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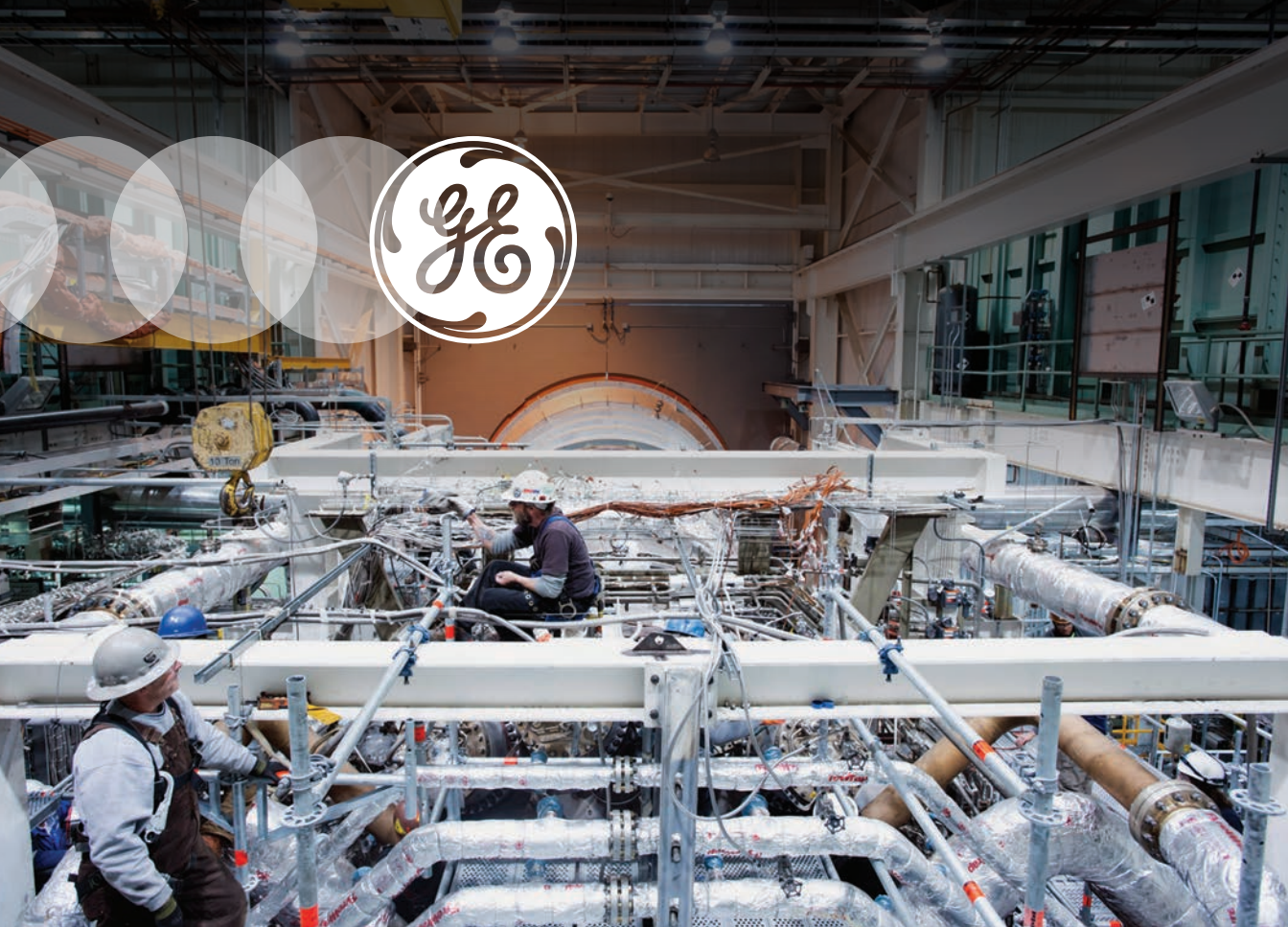
INSTITUTE for  
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#PTP15

**powering the people**

CONNECTED CONVERSATIONS

**Thursday, March 19, 2015 • 12:00 pm – 6:00 pm • Reception Follows**  
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# Welcome



Welcome to **Powering the People** – our annual celebration of innovation and transformation in the electric power sector. This year’s theme is **Connected Conversations**, and we look forward to hearing from electric power industry thought leaders – electric utility executives, technology company executives, policymakers, and other stakeholders – as they connect the emerging trends shaping the evolving power grid.

This is an unprecedented time of change in the electric power sector. While it is difficult to predict where the evolving power grid ultimately will go, the utility’s basic function remains – to provide safe, reliable, affordable, and increasingly clean electricity. The future is an expansive electrified economy as limitless as the imagination. It will offer choices to customers, entrepreneurs, and utilities. But, the electricity grid must remain the best plug-and-play platform in the world.

As new energy services and technologies multiply, today’s grid is changing into a broad platform to connect an increasingly diverse set of both supply- and demand-side resources of varying types and sizes. Managing the integrated grid platform will require utilities to continue to upgrade and modify their distribution systems, to invest confidently in technology, and to maintain close connections and open dialogues with customers. This new business environment relies increasingly on utilities collaborating with and balancing the interests of three key strategic stakeholders: technology companies whose innovative products and services plug into the grid; regulators who define appropriate business models for the plug-and-play grid platform; and customers/communities who have specific wants and needs.

During this year’s Powering the People, 25 thought leaders will present their individual perspectives about the evolving power grid in a “TED talk like” format. Discussions will range from basic “grid talk” about resiliency, reliability, optimization, and data analytics to connecting “things” to the grid, such as distributed generation, electric vehicles, storage, and microgrids. Ultimately, all of these conversations examine how the electric power grid is evolving into an integrated grid platform, connecting a growing number of things, and what that future platform and business model might look like. In the final dialogue of the day, we will discuss how to connect the many dots among technologies, public policies, and electric utilities as we continue to best serve our customers.

I hope you enjoy today’s event!

**Lisa Wood**

Vice President, The Edison Foundation  
Executive Director, Institute for Electric Innovation



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# Summary Agenda

- 12:00 p.m.** Registration, Networking, & Light Lunch
- 1:00 – 1:10 p.m.** **Welcome Remarks:** Lisa Wood, Vice President, The Edison Foundation and Executive Director, Institute for Electric Innovation
- 1:10 – 1:30 p.m.** **Keynote:** Chris Johns, President, Pacific Gas and Electric Company
- 1:30 – 2:20 p.m.** Breakout Discussions
- |  |    |   |
|--|----|---|
| <b>Grid Talk</b><br>Data Analytics/<br>Grid Optimization | OR | <b>All Things Connected</b><br>DG/EV/Home/<br>Customer/Grid |
|--|----|---|
- 2:30 – 3:20 p.m.** Breakout Discussions
- |   |    |   |
|---|----|---|
| <b>Grid Talk</b><br>Grid Reliability/<br>Resiliency | OR | <b>All Things Connected</b><br>Micro-Grids/Diverse<br>Resources |
|---|----|---|
- 3:20 – 3:50 p.m.** Break
- 3:50 – 4:15 p.m.** Lightning Round: Insights & Connections
- 4:15 – 4:45 p.m.**
- |  |
|--|
| <b>Evolving Power Grid</b><br>Different Perspectives – Tech, Utility, Regulatory |
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- 4:45 – 5:45 p.m.** **Connected Conversations Dialogue:** Bob Rowe, President and CEO, NorthWestern Corporation
- 5:45 – 6:00 p.m.** **Closing Remarks:** Tom Kuhn, President, Edison Electric Institute
- 6:00 – 7:30 p.m.** Reception



## Be Part of the Conversation!

Share your Powering the People experience & feedback with the world on Facebook & Twitter at **@Elec\_Innovation, #PTP15**.

# Detailed Agenda

**12:00 p.m. – 1:00 p.m.**

**Registration, Networking, & Light Lunch**

**1:00 – 1:10 p.m.**

**Welcome Remarks**

Lisa Wood, Vice President, The Edison Foundation and Executive Director, Institute for Electric Innovation

**1:10 – 1:30 p.m.**

**Keynote: Expectations of the 21st Century Customer and the Evolving Grid of Things™**

Chris Johns, President, Pacific Gas and Electric Company

**1:30 – 2:20 p.m.**

**Breakout Discussions**

Attendees have the choice of attending one of two breakout discussions. Either:

**Grid Talk – Data Analytics/Grid Optimization**

Grid resource management and the integration of distributed energy resources are becoming increasingly sophisticated as a result of new technologies and data analytics.

What are utility companies doing today to optimize grid assets, and how are data analytics already influencing grid operations? What is the role of technology in data analytics and grid optimization? What are some of the policy issues surrounding big data and consumers? What are the implications for the future grid?

**Facilitator** – Trevor F. Lauer, Senior Vice President, Distribution Operations, DTE Energy  
**Speakers**

- Peter McCarthy, Senior Vice President, North America, C3 Energy
- Mark Lantrip, Chairman, President, & CEO, Southern Company Services, Inc.
- Karen Lefkowitz, Vice President, Business Transformation and Chief Information Security Officer, Pepco Holdings, Inc.

**OR**

**All Things Connected – DG/EV/Home/Customer/Grid**

The power grid has enabled a new generation of energy technologies and services, including rooftop solar, electric vehicles, and networked home-automation devices that give residential customers even greater control over their energy use—even when they are far from home.

How does the evolving relationship among utilities, technology companies, and customers create new challenges—and new opportunities—for electric utilities, state regulators, technology companies, and customers? How does the role for state regulators change when both regulated and non-regulated companies are providing energy technologies and services to customers?

**Facilitator** – Kevin C. Fitzgerald, Executive Vice President and General Counsel, Pepco Holdings, Inc.  
**Speakers**

- Theodore F. Craver, Jr., Chairman, President, & CEO, Edison International
- Bob Stump, Commissioner, Arizona Corporation Commission
- Rick Counihan, Head of Energy and Government Affairs, Nest Labs

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## 2:30 – 3:20 p.m.

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### Breakout Discussions

Attendees have the choice to attend one of two breakout discussions. Either:

#### **Grid Talk – Grid Reliability/Resiliency**

Customers today are demanding higher and higher levels of reliability and resiliency, and they expect a grid that supports all of their power needs all of the time. While customers demand a higher level of service, the willingness to pay for these services does not necessarily follow.

How can electric utilities and policymakers balance the need for investments to improve grid reliability and resiliency with the need to ensure affordability for customers? Are customers really asking for reliability? Is that the driver? What are some of the solutions that are currently being offered to customers by both utilities and competitive suppliers?

**Facilitator** – Monica Martinez, Principal, Ruben Strategy Group

#### **Speakers**

- Betty Ann Kane, Chair, DC Public Service Commission
- Brian Case, Executive Director, New Energy Platform, GE Ventures, Energy
- Kenneth M. Mercado, Senior Vice President, Electric Operations, CenterPoint Energy

**OR**

#### **All Things Connected – Micro-Grids/Diverse Resources**

As customers' interest in more resilient electric service grows, some believe that micro-grids are the solution. At the same time, state regulators are increasingly asking electric utilities to consider strategies for combining "diverse resources" to meet growing electricity needs—such as distributed generation, storage, energy efficiency, and demand response—in lieu of investing in a power plant or a substation.

What is driving the momentum around micro-grids and diverse resource solutions? What projects are already underway? How will these projects ultimately take shape? Will diverse resource solutions become the next "go to" approach for meeting growing electricity needs?

**Facilitator** – Philip J. Dion, Senior Vice President, Public Policy and Customer Solutions, UNS Energy

#### **Speakers**

- Hon. Dennis V. McGinn, Assistant Secretary of the Navy, Energy, Installations and Environment
- Lawrence Jones, Vice President, Utility Innovations and Infrastructure Resilience, Alstom
- Robert Schimmenti, Senior Vice President, Electric Operations, Consolidated Edison Company of New York

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## 3:20 – 3:50 p.m.

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### Break

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## 3:50 – 4:15 p.m.

### Lightning Round: Insights & Connections

Breakout discussion facilitators summarize key takeaways.

**Speakers** – Trevor F. Lauer, Kevin C. Fitzgerald, Monica Martinez & Philip J. Dion

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## 4:15 – 4:45 p.m.

### Evolving Power Grid – Different Perspectives

As new energy services and technologies multiply, today's electric distribution grid is evolving into a broad platform—connecting an increasingly diverse set of both supply- and demand-side resources. For electric utilities that operate this plug-and-play distribution grid, this means seamlessly integrating new energy resources, technologies, and services, and continually meeting the evolving needs of various stakeholders.

As the grid continues to evolve, only utilities have the end-to-end visibility and the mandate to provide safe, reliable, affordable, and increasingly clean electricity. How might the electric utility business and the associated regulatory paradigm change to keep pace with the transformation of the power sector that is well underway in the U.S.? How does this align with the pace of change of technology?

#### Speakers

- Marvin E. McDaniel, Jr., Executive Vice President, Group President – Utilities, and Chief Administrative Officer, Xcel Energy, Inc.
- Elisabeth Brinton, VP, Corporate Strategy Officer, PG&E Corporation
- Michael Champley, Commissioner, Hawaii Public Utilities Commission
- Guerry Waters, Vice President, Industry Strategy, Oracle Utilities
- Philip Mezey, President & CEO, Itron

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## 4:45 – 5:45 p.m.

### Connected Conversations Dialogue

Based on the different perspectives and discussions heard throughout the day, how do we connect the dots among technologies, public policies, and electric utilities to best serve the customer?

**Facilitator** – Bob Rowe, President & CEO, NorthWestern Corporation

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## 5:45 – 6:00 p.m.

### Closing Remarks

Tom Kuhn, President, Edison Electric Institute

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## 6:00 – 7:30 p.m.

### Reception



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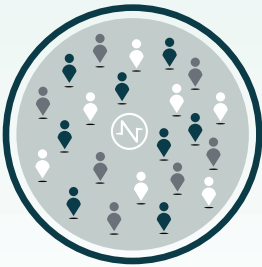


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## Welcome Remarks

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### **Lisa Wood**

Vice President, The Edison Foundation  
Executive Director, Institute for Electric Innovation

Lisa Wood is Vice President of The Edison Foundation and Executive Director of the Institute for Electric Innovation (IEI). As Executive Director of IEI she promotes the sharing of information, ideas, and experiences among regulators, policymakers, technology companies, thought leaders, and the electric power industry, and provides thought leadership on current issues and innovation in the power sector. Under Ms. Wood's direction, IEI published two recent books: *Innovations across the Grid: Partnerships Transforming the Power Sector*, in 2013, and *Innovations Across the Grid: Volume II*, in 2014.

Ms. Wood is an Adjunct Professor at Johns Hopkins University, a Non-resident Fellow in the Energy Security Initiative at The Brookings Institution, and serves on several boards.

Prior to launching the Institute, Wood was a Principal with The Brattle Group and Director of Brattle's Washington DC office; a Principal with PHB Hagler Bailly; and a Program Director at RTI International.

Wood holds a Ph.D. in Public Policy and Management from the Wharton School of the University of Pennsylvania; an M.A. from the University of Pennsylvania; and a B.A. from Rutgers College.

## Keynote: Expectations of the 21st Century Customer and the Evolving Grid of Things™

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### **Chris Johns**

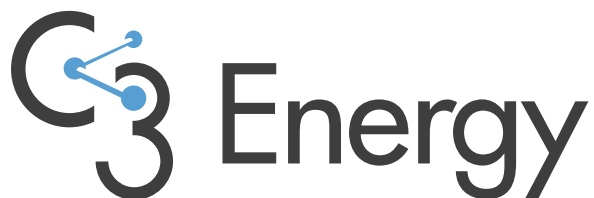
President, Pacific Gas and Electric Company

Christopher P. Johns is President of Pacific Gas and Electric Company (PG&E) and a member of the utility's board of directors.

Johns joined PG&E in 1996 as vice president and controller. He was named chief financial officer in January 2005. He was named president of PG&E in August 2009.

Before joining PG&E, Johns was a partner at KPMG Peat Marwick LLP. Johns earned a bachelor's degree in accounting from the University of Notre Dame. He has also completed the Nuclear Reactor Technology Program at the Massachusetts Institute of Technology.

Johns is a member of the board of directors for Associated Electric & Gas Insurance Services Limited. He serves as chair for the Western Energy Institute, co-chair for the Institute for Electric Innovation and he serves on the Executive Committee for the American Gas Association. Johns also serves as a member of the board of directors for the Edison Electric Institute, San Francisco Ballet, San Francisco Reviving Baseball for Inner-City Youth, Inc., and The First Tee of San Francisco.



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# Grid Talk: Data Analytics/Grid Optimization



## Grid Talk: Data Analytics/Grid Optimization

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Grid resource management and the integration of distributed energy resources are becoming increasingly sophisticated as a result of new technologies and data analytics.

What are utility companies doing today to optimize grid assets, and how are data analytics already influencing grid operations? What is the role of technology in data analytics and grid optimization? What are some of the policy issues surrounding big data and consumers? What are the implications for the future grid?

### Facilitator:

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#### **Trevor F. Lauer**

Senior Vice President, Distribution Operations, DTE Energy

Trevor F. Lauer, 50, is senior vice president of Distribution Operations for DTE Electric, an electric utility serving 2.1 million customers in Southeastern Michigan and a subsidiary of DTE Energy (NYSE:DTE), a Detroit-based diversified energy company involved in the development and management of energy-related businesses and services nationwide. Lauer is responsible for the delivery of electricity to the homes and businesses of DTE Energy customers. This includes substation operations, outage restoration, field and meter services and maintenance activities. Previously, Lauer served as the vice president of Marketing and Renewables.

Prior to joining DTE Energy, Lauer was executive vice president at Pittsburgh-based Strategic Energy LLC, a competitive supplier of retail electricity. He also worked on a variety of leadership and general management positions from Honeywell, Inc. in the Washington, D.C. area.

Lauer earned a bachelor of science degree in mineral economics from Pennsylvania State University and a master of business administration degree from the University of Maryland. He is a 2006 graduate of Leadership Michigan.

Lauer is chairman of the Detroit Regional Economic Partnership. He serves on the executive committees of the Michigan Hispanic Chamber of Commerce, Ann Arbor SPARK and the Marketing Executives Conference. Lauer is a board member of the Cranbrook Institute of Science and The Parade Company, and is a member of the Engineering Society of Detroit, the Detroit Economic Club, Corp! magazine board of advisors and serves on the foundation board of the Associated Food and Petroleum Dealers. He has served on the Michigan Renewable Fuels Commission and the Michigan Wind Energy Resource Zone boards.

### Speakers:

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#### **Peter McCarthy**

Senior Vice President, North America, C3 Energy

Peter McCarthy is a Senior Vice President at C3 Energy. Prior to C3 Energy, Mr. McCarthy held various leadership positions in sales and marketing at Silver Spring. As Silver Spring grew from an early stage start-up to a public company listed on NYSE with \$300 million in revenues, Mr. McCarthy oversaw sales for all investor-owned utility accounts in North American and the Caribbean. He holds a B.A. from Amherst College.



### **Mark Lantrip**

Chairman, President, & CEO, Southern Company Services, Inc.

Mark Lantrip serves as president and CEO of Southern Company Services. He is responsible for overseeing the company's information technology, human resources, supply chain management, marketing and program management, as well as SouthernLINC Wireless, Southern Company's wireless telecommunications provider, and Southern Telecom, the company's wholesale fiber optic network provider.

Prior to assuming his current role in February 2014, Lantrip served as executive vice president of finance and treasurer of Southern Company Services and treasurer of Southern Company with responsibility for financial planning and analysis, enterprise risk management, trust finance, capital markets and treasury.

Lantrip joined Southern Company in 1981 as an analyst in the corporate planning department of Gulf Power and progressed through various areas of responsibility at both Georgia Power and Southern Company Services.

Lantrip holds a B.A. from Southern Illinois University and an M.B.A. from the University of West Florida. He and his wife, Lisa, have two children and two grandchildren.



### **Karen Lefkowitz**

Vice President, Business Transformation and Chief Information Security Officer, Pepco Holdings, Inc.

Karen Lefkowitz is the Vice President, Business Transformation and Chief Information Security Officer for Pepco Holdings, Inc. (PHI), a regional energy holding company that provides utility service to more than 1.9 million customers. PHI is the parent company of Potomac Electric Power Company, Delmarva Power and Atlantic City Electric.

In her current role, Ms. Lefkowitz is responsible for Smart Grid strategy, the mass deployment of AMI Smart Meters and enabling the Smart Grid throughout the PHI service territory, transforming internal business processes and empowering customers to manage their energy use more efficiently.

She has worked in a variety of jobs during a 30-year career at Pepco. Most recently, Ms. Lefkowitz served as Director of Customer Relations with responsibility for enhancing customer service and administering energy efficiency programs. She was previously the Director of System Operations, with responsibility for the daily operation of PHI's electric system.

She holds a bachelor's degree in Business Administration from George Washington University and a Master of Business Administration from Marymount University.

Ms. Lefkowitz is a member of the Board of Directors for the Gridwise Alliance, a national organization promoting the development of the Smart Grid, the Woolly Mammoth Theatre Company in Washington, DC and Strathmore Performing Arts Center in Montgomery County, Maryland. She also served as the Executive Sponsor for the PHI United Way Campaign for two years.

# #1

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# All Things Connected: DG/EV/Home/Customer/Grid



## All Things Connected: DG/EV/Home/Customer/Grid

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The power grid has enabled a new generation of energy technologies and services, including rooftop solar, electric vehicles, and networked home-automation devices that give residential customers even greater control over their energy use—even when they are far from home.

How does the evolving relationship among utilities, technology companies, and customers create new challenges—and new opportunities—for electric utilities, state regulators, technology companies, and customers? How does the role for state regulators change when both regulated and non-regulated companies are providing energy technologies and services to customers?

### Facilitator:

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#### **Kevin C. Fitzgerald**

Executive Vice President and General Counsel, Pepco Holdings, Inc.

Kevin Fitzgerald is executive vice president and general counsel of Pepco Holdings, Inc. (PHI). He has more than two decades of legal experience in the utility and energy industries, most recently serving as Executive Partner for Client Development Strategic Planning and a member of the Executive Committee for Troutman Sanders.

Fitzgerald has been honored as a Washington, D.C., “Super Lawyer” and as a “Groundbreaking Lawyer” in Public Utilities Fortnightly magazine. In 2006, he was awarded the prestigious Pro Bono Legal Service Award from the John Carroll Society. Fitzgerald is active within the Edison Electric Institute, and is an advisory board member to the Electric Power Research Institute. He is a graduate of The George Washington University, where he earned his Juris Doctor in 1991, a master’s degree in 1988, and a bachelor’s degree in 1985. Fitzgerald is admitted to practice law in the Commonwealth of Massachusetts, the District of Columbia and before the U.S. Supreme Court.

### Speakers:

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#### **Theodore F. Craver, Jr.**

Chairman, President, and Chief Executive Officer, Edison International

Theodore F. Craver, Jr., is chairman, president and chief executive officer of Edison International, the parent company of Southern California Edison, one of the nation’s largest electric utilities, and subsidiaries that are competitive businesses engaged in generation, delivery or use of electricity. Craver is on the Board and serves as Chairman of the Edison Electric Institute, and is on the Board of the Electric Power

Research Institute. He is a member of the Business Roundtable and serves on the Board of Directors of Health Net, Inc. Craver is also on the Board of Trustees of the Autry National Center, the California Board of Trustees of The Nature Conservancy, and serves on the Advisory Board of the Smithsonian National Museum of American History. Before joining Edison in 1996, Mr. Craver was executive vice president and corporate treasurer of First Interstate Bancorp from 1991 to 1996. He was also executive vice president and CFO of the wholesale banking subsidiary from 1986 to 1991.



### **Bob Stump**

Commissioner, Arizona Corporation Commission

Deemed a “candidate to watch” by the National Journal, and one of Arizona’s three “Best State Representatives” by the Arizona Capitol Times’ “Best of the Capitol” survey, Arizona Corporation Commissioner Bob Stump was elected to the Arizona Corporation Commission in 2009 and re-elected in 2012. He also served three terms in the Arizona House of Representatives.

Commissioner Stump serves on the Board of Directors of the National Association of Regulatory Commissioners (NARUC), is a member of the Harvard Electricity Policy Group and the Aspen Institute’s Society of Fellows, and is an Advisory Council member of the Center for Public Utilities. Commissioner Stump is also a member of the NARUC Committee on Critical Infrastructure.

Commissioner Stump’s policy proposals have made front-page news in USA Today. He has discussed key legislative initiatives on CNN; “Your World with Neil Cavuto,” on the Fox News Channel; and National Public Radio. In 2006, Commissioner Stump was a featured guest on C-SPAN’s “Washington Journal” to discuss his policy ideas with a national audience. He has also worked as a reporter for The Weekly Standard and as a Manhattan Institute research associate to author and former White House speechwriter David Frum. Commissioner Stump has contributed reviews and essays to The Wilson Quarterly, the Daily Caller and a host of magazines and newspapers.

Commissioner Stump is Chairman of the Board of Phoenix Opera. He holds degrees from Harvard University and the University of California at Berkeley.



### **Rick Counihan**

Head of Energy Regulatory and Government Affairs, Nest Labs

Rick Counihan is the Head of Energy Regulatory and Governmental Affairs for Nest Labs, the maker of the Nest Thermostat. In that capacity he is responsible for relations with the Federal and State governmental energy agencies.

Rick has over 25 years experience in the energy and utility fields, with employment stints in state, local and federal government, as well as the private sector. Prior to Nest, Rick was Vice-President of Government Affairs for EnerNOC, Inc., a leader in demand response and energy management services for the commercial and industrial sectors for 8 years. Before EnerNOC, Rick was Vice President at the Electricity Innovation Institute (E2I), a nonprofit research institute affiliated with the Electric Power Research Institute (EPRI) to build public/private partnerships to improve the nation’s electricity systems and an early research center on the Smart Grid. Rick has also been Vice President at Green Mountain Energy Company, a retail energy service provider selling renewable power. Rick worked in regulatory affairs for five years with Southern California Edison and was a professional staffer for the Energy and Commerce Committee of the U.S. House of Representatives for six years.

Rick has a Bachelors degree in Economics from Pomona College and a Masters in Public Policy from Harvard University. Rick sits on the boards of the Center for Resource Solutions and the Association for Demand Response and SmartGrid.







# Grid Talk: Grid Reliability/Resiliency



## Grid Talk: Grid Reliability/Resiliency

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Customers today are demanding higher and higher levels of reliability and resiliency, and they expect a grid that supports all of their power needs all of the time. While customers demand a higher level of service, the willingness to pay for these services does not necessarily follow.

How can electric utilities and policymakers balance the need for investments to improve grid reliability and resiliency with the need to ensure affordability for customers? Are customers really asking for reliability? Is that the driver? What are some of the solutions that are currently being offered to customers by both utilities and competitive suppliers?

### Facilitator:

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#### **Monica Martinez**

Principal, Ruben Strategy Group

Ms. Martinez is principal of Ruben Strategy Group LLC. There she serves as a senior strategic regulatory and energy/environment consultant. She works with national associations, non-profits, coalitions, and energy related businesses to help develop their markets, create strategic pathways to problems, and grow their organizations.

Previously, Ms. Martinez served for over 6 years as a Michigan Public Service Commissioner, where she led new consumer education and awareness efforts promoting low-income and senior programs, energy affordability via efficiency, and the value of generation resource diversity. She was also responsible for drafting Michigan's 2008 energy laws and oversaw their implementation while on the Commission.

In addition, Ms. Martinez serves as President and co-founder of Hispanics in Energy, a 501(c)3 dedicated to providing a platform for Hispanics and energy.

Ms. Martinez earned a Bachelors in Economics and Political Science and a Masters in Business Administration, with distinction, both from the University of Michigan.

### Speakers:

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#### **Betty Ann Kane**

Chairman, Public Service Commission of the District of Columbia

Betty Ann Kane has served on the District of Columbia Public Service Commission since March 2007 and as Chairman since March 2009. She previously served three terms as a member of the DC City Council and as Executive Director of the DC Retirement Board.

Chairman Kane is a member of the NARUC Board of Directors, a member of the NARUC Telecommunications Committee, a NARUC appointee to the Virtual Working Group on Education, Training and Best Practices for The International Confederation of Energy Regulators and Treasurer of the National Regulatory Research Institute (NRRI), the research arm of NARUC. Additionally, she is a past Chairman of the Board of the National Regulatory Research Institute, and a past President of the Mid-Atlantic Conference of Regulatory Utilities Commissioners (MACRUC), a member of the Telecommunications Committee of NARUC. Chairman Kane also serves in two FCC-appointed positions, as Chairman of the North American Numbering Council and as a member of the Joint Conference on Advanced Telecommunication Service.



### **Brian Case**

Executive Director, New Energy Platform, GE Ventures, Energy

Brian is the Executive Director for the GE Ventures, New Energy Platform team based in Schenectady, New York. Brian leads new business development and incubation with a focus on distributed energy resource assets. He is responsible for the creation of new energy business platforms on behalf of GE Ventures.

Prior to this role, Brian was the Director for the America's Project Development team with GE's Power & Water business. In this role, Brian lead Power & Water's partnering and development initiatives for development stage power generation projects with a specific focus on combined cycle and wind generation assets. Brian joined GE in 2006 through the Junior Officer Leadership Program, a two-year, cross functional, business rotational program designed for transitioning military officers.

Prior to joining GE, Brian served six years as an armor officer in the United States Army's 3rd Infantry Division. Brian holds a Bachelor of Science degree in civil engineering from the United States Military Academy.



### **Kenneth M. Mercado**

Senior Vice President, Electric Operations, CenterPoint Energy

As senior vice president of CenterPoint Energy's electric utility business, Kenny Mercado has financial and operational responsibility of the company's 5,000 square-mile service territory, as well as power delivery to more than 2.2 million homes and businesses in the Houston metropolitan area. Prior to his current position, he was division senior vice president of Grid and Market Operations, responsible for automating and integrating the company's nearly 53,000 miles of electric transmission and distribution grid to serve the Texas competitive market. He was also responsible for the deployment of a smart grid system, which includes the installation of smart meters and intelligent grid technology.

In his 30-year career at CenterPoint Energy and predecessor companies, Mercado has held numerous leadership positions in engineering and operations in the company's electric utility business.

Mercado received a Bachelor of Science degree in electrical engineering and a Master of Science degree in industrial engineering from the University of Houston. He also received an Executive MBA degree from Mays Business School at Texas A&M University.

A licensed professional engineer registered in the state of Texas, Mercado serves on the boards of the March of Dimes in Houston, the University of Houston Honors College and Engineering Leadership Program, Southeastern Electric Exchange and the Texas Center for Commercialization of Electric Technologies.







# All Things Connected: Micro-Grids/Diverse Resources



## All Things Connected: Micro-Grids/Diverse Resources

As customers' interest in more resilient electric service grows, some believe that microgrids are the solution. At the same time, state regulators are increasingly asking electric utilities to consider strategies for combining “diverse resources” to meet growing electricity needs—such as distributed generation, storage, energy efficiency, and demand response—in lieu of investing in a power plant or a substation.

What is driving the momentum around micro-grids and diverse resource solutions? What projects are already underway? How will these projects ultimately take shape? Will diverse resource solutions become the next “go to” approach for meeting growing electricity needs?

### Facilitator:

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#### **Philip J. Dion**

Senior Vice President, Public Policy and Customer Solutions, UNS Energy Corp.

Mr. Dion is Senior Vice President of Public Policy and Customer Solutions. In this capacity, he is responsible for the direction and execution of regulatory and legislative strategy at the federal and state levels for TEP and its affiliates. He also oversees the customer experience through customer service and engagement, marketing, corporate communications, customer programs and community relations.

Mr. Dion joined TEP in 2008 as Vice President of Legal and Environmental Services, became Vice President of Public Policy in 2010 and was promoted to his current role in August 2013. He previously served as chief of staff and chief legal advisor to then-Commissioner Marc Spitzer of the Federal Energy Regulatory Commission (FERC). Before Spitzer's appointment to the FERC in 2006, Dion had served as his advisor at the Arizona Corporation Commission (ACC) since 2004. He had previously served as a Deputy Maricopa County Attorney and an administrative law judge at the ACC.

Mr. Dion has a bachelor's degree in finance from the University of Arizona and a Juris Doctorate and an MBA in finance from Santa Clara University.

### Speakers:

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#### **Hon. Dennis V. McGinn**

Assistant Secretary of the Navy, Energy, Installations and Environment

Appointed Assistant Secretary of the Navy (Energy, Installations & Environment) on September 3, 2013, Mr. McGinn develops Department-wide policies, procedures, advocacy and strategic plans and oversees all functions and programs related to installations, safety, energy, and environment.

In 2002, after 35 years of service, Mr. McGinn retired from the Navy after achieving the rank of Vice Admiral. While in the Navy, he served as a naval aviator, test pilot, aircraft carrier commanding officer, national security strategist, Deputy Chief of Naval Operations for Warfare Requirements and Programs, and commanded the U.S. Third Fleet.

Mr. McGinn is the former President of the American Council On Renewable Energy (ACORE), a past co-chairman of the CNA Military Advisory Board and an international security senior fellow at the Rocky Mountain Institute. Mr. McGinn is a past member of the Steering Committee of the Energy Future Coalition, the United States Energy Security Council, and the Bipartisan Policy Center Energy Board. He earned a B.S. degree in Naval Engineering from the U.S. Naval Academy; attended the national security program at the Kennedy School of Government, Harvard University; and was a Chief of Naval Operations strategic studies fellow at the U.S. Naval War College.



### **Lawrence Jones**

Vice President, Utility Innovations and Infrastructure Resilience, Alstom

Dr. Lawrence E. Jones joined Alstom Grid Inc. in 2000 and is currently North America Vice President for Utility Innovations and Infrastructure Resilience and serves on the company's global Business Development team for Smart Grids and Smart Cities. He was previously Vice President for Regulatory Affairs, Policy and Industry Relations in North America. Dr. Jones serves on the US Department of Commerce's Renewable Energy and Energy Efficiency Advisory Committee, and the National Institute of Standards and Technology (NIST) Smart Grid Advisory Committee. Dr. Jones is Editor of the book "Renewable Energy Integration: Practical Management of Variability, Uncertainty and Flexibility in Power Grids." He received the Renewable Energy World Network Excellence in Renewable Energy Awards for Leadership in Technology in 2012. He received MSc, Licentiate and Ph.D. degrees in Electrical Engineering from the Royal Institute of Technology in Stockholm, Sweden.



### **Robert Schimmenti**

Senior Vice President, Electric Operations, Consolidated Edison Company of New York

Robert Schimmenti is senior vice president of Electric Operations for Con Edison. His organization is responsible for the safe and reliable delivery of electricity to the nine million people living in New York City and Westchester County.

Mr. Schimmenti and his team manage the design, construction, operation, and maintenance of the nation's most reliable electric system, with more than 130,000 miles of underground and overhead electric cable.

He joined Con Edison as a management intern in 1987, and has held senior level positions in Electric Operations, Electric Construction, Control Center Operations, and Substation Operations. He served most recently as vice president of Engineering and Planning.

Mr. Schimmenti demonstrates his commitment to developing leaders through mentoring in Con Edison's executive development program, and by teaching senior managers in the company's Business Academy.

He continues his advocacy for developing future generations and a sustainable environment through his work on the board of the Brooklyn Botanic Garden as well as the board of Architecture, Construction, and Engineering (ACE), a high school mentoring program.

Mr. Schimmenti earned a bachelor's degree in electrical engineering from Hofstra University and a master's degree in management technology from Polytechnic University.





# Evolving Power Grid





## Evolving Power Grid

As new energy services and technologies multiply, today's electric distribution grid is evolving into a broad platform—connecting an increasingly diverse set of both supply- and demand-side resources. For electric utilities that operate this plug-and-play distribution grid, this means seamlessly integrating new energy resources, technologies, and services, and continually meeting the evolving needs of various stakeholders.

As the grid continues to evolve, only utilities have the end-to-end visibility and the mandate to provide safe, reliable, affordable, and increasingly clean electricity. How might the electric utility business and the associated regulatory paradigm change to keep pace with the transformation of the power sector that is well underway in the U.S.? How does this align with the pace of change of technology?

### Speakers:



#### **Marvin E. McDaniel, Jr.**

Executive Vice President, Group President – Utilities, and Chief Administrative Officer, Xcel Energy Inc.

Marvin McDaniel is Group President, Utilities and Chief Administrative Officer (CAO) of Xcel Energy. He is responsible for the four Xcel Energy operating companies: Northern States Power-Minnesota, Northern States Power-Wisconsin, Public Service Company of Colorado and Southwestern Public Service Company. He also oversees the Xcel Energy corporate service functions, including Business Systems, Human Resources, Employee and Public Safety, Business Services, Resource Planning and Marketing. Previously, McDaniel was the Senior Vice President of Corporate Services and CAO.

McDaniel has been employed by Xcel Energy and its predecessor companies for more than 25 years. He has served in a variety of senior positions in Commercial Operations, Corporate Accounting, and Rates & Regulatory Services.

McDaniel earned a Bachelor of Science degree in business administration from Colorado State University and a Master of Business Administration degree from Regis University. He is also a Certified Public Accountant (inactive).



#### **Elisabeth Brinton**

VP, Corporate Strategy Officer, PG&E Corporation

Elisabeth S. Brinton is Vice President, Corporate Strategy Officer for PG&E Corporation. Brinton joined PG&E in the Fall of 2014. She is responsible for enterprise-wide utility strategy across both the electric and gas utility businesses, corporate strategy and corporate development.

Most recently, she was Executive Vice President of Operations for C3 Energy. In that role she served as the executive sponsor for the utility market and product development in addition to leading operations. Prior to that, Brinton was the Chief Customer Officer for SMUD, where she ran the vertically integrated utility's \$2B retail business.

Brinton holds a triple major from Principia College, integrating hard sciences and the humanities. She is a Harry S. Truman Scholar, Lincoln Academy Fellow and also a graduate of Singularity University's Global Executive program. Brinton now serves as the co-chair for Singularity University's Energy and Climate Program.



### **Michael E. Champley**

Commissioner, Hawaii Public Utilities Commission

Mr. Champley was appointed commissioner to the Hawaii Public Utilities Commission (PUC) in September, 2011 by Governor Neil Abercrombie for a term to expire in June, 2016.

Commissioner Champley has over 40 years of experience analyzing, integrating and managing complex economic, public policy and technical issues facing the energy utility industry.

Prior to re-locating to Hawai'i, Commissioner Champley was a senior executive with DTE Energy, where he held various executive positions including Senior Vice President-Regulatory Affairs and Senior Vice President-Power Supply.

Commissioner Champley holds a Bachelor of Science in Electrical Engineering from the University of Dayton and a Master of Business Administration from Indiana University, with emphasis in Finance and Public Utility Economics and Regulation.



### **Guerry Waters**

Vice President, Industry Strategy, Oracle Utilities

Guerry Waters has more than 30 years experience in global information technology strategy, organization, architecture, and business-driven IT solutions.

Mr. Waters served as Executive Vice President and Chief Technology Officer of SPL WorldGroup since 2000, and joined Oracle Utilities when Oracle acquired SPL WorldGroup in 2006. Previously, he was Vice President of Energy Information Strategy at META Group (now Gartner), where he focused on customer management and the alignment of information technology with energy lines of business. He has also held positions as CTO and Director of Technology Strategy and Engineering at Southern Company.

Mr. Waters' educational background includes concentrations in business technology and extensive course work in management, strategy development, and implementation planning. He is a frequent speaker and writer on issues surrounding the delivery of energy and water to customers, and the IT strategies that help utilities meet their goals amidst changing customer demands, regulations, and market structures.



### **Philip Mezey**

President & CEO, Itron

Philip Mezey was appointed president and chief executive officer and named to Itron's board of directors on January 1, 2013. Mezey has served the company in several capacities during his career at Itron, most recently as chief operating officer for Itron's global Energy segment, with responsibility for the operations of Itron's electricity and gas businesses around the world. He also previously served as senior vice president and chief operating officer — Itron North America, group vice president and general manager, as well as senior vice president for Software Solutions. Upon Itron's acquisition of Silicon Energy in 2003, Mezey joined the company as managing director of Software Development for Itron's Energy Management Solutions group. Prior to joining Silicon Energy in 2000 as vice president, Software Development, Mezey was a founding member and served 12 years with Indus, a provider of integrated asset and customer management software. Mezey earned his BA degree in history from the University of California, Berkeley.





# Connected Conversations Dialogue



## Connected Conversations Dialogue

Based on the different perspectives and discussions heard throughout the day, how do we connect the dots among technologies, public policies, and electric utilities to best serve the customer?

### Facilitator:



#### **Bob Rowe**

President and CEO, NorthWestern Corporation

Mr. Rowe is President and Chief Executive Officer of NorthWestern Corporation since August 13, 2008. He is Co-Chair of the Institute for Electric Innovation, part of the Edison Electric Institute. Previously, he was co-founder and senior partner at Balhoff, Rowe & Williams, LLC, a specialized national professional services firm providing financial and policy advice to clients in the telecommunications and energy industries. Mr. Rowe served as commissioner and chairman of the Montana Public Service Commission from 1993–2004, and also served as president of the National Association of Regulatory Utility Commissioners (NARUC). While at the PSC, Bob was a member and state chairman of the Federal-State Joint Board on Universal Service, as well as a founding member of the Federal-State Joint Conference on Access to Advanced Services. He testified frequently before Congress and consulted with and trained U.S. and non-U.S. energy and telecommunications regulators. Mr. Rowe resides in Helena, Montana. He holds a BA from Lewis and Clark College in Portland, Oregon, a JD from the University of Oregon, completed the Kennedy School Senior Executives' Program, and is active in various legal and professional organizations.

## Closing Remarks



#### **Thomas R. Kuhn**

President, Edison Electric Institute

Mr. Kuhn is President of the Edison Electric Institute, the association of investor-owned electric companies whose members generate and distribute approximately three-quarters of the Nation's electricity. In addition, EEI has a growing affiliate membership of utilities worldwide. Mr. Kuhn joined the Institute in 1985 as executive vice president, was named chief operating officer in 1988, and elected president in 1990. Prior to joining the Institute, Mr. Kuhn was president of the American Nuclear Energy Council, which subsequently merged with the Nuclear Energy Institute. The Council represented virtually all of the companies in the commercial nuclear power industry. He joined the Council in 1975 as vice president, government affairs, and became president in 1983. From 1972 to 1975, he headed the energy section of the investment banking firm, Alex Brown and Sons. Prior to that, from 1970 to 1972, Mr. Kuhn was White House Liaison Officer to the Secretary of the Navy.





# THE ENERGY EXPERTS

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# Notes

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# IEI Management Committee

**Executive Director** Lisa Wood

**Co-Chair** Christopher Johns, President, Pacific Gas and Electric Company

**Co-Chair** Robert Rowe, President and CEO, NorthWestern Corporation

Nicholas Akins

Chairman, President, and CEO  
American Electric Power

David Hutchens

President and CEO  
UNS Energy Corporation

Anne Pramaggiore

President and CEO  
Commonwealth Edison Company

Terry Bassham

Chairman, President, and CEO  
Great Plains Energy, Inc.

Thomas King

President  
National Grid USA

Scott Prochazka

President and CEO  
CenterPoint Energy, Inc.

Christopher Crane

President and CEO  
Exelon Corporation

Mark Lantrip

President and CEO  
Southern Company Services

Joseph Rigby

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Peter Delaney

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Charles Schrock

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Integrus Energy Group, Inc.

Anthony Earley

Chairman, President, and CEO  
PG&E Corporation

Marvin McDaniel

EVP, Group President – Utilities,  
and Chief Administrative Officer  
Xcel Energy, Inc.

Eric Silagy

President and CEO  
Florida Power & Light Company

Thomas Fanning

Chairman, President, and CEO  
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David Meador

Vice Chairman and Chief  
Administrative Officer  
DTE Energy Co.

B. Keith Trent

EVP, Grid Solutions and  
President – Midwest and Florida  
Regions  
Duke Energy

Kevin Fitzgerald

Executive Vice President &  
General Counsel  
Pepco Holdings, Inc.

Scott Morris

Chairman, President, and CEO  
Avista Corp.

Patricia Vincent Collawn

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PNM Resource, Inc.

Benjamin Fowke

Chairman, President, and CEO  
Xcel Energy, Inc.

Jim Piro

President and CEO  
Portland General Electric

Lynn Good

President and CEO  
Duke Energy Corporation

Pedro Pizarro

President  
Southern California Edison Company

# IEI Technology Partner Roundtable

**Chair** Kevin C. Fitzgerald, Executive Vice President and General Counsel, Pepco Holdings, Inc.

- Alstom
- BRIDGE Energy Group
- Broadscale Group
- BuildingIQ
- C3 Energy
- Comverge
- Copper Development Association
- Ecova
- Enbala
- Energate
- EnerNOC
- FirstFuel
- First Solar
- GE Power & Water
- Gridco
- GridSense
- IBM
- Intelligent Energy Solutions
- Itron
- Johnson Controls
- Opower
- Oracle
- RES Americas
- Sensus
- Siemens
- Silver Spring Networks
- Simple Energy
- Tendril

The IEI Partner Roundtable is a select group of innovative technology companies dedicated to advancing smart technologies with electric utilities. The roundtable is a platform to share information, ideas, innovations, and results as utilities and technology companies work together.





*The Edison Foundation*

## INSTITUTE for ELECTRIC INNOVATION

### **About the Institute for Electric Innovation**

The Edison Foundation Institute for Electric Innovation (IEI) focuses on advancing the adoption and application of new technologies that will strengthen and transform the power grid. IEI's members are the investor-owned electric utilities that represent about 70 percent of the U.S. electric power industry. The membership is committed to an affordable, reliable, secure, and clean energy future.

IEI's objectives are to: provide a forum for peer-to-peer exchange of information on technology trends, experiences with new technology, and best practices among electric utility industry executives; promote the sharing of information, ideas, and experiences among regulators, policymakers, technology companies, thought leaders, and the electric power industry; and identify policies that support the business case for the adoption of cost-effective technologies.

IEI is governed by a Management Committee of electric industry Chief Executive and Senior Officers. In addition, IEI has a Strategy Committee made up of electric industry executives and more than 30 smart grid technology company partners.

Visit us at: [www.edisonfoundation.net](http://www.edisonfoundation.net).

### **About The Edison Foundation**

The Edison Foundation is a 501(c)(3) charitable organization dedicated to bringing the benefits of electricity to families, businesses, and industries worldwide. Furthering Thomas Alva Edison's spirit of invention, the Foundation works to encourage a greater understanding of the production, delivery, and use of electric power to foster economic progress; to ensure a safe and clean environment; and to improve the quality of life for all people. The Edison Foundation provides knowledge, insight, and leadership to achieve its goals through research, conferences, grants, and other outreach activities.