UTILITY AGING WORKFORCE

April 23 - 24, 2014
Renaissance Chicago Downtown Hotel
Chicago, IL

WORKSHOPS
Pre-Conference Workshop
Predictive Analytics to Understand and Control Flight Risk
Wednesday, April 23, 2014

Post-Conference Workshop:
Creating a Knowledge Management Guide for Your Organization
Friday, April 25, 2014

EUCI is authorized by IACET to offer 0.9 CEUs for the conference and 0.4 CEUs for each workshop.

EUCI is authorized by CPE to offer 11 credits for the conference and 5 credits for each workshop.
OVERVIEW

Participants at this 2nd Utility Aging Workforce Conference will become familiar with the utility and energy industries challenges and trends concerning the aging workforce, effective knowledge transfer, and retirement impacts.

- Over one-half (50%) of utility workers will be eligible to retire in the next 6-8 years
- Utility personnel with critical job functions: repair workers, lineman, managers and engineers -- people with skills essential to a reliable supply are continuing to exit organizations
- Retiring and transferring workers are taking critical knowledge with them
- Detailed and expansive planning on how to educate and train the next generation of utility workers is essential
- New challenges will face utility professionals as they attempt to attract new generational workers to careers in the utility workforce

Learn from expert instructors what you can do for your organization to deal with the complex issues associated with the utility aging workforce. Tools you will be able to apply to human resource management activities involving the aging workforce include:

- How to effectively create effective knowledge transfer from seasoned veterans to less skilled and new workers
- How to attract and recruit personnel with specialized skills necessary to fill highly technical positions
- How to use retention risk analysis in the management of the workforce
- How to effectively apply statistical and data analysis to the workforce
- How to redefine both potential and performance in order to improve secession planning
- How to create a unique and effective job transition guides to assist personnel moving to new positions
- How to attract skilled specialty workers to your organization
- How to structure pension and benefits plans in order to retain and attract employees.
- How to manage the aging workforce to benefit your organization.
- How to create the process of knowledge transfer throughout the organization to retain stability

Participants at the conference will be able to return to their organizations with fresh ideas on managing the aging workforce; making recommendations that will reduce costs and ensure productivity and reliability.

LEARNING OUTCOMES

- Discuss the Utility Aging Workforce impact on utilities and the current situation in the U.S.
- Describe effective tools to be used for retention risk analysis in organizations
- Explain the essential succession planning tools available to utility professionals
- Recognize five key elements of effective Job Transition Guides
- Identify the key components of useful developmentally-oriented assessments
- List advantages and disadvantages of keeping potential retirees on the job
- Describe techniques available to recruit and manage specialty workers
- Identify the key changing roles of utility field personnel
- Recognize the positive and negative impacts of new technology on the aging utility workforce
- Discuss how changing retirement programs and pension plans have affected the aging workforce
- Explain how effective training programs can improve knowledge transfer
- Discuss costs associated with the utility aging workforce transition
Wednesday, April 23, 2014

12:30 – 1:00 p.m.  Registration

1:00 – 1:45 p.m.  **Landscape of the Utility Aging Workforce – Demographics and Analysis**

There is little doubt that the aging utility workforce is about to have a major impact on organizations across the country. It is essential to understand the realities and myths of the current situation and where the major impacts on utility operations will take place. This presentation will address the facts of the aging workforce including, what the statistics show, what regions will be most affected, and the timeline of the impact of the aging workforce. Additionally, an overview of the most critical impacts to the utility structure will be discussed.

- Dennis Ray, Deputy Director, Power Systems Engineering Research Center

1:45 – 2:15 p.m.  **Optimize Workforce Planning Through Retention Risk Analysis**

Accurate statistical analysis in workforce management is challenging and often difficult. Are the projections for critical position shortages accurate? Are the correct people on hand in the organization and are they trained sufficiently to assume new roles? Do Human Resources and other workforce teams have the right mix of personnel available to obtain and analyze pertinent statistics, design appropriate graphics, and communicate results to executive management? In this session, tools for effective workforce planning and management will be addressed. Technology providing ideal HR applications to systematically organize and apply business objectives to human capital planning will be discussed. Additionally, participants will learn techniques to see when and where to staff up to ensure execution of strategies and when and where to staff down to ensure that you are always maintaining the optimal cost structure and highest return on investment.

- Chris Reese, Manager, Predictive Analytics, Vemo, Inc.

2:15 – 3:00 p.m.  **Turning Workforce Insight Data into Action - The Challenge has Just Begun**

You’ve spent considerable time and resources gathering and analyzing data to project your Workforce needs. Reports are run. Dashboards are built. Executives are all in agreement that something needs to be done. So what’s next? How do you take all the insights you have developed and turn it into an organized plan with milestones, deliverables, measures of success and buy-in from key Stakeholders who need to coordinate efforts to drive the plan to action? Join us as we share practices Edison International developed to grow and shape the business by turning insights into action.

- Jay Helmer, Senior Project Manager for Strategic Workforce Planning, Southern California Edison

3:00 – 3:30 p.m.  Networking Break

3:30 – 4:15 p.m.  **Effectively Using Succession Planning Tools and Metrics**

In many organizations there is a need to overhaul the succession planning process. This includes redefining potential and performance, as well as improving the way to report metrics for the succession planning process. The presentation will cover some new metrics, beyond traditional ones like number of ready now candidates, to reflect movement (since the last talent review) of candidates on the succession plan.

- Christine Cocchiarella, HR Director, Xcel Energy

4:15 – 5:00 p.m.  **Creating Effective Job Transition Guides**

Developing guides for job transition is essential for smooth knowledge transfer in critical positions. This presentation will cover the development of three such job transition guides (one for individual contributors, one for managers, and one for executives) that are intended to be used by people transitioning into new jobs within our agency. These guides cover six to eight challenges that are associated with transitioning into new jobs (with a substantial focus on knowledge transfer).

- Chad Roedder, Senior Program Manager, Talent Assessment, Tennessee Valley Authority

5:00 – 6:00 p.m.  Networking Reception
Thursday, April 24, 2014

8:00 – 8:30 a.m.  Continental Breakfast

8:30 – 9:15 a.m.  Keeping Retirees On the Job: Solid Strategy or Deferring the Inevitable

Many utility personnel experts are projecting that during the next five to ten years, many utilities will lose 50% of their current workforce to retirement across all job classifications. Utility workforce retirement is more critical than personnel turnover because it represents a loss of critical knowledge. In order to reduce the effects to the utility, it may be essential to initiate programs to slow the rate of retirements in order to effectively manage the rapid loss of critical knowledge to the organization. But will this strategy make sense in the long term for the organization? This presentation will address balancing the pros and cons of delaying retirements and measures to assist utilities in achieving balance in retiring worker management.

- Valoria Armstrong, Human Resources Manager, American Water

9:15 – 10:00 a.m.  Methods for Attracting Specialty Workers: The Quest for Young Engineers

In the last 15 years, colleges and universities have seen a 50% decline in the number of graduating engineers, one of many skill sets a utility requires. As utilities lose their skilled workers, those skills are not being replaced in the labor pool. Solutions other than traditional hiring programs will be needed to bridge the gap between skills lost and skills by attracting and retaining specialty personnel.

- Develop long term staffing plans
- Creation of partnerships with universities and community colleges
- Emphasizing the strength of continuing education and training programs
- Encourage active involvement in industry organizations
- Participation in internal knowledge sharing programs
- Creating reasonable and realistic compensation, benefits, and retirement plans

- David Heler, Manager of HR Programs, Palo Verde Nuclear Generating Station, Arizona Public Service

10:00 – 10:30 a.m.  Networking Break

10:30 – 11:15 a.m.  Re-examining the Ever Changing Roles and Responsibilities of Field Personnel

While utilities struggle with the many challenges of losing institutional knowledge through the exit of retiring highly trained personnel, they must also consider the actual requirements for the new workforce employees, particularly in the field operations environment. New technology has changed the scope of these requirements and utilities are now facing the need for continually evaluating what is required in the field. This presentation will focus on how such analysis can be structured and how this continuous process can be applied to staffing, skill projections, hiring decisions, maintenance and operations.

- Doug Howey, Divisional Vice President, Human Resources, Atmos Energy

“Great time networking with others in the utility industry. No matter which type of utility it is, we all have similar challenges.”

– HR Director, United Water
Thursday, April 24, 2014 (CONTINUED)

11:15 a.m. – 12:00 p.m. Understanding Technology Impacts on the Utility Aging Workforce

The next significant strategic technologies implemented by utilities will be those that optimize solutions and processes. This may clearly impact on the number of employees required to maintain reliability and operations. It will also affect requirements for training, development of job descriptions, organizational needs. Technology will help utilities institutionalize the knowledge of seasoned employees and incorporate that knowledge within documented, sustainable best practices. Further, new strategic technologies will help the utility evolve best practices over time through a program of continuous process improvement. Also, the new technologies will provide the utility with ways to most effectively use both new and existing applications to perform work across the entire horizontal utility organization. Points of discussion will include:

- Business process change opportunities
- Design engineering opportunities
- Scheduling and dispatching opportunities
- Wireless opportunities

- Elton Richards, Regional Manager, ComEd (invited)

12:00 – 1:00 p.m. Group Luncheon

1:00 – 1:45 p.m. Changing Retirement and Pension Plans and the Effects on the Aging Workforce

The retirement landscape has experienced ups and downs over the years. Most recently, external forces – including the financial markets’ downturn, the extended recovery, historically low interest rates, and continued increases in life expectancy – have increased both the level and volatility of pension plan costs. In order to balance the interests of customers, employees and shareholders, utilities have made and are continuing to make changes to their retirement programs and risk management strategy.

This presentation will discuss how these forces have impacted retirement programs across the country, how the utility industry is addressing these challenges, and what employees must do in the future to ensure a secure retirement.

- Royce Kosoff, Senior Consulting Actuary, Towers Watson

1:45 – 2:30 p.m. Creating Productive Training Programs to Ensure Knowledge Transfer

Ensuring the success of knowledge transfer for critical positions in utility operations requires effective training programs that produce results. Many challenges can occur when formulating specialized training. Some of the key elements to consider include:

- Establishing a training goal
- Finding the training time will meeting the mission
- Leveling the generation/experience gap
- Effectively managing resources

- Ken Mall, Managing Director, EDSI Consulting

2:30 – 3:00 p.m. Networking Break

3:00 – 4:00 p.m. Effective Investment and Cost in the Utility Aging Workforce Transition – Panel Session

This panel session will address the costs associated in recruitment, training new personnel, and technology advancement adjustments that can change organization strategy, planning, and resource management.

- Valoria Armstrong, Human Resources Manager, American Water
- David Heler, Manager of HR Programs, Palo Verde Nuclear Generating Station, Arizona Public Service
- Doug Howey, Divisional Vice President, Human Resources, Atmos Energy
OVERVIEW

Wednesday, April 23, 2014

7:30 – 8:00 a.m.   Registration and Continental Breakfast

8:00 a.m. – 12:00 p.m.   Workshop Timing

In 2013, social media lit up with discussions about data scientists invading HR, using data for decision making, and the coming era of Big Data. However, with limited exceptions, most organizations still don’t have a data science approach and aren’t sure how to get started on this journey.

In this workshop, Peter Louch and Chris Reece will share Vemo’s pragmatic vision and approach to predictive analytics - that is helping organizations move to the desired data-driven state.

Based on our approach of machine-learning based statistics, we will share with attendees how to use predictive analytics to help measure and control turnover and retirement risk of critical employees. The session will include:

• Key findings regarding how employee attributes, employer actions, workplace conditions and external market conditions drive retention risk.
• Return of investment analysis that shows organizations the savings opportunity made possible by more accurately pinpointing retirement and turnover risk.
• Case examples of successful modeling of what-if scenarios of how HR can design deliberate interventions that change individual employee retention risk
• Key learning and recommendations that organizations can leverage - even without further data analysis.

Attendees will come out of this session with a clear vision of how predictive analytics can be used in their organization along with policy recommendations for their companies.

INSTRUCTORS

Peter Louch / Founder and CEO / Vemo

Chris Reece / Manager, Predictive Analytics / Vemo
OVERVIEW

Worried about knowledge retention as baby boomers start to exit your workforce? If you are interested in taking a proactive approach to capturing institutional knowledge before you lose key employees to retirement and attrition, you won’t want to miss this workshop. Whether you expect to lose a significant number of workers in the next five years, or have a handful of mission-critical employees nearing retirement age, the presenter will provide you with actionable steps so that you can jump-start your own knowledge retention programs. During the workshop, you will learn:

• How to identify and prioritize needs
• How to capture job-specific knowledge, and institutional knowledge
• How to develop a knowledge transfer strategy
• How to build a talent pipeline
• How to attract and retain talent

During this interactive active workshop you will also learn how to:

• Conduct a knowledge loss risk assessment
• Determine an approach to capture critical knowledge
• Develop and implement a knowledge retention plan, monitor, and evaluate

AGENDA

Friday, April 25, 2014

7:30 – 8:00 a.m.  Registration and Continental Breakfast
8:00 a.m. – 12:00 p.m.  Workshop Timing

• Documenting existing knowledge in databases and software
• Accessing valid knowledge from outside sources and cataloguing best practices
• Adopting new practices and developing a new culture with incentives to facilitate generating new ideas
• Enhancing information sharing throughout the organization
• Promoting awareness of knowledge retention within the organization and the benefits for meeting the challenges of the changing industry
• Developing systems to retain knowledge as people leave the organization

INSTRUCTOR

Ken Mall / Managing Director / EDSI Consulting
INSTRUCTIONAL METHODS

PowerPoint presentations, audience discussion, and handouts will be used in the program.

REQUIREMENTS FOR SUCCESSFUL COMPLETION OF PROGRAM

Participants must sign in/out each day, be in attendance for the entirety of the conference, and participate in learning outcome assessments to be eligible for continuing education credit.

EVENT LOCATION

A room block has been reserved at the Renaissance Chicago Downtown Hotel, 1 West Wacker Drive, Chicago, IL 60601, for the nights of April 22 - 24, 2014. Room rates are $239, plus applicable tax. Call 1-312-372-7200 for reservations and mention the EUCI program to get the group rate. The cutoff date to receive the group rate is April 1, 2014, but as there are a limited number of rooms available at this rate, the room block may close sooner. Please make your reservations early.

CREDITS

EUCI has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102. In obtaining this approval, EUCI has demonstrated that it complies with the ANSI/IACET Standards, which are widely recognized as standards of good practice internationally.

As a result of its Authorized Provider membership status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standards.

EUCI is authorized by IACET to offer 0.9 CEUs for the conference and 0.4 CEUs for each workshop.

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 11 credits for the conference and 5 credits for each workshop.

There is no prerequisite for this conference.

Program Level 1: Beginner and Intermediate
Delivery Method: Group Live
Advanced Preparation: None
A copy of the conference proceedings will be distributed to attendees at the event. If you are unable to attend or would like to purchase additional copies, flash drives are available two weeks after the conference is complete. The cost per flash drive is US $395 (add US $50 for international shipments). Flash drives include visual presentations only. Upon receipt of order and payment, the flash drive will be shipped to you via regular USPS mail.

NOTE: All presentation flash drive sales are final and are nonrefundable.
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PLEASE REGISTER THE FOLLOWING

☐ UTILITY AGING WORKFORCE CONFERENCE AND BOTH PRE-CONFERENCE AND POST-CONFERENCE WORKSHOPS
  APRIL 23 - 25, 2014 : US $2195
  EARLY BIRD ON OR BEFORE APRIL 11, 2014: US $1995

☐ UTILITY AGING WORKFORCE CONFERENCE AND ONE WORKSHOP (CHOOSE ONE)
  APRIL 23 - 25, 2014 : US $1795
  EARLY BIRD ON OR BEFORE APRIL 11, 2014: US $1595
  □ PRE-CONFERENCE WORKSHOP
  □ POST-CONFERENCE WORKSHOP

☐ UTILITY AGING WORKFORCE CONFERENCE ONLY
  APRIL 23 - 25, 2014 : US $1395
  EARLY BIRD ON OR BEFORE APRIL 11, 2014: US $1195

☐ WORKSHOP ONLY (CHOOSE ONE)
  APRIL 23 OR 25, 2014 : US $595
  EARLY BIRD ON OR BEFORE APRIL 11, 2014: US $495
  □ PRE-CONFERENCE WORKSHOP
  □ POST-CONFERENCE WORKSHOP

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

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Job Title

Company

What name do you prefer on your name badge?

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OR Enclosed is a check for $ __________________________ to cover

All cancellations received on or before March 21, 2014, will be subject to a US $195 processing fee. Written cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event or publication. This credit will be good for six months. In case of event 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 at (201) 871-0474. EUCI reserves the right to alter this program without prior notice.