they optimize their utility operations to thrive and better serve customers.

11:30am – 12:15pm **How Much Should It Cost to get Paid? Do you Really Have to Spend Money to Make Money**

Nicole Haskins, Vice President, Paymentus
Debra Ardoline, Vice President, TMG
Marty Rosenberg, Session Moderator, Host of GridTalk

When it comes to spending money, customer behaviors and expectations have radically changed. When is the last time you wrote a check at the grocery store? Or used cash? Every utility customer is a consumer first. And every service provider is now competing for a share of wallet against trillion-dollar enterprises that measure customer responsiveness in nano-seconds. Are you prepared to do the same? Truth is, you have no choice. Managing and paying monthly bills is a frustrating experience to begin with for all. When it's inconvenient, your bill moves to the bottom of the pile – which affects your bottom line. But what's the real price of customer convenience? What does it take to make innovation and future-proofing manageable? It's time to cut through the jargon and have a frank conversation about bill pay. Why is it so complicated? How much does it really cost to send a bill? To send a reminder? To collect a payment? Where can you streamline and simplify? By doing fewer things, better, does your bill move from the bottom of the pile to the top? And what are the bottom-line benefits to you?

12:15pm – 1:15pm **Lunch**
Sponsored by Paymentus

1:15pm – 2:15pm **The Secrets to Getting More Energy Customers on Time-of-Use Rates**
Scott Engstrom, Vice President of Corporate Strategy & Business Development, GridX, Inc.
Eva Molnar Senior Manager, Customer Programs and Services, Southern California Edison
Hedi Ago, Session Moderator, TMG

Time-of-use (TOU) and other complex rate structures are critical to managing an increasingly complex grid, achieving decarbonization goals, and integrating distributed energy resources. Not to mention, if people get on the right one, it can save them money. So why aren't more of us on them? According to EIA data, while TOU rates are available to 62% of U.S. residential customers, only 7.3% are enrolled in these plans.

Much of the success we've seen with TOU rollouts have been in California. What can we learn from what those CA IOUs have accomplished? This discussion with GridX and one of their utility customers will detail how they successfully owned and managed a large TOU rate rollout by taking an analytics-driven approach and putting the customer first. It will detail lessons learned and pitfalls to avoid as other states look to deliver similar programs. It will also touch on the emergence of EV-specific rates and how these lessons can be applied to this use case.

1:15pm – 2:15pm **Southern California Edison's Journey to Streamlining DER & Load Interconnection Processes**
Debra Camona, Senior Manager, Southern California Edison
Bill Fenstermaker, Session Moderator, TMG

Southern California Edison wanted a Centralized application digitizing fragmented Distributed Energy Resources (DER) Interconnection Requests across various Tariff types. This was needed to adhere to California Regulatory needs. A streamlined DER & Load Interconnection process needed to be set up to establish the foundation for simplified onboarding of future tariff types. The tool provided End to End Automation for Rule 21 Non Export Tariff and an implementation Framework that can be expanded to future Tariff Types. It helped increase the speed of time to market (quarterly major production deployment) and provided real-time awareness of Interconnection Request (Where Am I).

**Note: The final agenda is subject to change and all updates will be on the website and the Forum mobile App*

THURSDAY, October 13th

2:15pm –
3:00pm

Pasadena Water & Power's Road to Digital Transformation

Jeremy Marquette, Utility Operational Technology Manager, Pasadena Water & Power
Ralph Lousteau, Session Moderator, TMG

Changing market realities and shifting regulatory requirements have accelerated digital initiatives for utilities across the board. Pasadena Water & Power's journey began with a goal to provide better customer service and streamlined business processes that would make work easier for their employees. Limited resources and competing priorities at the City would require careful considerations and focus on enhancing the systems they had in place and replacing older technology with more modern solutions. In this session, learn from Pasadena Water and Power's Jeremy Marquette on how cloud solutions like OPower and C2M and a culture committed to innovation can help your utility drive business results.

2:15pm –
3:00pm

City of Mesa & Hansen – Building a Smart City Together

Harry Meier, Deputy Chief Innovation Officer, City of Mesa
John Baksa, President of Americas Utilities, Hansen
Bill Fenstermaker, Session Moderator, TMG

The City of Mesa, AZ, provides safe, reliable, and environmentally responsible water and wastewater services to 165,000 customers. It also provides electric utility service to more than 17,000 homes and businesses. It provides natural gas service to over 68,000 homes and businesses within its two service territories. The City of Mesa has been a long-standing Hansen customer since 2000, including going live on the newly architected Hansen CIS in March 2021 to streamline its technology stack and enable a new degree of operational efficiency and digital transformation. In this presentation, you will hear how this multi-commodity utility is creating a digital future that encompasses an integrated CIS, AMI, smart meters, and a "Smarter Mesa" that includes the latest technologies and data-driven insights to improve the quality of life, civic engagement, economic development, service delivery, and community vibrancy for its citizens, businesses, and visitors. Harry Meier, Deputy CIO for Innovation from the City of Mesa, will be presenting along with John Baksa, President Americas Utilities, from Hansen Technologies.

3:15pm –
4:00pm

New Infrastructure Laws: Federal Funding Opportunities and Utilities (UTILITY ONLY SESSION)

Thomas Bialek, Chief Technology Officer, Toumetis, Inc.
Maria DeChellis, Senior Director, Global Strategy and Value, Oracle Energy and Water
Marty Rosenberg, Session Moderator, Host of GridTalk

As part of its focus on combating climate challenges, creating clean energy jobs, and promoting energy justice, the current US administration has launched various initiatives through the Bipartisan Infrastructure Law (BIL)/Infrastructure Investment and Jobs Act (IIJA), the Inflation Reduction Act, and other programs. These initiatives present significant funding opportunities to utilities for capital projects. At the same time, there are many timelines, requirements, and complex applications, tax credits, and audit processes to navigate. Our speakers, Tom Bialek, Smart Grid Subcommittee Chair at US Department of Energy's Electricity Advisory Committee and Chief Technology Officer at Toumetis will discuss the latest developments, areas utilities can focus on, and considerations for accessing funding as it becomes available.

4:45pm –
5:30pm

From Engagement to Empowerment - Perfecting Water Conservation and Customer Experience with AI

Hear from data experts at Moulton Niguel Water District and Smart Energy Water talk about the new digital, intelligent technologies that transform the utility-customer relationship. How do we build the ecosystem that empowers each player to do its part and help create a water-secure future? How do we leverage the data tide to course-correct the customer experience strategy? Join the session and find answers, gain insights from your peers, and take home actionable next steps for your digital journey.

6:30pm

Evening Event, Poolside Terrace at the Marriott Marquis San Diego Marina

FRIDAY, October 14th

7:30am –

Breakfast

8:30am –
9:30am

Agile vs Waterfall vs Agile-fall: Methodology Options for Large Transformational Technology Projects

Dawn Maskell, IT Product Line Manager, Eversource Energy
Robin Pierce, Director, Enterprise Project Management Office, Southwest Gas Corporation
Sudeep Kappadan, EVP – Advisory Services, TMG
Bill Fenstermaker, Session Moderator, TMG

The modern utility organization must quickly adapt to change, possess a diverse array of skills, and above all else, deliver results amidst the reality of evolving targets. Many are moving to more agile delivery methods to meet these requirements. Large transformational technology projects have historically been implemented using a traditional waterfall methodology that follows a linear path from start to finish, whereas Agile methods involve multiple iterations ("sprints") intended to deliver smaller pieces of production-ready functionality sooner. In this session, a panel of utility experts will share their views and experiences with Waterfall, Agile and hybrid approaches to large implementation projects.

9:45am –
10:30am

Advanced Metering Infrastructure Impacts on Cyber-Security

Michelle Cook, Collection & Field Services Manager, City of Lubbock
Todd Stocker, Session Moderator, TMG

Cyber security risk management is about determining and understanding potential threats, evaluating the impact on operations, and creating processes to manage them. The investment required needs to be balanced against potential risks. Cyber security in AMI involves more than the technical security of the solution. As systems and processes of energy utilities become more intelligent and increasingly integrated, they also become more attractive targets for attacks. The threat of unanticipated security breaches is not only about the loss of income or reduced customer satisfaction but finally about consumer privacy and stability of the electricity network. The addition of an AMI system extends the utility network throughout the service territory and therefore adds a new set of potential risks. A utilities consideration on how to manage this new reality is critical. Overall, AMI security consists of both technical and organizational aspects. Improvements can be made in various categories, including people & processes, IT infrastructure, and procuring the right solutions. Join this panel discussion to learn more.

10:45am –
11:30am

Managing Innovation at Utilities: A Structured Approach

Fabrizio Daniel Meloni, Consultant, Advisory Services, TMG
Sudeep Kappadan, Session Moderator, TMG

Utilities operate in a rapidly evolving environment involving new business models, technologies, regulatory requirements, and changing customer and corporate citizenship expectations. All indications are that the pace of change Utilities will have to adapt to will continue to accelerate in the coming years. In this context, it will become increasingly important for Utilities of all sizes to innovate and manage innovation activities in a structured way while aligning these activities with the organization's strategic direction. This will be key to help ensure: the ability to react faster to emerging market demands and trends, readiness for new compliance requirements, improvements in organizational risk management, efficiency in resource allocation, and utilization ability to effectively explore new ideas and opportunities, high employee engagement, retention and attracting of new talent company growth, revenue and profitability improvement while reducing costs improvement in the satisfaction of users, suppliers, customers, regulators, investors, and citizens. TMG will present a structured approach to innovation management that consists of a framework to provide a foundation for the development/improvement of innovation capabilities within Utilities. This framework will allow Utilities to manage innovation in a deliberate, systematic, and measurable fashion, enabling them to adapt, evolve, and thrive in an uncertain business environment where rapidly accelerating change will be normal.

12:00pm

Forum Closing Reception