

UTILITY PROJECT MANAGEMENT SYMPOSIUM


August 13 - 14, 2018
EUCI Conference Center
Denver, CO

PRE-SYMPOSIUM WORKSHOP

**Fundamentals of
Project Management**

MONDAY, AUGUST 13, 2018

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 EUCI is authorized by IACET
to offer 1.0 CEUs for the
symposium and 0.3 CEUs for
the workshop.

OVERVIEW

Utility project managers and engineers are facing ever-increasing challenges in the industry including heightened customer expectations, changing regulations, technological advancements, introduction of the Smart Grid, and more, all while simultaneously facing unprecedented demands to deliver timely and cost-effective projects. On top of that, implementation success for projects is not a given in the utility industry in general, where the majority of projects fail to meet their cost, technical, or schedule objectives. For projects that have achieved success, strong project management has proven to be the essential ingredient.

EUCI's Utility Project Management Symposium will explore the art and science of project management and best practices through tangible skills, real-life examples, and successful case studies. Attendees will explore the opportunities, challenges, issues and pitfalls involved in utility project management, and leave equipped with the tools and techniques necessary to achieve consistent success.

LEARNING OUTCOMES

- Identify major challenges facing utility capital projects and actionable steps to overcome these challenges
- Analyze the impact of environmental regulations on projects, how to adequately plan for these considerations, and innovative solutions
- Distinguish cost estimating challenges and specific steps to overcome them
- Acquire examples of successful risk management in a real-life project
- Examine effective scheduling techniques based on a successful AMI case study
- Acquire guidance on what actions to take when major problems arise on a project
- Discuss components of a communication plan and how to formulate key messages including appropriate communication methods and proper execution
- Identify techniques for managing key stakeholder expectations and communication
- Review the various tools used in successful project management and determine which ones can be the most beneficial based on the lessons learned from utility case studies
- Identify key project phases and best practices including successful closeout and completion
- Engage in group discussion on lessons learned in risk management, project planning, and stakeholder expectations

WHO SHOULD ATTEND

- Project managers and project team leaders
- Consulting engineers
- Contractor project managers
- Planners and schedulers
- Project engineers
- Estimators

AGENDA

MONDAY, AUGUST 13, 2018

12:00 – 12:30 pm

Registration

12:30 – 12:45 pm

Opening Remarks by Chairperson

12:45 – 1:30 pm



Understanding Unique Factors Driving Utility Capital Projects

This presentation will provide a look into the unique factors that drive utility capital projects, the challenges faced and how utilities address each factor and challenge. The presentation will show statistics from studies that analyze these factors and provide recommendations on how to successfully complete projects under these conditions.

Arlee Jones, Project Manager II, Tampa Electric

1:30 – 2:15 pm



The Regional Reclaimed Water Partnership: A Case Study for Innovation in Environmental Planning

Tampa Electric undertook the Regional Reclaimed Water Partnership Initiative to provide an innovative solution for meeting current and future water needs. The two-phase, multi-year initiative required extensive permitting, operational considerations and coordination with multiple state, regional and local government and municipal entities. Impacting most facets of the environment, the initiative required close coordination to ensure a successful implementation.

David Lukcic, Project Manager, Tampa Electric

2:15 – 2:45 pm

Networking Break

2:45 – 3:30 pm



Case Study: Overcoming Challenges of Large-Scale Project Cost Estimating

Estimating of projects of any size takes time, team input, and follow through. Estimating challenges remain the same even for large scale projects. How to start off right with gathering estimate inputs, knowing what inputs are better off in a risk registry, and how to track your actuals versus forecasts will be discussed.

Barbara Mikolajczyk, Major Project Manager, American Transmission Co.

3:30 – 4:15 pm



Operational Risk Management, American Electric Power's Journey

Over the past 3 years, AEP has been on a journey to mature their Risk management practices, with an initial focus on the operational risks. During this session, Venkat (Ven) Miriyala, will share AEP's vision for Risk management, the risk framework, associated process and implementation approach. Ven will highlight the application of the risk methodology to a major project.

Venkata Miriyala, Managing Director, Enterprise Operational Risk & Business Continuity Management, American Electric Power

4:15 – 5:00 pm



Best Practices: Effective Scheduling Techniques for Major Projects

AMR to AMI metering technology projects require significant long-term coordination between the utility, the systems integration partner and vendors in order to hit targeted in-service dates and other critical stakeholder performance expectations. This segment will cover how adopting a multi-firm integrated scheduling framework during planning establishes effective expectations and relationships that ultimately are reflected in project schedule, cost controls, change controls and risk.

Mark Nesslein, Smart Meter Program Strategy and Implementation, Ameren

AGENDA

TUESDAY, AUGUST 14, 2018

8:00 – 8:30 am

Continental Breakfast

8:30 – 9:15 am



Effective Communication Planning – It Can Make or Break Your Project

We will discuss components of a communication plan, how to formulate key messages, how to choose appropriate communication methods and how to ensure proper execution of your plan. We will also discuss matching the rigor of your communication plan to the complexity and level of risk in your project.

Hengameh Pourfakhr, Program Manager, Southern Company

9:15 – 10:00 am



Tampa Electric's AMI Initiative: Communication to Drive Business Transformation

Tampa Electric undertook an AMI initiative to replace all AMR meters with new AMI meters. This Initiative transforms the way Tampa Electric interacts with customers as well as how business is performed. As part of a consortium, communication for the Tampa Electric project team was essential to ensure all Initiative participants, consultants, suppliers and contractors were receiving timely and correct information about the project.

David Lukcic, Project Manager, Tampa Electric

10:00 – 10:30am

Networking Break

10:30 – 11:15am



Integrated Project Monitoring and Control

Scope, schedule, and budget on their own can be challenging. Integrating them can be hard at first but once they are used as one tool, a project can be monitored and forecasted much easier. Project execution plans and Primavera are just some of the tools.

Barbara Mikolajczyk, Major Project Manager, American Transmission Co.

11:15 am – 12:00 pm



The Benefits of Delivering a Project Using Integrated Tools

This presentation will review how individual tools available to project managers can assist with delivery of projects that meet scope, maintain the budget, and are completed on time. Explore the advantages and pitfalls to putting a set of integrated tools in place. Finally, walk through Colorado Springs Utilities' implementation and use of integrated tools for project delivery using actual examples from projects.

Natalie Lovell, Project Manager, Colorado Springs Utilities

12:00 – 1:00 pm

Group Luncheon

1:00 – 1:45 pm



The Art and Science of Stakeholder Management

In this session we will discuss how to identify key stakeholders and their interest in the project. We will explore the art of managing expectations, resolving conflicts and gaining stakeholder support for success of your project.

Hengameh Pourfakhr, Program Manager, Southern Company

1:45 – 2:30 pm



Managing Multiple Utility Projects and Portfolio Management Tools

This presentation will outline the challenges and best practices used to manage multiple utility projects. Portfolio management tools will be discussed, and examples will be shown allow the attendees to see firsthand how these tools can help project managers successfully manage their projects.

Arlee Jones, Project Manager II, Tampa Electric

2:30 – 3:00 pm

Networking Break

AGENDA

TUESDAY, AUGUST 14, 2018 (CONTINUED)

3:00 – 3:45 pm

Monitoring Variation of Expected ROI

Good project management plays a critical role in understanding the financial health of projects and business initiatives. Understanding and communicating project costs incurred versus projected costs requires accurate calculations of investments, resources, and other business impacts. These metrics and reporting allow decision makers to know whether or not an initiative is successful and benefiting the company or if corrective action is needed.

Vanessa Barbarisi, Senior Managing Consultant, ILLUME Advising

3:45 – 4:30 pm



Close Out: Project Phases, Contracts and Overall Project Completion

This presentation will feature an overview of Colorado Springs Utilities Project Delivery Lifecycle and the use of Gateways and Milestones. Material will cover starting with the end in mind, having a plan and a checklist, and, how to avoid common pitfalls with the closeout process to ensure your project and team finishes strong.

Natalie Lovell, Project Manager, Colorado Springs Utilities

INSTRUCTORS



Arlee Jones

Project Manager II, Tampa Electric Company

Arlee Jones is a Project Manager II at Tampa Electric, a subsidiary of Emera Inc. where he is responsible for the management of transmission, distribution and substation infrastructure projects in the 13kV to 230kV range, solar installation projects in the 2MW to 74.5 MW range and all T&D infrastructure relocations required by transportation projects. He completed advanced engineering training in the US Navy's Nuclear Power Program where he served for 25 years and earned a BS in Nuclear Engineering. He has an AS in Electronics Engineering Technology from Southeast Arkansas University in Pine Bluff, AR and a BS in Electrical Engineering from the University of London. He has obtained Master's Degrees in Electrical Engineering and Engineering Management from Old Dominion University in Norfolk, VA and has over 30 years experience in the power design and energy consulting industry.



Natalie Lovell

Project Manager, Colorado Springs Utilities

Natalie Lovell is a Senior Project Manager with Colorado Springs Utilities in the Acquisition, Engineering, and Planning Department. Natalie has a unique background in public-sector-utility accounting, construction, and project management. She is currently delivering a variety of high-interest, complex projects ranging from operation-based software implementations to large scale transmission efforts in support of power plant decommissioning. She relies on her advanced project delivery skills for tracking, monitoring, analyzing, and reporting on project progress. Utilizing a set of integrated project delivery tools helps Natalie with managing cost, schedule, and scope. Prior to her work as a project manager, Natalie was a Senior Auditor in the construction and performance group of the City Auditor's office. Natalie holds a bachelor's degree in Geography/Environmental Studies from the University of Colorado, Colorado Springs. She has completed a substantial number of classes towards her Master's in Business Administration with an emphasis in Accounting. She is certified as both a Construction Industry Financial Professional (CCIFP) and a Project Management Professional (PMP). When Natalie is not working she is spending time with her husband, twin sons, and golden retriever. She lives in Colorado Springs, CO.

INSTRUCTORS



David Lukcic

Direction of AMI Strategic Solutions, Tampa Electric Company

David Lukcic is the Direction of AMI Strategic Solutions for Tampa Electric Company. He has an electrical engineering degree from the University of South Florida (USF), an MBA from USF and is a Professional Engineer in the State of Florida. Mr. Lukcic is responsible for overseeing the AMI Initiative for Tampa Electric. Previous experience includes overseeing major capital projects for the environmental team, such as power plants, transmission lines and major infrastructure. His duties have included overseeing permitting of major project, interacting with the media, testifying as an expert witness, among other things. Mr. Lukcic's experience includes nearly 20 years in industrial and power plant operations, transmission and distribution and environmental capacities.



Barbara Mikolajczyk

Major Project Manager, American Transmission Company

Major Project Manager, American Transmission Company, Waukesha, WI. Barbara is now in her tenth years with ATC as a Major Project Manager. Barbara oversees the company's projects over \$10 Million from project initiation through construction and project closeout. Her recent completion, The Zoo Interchange Project, was a \$55 Million Electric Transmission Relocation project involving extensive coordination with the WisDOT as they performed their \$1 Billion Zoo Interchange Roadway Relocation Project.

Prior to ATC, Barbara worked for the WisDOT for over 17 years as a project manager, financial supervisor and then in public relations for the \$850 Million Marquette Interchange Roadway Reconstruction Project. Barbara has been able to work in all areas of DOT from Planning to Design and through Construction.

Barbara is a graduate of UW-Milwaukee with a degree in Civil Engineering, with an emphasis on Transportation. Barbara has her Electrical Certification from UW-Milwaukee. She is also a licensed Professional Engineer in WI.



Venkata Miriyala

Managing Director Enterprise Operational Risk & Business Continuity Management, American Electric Power

Venkat (Ven) Miriyala, Managing Director at American Electric Power leads their Enterprise Resiliency function. He is responsible for the development and execution of the strategy for the Operational Risk Management, Business Continuity and Crisis Response Management functions at AEP. Ven's organization is tasked to ensure the integrity and consistency of the operational risk, business continuity management & Incident Command System frameworks. They govern and support with the enterprise-wide deployment of associated programs. Prior to this, Ven has served as the Director for the Operations & Performance Transformation organization (AEP's Continuous improvement office) and earlier as a Director in the IT organization. Ven has a Master's degree in Computer Sciences and has been with the company for 19 years.

INSTRUCTORS



Mark Nesslein

Smart Meter Program Strategy and Implementation, Ameren

Mark Nesslein, B.S.B.A. Economics, PMP, is the Smart Meter Program Strategy and Implementation Manager at Ameren Missouri. Mark's team included Scheduling, Cost Control and Risk planning during business case, RFI/RFP phases, and planning the execution controls environment. Mark brings a broad-based multi-industry business/consulting background focused on strategic initiative planning and execution.



Hengameh Pourfakhr

Principal Engineer, Southern Company

Hengameh Pourfakhr has over 20 years of project and program management experience in the Energy Utility industry, specializing in large, complex, high profile projects and programs. She is currently a program manager at Southern Company, the second largest gas and electric utility company in the U.S. Her list of past projects includes a multimillion dollar undertaking to upgrade telecom and networking infrastructure at transmission substations across the Southern Company's territory and a multi-year program to implement Cisco- based VOIP technology at over 600 locations, including power plants, local offices, and operating headquarters across 5 states. She has also led cyber security, insider threat, and information protection programs. Most recently, she managed a project to launch an energy innovation center to bring innovative products and services to customers and led a crowd source ideation project to improve employee safety. She also has experience in start-up of a project office and has a wealth of knowledge in best practices for establishing a project management center of excellence. Hengameh holds a Bachelor's degree in Electrical Engineering from State University of New York at Stony Brook and an MBA from Georgia State University. She is a member of the Project Management Institute (PMI) and has earned her Program Management Certification from PMI.



Vanessa Barbarisi

Senior Managing Consultant
ILLUME Advising

Vanessa Barbarisi is an education enthusiast who delights in diving head first into cacophonous data, emerging triumphant with actionable insights, and then training others to follow suit. With over 10 years in the industry, Ms. Barbarisi has focused on developing manuals and processes in the utility sector with an emphasis on quantitative exploration and reasoning. Ms. Barbarisi is a skilled project manager with extensive experience in utility demand-side management (DSM) programs.

Ms. Barbarisi was previously a certified instructor with Everblue Training Institute, where she taught accredited courses on Professional Energy Manager—conducting commercial building energy audits and equipment assessments.

In a sector that is critical to every part of community life and yet ever-changing, Ms. Barbarisi is invigorated by the challenge of orchestrating efforts across the research spectrum and advancing knowledge industry-wide. She has worked on large statewide and multi-state evaluations. Always the educator, Ms. Barbarisi guides clients into a deep understanding of both how to impact customers and the engaged systems.

PRE-CONFERENCE WORKSHOP

Fundamentals of Project Management

MONDAY, AUGUST 13, 2018

8:00 – 8:30 am **Registration & Continental Breakfast**

8:30 – 11:45 am **Workshop Timing**

OVERVIEW

This workshop is designed to address the many areas of the project management processes, starting with planning through project execution and all the different elements within managing project scope.

Project management occurs at all levels in the utility industry and across the various business arms. Strong project managers are necessary to develop, lead, and report on projects throughout their life cycle. Developing well-orchestrated projects increases the probability a project will reach critical targets and achieve a return-on-investment.

Learn how to setup a successful project from the beginning, leveraging available tools, optimize staff skillsets, tracking financial impacts, and creating clear lines of communication so all stakeholders understand how the project or initiative is progressing.

LEARNING OUTCOMES

- Defining and developing elements of effective projects
- Review of the five (5) phases in the project management life cycle
- What should be considered during each stage, tools and resources for managing various project types
- Risks and mitigation strategies in each project management phase
- Examples of project management, case studies, and lessons learned

WORKSHOP AGENDA

Introduction

- Background and terminology of project management
- Popular project management methods

Definition Phase

- Developing a project plan and task management
- Project stakeholders

Planning Phase

- Project scope
- Gathering requirements
- Picking vendors and contract management
- Defining a schedule
- Projected costs and tracking
- Communication plan

Execution Phase

- Progress tracking and stakeholder engagement
- Change management and scope creep
- Managing risks & issues
- Managing the team
- Managing schedule
- Managing costs
- Managing quality

Closing Phase

- Project close out and transitioning

WORKSHOP INSTRUCTOR



Vanessa Barbarisi

Senior Managing Consultant
ILLUME Advising

Vanessa Barbarisi is an education enthusiast who delights in diving head first into cacophonous data, emerging triumphant with actionable insights, and then training others to follow suit. With over 10 years in the industry, Ms. Barbarisi has focused on developing manuals and processes in the utility sector with an emphasis on quantitative exploration and reasoning. Ms. Barbarisi is a skilled project manager with extensive experience in utility demand-side management (DSM) programs.

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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

Case studies, PowerPoint presentations and group discussion will be used in this event.

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.



EUCI is authorized by IACET to offer 1.0 CEUs for the symposium and 0.3 CEUs for the workshop.

Earn 10 PDU credits towards PMI's Continuing Certification Requirements (CCR) program.

EVENT LOCATION

EUCI Conference Center

4601 DTC Blvd., B-100
Denver, CO 80237

NEARBY HOTELS

Preferred Hotel

Hyatt Place Denver Tech Center

8300 E. Crescent Parkway, Greenwood Village, CO 80111 (0.9 miles away)

Call Central Reservations at **888-492-8847** and ask for the corporate rate of \$159 under the **Group Code: EUCI**.

or visit https://denvertechcenter.place.hyatt.com/en/hotel/home.html?corp_id=102338 for the corporate rate using the

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Hyatt Regency Denver Tech Center

7800 E. Tufts Ave
Denver, CO 80237
Phone: 303-779-1234
0.3 miles away

Hilton Garden Inn Denver Tech Center

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Denver, CO 80237
Phone: 303-770-4200
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Denver Marriott Tech Center

4900 S. Syracuse St
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EVENT LOCATION

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- UTILITY PROJECT MANAGEMENT SYMPOSIUM ONLY**
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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 July 13, 2018 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 at (201) 871-0474.