The next-generation smart grid is one that leverages technology and business model innovation to deliver greater efficiency, cost control, reliability, and high-quality service flexibility to end users of all types. Together with advanced metering infrastructure, the grid of the future will employ cutting-edge advances in Big Data analytics, energy storage, power generation, IoT and M2M communications, cyber security and more to deliver a harmonized, distributed energy system that efficiently meets the growing requirement for clean, sustainable, and reliable energy across the service regions. Evaluating these technology innovations, determining which ones make sense within various business scenarios, and ensuring their seamless integration and interoperability is a top priority for energy providers.

Building on the success of the 2016 edition, the **2nd Annual Grid Modernization Forum,** April 3-5, 2017 in Chicago, will closely examine lessons learned to date by industry leaders pushing the frontiers of grid modernization and reliability. Key technology innovators and executives will come together to share perspectives on how best to leverage AMI investment, engage the customer, and take the smart grid to the next level. Case studies of improved network performance, resiliency, outage restoration, and distributed energy resource (DER) integration will be examined with an eye toward determining best practices and technology advances for today's energy ecosystem. Like the 2016 edition, this will be a unique opportunity to network with top industry professionals who are leading the way toward effective grid modernization and the integrated, interoperable, resilient energy network of tomorrow.

Topics to be addressed include:

- Case study best practices and strategies for enhancing grid reliability
- Analyzing the NY REV initiative
- Outage restoration advances
- Managing and integrating distributed energy resources
- Energy storage advances for improved grid performance and independence
- Ensuring interoperability between key systems
- Advanced communications networks and technologies for smart grid systems
- Advanced grid sensing, measurement and control technologies
- And more

Forum Audience

• Network strategies and executives at investor-owned, municipal, and rural utilities
• Grid operations engineers and directors
• Service and network planners
• Consultants and system integrators
• Regulatory and policymakers
• Technology innovators and equipment vendors
• Energy storage, communications, and power control solutions providers
• Government agency representatives
• Researchers and university professionals
• Renewable energy providers and technology vendors
• Financial and investment industry professionals

Schedule Overview

Subject to change. Last update: 3-12-17

Monday, April 3, 2017

12:00 – 1:00 pm	Registration Open
1:00 – 3:15 pm **Pre-Conference Workshop: Upgrading to a 21st Century Utility -- How to Build Your Smart Grid**	Dale Pennington, Managing Director **UtiliWorks Consulting, LLC.**
3:15 – 5:00 pm **Site Tour: S&C Electric's Smart Grid Demo Center**	*Meet in lobby at 525 S. State Street. Pre-registration on website is required.*

Tuesday, April 4, 2017

7:30 – 8:30 am	Continental Breakfast
7:30 – 5:30 pm	Registration Open
8:30 - 9:00 am **Opening Address: Business Change and System Impacts a Result of DER**	Sharon S. Allan, CEO & President **Smart Grid Interoperability Panel (SGIP)**
9:00 – 10:30 am **Session 1: Progress on New York REV and other Key Grid Modernization Initiatives**	Brien J. Sheahan, Chairman, **Illinois Commerce Commission** Keith Lorenzetti, Program Director, Energy Smart Community, **AVANGRID** Kelly Ziegler, Manager, State Regulatory Affairs, Stakeholder Ombudsman, **ConEd** Joe Hally, Manager, Energy Transformation & Solutions, **Central Hudson Gas & Electric** Paul A. DeCotis, Senior Director, Energy & Utilities Practice, **West Monroe Partners** Robert D. Sheridan, P.E., Director, Utility of the Future, **National Grid**
10:30 – 11:00 am	Networking Break
11:00 am - 12:15 pm **Session 2: Grid Edge Integration Techniques**	Phil Davis, Vice President, Planning and Partnerships, **Sterling Energy Assets** Howard Smith, Manager, Distributed Energy Resouces Policy, **Southern Company** Doug Houseman, Vice President, Innovation and Technology, **EnerNex** Tim Hade, Co-Founder and Chief Operating Officer, **Scale Energy Solutions**
12:15 - 1:15	Networking Lunch
1:15 – 2:30 pm **Session 3: IoT and Big Data Analytics for New Business Models and Operational Excellence**	Zac Canders, CEO & CoFounder, **DataCapable** Paul Hofmann, Team Lead, Business Intelligence and Data Warehouse, **Alliant Energy** Dave Mulder, VP - Strategy and Solution Development, **Open Energy Solutions** Mimi Zhang, Senior Product Manager, **Silver Spring Networks**
2:30 – 3:00 pm	Networking Break
3:00 – 4:00 pm **Session 4: Determining the Value of DER through Distribution Locational Marginal Pricing (DLMP)**	Jason Iacobucci, President, **PowerRunner** Keith Hock, Director Transmission Technical Services and Operations Planning, **Ameren**
4:00 – 5:15 pm **Session 5: Case Study Perspectives on Enhancing Grid Reliability**	Christopher N. Evanich, Applications Director of Microgrids, **S&C Electric Company** Donald Harrod, Village Administrator, **Village of Minster, Ohio** Bill Abolt, Vice President, Energy, **AECOM** Mike Danziger, Managing Director, Power and Utilities Practice, **Deloitte Consulting LLP**
5:15 - 6:15	Drink Reception

Wednesday, April 5, 2017

7:30 – 8:30 am	Continental Breakfast
7:30 – 5:00 pm	Registration Open
8:30 – 9:45 am **Session 6: Energy Storage and the Integration of Renewables and DERs**	Ryn Hamilton, President, **Ryn Hamilton Consulting** David Dobratz, P.E., Supervisor, Energy Efficiency, **Eversource Energy** Clay Collier, Co-Founder and CEO, **Kisensum** Michael Hopkins, CEO, **Ice Energy**
9:45 - 10:15 am	Networking Break
10:15 - 10:45 am **Keynote Address: The Evolution of US Power Grids – Complexity and Clarity**	Jeffrey D. Taft, PhD, Chief Architect, Electric Grid Transformation, Energy and Environment Directorate, **Pacific Northwest National Laboratory**
10:45 am – 12:00 pm **Session 7: Public-Private Partnerships: Can Cities and Utilities Work Together on Microgrids?**	Gordon Feller, Consultant, **Cisco Systems HQ** and Founder, **Meeting of the Minds** Michael T. Burr, Director, **Microgrid Institute** John Vernacchia, Global Segment Manager, Alternative Energy Solutions, **Eaton** Patrick Norton, Vice President, **Swift Current Advisors**
12:00 - 1:00 pm	Networking Lunch
1:00 – 1:30 pm **Session 8: Could Illinois' New DER Valuation Approach Bridge The Utility-Solar Divide?**	Andrew Barbeau, President, **The Accelerate Group;** and Senior Clean Energy Consultant, **EDF**
1:30 – 2:00 pm **Session 9: Mitigating Physical and Cybersecurity Attacks to Critical Utility Infrastructure**	Brian Harrell, CPP, Director, Security and Risk Management, Energy Practice **Navigant**
2:00 – 3:00 pm **Session 10: Better Programs, Better Performance, with Customer + Grid Data Analytics**	Jamie Peters, Director, Client Solutions, **EnergySavvy** Kevin Bricknell, Energy Data Services Program Manager, **ComEd**
3:00 - 3:30 pm	Networking Break
3:30 – 4:45 pm **Session 11: Unlocking the Value of Grid Modernization and DER for Commercial Customers**	David W. South, Senior Principal, Sustainability, Energy & Utilities Practice **West Monroe Partners** Arthur (Bud) Vos, President and CEO, **Enbala Power Networks** Dennis Quinn, Chief Operating Officer & Founder, **Joule Assets** Teresa R. Lutz, Director - Program Evaluation, **Michaels Energy**

From Grid Modernization Forum 2016

Detailed Program Agenda

Subject to change.

Monday, April 3, 2017

12:00 – 1:00 pm – Registration Open

Pre-Conference Workshop: Upgrading to a 21st Century Utility -- How to Build Your Smart Grid

1:00 - 3:15 pm

The Smart Grid requires a significant design effort to manage how the various components need to work to make the grid "Smart." In this workshop, a road map for the various components will be reviewed, examining how the segments of a smart grid project must be stitched together. Technical aspects such as the working relationships between distribution automation, AMI, customer systems, energy storage devices and new distributed generation will be addressed.

In conjunction with the technical road map, a complete detailed deployment schedule must be created. This project plan must not only account for the physical events of the deployment process, but also how the training and data utilization throughout the organization must be planned for in order to maximize benefits.

With new systems and new data, there come new decision points that are created by the Smart Grid. As monitoring systems are established, all of the associated settings and alarms must be allocated and assigned within the utility organization, such that the staff takes ownership of the technology and business process changes that are required to fully enable the Smart Grid.

Key Topics to be covered:

- Defining a "smart grid"
- Understanding how to build a technical roadmap and project plan
- Understanding the business process changes, challenges and success strategies
- Stressing the importance of training and data utilization across the organization

Workshop Instructor:

- **Dale Pennington, Managing Director, UtiliWorks Consulting, LLC.**

  Dale Pennington is the Managing Director of UtiliWorks, a boutique consulting firm that specializes in providing professional services in the electric, water, and gas utility space. By utilizing proven workflow and asset management techniques that he has practiced over the last 30 years, Dale is able to assist utilities in maximizing the benefits of their technology investment. Dale facilitates discussions with vendor and client resources, studies the latest developments with technology applications, and provides strategy and implementation advice both in the U.S. market and internationally.

Note: Separate registration fee is required.. Participants are welcome to also attend the on-site tour of the S&G Smart Grid Demo Center from 3:15 to 5:00

Pre-Conference Tour: Smart Grid Solutions Demonstration Center

3:15 – 5:15 pm (Monday, April 3, 2017)

Forum attendees are invited to participate in a free tour of the **Smart Grid Solutions Demonstration Center** at S&C Electric Company's global headquarters in Chicago. The demonstration center will allow you to see, in real time, how smart grid technologies respond to grid issues and optimize power delivery systems. The demonstration center includes interactive exhibits that display S&C's solutions such as microgrids, self-healing technology, energy storage integration solutions and communications systems.

The center's interactive exhibits showcase the benefits of these technologies and demonstrate how S&C's solutions can improve the efficiency and operating performance of the electrical grid, a crucial goal for utilities. The Smart Grid Solutions Demonstration Center features the latest innovations from S&C, including IntelliRupter ® PulseCloser, PureWave ® CES Community Energy Storage, and the IntelliTeam ® SG Automatic Restoration System.

Participation in this tour is complimentary for all Forum attendees. However, you must reserve your spot by **Thursday, March 30.**Transportation will be provided to and from the Demonstration Center.

Tour participants should meet in the lobby of the Conference Chicago at University Center, 525 South State Street, Chicago, at 3:00 pm. We will depart the Center at 3:15 and arrive at S&C by 3:45. The tour of the Technology Demonstration Center will be from 3:45 - 4:45 pm, and attendees will be dropped off back at Conference Chicago at approximately 5:15 pm. Please note that only those who have pre-registered will be able to attend the tour. No onsite sign-ups, please.

Tuesday, April 4, 2017

7:30 - 8:30 am -- Continental Breakfast
7:30 - 5:30 pm -- Registration Open

Opening Address: Business Change and System Impacts a Result of DER

8:30 - 9:00 am

This session sets the stage with a discussion of current technology, market trends, and collaborations to drive grid modernization. The focus of the session will be on the impacts of DER to planning and operational systems of the utilities. The session will explore industry efforts to define the impacts to current systems, the requirements and capabilities needed, and the needed dialogue amongst industry.

- **Sharon S. Allan, CEO & President, Smart Grid Interoperability Panel (SGIP)**

  Sharon Allan has been helping participants in the energy sector unlock the business value of the electric grid by aligning and implementing strategy, processes and operations. Before joining SGIP, she ran her own consulting firm, and prior to that she ran the Accenture NA Smart Grid Practice. Other industry roles include President of Elster Integrated Solutions, Chief Knowledge Officer of Elster Electricity, Director of Product Management ABB, and IBM Marketing Information.

Sharon has received many accolades for her leadership in the industry. She was named one of the "100 Movers and Shakers of the Smart Grid in 2012" by Greentech Media. She has been recognized by Smart Grid News as "Smart Grid's three most powerful women," as well as by Now magazine as "One of the 50 Key Women in Energy." In addition, she was named to World Generation magazine's 'Class of 2007' recognized leaders. Sharon also is a contributor to WEF's "Accelerating Successful Smart Grid pilot."

Session 1: Progress on New York REV and other Key Grid Modernization Initiatives

9:00 - 10:30 am

Progress made in Grid Modernization programs throughout the U.S. is mixed. While State's are moving purposefully and deliberatively to modernize the grid, empower customers, and offer competitive opportunities for utilities and non-utilities alike and technology providers to serve load, we are looking at billions of dollars of investment needed to fully operationalize the grid-of-the-future. Most people agree generally on what the future state should look like and also recognize that the road to realization of this vision is fraught with risk. This panel will address the vision, planning and investment needs, risks and opportunities, and provide a status report on grid mod initiatives in New York and other leading states.

- **Brien J. Sheahan, Chairman, Illinois Commerce Commission**
  Brien J. Sheahan is the Chairman and CEO of the Illinois Commerce Commission. He was appointed by Governor Bruce Rauner on January 20, 2015. During the first year of his five-year term, Sheahan initiated agency reform and established the Office of Diversity and Community Affairs, hosted a Policy Session on Business and IT Investments in Cloud Computing Arrangements, accepted an appointment to the National Association of Regulatory Utility Commissioners (NARUC) Board of Directors, endorsed a new smart thermostat initiative, and joined industry leaders at Penton's Empowering Customers and Cities Conference where he participated on a panel to weigh in on whether the role of regulators should be responding or driving change. Prior to joining the Commission, Sheahan was a senior advisor to the Governor's successful 2014 campaign and served as Counsel to Governor Rauner's Transition Committee beginning in November 2014. Prior to that, Sheahan was the Director of Government Relations for Navistar from 2012-2014 and General Counsel for the Illinois Republican Party from 2007 to 2012. His extensive background in government includes serving three Illinois Governors in senior leadership roles. Sheahan was also a DuPage County Board Member for ten years and served on the staffs of the Office of the Governor, Lieutenant Governor, and the Illinois Commerce Commission. He was Deputy Executive Director of the Illinois Housing Development Authority, a $2 Billon quasi-public affordable housing lender, where he was responsible for government relations, legal, Human Resources, and information technology. Sheahan received his Bachelor of Arts in Urban and Regional Planning, with High Honors, from the University of Illinois at Champaign Urbana and his Juris Doctorate from DePaul University College of Law. He resides with his wife, Anne, and son in Hinsdale, Illinois.

- **Keith Lorenzetti, Program Director, Energy Smart Community, AVANGRID**

- **Kelly Ziegler, Manager, State Regulatory Affairs, Stakeholder Ombudsman, Con Edison**

  At Con Edison, Kelly focuses on stakeholder and regulatory outreach and works on issues including the Reforming the Energy Vision (REV) proceeding, New York's Clean Energy Standard, and Net Energy Metering reform. Kelly has also led government and public affairs for the North American Electric Reliability Corporation (NERC), where she helped to strengthen critical infrastructure protections for the electric industry. Kelly went on to support alignment of cyber security accreditation between the U.S. Department of Defense, the National Security Agency (NSA), and their counterparts in the U.K. Kelly has also worked for the Regional Greenhouse Gas Initiative (RGGI) and smart grid company Comverge.

- **Paul A. DeCotis, Senior Director, Energy & Utilities Practice, West Monroe Partners**

  Paul is an accomplished and respected executive and thought leader with deep expertise in trends and issues facing today's energy and utility leaders. Among other responsibilities, he works with utilities, independent power and distributed energy generators, and state agencies to help plan their response to the U.S. Environmental Protection Agency's (EPA) preliminary rules requiring states to reduce carbon dioxide emissions by 30 percent or more by 2030. Paul joined West Monroe Partners in 2014 from Long Island Power Authority, where he

served as managing director for contract oversight and previously as vice president of power markets. His responsibilities included oversight of the PSEG Long Island (Public Service Electric & Gas) utility services contract for transmission and distribution operations, customer service, business services, and emergency planning and storm restoration. He was a member of the utility's Risk Management Committee. As vice president of power markets, Paul oversaw power generation, project development, integrated resource planning, and FERC and RTO market policy.

- **Robert D. Sheridan, P.E., Director, Utility of the Future, National Grid**

  Mr. Sheridan is responsible for the development of utility strategy, plans and demonstration projects to advance the goals of NY's Reforming the Energy Vision (REV) and Massachusetts' Grid Modernization efforts. He has 28 years of utility experience in power systems management with a focus on distribution system planning and asset management. He has been in responsible charge of numerous engineering departments accountable for the development and implementation of capital plans of up to $500M annually across New York and New England and is a licensed professional engineer in Massachusetts.

- **Joe Hally, Manager, Energy Transformation & Solutions, Central Hudson Gas & Electric**

10:30 - 11:00 **Networking Break**

Session 2: Grid Edge Integration Techniques

11:00 - 12:15 pm *Additional Speaker TBA*

Our industry has major pilots and plans around Distributed Resource Integration, interactive microgrids, transactive energy, and many other shiny new objects. However, five minutes at another industry's conferences is all it takes to learn that customers aren't ready, they are suspicious, and they want to be left alone (mostly). After suffering our own indigestion with the recent explosion of standards, are we in danger of alienating our customers for the same reason? This panel will explore the issue with key managers from the energy, technology, and major industry perspectives and the best ways to work through the issues.

- **Phil Davis, Vice President, Planning and Partnerships, Sterling Energy Assets**

  Before starting Strategic Grid Services Group in March 2016, Phil Davis served as Senior Manager, Energy and Utilities Business at Schneider Electric. Prior to joining Schneider Electric via an acquisition, he was Chief Operating Officer for RETX Energy Services where he also ran market operations to monetize client energy positions. Trained in Economics, Mr. Davis has an extensive professional background in applying efficient energy strategies to support the disparate goals of energy stakeholders. Among his credits is the design and installation of a groundbreaking "intelligent building system" at Rockefeller Center in New York, and a high speed energy interactive system at the College of San Mateo.

- **Howard Smith, Manager, Distributed Energy Resouces Policy, Southern Company**

  Howard Smith graduated from Clemson University in 1977 with a Bachelor of Science in Electrical Engineering. Currently, Howard is Manager of Distributed Energy Resource Policy at Southern Company. In this role, he is responsible for tracking current and future trends and activities involving the broad aspects of DER. Also, he is responsible for developing plans and policy positions related to DER in support of Executive Management's efforts in the establishment of goals, actions and policies for the Southern system. Howard has served on the Alabama Governor's Advisory Team for Industrial Energy Efficient and CHP, and has made numerous regional and national presentations on integrated resource planning, demand-side management, smart grid and other electric industry-related topics.

- **Doug Houseman, Vice President, Innovation and Technology, EnerNex**

  With 30 years of extensive energy and utility industry experience, Doug has been involved in projects in more than 30 countries. He was named part of the World Generation Class of 2007, one of 30 people in the global utility and energy industry so named. He was the lead investigator on one of the largest studies on the future of

distribution companies over the last 5 years working with more than 100 utilities and 20 governments. Among his many industry accomplishments, he helped develop the NIST smart grid framework model, designed the second NIST workshop for smart grid, facilitated over 40 single utility smart grid road map sessions in 14 countries, and worked in Cap Gemini's 12,000-person Energy Practice for 15 years, rising to the position of CTO.

- **Tim Hade, Co-Founder and Chief Operating Officer, Scale Energy Solutions**

  Tim focuses on developing sustainable distributed generation solutions to serve North America's growing indoor agriculture industry. Prior to joining Scale, Tim served as the Business Development Manager for ENER-G Rudox, where he oversaw project development of the company's turnkey sustainable energy projects, and built the company's performance contracting division. In 2015, Tim's white paper "Sustainable Load Balancing: Integrating Distributed Natural Gas, Solar PV, and Energy Storage Assets" was named the 2015 Renewable Energy World Paper of the Year. Prior to joining the clean technology industry, Tim served on Active Duty as an officer in the United States Air Force. He holds a B.S. from the United States Air Force Academy, an MBA from Stanford University, and is a certified LEED AP.

12:15 - 1:15 **Networking Lunch**

Session 3: IoT and Big Data Analytics for New Business Models and Operational Excellence

1:15 - 2:30 pm *Additional Speaker TBA*

The future of the grid is dynamic and ever-changing. The role of telecommunication networks, the customer, and renewables is rapidly overlaying onto the electric grid. While IoT is the new moniker in town, the value of interoperability, collaboration, and technology is foundational in the future of the grid. In this exciting presentation, experts from utilities and vendors will discuss the future of the Smart Grid and how interoperability is the key to success.

- **Zac Canders, CEO and CoFounder, Data Capable**

  Zac Canders is the Co-Founder and CEO of DataCapable. In this role he leads DataCapable's worldwide delivery of the UtiliSocial platform. The first customer engagement system designed for utilities. He is passionate about the reliability of the global grid and "Connecting to the Customer of 2016". He has also authored numerous papers and extensively supports interoperability initiatives.

- **Dave Mulder, Vice President, Strategy and Solution Development, Open Energy Solutions**

- **Paul Hofmann, Team Lead, Business Intelligence and Data Warehouse, Alliant Energy**

- **Mimi Zhang, Senior Product Manager, Silver Spring Networks**

  Mimi Zhang is a Senior Product Manager at Silver Spring Networks. She is responsible for the software analytics platform, outage detection, and data access for application enablement. She serves as the Green Button Alliance representative for Silver Spring Networks and is the GBA Board's Vice Chair as well as Chair of the Global Marketing Committee. Before joining Silver Spring Networks, Mimi was a consultant focused on quantitative analysis in the smart grid, energy storage, and renewables sectors. Mimi holds a Bachelor of Science degree in Earth and Ocean Sciences from Duke University and a Master in City Planning degree from Massachusetts Institute of Technology.

2:30 - 3.00 **Networking Break**

Session 4: Determining the Value of DER through Distribution Locational Marginal Pricing (DLMP)

1:00 - 2:00 pm

This session discusses how utilities can extract value from the convergence of IT and OT. We will examine the process of transforming to the Distribution System Operator (DSO) of the future by enabling value-added functions such as:

- Locational Resource Management, including contingency analysis
- Dynamic Loss Minimization
- DER Integration
- Transactive Energy Settlement, including Distribution Locational Marginal Pricing (DLMP) determination

We will look in particular at the experiences of Ameren in leveraging micro forecasting, grid analytics, and distributed temporal and spatial data to determine the value of DERs at any location and time. The objective is to generate the right planning signals in order to efficiently integrate cutting-edge enabling technology, while ensuring grid reliability and safe and efficient real-time operations.

- **Jason Iacobucci, President, PowerRunner**

Jason Iacobucci is Founder and President of PowerRunner, LLC, an innovating energy industry analytics software and consulting company since 2007. He has over 20 year' experience in global energy industry operations and systems with previous experience at DOE, Southern Company, Lodestar (now Oracle) and Accenture. Jason has worked with regulated and deregulated retail and wholesale energy companies as well as central market operators, including MISO, CAISO, and ERCOT, to lead world-recognized energy market implementations.

- **Keith Hock, Director, Transmission Technical Services and Operations Planning**

Keith is the Director Transmission Technical Services and Operations Planning at Ameren where he is responsible for providing technology services to the Ameren Transmission business line including application development and support, real-time operations support including the EMS and control room visualization, hardware infrastructure, cyber-security including NERC CIP compliance, GIS, SharePoint, project management and strategy development. He is also responsible for energy and transmission market settlements, retail supplier and wholesale customer care and generator and utility interconnections.

Session 5: Case Study Perspectives on Enhancing Grid Reliability

4:00 - 5:15 pm *Additional Speakers TBA*

This panel will discuss the current state of the electrical grid and what would happen to society in a major power outage. Panelists will discuss how the electrical grid can be strengthened to increase its resiliency, as well as what steps have owners and users of the grid have been implementing and what are their future plans. The session takes a look at cutting-edge case studies, and key take-aways for organizations planning similar systems.

- **Christopher N. Evanich, Applications Director of Microgrids, S&C Electric Company**

  Chris Evanich is the Applications Director of Microgrids for S&C Electric Company. This position is focused on the global support of S&C's medium voltage switching, protection and energy storage products into microgrids. Prior to joining S&C, Chris spent 10 years with Thomas & Betts as the Senior Engineer specializing in distribution overhead and underground protection and control equipment. He holds a Bachelor of Science in Engineering from Cleveland State University and an MBA from Case Western Reserve University. He is an active member of the IEEE including participation in the Standards Association and being an IEEE PES Scholar Mentor.

- **Bill Abolt, Vice President, Energy, AECOM**

  Bill Abolt is a Vice President at AECOM where he focuses on energy, sustainability and smart, resilient urban infrastructure in the largest metropolitan economies in North America. He has over 31 years of experience managing complex environmental, energy and public issues and programs. He has developed, administered and implemented comprehensive energy and sustainability programs for utilities, government and private clients. He has extensive experience with alignment of grants, incentives and other third party resources with project and enterprise-wide budgeting, planning and sustainability goals. Previously, he served as Environment Commissioner, Director of the Office of Budget and Management and Chief of Management, Office of the Mayor, for the City of Chicago, where he was responsible for developing Chicago's strategy to become one of the greenest cities in the nation.

  Bill is a member of the Green Ribbon Committee of the Chicago Climate Action Plan; the Midwest Advisory Council of the Natural Resources Defense Council; the Civic Consulting Alliance Leadership Council; the Plan for Economic Growth and Jobs, Neighborhood and Placed-based Assets Strategy Team and a Leadership Greater Chicago Fellow (Class of '92.) He has served as an adjunct instructor in Public Policy and Administration at both Northwestern University and the University of Illinois at Chicago. He has developed and taught graduate courses on subjects including public budgeting, energy and climate policy, urban sustainability, intergovernmental management and capital and development finance.

- **Mike Danziger, Managing Director, Power and Utilities Practice, Deloitte Consulting LLP**

  Michael Danziger is a Director in the Energy and Resources Practice, focusing on Utility Companies. He is considered a thought leader in the areas of Smart Grid and Smart Metering technology, energy services, data management and cloud technology implementation, as well as the convergence of operations technology with information technology.

  Michael has led Deloitte's efforts in support of numerous clients developing roadmaps for future smart grid and operations initiatives for both gas and electric utilities. In addition, Michael authored the original Deloitte data analysis methodology, as well as co-authored the technical infrastructure methodology at another big 4 consulting company. Mr. Danziger recently completed work with a global combined gas and electric utility reviewing their front office technology strategy. This initiative evaluated alternative improvement areas including end-to-end work management processes. The initiative evaluated work performance from an organizational, business process, and technology perspective.

- **Donald Harrod, Village Administrator, Village of Minster, Ohio**

5:15 - 6:15 **Drink Reception**

Wednesday, April 5, 2017

7:30 - 8:30 am -- Continental Breakfast
7:30 - 5:00 pm -- Registration Open

Session 6: Energy Storage and the Integration of Renewables and DERs

8:30 - 9:45 am

There is an urgent call for energy storage to solve the challenges of variability and intermittency that accompany solar and wind generation. Grid modernization will require substantial deployment of storage resources. Innovation seems to be taking place faster than the ability to regulate it. The new President has included energy storage grid modernization on a list of the Top 50 Infrastructure Projects that promote national security. Yet in the absence of assurances and a 15-year track record some utilities remain wary. The panel includes a utility, a software company and an early player in storage technology who will discuss their personal experiences. Key discussion points will be:

- How new technologies are pushing the boundaries
- How manage the complex integration of storage with the grid
- How utility pilots are testing options to solve their own challenges, such as pairing grid storage with inverter technology

- **Ryn Hamilton, President, Ryn Hamilton Consulting**

  Ryn Hamilton Consulting was formed in 1992 to offer personalized demand-side management and impact evaluation services. The company has completed over 120 client projects. In recent years, the consultancy has focused almost entirely on demand response and smart grid. Ryn has led numerous demand response strategy projects, helped clients develop demand response capabilities, participated in the ISO/RTO working groups and helped develop industry standards for demand response. Her clients include utilities, ISOs/RTOs, government, startups, financial entities and nonprofits.

- **David Dobratz, P.E., CEM, BSME, MBA, CEM, Supervisor, Energy Efficiency, Eversource Energy**

  Dave is a key resource within Eversource regarding demand response industry developments, market integration of demand resources, automation of demand response and smart grid technologies. Eversource Energy operates New England's largest utility system serving more than 3.6 million electric and natural gas customers in Connecticut, Massachusetts and New Hampshire. Dave has more than 20 years of experience in engineering, energy industry project management, energy efficiency program implementation as well as Load Response Program Administration. He has proven expertise in leading project teams and organizing the implementation of complex project activities. He is a licensed professional engineer, a certified energy manager and has a baccalaureate degree in mechanical engineering and a master's degree in business management.

- **Clay Collier, Co-Founder and CEO, Kisensum**

  Clay is Co-Founder of Kisensum, a software firm specializing in Location-based and Energy-optimization applications. The company's first products will optimize the utilization and charging of electric vehicle fleets and will use the EV batteries to participate in the wholesale energy market.

  Clay was most recently the Co-Founder and CEO of Akuacom, the inventor of the full suite of software and hardware that created the Automated Demand Response market and led to the OpenADR standard with the support of Southern California Edison, Pacific Gas & Electric, Lawrence Berkeley National Labs, and the California Energy Commission. Honeywell acquired Akuacom in 2010 and Clay spent three years in Business Development domestically and internationally. Clay received a B.A. in Physics from UC Berkeley, and has patented multiple technologies in the areas of geospatial and energy systems and software.

- **Michael Hopkins, CEO, Ice Energy**

  Prior to joining the company in 2009, Mike practiced law for 18 years as a partner with Bennett Jones LLP, a pre-eminent Canadian law firm and global leader in energy and climate change. He specialized in the development and financing of power projects around the world, served on the firm’s Executive Committee and led its Utilities, International, and Independent Power Groups. He left Bennett Jones in 2003 to lead the workout of a private data center developer that resulted in its successful sale. Next, Mike co-founded a geospatial information services company and assisted several other startups, including Ice Energy. During his career working with startups, Mike has raised over $100 million in equity funding. Mike is a member of the Law Society of Alberta and the American Bar Association.

9:45 - 10:15 **Networking Break**

Keynote Address: The Evolution of US Power Grids -- Complexity and Clarity

10:15 - 10:45

The evolution of US power grids is proceeding apace, and that pace is not only much faster than in the past, it may still be accelerating. Part of this is due to technologies like Distributed Energy Resources (DER), storage, and ubiquitous communications but part is due to societal trends such as localized energy choice and climate concerns. The complexity of grid transformation and modernization has been a significant limiting factor in much key decision-making at all levels and the wide range of stakeholders and stakeholder interests in the grid makes it difficult even to communicate on these topics. A handful of strong conceptual tools and methods are being used successfully to achieve key clarifying insights about topics as diverse as DER value accrual across the grid, new roles and responsibility definitions for utilities and their relationships to evolving utility business models, and the convergence of grids with other networks, including gas, water, transportation, and social networks. We use these tools along with insights from Grid Architecture to discuss the things we know about grid evolution and what we don't yet know.

- **Jeffrey D. Taft, PhD, Chief Architect, Electric Grid Transformation, Energy and Environment Directorate Pacific Northwest National Laboratory**

  Jeff is the Chief Architect for Electric Grid Transformation at the Pacific Northwest National Laboratory. As a member of the Energy and Environment Directorate, he is responsible for development and articulation of large scale architecture for grid modernization, as well as support of many cross-cutting activities at the Laboratory, including the Future Power Grid Initiative, advanced computing, and the Control of Complex Systems Initiative. He began working in the grid modernization area in 2001 and has held smart grid chief architect roles with Cisco, Accenture, and IBM.

  Jeff formerly worked for Westinghouse and has participated in several key smart grid projects since he first began to develop sensor architectures and analytics for distribution grids, and then became involved in the larger issues of end-to-end grid integration and control. Jeff earned a PhD in Electrical Engineering from the University of Pittsburgh with a dual specialization in digital signal processing and digital control systems in 1986. He is a member of the IEEE Power and Energy Society, is an emeritus member of the GridWise Architecture Council and is the holder of 27 patents in control systems, signal processing, and grid modernization.

Session 7: Public-Private Partnerships: Can Cities and Utilities Work Together on Microgrids?

10:45 - 12:00 pm *Additional Speaker TBA*

City government leaders (whether elected or appointed) and utility executives see their energy destinies as conjoined. Sometimes, as large utilities customers, city governments are looking for ways to decrease their dependency on a major utility. Sometimes diversifying the city's economic development depends upon creating new sources of power, new storage options, new distribution and control systems. For instance, the City of Berkeley, together with the Univ. of Calif. and the Lawrence Berkeley National Lab, are undertaking new microgrid ventures. How are these kinds of microgird projects likely to play out? Who will finance and operate these systems? What role for the first-movers/customers who sign up with such microgrids? This session will explore these questions, and others.

- **Gordon Feller, Consultant, Cisco Systems HQ, Founder, Meeting of the Minds**

  Gordon Feller is the Co-Founder of Meeting of the Minds, a global thought leadership network and knowledge-sharing platform focused on the future of sustainable cities, innovation and technology.

  Gordon serves as a consultant to Cisco focused on Internet of Things and Talent. Gordon has worked in the area of emerging technology for three decades, most recently consulting on projects which harness the power of data (whether in the cloud, pulled via mobile networks from IoT-enabled end-points, or other advanced technologies) for solving complex problems. From 2010-2016, Gordon was the Director of Urban Innovation at Cisco Systems headquarters in Silicon Valley where he served in an executive capacity within the company's programs focused on cities. Prior to joining Cisco, he was the CEO of Urban Age Institute, an international non-profit research and training organization which began inside the World Bank and spun off in 2001.

- **Michael T. Burr, Director, Microgrid Institute**

  Michael T. Burr manages collaborative work among multidisciplinary groups of subject matter experts and leaders. He has produced more than 20 volumes of energy industry journals; moderated numerous public events, workshops, and seminars; and led formative industry initiatives to accelerate adoption of advanced energy technologies. Michael brings 25 years of industry experience to the Microgrid Institute initiative. He began his career in 1989 on the editorial staff of Independent Energy magazine and the Independent Energy Forum, serving developers and finance executives in the independent power producer (IPP) industry. In the early 1990s he served a brief stint as communications director for the National Independent Energy Producers trade association (succeeded by EPSA). He then began an independent analysis and consulting practice that numbered among its clients IBM, Barclays PLC, PriceWaterhouse Coopers, Sutherland Asbill & Brennan, and U.S. Generating Co. In the late 1990s he served as editor of PennWell's Electric Light & Power magazine. In the 2000s he served as editor-at-large for Inside Counsel magazine. He joined Public Utilities Reports in 2001, and from September 2007 through April 2014 he served as editor-in-chief of Public Utilities Fortnightly, the journal of record for the U.S. investor-owned utility industry. He also was Fortnightly's associate publisher from 2009 through 2014.

- **John Vernacchia, Global Segment Manager, Alternative Energy Solutions, Eaton**

  John Vernacchia is the Global Segment Manager for Alternative Energy solutions at Eaton. Vernacchia has 30 years of experience in marketing, sales and operations and has played a major role in the development of Eaton's Alternative Energy solutions to help customers connect solar and wind energy resources to buildings and the utility grid. Vernacchia is a member of the IEEE Applications Society and holds a Bachelor of Science in Mechanical Engineering from Virginia Tech.

- **Patrick Norton, Vice President, Swift Current Advisors**

  Patrick Norton is a Vice President for Swift Current Advisors where he assists energy and sustainability clients with capital raising, M&A, and strategic advisory. Mr. Norton has more than ten years of experience in the energy industry with a background that includes positions in investment banking, renewable energy development, and venture capital investing. Prior to Swift Current Advisors, he worked in a renewable energy advisory capacity at Marathon Capital, venture investing at Energy Foundry, and wind development at Nordex USA and Suzlon.

12:00 - 1:00 pm **Networking Lunch**

Session 8: Could Illinois' New DER Valuation Approach Bridge The Utility-Solar Divide?

1:00 - 1:30 pm

Illinois' recently-passed Future Energy Jobs Bill, a landmark piece of climate and energy policy, is a stepping stone to building the grid of the future. Although it received much attention for its focus on energy efficiency, distressed nuclear power plants, and the fix and improvement of the state's renewable portfolio standard, several other Distributed Energy Resource (DER) provisions could have an outsized impact. The most significant change is the creation of a Value of DER rebate as a new policy once the state reaches its net metering cap. The Value of DER rebate will be an upfront cash payment from the utility to a DER system owner to account for the lifetime value of the asset to the distribution grid, taking into account the value of its Location, Time, and Performance. The new policy will treat DER investments as equally or more beneficial to the grid and customers than new wires, poles, and transformers.

What does this mean for the future of the utility relationship with rooftop solar? What does it mean for a utility to say that solar is a value to the grid, and not a cost to the grid? How will different DER assets be able to take advantage of a valuation that is specific to their capabilities on the system? And how can the utility get more involved in DER siting to enable additional grid benefits?

- **Andrew Barbeau, President, The Accelerate Group; Senior Clean Energy Consultant, EDF**

  Andrew Barbeau is President of The Accelerate Group, a Midwest-based strategic consulting and innovation firm focused on accelerating large civic change initiatives. Through The Accelerate Group, Mr. Barbeau has helped companies, governments, and not-for-profits working to advance clean tech , smart cities, innovative government and economic development projects at a local and global scale.

Session 9: Mitigating Physical and Cybersecurity Attacks to Critical Utility Infrastructure

1:30 - 2:00 pm

Securing the North American power grid is a top priority for both regulators and utilities. While the industry remains focused on grid resiliency, physical and cybersecurity threats remain that could impact generation, transmission, and distribution operations. This session will review best practices for securing electric infrastructure and discuss the impact of the NERC standards (and how they may be inhibiting technology innovation), the potential for additional federal legislation, and emerging threats facing electric utilities. For discussion will also be the economic and interdependency impact of a significant "outage", utility reputational risk, and the response and recovery aftermath of a major security breach.

- **Brian Harrell, CPP, Director, Security and Risk Management, Energy Practice, Navigant**

  Brian Harrell, CPP is the Director of Security and Risk Management within Navigant's Energy Practice, providing energy companies with expert consultation on risk mitigation, protective measures, and compliance guidance. Prior to Navigant, Brian was the Director of the NERC Electricity Sector Information Sharing and Analysis Center (ES-ISAC) and was charged with leading NERC's efforts to provide timely threat and risk information to over 1900 bulk power system owners/operators and government stakeholders. In addition, Brian was a subject matter expert and Standard Drafting Team member for the NERC CIP-014 physical security standard. Brian has received many accolades for his work including awards from CSO Magazine and the 2014 GovSec "Gov30" award, which recognized leaders for their contributions to the security community. Brian has an MA from Central Michigan University and Pennsylvania State University, and a BA from Hawaii Pacific University. He is also board certified in security management.

Session 10: Better Programs, Better Performance, with Customer + Grid Data Analytics

2:00 - 3:00 pm

Running high performing utility customer programs often requires "reading the tea leaves." Manual program management and murky performance data makes it hard to scale programs, difficult to identify problems mid-course, and can lead to poor customer experiences.

But as real-time data has become available from the meter and from digitized customer programs, it's creating new opportunities to control costs, increase performance, and provide better customer experiences. Utility customer programs are being transformed through the intersection of grid and customer data, opening up entirely new ways to track, measure, and optimize performance. During this presentation, the case study of a large Southwestern IOU will be examined closely, looking at key learning points such as 2x gains in measured efficiencies, reducing inspection costs by 25%, justifying program investments, and increasing contractor performance.

- **Jamie Peters, Director, Client Solutions, EnergySavvy**

  Jamie leads client solutions for the Midwestern U.S. She brings eight years of energy efficiency and sustainability experience to EnergySavvy including launching Illinois' first statewide Home Performance with ENERGY STAR program, managing large-scale prescriptive and direct install utility programs, and developing tools and training for residential contractors. Jamie is passionate about the value energy efficiency brings to both

utilities and consumers and the importance of technology in unlocking the industry's potential. A member of the USGBC - Illinois board of directors and President of AESP Chicago, she holds a B.S. in environmental sciences from the University of Notre Dame.

- **Kevin Bricknell, Energy Data Services Program Manager, ComEd**

3:00 - 3:30 pm **Networking Break**

Session 11: Unlocking the Value of Grid Modernization and DER for Commercial Customers

3:30 - 4.45 pm

Meeting the funding challenge is one key obstacle to widespread adoption of DERs. As such, there's growing recognition that private capital and vibrant commercial models are the preferred, and perhaps only, way to achieve the transformation quickly and within the constraints of available taxpayer/ratepayer funding. This session discusses what commercial end users expect of the modernized electric grid, and how all stakeholders - both utilities and customers - can benefit from the transition to models that meet such expectations. Key topics to be addressed include:

- DER management technology for resource integration at the grid edge
- Financing based on measured energy reduction of integrated demand-side solutions
- Data on what large commercial customers expect of grid modernization
- Utility role in, and benefits from, new transaction model
- Innovative utility case study projects -- Con Edison and PG&E

- **David W. South, Senior Principal, Sustainability, Energy & Utilities Practice, West Monroe Partners**

  David South devises innovative business solutions and strategies for clients challenged by the interaction among technologies (power generation, energy efficiency, process and environmental), commodity and financial markets, and regulatory requirements related to energy, emissions/residuals and sustainability. He has worked with numerous companies in the power generation, industrial/manufacturing, financial, technology development, and transportation sectors, as well as public-sector organizations such as trade associations, research institutions, and government agencies at the local, state and federal levels.

  David combines substantial business consulting experience with deep resource, technology and delivery infrastructure experience includes coal, natural gas, nuclear power, distributed/on-site, cogeneration, renewable/clean energy and clean fuels. He has devised strategies for compliance with clean air and greenhouse gas emissions -- including making contributions to trading mechanisms for SO2, NOx, CO2, and RECs -- and water and waste residuals. For example, he is widely recognized for his work on emissions and renewable energy credit (REC) trading; monetization of clean air, greenhouse gas, environmental and energy credits to facilitate project economics; multi-pollutant control and mitigation strategies; and quantification and monetization of avoided (displaced) emissions.

- **Dennis Quinn, Chief Operating Officer & Founder, Joule Assets**

  Mr. Quinn is currently COO and co-founder of Joule Assets responsible for market development, development of web-based customer engagement platform and company sales. Previously, Mr. Quinn was a founding member and CEO of Celerity Energy LLC, one of the first demand response companies in the US in 2000 and early on successfully developed one of the largest portfolios of demand response clients in the Western US by developing win/win business relationships with his clients, which ranged from major industrial, commercial and institutional customers, including California's 30 major public universities. Mr. Quinn was instrumental in developing early rules of participation for DR in California. His vision to create a fully dispatchable portfolio of resources under a 25 MW long term contract led to one of the first successful third-party-owned non-spin reserve DG/DR resources in the US. Mr. Quinn successfully sold Celerity Energy in 2006 to EnerNOC.

- **Arthur (Bud) Vos, President and CEO, Enbala Power Networks**

  With over 15 years of energy industry experience, Bud Vos has in-depth knowledge of and experience with providing high-value software solutions to utilities. As president and CEO of Enbala, Bud is leading the company through the next phase of its business as it continues to expand its energy balancing platform capabilities and applications for the utility market. Previously, Bud worked as the COO of Simple Energy and was also senior vice president of utility sales and the chief technology officer at Comverge, where he oversaw the company's technology architecture while working with the utility client base to identify and deliver high value projects using smart grid technology.

- **Teresa R. Lutz, Director, Program Evaluation, Michaels Energy**

  Teri has been working in the energy sector for nearly a quarter of a century. While earning her electrical engineering degree, she worked for the local utility investigating 'flickering light' complaints in households, tackling power quality concerns in manufacturing facilities, and teaching kids about electrical safety in schools. After graduation, she joined the utility working in field operations with responsibilities ranging from completing distribution system fault studies to designing over-current protection schemes to managing the capital budgets.

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PowerRunner provides energy companies with predictive and actionable analytics solutions that leverage operational data, localized weather data and market data to support enhanced operational decision management of critical business processes. PowerRunner's pointed business solutions are built upon a single source of business truth to support operational and commercial decision management across multiple business units within an energy company. PowerRunner's FORRunner predictive analytics solution is a micro forecasting engine supporting such functions as short and long-term analysis of DER integration. REVRunner analytics provides micro spatial and temporal revenue analysis including customer valuation and profit and loss analysis. RateRunner supports rate restructuring and decoupling scenario analysis from a single service point to whole company portfolios. These solutions, combined with PowerRunner's extensive use case library and roadmap of quantifiable value, bridges today's distribution paradigm to support future states of the transactive energy supply chain from grid operations through profit and loss analysis. Learn more at www.powerrunner.com

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EnergySavvy is a cloud software company that helps utilities transform their customer experience and operations. EnergySavvy provides personalized customer insights, breakthrough customer engagement, and automated program delivery with the industry's only platform purpose-built to enhance the customer experience and increase operational efficiency. Nearly 40 utilities and state programs rely on EnergySavvy to enable customer experience transformation in the modern, digital customer era. Learn more at www.energysavvy.com

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Registration

>> Register securely online at http://www.grid-modernization-forum.com/register.htm

Registration includes:

- Attendance at pre-conference site tour on April 3, 2017
- Attendance at all networking breakfasts, coffee breaks, lunches, and drink receptions
- PDF copy of all presentations

STANDARD - MAIN CONFERENCE ONLY (APRIL 4-5) *For solution providers, equipment and software vendors, consulting firms, and other service providers*	$995.00
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- White paper or press release posted on event Website
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- 150 x 150 banner ad on Smart Grid Observer home page for 2 months
- Attendee List provided one week prior to, and following the event

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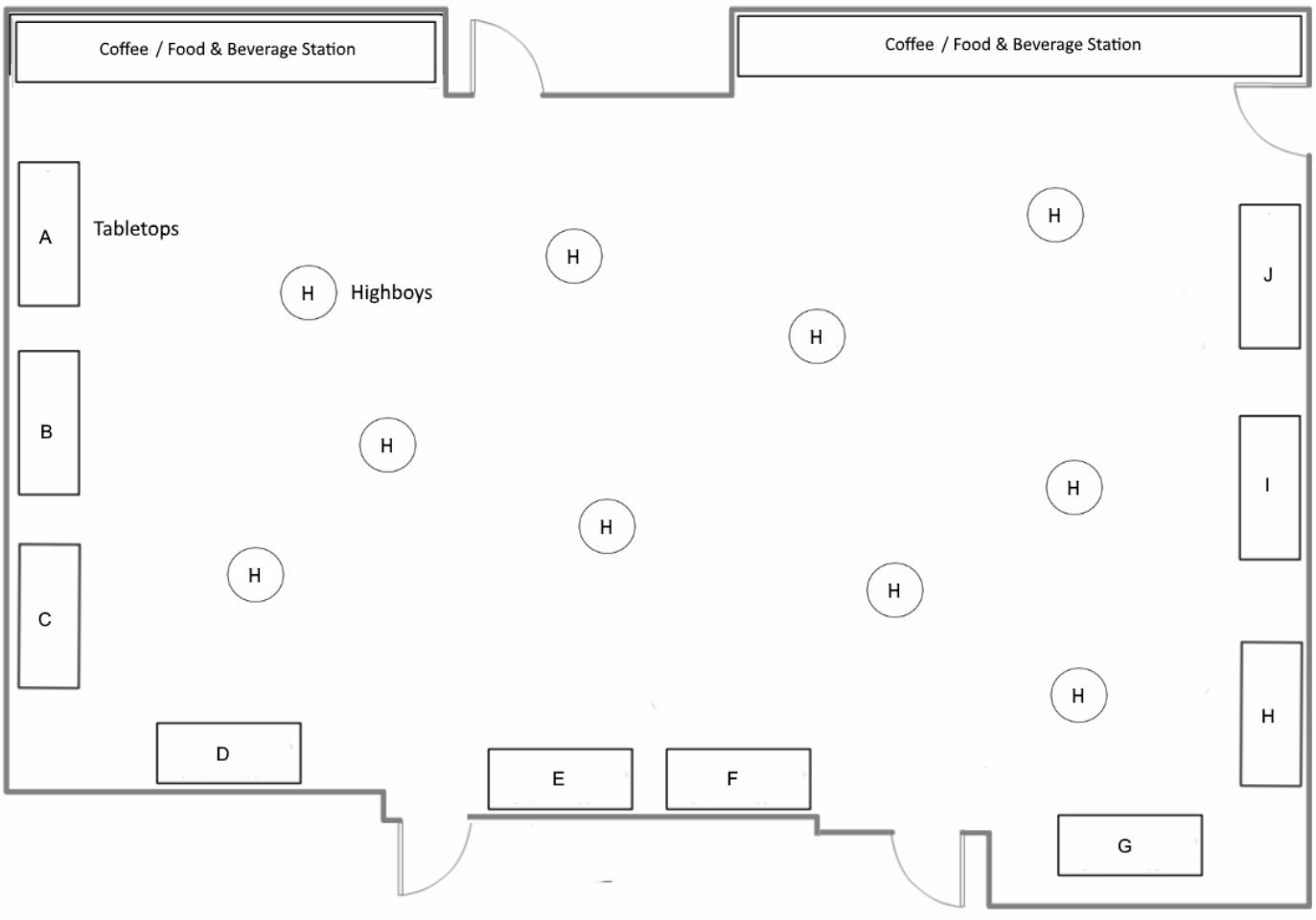
Coffee Break / Exhibition Area



Sample Feedback From Other Recent SGO Forums

"Very high-quality speakers, well designed and organized. Very professional attendees – the dialogue has been amazing! Thank you for all of the time and energies to create this incredible experience."
-- Jenn Toothaker, Project Manager, Tucson Department of Transportation

"Lots of good and relevant information. Very informative! Very impressive and diverse crowd and panels."
-- Kevin Clements, P.E.. Director - Telecom, GPD Group

"We need more conferences like these. It was a good balance from underground to city infrastructure to individual use of technology, even some social issues such as security."
-- Eric Boria, PhD, Sociology, Urban Development, Community Politics, Loyola University, Chicago

"Excellent. Well worth my time. Great mix to participants - utilities, regulators, developers, hardware / software suppliers, consultants. Very good speakers with lots of energy and experience."
-- John S. Andrepont, President, The Cool Solutions Co.

"The quality of presenters and presentations provided an excellent mix of depth, varity, and perspective."
-- Jay Marhoefer, Co-Founder and CEO, Intelligent Generation

"It was a real pleasure to participate in the forum and to interact with so many interesting attendees. You really did well with the diversity and experience of the audience and the presenters. The two days went by quickly -- my compliments."
-- Don Dumich, Microgrid Application Director, S&C Electric Company

"The content, quality of presentations, and speakers were EXCELLENT. Very informative sessions. Attendees were knowledgeable and very engaged. It was also a good conference for networking."
-- Laura DiDio, Director, IoT Systems, Strategy Analytics

"Good cross section of experts and viewpoints. Exceeded my expectations. I would recommend it!"
-- Joel L. Webb, IT Architect - Smart Grid - Grid Edge, Oklahoma Gas & Electric

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About the Organizer

The Smart Grid Observer is an online information portal and weekly e-newsletter serving the global smart grid industry. SGO delivers the latest news and information on a daily basis concerning key technology developments, deployment updates, standards work, business issues, and market trends driving the smart energy industry worldwide. The publication serves a global readership of executives and practitioners in the electric power generation, transmission, and distribution industry. For a free subscription visit http://www.smartgridobserver.com/newsletter.htm

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"Many thanks for organizing the Grid Modernization Forum, it was extremely effective in exposing the issues across technology, regulatory landscape, and business plans for the grid of the future. I learned a great deal and look forward to more when you are ready to mount the next installment."

-- George W. Crabtree, Senior Scientist, Argonne Distinguished Fellow, and Associate Division Director, Argonne National Laboratory

"Great cross section of qualified speakers discussing relevant topics."
-- Margarett Jolly, Director, Research & Development, Con Edison

"This was a well-run, very informative event. Great job."
-- Tom Mahowald, Director of Business Development, Navigant

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To arrange for your organization's participation in the 2nd Grid Modernization Forum 2017, complete the form at:

http://grid-modernization-forum.com/contact.htm

Or contact the program manager:

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