

UTILITY BILL AUDITING

July 18-19, 2019
Doubletree by Hilton Houston
by the Galleria
Houston, TX



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EUCI is authorized
by IACET to offer
1.0 CEUs for the
course



EUCI is authorized
by CPE to offer
12 credits for the
course

OVERVIEW

Utility bill auditing is one of the key factors in reducing overall billing expenditures company wide. This class will provide an overview of utility bill auditing, and how it should be applied to consistent operations within an organization. This Utility Bill Auditing course will primarily focus on key aspects of utility categories with Electric, Natural Gas, Water, Sewer, Storm Drainage and Waste Removal. Additionally, course attendees will be given insight on utility tax structures, franchise fees, as well as the latest trends with retrofitting, rebates, and solar energy.

This training course will outline the the basics and intermediate industry knowledge of utility billing and bill auditing. Information from this class can be applied across all levels of experience and industries.

LEARNING OUTCOMES

Upon completion of this course, participants will be able to successfully:

- Perform and understand the basics of a utility bill audit
- Identify Public Utilities Commission (PUC) regulations
- Obtain working knowledge of local utility tariffs and rate structures
- Explain the concept and purpose of power factors
- Explain curtailment and emergency power
- Classify regulated and deregulated states
- Discuss the options of fixed and index pricing with commodities
- Understand the workings of meters
- Review expenses with potable and non-potable water
- Understanding of various tax structures within utilities
- Outline tax exemptions available in certain fields and regions
- Define incorporated and non-incorporated franchise fees and zoning discounts
- Provide working knowledge of energy rebates available
- Outline the return on investment with retrofitting projects
- Identify types of solar energy
- Track savings as a result of auditing utility bills

WHO SHOULD ATTEND

This course is designed for anyone who wishes to obtain a basic understanding of the FERC USofA prescribed for electric and gas utilities.

- Procurement Officers
- Controllers
- Accountants
- Energy Management
- Accounts Payable
- Financial Officers
- Facility Managers

TO REGISTER, CALL 201-871-0474 OR [CLICK HERE](#)

AGENDA

THURSDAY, JULY 18, 2019

8:30 – 8:45 am

Course Introductions and Objectives

- Course outline
 - o What is utility bill auditing?
 - o Electricity audits
 - o Natural gas audits
 - o Water, sewer & storm drainage audits
 - o Waste removal audits
 - o Tax structures
 - o Franchise fees
 - o Energy rebates
 - o Lighting retrofit
 - o Solar energy

8:45 – 9:45 am

Introduction of Utility Bill Auditing and Operations

- What is a utility bill audit?
- When is a utility bill audit necessary?
- Why perform a utility bill audit?

9:45 – 10:00 am

Morning Break

10:00 am – 12:00 pm

Electricity

- Local distribution company
- Public Utility Commission
- Primary and secondary service
- Opening of new accounts
 - o Security deposits
 - o Surety bonds
- Power factors
- Meters
 - o Meter types
 - o Reading meters
 - o Multipliers
 - o Estimated reading
 - o Meter replacements
- Rates and tariffs
 - o Tariff structure
 - o Riders
 - o Rate options
 - o Electric cost adjustments
- Curtailment
 - o Capacity reservation
 - o Emergency power
 - o Percentages
 - o Energy discounts

12:00 – 1:00 pm

Group Luncheon

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AGENDA

THURSDAY, JULY 18, 2019 (CONTINUED)

1:00 – 2:00 pm

Electricity / Natural Gas Deregulation

- Deregulation overview
- What states are deregulated?
- Local distribution company choice
- Electric supply agreements
- Gas supply agreements
- Fixed market pricing
- Index market pricing

2:00 – 2:10 pm

Afternoon Break

2:10 – 2:45 pm

Natural Gas

- Local distribution company
- Public Utility Commission
- Opening of new accounts
 - o Security deposits
 - o Surety bonds
- Meters
 - o Meter types
 - o Reading meters
 - o Multipliers
 - o Estimated reading
 - o Meter replacements
- Rates and tariffs
 - o Tariff structure
 - o Riders
 - o Rate options
 - o Gas cost adjustments

2:45 – 3:00 pm

Afternoon Break

3:00 – 4:00 pm

Water / Sewer / Storm Drainage

- Is water and sewer regulated
- Potable water
- Non-potable water
- Water meters

4:00 – 4:30 pm

Questions, Concluding Remarks and Day 1 Recap

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AGENDA

FRIDAY, JULY 19, 2019

8:00 – 8:30 am

Continental Breakfast

8:30 – 9:00 am

Tax Structures & Franchise Fees

- Tax structures
 - o Types of tax structures
 - o Tax exemptions
 - o Federal Tax Act adjustments
- Franchise fees
 - o Incorporated and non-incorporated areas
 - o Zoning discounts
 - o Clean river rewards

9:00 – 10:00 am

Waste Removal

- o Container sizes & types
- o Service levels
- o Pick ups
- o Overflow charges
- o Fuel & administrative charges
- o Franchised areas
- o Competitive market pricing

10:00 – 10:15 am

Morning Break

10:15 am – 12:00 pm

Energy Rebates, Lighting Retrofit, Solar and Wind Energy

- Energy rebates
 - o Rebate types
 - o Qualifications for rebates
 - o HVAC
- Lighting retrofit
 - o LED
 - o Return on investments
- Solar and wind energy
 - o Federal programs
 - o The high cost of green
 - o Is green energy worth the cost?

12:00 – 12:15 pm

Wrapping Up: Questions and Concluding Remarks

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INSTRUCTORS



Jeremiah Vigil

VP of Operations, Utility Audit, Inc.

While strategically managing the sourcing department at Utility Audit, Inc., Jeremiah uses his underlying experience in project control to progress Utility Audit, Inc. through operations and business management. His expertise in utility tariffs, statutes, and utility tax law have propelled the firm into record breaking refunds, credits, and savings for their clientele. His technological education and history in business management has proven necessary to complete the corporate vision.

Jeremiah also serves as a valued instructor where he expands the company's expertise of utility bill auditing into the nationwide arena for professionals expanding their knowledge to save resources and monies for their companies. His experience on conducting conferences, classes and online webinars are utilized during conventions and higher education classes, including the National Retail Tenants Association and the EUCI.

As an Eagle Scout, he carries the integrity of the rank into his professional and personal life. A husband and father of two, he values his home life and counts his family as his highest priority. He and his wife also serve as mentors and counselors to youth, and young adult groups within their local assembly.



Mike Vigil

President & Founder, Utility Audit, Inc.

After 30 years in the industry, Mike has grown a fledgling utility auditing firm into the nation's most knowledgeable in the utility billing experience. He has been pivotal in finding countless cost reductions for international companies, local government, retail, health care facilities, school districts, industrial/ manufacturing and the private sector with his comprehensive utility bill tariff and vendor knowledge.

During his career Mike, has been awarded Businessman Of The Year from the National Congressional Committee and Business Advisory Council. His educational business and accounting background has proven necessary to complete the corporate vision. The advantage of being a Realtor in the state of Arizona, benefits his use of secure portals into lease management rules and regulations. His experience on conducting conferences, classes and online webinars are just a portion of direction he can provide. The National Retail Tenants Association (NRTA), and Electric Utility Consultants, Inc. (EUCI) an accredited conference are some of the training courses he has participated in for professionals in the energy field as well as other industries.

Mike shares his life with his wife, Debra of 39 years. Their son gave them a wonderful daughter when he married his wife. They are proud grandparents to two of the best kids, ever! Residing in Arizona, they enjoy the benefits of wonderful weather: hiking and golf. Two fuzzy faced Old English Sheepdogs contribute to the mix of a full home life. Mike holds a Christian ministerial license and is on the board of directors at his home church.

TO REGISTER, CALL 201-871-0474 OR [CLICK HERE](#)

REQUIREMENTS FOR SUCCESSFUL COMPLETION

Participants must sign in/out each day and be in attendance for the entirety of the course to be eligible for continuing education credit.

INSTRUCTIONAL METHODS

PowerPoint presentations and case studies will be used in program.

EVENT LOCATION

A room block has been reserved at the Hilton Houston by the Galleria, 5353 Westheimer Rd, for the nights of July 17 – 18, 2019. Room rates are US \$139 plus applicable tax. Call **1-713-961-9000** for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is June 16, 2019 but as there are a limited number of rooms available at this rate, the room block may close sooner. **Please make your reservations early.**

IACET CREDITS



EUCI has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, EUCI has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Authorized Provider status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.

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CPE CREDITS



EUCI is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Upon successful completion of this event, program participants interested in receiving CPE credits will receive a certificate of completion. **EUCI is authorized by CPE to offer 12 credits for this course.**

There is no prerequisite for this course. **Program Level 1:** Beginner and Intermediate, **Delivery Method:** Group-Live, **Advanced Preparation:** None

REGISTER 3, SEND THE 4TH FREE

Any organization wishing to send multiple attendees to this course may send 1 FREE for every 3 delegates registered. Please note that all registrations must be made at the same time to qualify.

TO REGISTER, CALL 201-871-0474 OR [CLICK HERE](#)

To Register, Click Here or

Mail Directly To:
[PMA Conference Management](#)
[PO Box 2303](#)
[Falls Church VA 22042](#)
register@pmaconference.com

p:201-871-0474
f:253-663-7224

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PLEASE REGISTER

- UTILITY BILL AUDITING COURSE**
JULY 18-19, 2019: US \$1395
Early bird on or before June 28, 2019: US \$1195

ENERGIZE WEEKLY

Energize Weekly is EUCI's free weekly newsletter, delivered to your inbox every Wednesday. We provide you with the latest industry news as well as in-depth analysis from our own team of experts. Subscribers also receive free downloadable presentations from our past events.

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How did you hear about this event? (direct e-mail, colleague, speaker(s), etc.)

Print Name | Job Title

Company

What name do you prefer on your name badge?

Address

City | State/Province | Zip/Postal Code | Country

Phone | Email

List any dietary or accessibility needs here

CREDIT CARD INFORMATION

Name on Card | Billing Address

Account Number | Billing City | Billing State

Exp. Date | Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx) | Billing Zip Code/Postal Code

OR Enclosed is a check for \$ _____ to cover _____ registrations.

Substitutions & Cancellations

Your registration may be transferred to a member of your organization up to 24 hours in advance of the event. Cancellations must be received on or before June 14, 2019 in order to be refunded and will be subject to a US \$195.00 processing fee per registrant. No refunds will be made after this date. Cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event. This credit will be good for six months from the cancellation date. In the event of non-attendance, all registration fees will be forfeited. In case of course cancellation, EUCI's liability is limited to refund of the event registration fee only. For more information regarding administrative policies, such as complaints and refunds, please contact our offices. EUCI reserves the right to alter this program without prior notice.