

1. Accenture
2. Advanced Energy
3. Alectra Utilities
4. Alternative Energy Systems Consulting
5. Ameren
6. American Public Power Association
7. Apex Analytics
8. Apogee Interactive
9. Applied Energy Group
10. APTIM
11. Aquanta
12. Arizona Public Service
13. Armada Power
14. Austin Energy
15. Baltimore Gas and Electric
16. BC Hydro
17. Benton PUD
18. Berkshire Hathaway Energy
19. Bonneville Power Administration
20. Bowen Advisors
21. Bristol Tennessee Essential Services
22. Cadmus
23. Calico Energy
24. Central Electric Power Cooperative (SC)
25. Central Hudson Gas & Electric
26. City of Tallahassee Utilities
27. CLEARResult
28. Cobb EMC
29. COI Energy Services
30. Commonwealth Edison
31. Con Edison
32. Connected Energy
33. Connected Energy Limited
34. Consumers Energy Company
35. Contract Callers
36. Copper Labs
37. CPower Energy Management
38. CPS Energy
39. Customized Energy Solutions
40. Dairyland Power Cooperative
41. DemandQ
42. DNV Energy Insights USA, Inc.
43. DTE Energy
44. Duke Energy
45. E Source
46. E4TheFuture
47. Eaton
48. ecobee
49. Edison Electric Institute
50. Efficiency Vermont
51. EFI
52. EGM
53. Elocity
54. Emerson Commercial & Residential Solutions
55. EMI Consulting
56. Enbala
57. Encycle
58. Enel X
59. Energy Solutions
60. EnergyHub
61. EnerVision
62. EPRI
63. Evergy
64. Eversource
65. Extensible Energy
66. FirstEnergy
67. FlexCharging
68. FPL
69. Franklin Energy
70. GDS Associates
71. Generac
72. Georgia Power Company
73. Geotab Energy
74. Google (Nest)
75. Great River Energy
76. GridBeyond
77. GridFabric
78. GridOptimize
79. GridPoint
80. GridX
81. Guidehouse
82. Hawaiian Electric Company
83. High West Energy
84. Honeywell Smart Energy
85. ICF
86. Idaho Power
87. IGS Energy
88. Illume Advising
89. Indianapolis Power & Light Co.
90. Integral Analytics
91. IPKeys Power Partners
92. Itron
93. Jackson EMC
94. Kiwi Power Limited
95. Leap
96. Madison Gas and Electric
97. Mitsubishi Electric Trane HVAC
98. Modesto Irrigation District
99. National Grid
100. National Rural Electric Cooperative
101. New Brunswick Power
102. New Braunfels Utilities
103. New Hampshire Electric Cooperative
104. New York Power Authority
105. Nexant
106. North Carolina Electric Membership Corporation
107. NTC
108. OATI
109. Olivine
110. Oncor Electric Delivery
111. Open Systems International
112. OpenADR Alliance
113. Opinion Dynamics
114. Opus One
115. Oracle Utilities
116. Orange and Rockland Utilities
117. Otter Tail Power
118. Pacific Gas & Electric
119. Packetized Energy
120. PECO, An Exelon Company
121. Pepco, an Exelon Company
122. Portland General Electric
123. Powerley
124. RacePoint Energy
125. Rappahannock Electric Cooperative
126. Resideo
127. RF Demand Solutions
128. Sacramento Municipal Utility District
129. Saint John Energy
130. Salt River Project
131. San Diego Gas & Electric
132. Santee Cooper
133. Schneider Electric
134. Scope Services
135. Seattle City Light
136. Shifted Energy
137. Smart Electric Power Alliance
138. Smartenit
139. Snohomish County PUD
140. Sonoma Clean Power
141. Southern California Edison
142. Southern California Gas Company
143. Steffes
144. Sunverge Energy
145. Swell Energy
146. Tampa Electric Company
147. Tantalus
148. Tennessee Municipal Electric Power Association
149. Tennessee Valley Authority
150. Tetra Tech
151. The Brattle Group
152. Threshold
153. Tierra Resource Consultants
154. TRC Companies
155. Tri-State Generation & Transmission
156. Trickle Star
157. Tucson Electric Power
158. Uplight
159. Utility Load Management Exchange
160. Waseda University
161. West Monroe Partners
162. Xcel Energy
163. Zen Ecosystems
164. Zeuthen Management Solutions

# Call to Order

PLMA Spring 2021 Board Meeting  
Live Online  
May 3, 2021



# Chair's Welcome

Michael Brown

NV Energy/Berkshire Hathaway Energy



# Welcome New PLMA Members!

BC Hydro



FlexCharging



GridBeyond



Madison Gas and Electric



Sonoma Clean Power



Tampa Electric Company



## ▲ Vision

To empower PLMA members and allies to realize the full potential of tomorrow's dynamic energy grid.

## ▲ Mission

PLMA seeks to advance the practical applications of dynamic load management and distributed energy resources by providing a forum where members educate one another and explore innovative approaches to program delivery, pricing constructs, and technology adoption.

## ▲ PLMA By-Laws

- Roles and responsibilities of Board, Executive Committee, Officers, and Executive Director

## ▲ PLMA Code of Conduct

### • Confidentiality Policy

- Meeting content has PLMA confidential Information
- Maintain a bias-free decision-making process

### • Conflict of Interest Policy

- If you have a conflict of interest:
  - Disclose your conflict of interest
  - Recuse yourself from discussions or voting
  - Ask to hold the conversation and then exit until topic is concluded

### • Antitrust Policy

- No PLMA activity shall limit or restrict Free Trade

### • Whistleblower

- PLMA Adheres to federal, state, and local laws
- Member practitioners should report any violations

### • Anti-Harassment

- PLMA is dedicated to providing a harassment-free experience for everyone

# Association Structure

## Executive Committee

4

Elected Officers

8

Elected Members

## PLMA Staff

Executive Director  
Chief Development Officer  
Member Services Manager  
Registration Manager  
Resources Manager  
Webmaster  
Database Administrator

## PLMA Board of Directors

### “Seated” (voting)

1 Board Seat per  
Sustaining Member

37

Directors

1 Board Seat per  
Advisory Member

65

Directors

At-Large

4

Elected Directors

### “At-Large” (non-voting)

Associate Members

62

Academic Members

1

# Vice-Chair's Report

Rich Barone  
TRC Companies





## Retail Pricing Interest Group:

- **Launched:** December 2020
- **Co-Chairs:** Chris Gallo, ConEd | Allison Hamilton, NRECA  
Farrokh Albuyeh, OATI | Jordan Folks, Opinion Dynamics
- **HOT TOPICS:** Con Edison's Residential Demand Rate Pilots  
Findings from the Maryland Time-of-Use Pricing Pilots

## Electric Transportation Interest Group:

- **Launched:** January 2021
- **Co-Chairs:** Kessie Avseikova, Opinion Dynamics | Chad Saliba, Geotab Energy  
Joyce Bodoh, Rappahannock Electric Co-op | Katie Parkinson, Apex Analytics  
Nick Bengtson, EnergyHub
- **HOT TOPICS:** Exploring the Role of Electric Transportation in DR and LM

**Women in DM Interest Group: Evolving!**

**DER Transactions Series / Interest Group: Under Consideration!**

- **Based on the Load Management Dialogue,  
“DERS in the New Energy Economy”**

# Secretary's Report

Joe Childs  
Eaton



- **Fall 2020 Conference: Approving the Board Meeting Minutes**
  - Posted at: [www.peakload.org/board-home-page](http://www.peakload.org/board-home-page)
- **Elections: Officers and At-Large Directors**
- **Fall 2020 Conference Metrics**

Motion to accept  
the minutes as  
posted?

## ▲ Survey:

- Yay
- Nay
- Abstain

## ▲ **Policy:** [www.peakload.org/board-home-page](http://www.peakload.org/board-home-page)

- Access restricted PLMA Members behind your login on the Board of Directors and At Large Members page

## ▲ **Process**

### 1. **Call for an Election Officer**

### 2. **Officer Elections**

- All Officer Seats are up for election (Chair, Co-Chair, Secretary, Treasurer)
- Officer Job Descriptions posted

### 3. **Process**

- Self Nomination August
- Election Ballot Approval by Executive Committee September
- Electronic Vote prior to Conference

### 4. **Term Begins at Conclusion of Fall Conference**

## ▲ **Policy:** [www.peakload.org/board-home-page](http://www.peakload.org/board-home-page)

- Access restricted PLMA Members behind your login on the Board of Directors and At Large Members page

## ▲ **Process**

1. **Determine number of At-Large Director Seats 60 days before election**
2. **Election Process**
  - Self Nomination September
  - Election Ballot Approval by Executive Committee October
  - Electronic Vote prior to Conference
3. **Term Begins at Conclusion of Fall Conference**

# Fall 2020 Online Conference

▲ Return to >300 participants

▲ First Time participants increased

▲ Reduced participation from PUCs + Government Labs

▲ No participation from Education or International

Conference Attendance	Ave Pre Covid-19	St. Pete	Spring 2020 (no cost)	Fall 2020 (Charged)
Total Registration	222	319	1,138	320
First Time Registrants		112	765	123
Returning Registrants		207	373	197

Registration	Participants		Companies	
	Count	%	Count	%
Utility	143	45%	49	41.5%
Vendor	130	41%	47	39.8%
Consultant	42	13%	18	15.3%
Education	0	0%	0	0.0%
Government	2	1%	2	1.7%
Associations	3	1%	2	1.7%
<b>TOTAL</b>	<b>320</b>	<b>100.0%</b>	<b>118</b>	<b>100.0%</b>

Note: BPA, TVA, and WAPA counted as Utility



## ▲ First-time registration:

- Up from pre-COVID times

## ▲ Utility representation:

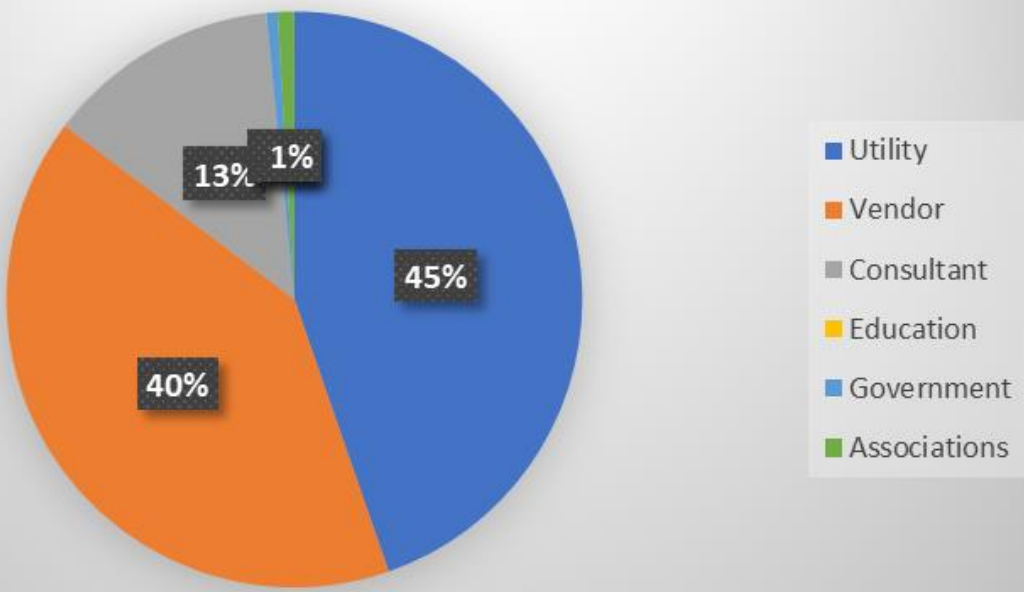
- Up from pre-COVID times
- Improved utility ratios

## ▲ Participation by companies:

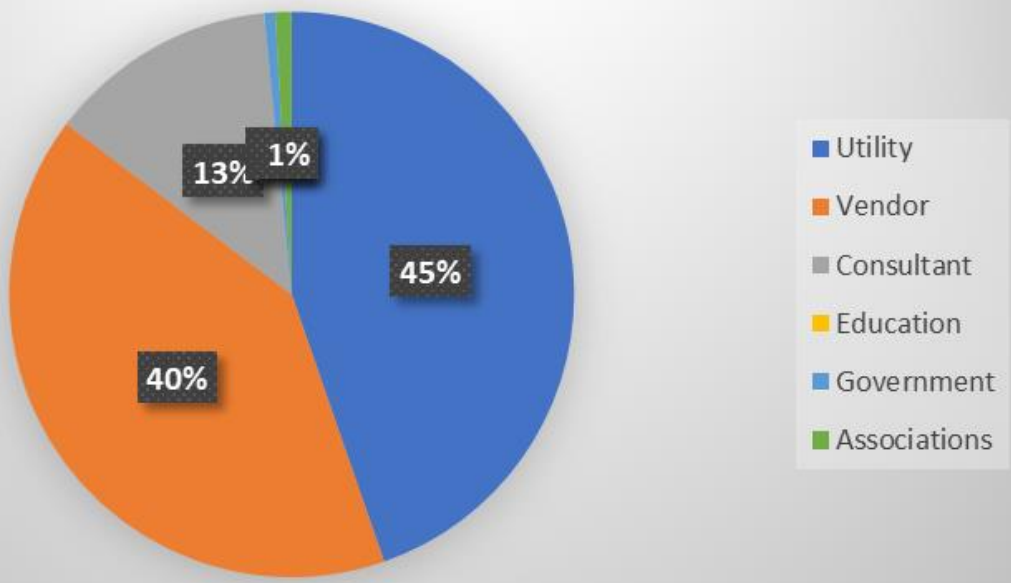
- Up from pre-COVID times

Conference Attendance	Ave Pre Covid-19	St. Pete	Spring 2020 (no cost)	Fall 2020 (Charged)
First Time		35%	65%	38%
People-Utility / Total	33%	32%	31%	44.7%
Companies - Utility/Total	33%	31%	24%	41.5%
Participation per Company				
Utility	1.9	2.2	3.2	2.9
Vendor / Consultant	1.9	2.4	2.5	2.6

### Person Registration by Company Type



### Person Registration by Company Type



# Treasurer's Report

Troy Eichenberger  
Tennessee Valley Authority



# Financial Report: P&L Overview

## REVENUES

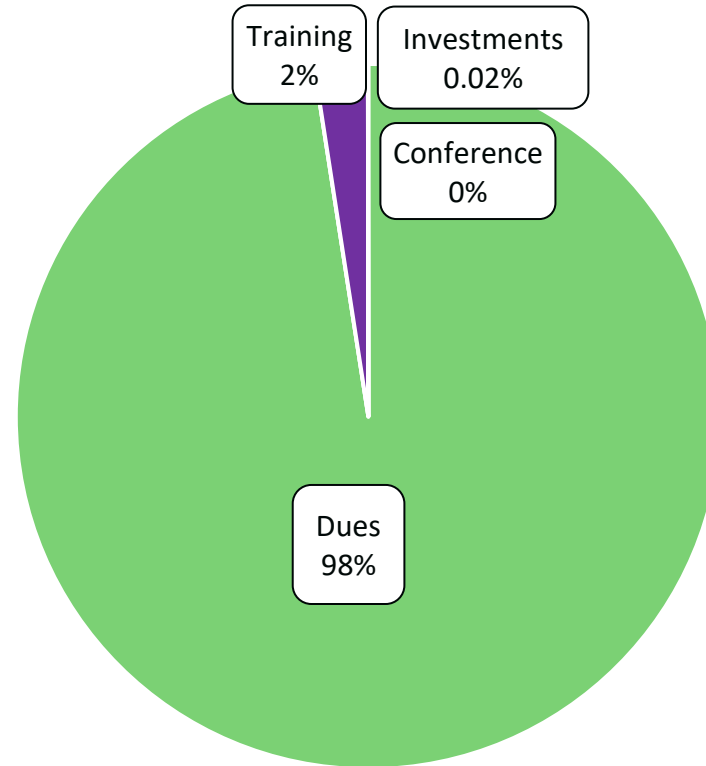
Dues	144,625
Conference	0
Training	3,693
Investments, Misc.	34
<b>Total Revenues</b>	<b>148,352</b>

## EXPENSES

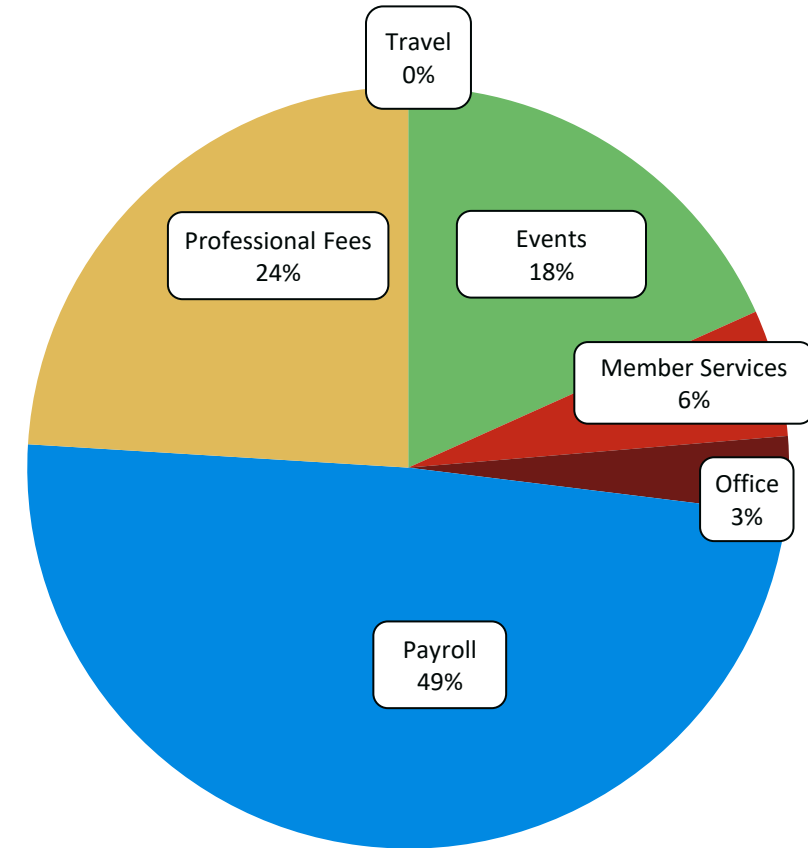
Events	27,868
Professional Fees	36,613
Member Services	8,210
Office	4,998
Payroll	74,714
Travel	0
<b>Total Expenses</b>	<b>152,403</b>

**Net Income (Loss) (4,051)**

## REVENUES



## EXPENSES



Based on statements as of March 31, 2021

# Financial Report: Balance Sheet

## ASSETS

Operating Accounts	\$185,636
Savings	\$374,888
Investments	\$0
Prepaid Expenses	\$17,064
<b><u>TOTAL ASSETS</u></b>	<b><u>\$577,588</u></b>

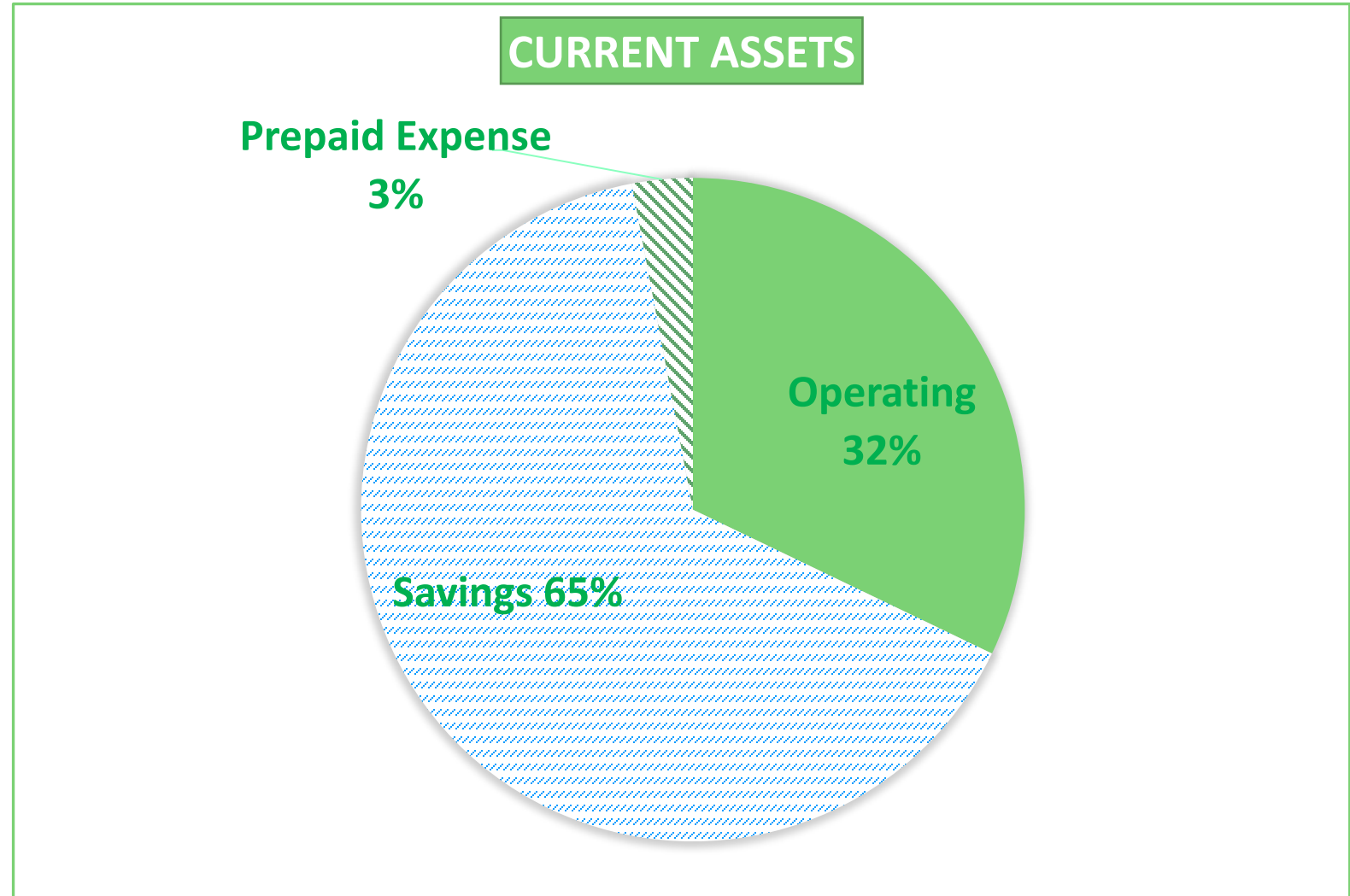
## LIABILITIES AND EQUITY

Current Liabilities	
Account Payable	\$600
Credit Cards	\$2,960
Other	\$0
Payroll Tax Payable	\$1,849
Deferred Revenue	\$2,770
<b><u>TOTAL LIABILITIES</u></b>	<b><u>\$8,179</u></b>

## EQUITY

Retained Earnings	\$573,460
Net Income (Loss)	(\$4,051)
<b><u>TOTAL EQUITY</u></b>	<b><u>\$569,409</u></b>

**TOTAL LIABILITIES AND EQUITY** **\$577,588**



Based on statements as of March 31, 2021

# Treasurer Report: 2020 Budget v. Actual

Annual budget process completed with Executive Committee:

	2020 Budget Total	2020 YE Actuals	YE Variance
Income			
Conference Fees	\$250,000.00	\$79,570.00	(\$170,430.00)
Membership Dues	\$605,000.00	\$539,560.00	(\$65,440.00)
Miscellaneous & Interest	\$8,122.37	\$2,168.98	(\$5,953.39)
Training Fees	\$25,000.00	\$16,852.00	(\$8,148.00)
Total Income	\$888,122.37	\$638,150.98	(\$249,971.39)
Expenses			
Event Expense	\$282,500.00	\$38,355.81	(\$244,144.19)
Total Member Services	\$131,500.00	\$85,694.35	(\$45,805.65)
Total Office Expense	\$65,000.00	\$47,578.01	(\$17,421.99)
Total Professional Fees	\$573,700.00	\$588,661.61	\$14,961.61
Total Travel Expense	\$30,500.00	\$3,955.03	(\$26,544.97)
Total Expenses	\$1,083,200.00	\$764,244.81	(\$318,955.19)
Net Operating Income	(\$195,077.63)	(\$126,093.83)	\$68,983.80

Based on statements as of December 31, 2020

# Treasurer Report: 2021 Budget Overview

Annual budget process completed with Executive Committee:

	Jan - Mar, 2021	Apr - Jun, 2021	Jul - Sep, 2021	Oct - Dec, 2021	2021 Budget Total
<b>Income</b>					
Conference Fees	20,000.00	50,000.00	100,000.00	120,000.00	292,000.00
Membership Dues	192,301.77	93,237.22	93,237.22	203,956.42	582,732.63
Miscellaneous	0.00	0.00	0.00	0.00	0.00
Training Fees	10,000.00	15,000.00	15,000.00	15,000.00	55,000.00
<b>Total Income</b>	<b>\$222,301.77</b>	<b>\$158,237.22</b>	<b>\$208,237.22</b>	<b>\$338,956.42</b>	<b>\$888,122.37</b>
<b>Expenses</b>					
Event Expense	10,000.00	10,000.00	25,000.00	257,375.00	302,375.00
Total Member Services	\$35,375.00	\$35,375.00	\$35,375.00	\$35,375.00	\$141,500.00
Total Office Expense	\$16,625.00	\$16,625.00	\$16,625.00	\$16,625.00	\$66,500.00
Total Professional Fees	\$114,908.00	\$114,908.00	\$114,908.00	\$114,908.00	\$459,632.00
Total Travel Expense	\$0.00	\$0.00	\$3,000.00	\$8,000.00	\$11,000.00
<b>Total Expenses</b>	<b>\$176,908.00</b>	<b>\$176,908.00</b>	<b>\$194,908.00</b>	<b>\$432,283.00</b>	<b>\$981,007.00</b>
<b>Net Operating Income</b>	<b>\$45,393.77</b>	<b>(\$18,670.78)</b>	<b>\$13,329.22</b>	<b>(\$93,326.58)</b>	<b>(\$92,884.63)</b>

- Monthly review of **financial statements**
- Approved and filed **2020 Form 990**
- Finalizing **Risk Management Plan**
- Exploring additional **investment opportunities**
- Executive Director and Chief Development Officer became PLMA's **first two fulltime employees**



# Staff Comments

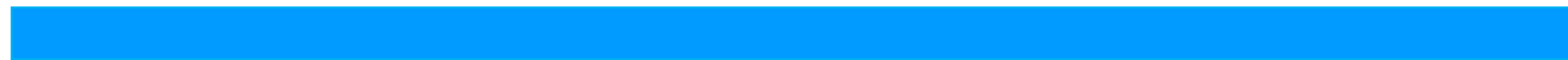
Rich Philip, Executive Director

Judy Knight, Chief Development Officer

Monica Hammond, Member Services Manager



# June is PLMA Interest Group Month



# PLMA Group Reports





Steering Committee:  
Brian Doyle, Paul Wassink,  
Dana DeRemigis, and Julie Cain



Load Management Leadership

**THOUGHT LEADERSHIP**

Co-Chairs:  
Jenny Roehm and Michael Ohlsen

# Thought Leadership Update

## Load Management Dialogues

**PLMA**  
Load Management Dialogue  
The Global Load Management Interest Group Presents:  
**Israel: Integrating the Smart Grid and DER**

Amir Maimon  
Israel Electric Company

Dr. Alex Levran  
IEC Ltd.

Jon Hliowitz  
Orange and Rockland  
Co-Chair, Global Load Mgmt Interest Group

Ross Malmé  
Bowen Advisors  
Co-Chair, Global Load Mgmt Interest Group

Scott Coe  
GridOptimize  
Co-Chair, Global Load Mgmt Interest Group

### Load Management Dialogue: Energy Trends to Watch in 2021 with Utility Dive

Thursday, February 4, 12:30 to 1:30 pm ET | 9:30 to 10:30 am PT

In this discussion, PLMA Chair Michael Brown of NVEnergy and Catherine Morehouse of Utility Dive will discuss Utility Dive's recent interviews with power sector experts who are tentatively predicting big changes in the year ahead.

Join us to learn what we might expect from the new administration and how its approach will potentially affect policymakers, regulators, utilities, and other energy stakeholders throughout the coming years.

#### Meet Our Speakers:



**Michael Brown**  
PLMA Board Chair,  
NVEnergy



**Catherine Morehouse**  
Reporter,  
Utility Dive

### Load Management Dialogue Research Topics in the Flexible Load Arena

Wednesday, May 5, 12:30 to 1:30 pm ET | 9:30 to 10:30 am PT

The energy industry is evolving at a variety of speeds across North America, often depending upon geographical region, and learnings are being discovered unevenly in most cases. While history says that "pioneers get the arrows while settlers get the land," it is necessary to monitor developments and use a broad base of information to help formulate future plans for the future.

This panel discussion features some of the top entities involved in researching the opportunities and impacts resulting from the growth of flexible load technologies. Join us as they share some highlights of what they are seeing in the marketplace and where it may be leading.

#### Meet Our Featured Speakers:



**Michael Brown**  
PLMA Board Chair,  
NV Energy



**Brett Feldman**  
Awards Co-Chair  
Guidehouse Insights



**Brenda Chew**  
Research Director  
SEPA

### Load Management Dialogue: Energy and Data Management for EVs

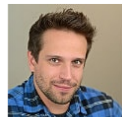
Thursday, February 25, 12:30 to 1:30 pm ET | 9:30 to 10:30 am PT

In this Dialogue, our guest speaker, Drivlz CEO Doron Frenkel will speak with the PLMA's Global Load Management Interest Group about EV energy and data management, and the value to utilities of gaining visibility of their charger network, real-time control of demand response, and the ability to optimize energy management for depot/home charging.

#### Meet Our Speakers:



**Doron Frenkel**  
Guest Speaker,  
CEO of Drivlz Ltd.



**Jon Hliowitz**  
Global Load Mgmt  
Co-Chair,  
Orange and Rockland  
Utilities



**Ross Malmé**  
Global Load Mgmt  
Co-Chair,  
Bowen Capital  
Advisors



**Scott Coe**  
Global Load Mgmt  
Co-Chair,  
GridOptimize

### Load Management Dialogue Growth Capital Investment in Energy Tech: Understanding the Trends

Tuesday, April 13, 12:30 to 1:30 pm ET | 9:30 to 10:30 am PT

The new energy economy is being driven by the big "Three D's", Decarbonization, Decentralization and Digitalization. As a result, a transformation of the energy industry is underway, away from a traditional central station electricity generation model and toward a new asset class of Distributed Energy Resources (DERs). This, coupled with the enormous rotation of capital away from the oil and gas industry into renewable electricity generation, energy storage, and cleantech makes for exciting times!

Join PLMA Vice Chair Rich Barone of TRC Companies and former PLMA Chair Ross Malmé of Bowen Advisors, a growth capital investment bank, as they discuss these and other exciting trends in M&A and growth capital investment in energy tech.

#### Meet our Featured Speakers:



**Richard Barone**  
Board Vice Chair,  
TRC Companies



**Ross Malmé**  
Global Load Mgmt Co-Chair,  
Bowen Capital Advisors

### Load Management Dialogue DERs and the New Energy Economy

Thursday, March 18, 12:30 to 1:30 pm ET | 9:30 to 10:30 am PT

With a future that includes tens of millions of DERs entering the ecosystem across many DER asset classes, the future is likely to include potentially billions of DER-to-grid transactions. One result of this will be the need for a new transaction infrastructure.

Join our moderator, PLMA Secretary Joe Childs of Eaton, Global Load Management Co-Chair Ross Malmé, and PLMA's special guest speakers to explore what this infrastructure might be, its benefits, and challenges.

#### Meet Our Featured Speakers:



**Joe Childs**  
PLMA Secretary,  
Eaton



**Ross Malmé**  
Global Load Mgmt Co-Chair,  
Bowen Capital Advisors



**Peter Kelly-Detwiler**  
PLMA Guest Speaker  
Northbridge Partners



**Rick Kornfeld**  
PLMA Guest Speaker  
Kitu Systems, Inc.



**Bob Manning**  
PLMA Guest Speaker  
UT: An Avangrid Company



**Tony Johnson**  
PLMA Guest Speaker  
So. Cal. Edison




# Thought Leadership Update

## HOT TOPIC Conversations with PLMA Interest Groups:

**HOT TOPIC Conversation:**  
**Inaugural 2020 Pricing Interest Group Meeting**  
 Plus Findings from Maryland's TOU Pricing Pilots




DATE / TIME: Thursday, December 1, 12:30 to 1:30 pm EDT



Join us for the inaugural meeting of PLMA's Retail Pricing Interest Group and learn about the findings to date from Maryland's TOU pricing pilots from PLMA's special guest, **Dr. Sanem Sergici**, a principal in The Brattle Group's Boston office.

As part of the Maryland Public Service Commission's PC44 proceedings, the Maryland Utilities designed time-of-use (TOU) pilots in a collaborative process. The PC44 pilots included unique features, such as separately measuring the impact of TOU rates on LMI and non-LMI customers and providing detailed bill impact information to customers during the recruitment stage.

**Meet the Retail Pricing Interest Group Co-Chairs:**

 Co-Chair Farrokh Albuyeh OATI	 Co-Chair Allison Hamilton National Rural Electric Cooperative Association	 Co-Chair Christopher Gallo Consolidated Edison	 Co-Chair Jordan Folks Opinion Dynamics
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**PLMA**  
**Hot Topics**  
 Conversations with  
 PLMA Interest Groups

**Con Edison's Demand Rate Pilots**

DATE / TIME: Thursday, February 11, 12:30 to 1:30 pm EST

Hosted by the Retail Pricing Interest Group





Con Edison's Demand Rate pilot programs have been testing new rate structures made possible with the implementation of Advanced Metering Infrastructure (AMI). Smart meters offer customers choices that can lead to savings, and can also help make electricity distribution more responsive and reliable.





Join us to learn about Con Edison's preliminary results from these pilots with our guest speakers, Rebecca Roberts, a Section Manager with Con Edison's Utility of the Future Group and Eric Van Orden, Director of Sales and Business Development with Copper Labs.

[Watch Recording Here](#)

**Meet the Pricing Interest Group and our Guest Speakers:**

 Co-Chair Farrokh Albuyeh OATI	 Co-Chair Allison Hamilton NRECA	 Co-Chair Chris Gallo Con Edison	 Co-Chair Jordan Folks Opinion Dynamics
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**Featured Speakers:**

 Rebecca Roberts Con Edison	 Eric Van Orden Copper Labs
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**PLMA**  
**HOT TOPIC**  
 Conversation

**Residential DR Retention and Recruitment Strategies, and Challenges**

Hosted by the PLMA Customer Engagement Interest Group  
 Thursday, March 4, 12:30 to 1:30 pm ET | 9:30 to 10:30 am PT

It has been a wild and woolly year for managing residential demand response programs! Join PLMA's Customer Engagement Interest Group to learn more about challenges your utility peers have faced, and some of the approaches they have taken to keep their programs fully subscribed and delivering results, while customers' homes are more fully occupied. With guest speakers Erica Keating of SCE and Michael Haber of Energy Hub.

**Meet the Customer Engagement Co-Chairs and Our Guest Speakers:**

 Co-Chair Diana Sefcik Orange and Hackland Utilities	 Co-Chair Eracy Schmitt Iowa Valley Authority	 Co-Chair Vanessa Richter Oracle Utilities
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**Guest Speakers:**

 Erica Keating So Cal Edison	 Michael Haber Energy Hub
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**PLMA**  
**HOT TOPIC**  
 Conversation




**Connected Devices:**  
 Building a DER Portfolio through Business Case Modeling



Thursday, April 15, 12:30 to 1:30 pm ET | 9:30 to 10:30 am PT

One hundred percent clean energy goals are emerging across the U.S. and utilities are working on how to drive and support this transformation. Puget Sound Energy needed to design and evaluate DER concepts that could help it meet its clean energy goals while providing both grid and customer benefits.

Join us to learn how Puget Sound Energy and West Monroe Partners developed a DER use-case stacking model to create a portfolio of DER concepts, and the lessons they learned along the way.

**Meet our Featured Speakers:**

 Cindy Berry, Co-Chair Connected Devices Austin Energy	 Kari Binley, Co-Chair Connected Devices ecobee	 J.T. Thompson, Co-Chair Connected Devices Enbala
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 Therese Miranda-Blackney Guest Speaker Puget Sound Energy	 Shelly Hagerman Guest Speaker West Monroe Partners
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**PLMA**  
**HOT TOPIC**  
 Conversation




**Electric Transportation:**  
 Exploring the Role of Electric Transportation in Demand Response and Load Management



Thursday, April 29, 1:00 to 2:00 pm ET | 10:00 to 11:00 am PT

At this inaugural HOT TOPIC Conversation with the new PLMA Electric Transportation Interest Group, Rappahannock Electric Cooperative's Joyce Bodoh will present Rappahannock's survey results and load data on electric vehicles from across its Virginia service area. In addition, she'll discuss the co-op's transportation electrification roadmap and share tips on member engagement.

Join us for this overview and follow-up discussion of ideas, thoughts, and suggestions, as well as other relevant issues in electric transportation for 2021.

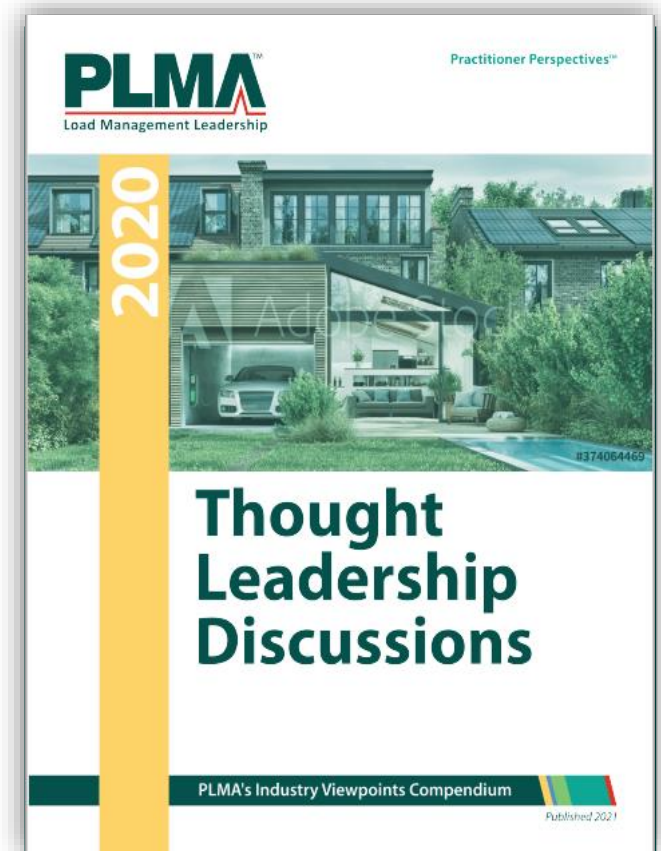
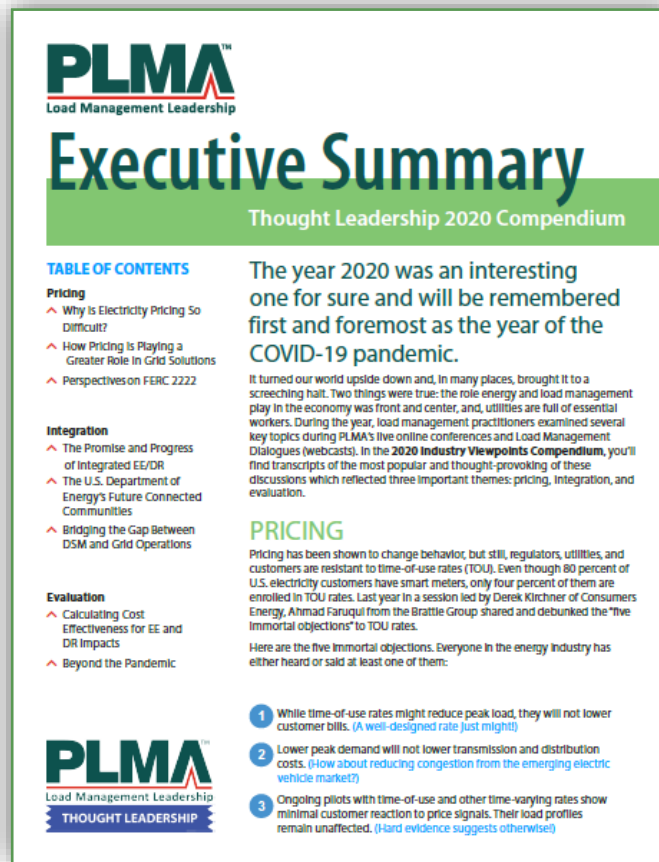
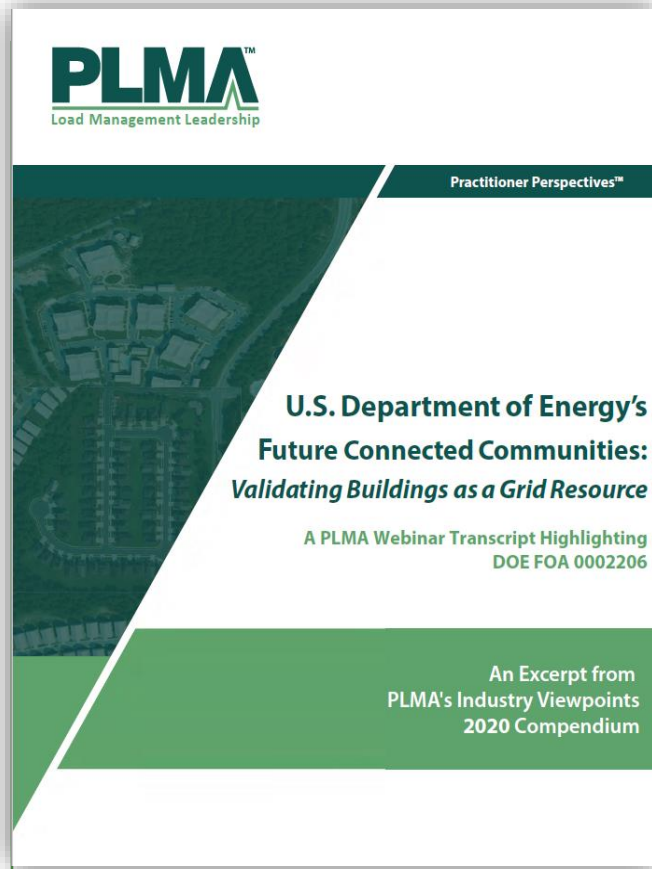
**Meet our Featured Speakers:**

 Joyce Bodoh, Co-Chair Electric Transportation Rappahannock Electric Cooperative	 Kessia Avseikova, Co-Chair Electric Transportation Opinion Dynamics	 Nick Bengtson, Co-Chair Electric Transportation EnergyHub
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 Katie Parkinson, Co-Chair Electric Transportation Apex Analytics	 Chad Saliba, Co-Chair Electric Transportation Geotab Energy
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# Thought Leadership Update

## Publications:





# Thought Leadership Update

**PLMA**  
Load Management Leadership

SEARCH WEBINARS CONFERENCES PUBLICATIONS INNOVATION FORUM LOGIN

## Welcome to PLMA's Load Management Resource Center

To find PLMA content on a specific topic, there are two ways to search this Resource Center:

1. Go to the Nav Bar at the top of this page and hover over "Search," or
2. For current content, the white blocks below list PLMA's most recent additions. All PLMA content going back to January 2020 can be found by searching the Nav Bar.

**HOT TOPIC**

### Building a DER Portfolio through Business Case Modeling

Puget Sound Energy (PSE) and West Monroe Partners discuss their DER use-case stacking approach to creating a portfolio of DER concepts.

2021 | HOT TOPICS | DER | Utility | Residential | Connected Devices | Model

**DETAILS**

**LOAD MGMT DIALOGUE**

### Growth Capital Investment in Energy Tech

The big "Three Ds," Decarbonization, Decentralization and Digitalization, are driving the new energy economy, as well as trends in M&A and growth capital investment in energy tech.

2021 | Load Management Dialogue | DER | FERC | Trends | Finance | Investment

**DETAILS**

**LOAD MGMT DIALOGUE**

### DERs in the New Energy Economy

By 2025, tens of millions of DERs will have entered the ecosystem across many DER asset classes. Understand the implications for a new transaction infrastructure.

Distributed Energy Resources | 2021 | Load Management Dialogue | FERC | Aggregation | DERs

**DETAILS**

**HOT TOPIC**

### Full House: Residential DR Recruitment and Retention Strategies during COVID-19

Discussion of challenges faced by utilities over 2020, and the approaches they've taken to keep programs fully subscribed and delivering results while customers' homes are more fully occupied.

Demand Response | Customer Engagement | 2021 | HOT TOPICS | COVID-19 | Residential

**DETAILS**

# Thought Leadership Update

## Looking Forward:

- Continue to leverage conference content for broad distribution to PLMA member practitioners.
- Continued news on COVID impacts to our industry and innovations in response...
  - **Will we someday look back at all this as a 'blip' in time or a driver of sustained change?**
- Strategic Initiatives A and B (Spark DER Innovation and Foster DER Adoption) continue to be viewed as springboards for future publications and dialogues.



Load Management Leadership

**AWARDS PROGRAM**

Co-Chairs:  
Peter Bergeron, Brett Feldman,  
Michael Smith

# Thank You Volunteer Awards Scorers

- Brett Feldman, Guidehouse Insights
- Peter Bergeron, Cpower
- Mike Smith, National Grid
- Farrokh Albuyeh, OATI
- Cindy Berry, Austin Energy
- Laurie Duhan, Baltimore Gas & Electric
- Ruth Kiselewich, ICF
- Melissa Knous, Duke Energy
- Johanna Koolemans-Beynen, USEA
- Vasudha Lathey, Olivine
- Ross Malme, Bowen Advisors
- Michael Ohlsen, City of Tallahassee
- Christine Riker, Energy Solutions
- Tracy Schmidt, TVA
- Diana Sefcik, Orange & Rockland
- Andrea Simmons, Idaho Power
- Uros Simovic, West Monroe Partners

\*20 total scorers of abstracts (17 volunteers and 3 awards co-chairs).

\*15 award nominations submitted in 2021.

\*Each nomination was scored at least 11 times by our judges.

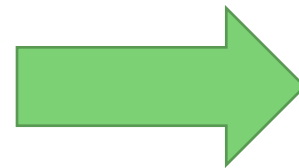
# Congratulations to Our 2021 Winners!

## ▲ Program Pacesetters

- Eversource Energy's ConnectedSolutions Program
- Western Power's 100 MW Challenge (Australia)
- Consumers Energy, Uplight, and Google Nest

## ▲ Thought Leader

- Sonoma Clean Power for The GridSavvy Community



## ▲ Technology Pioneer

- Enel X North America for DR, Storage, and Smart EV Charging

- July 15                   **Consumers Energy, Uplight, and Google Nest**
- July 20                   **Enel X North America**
- August 12               **The GridSavvy Community, Sonoma Clean Power**
- August 24               **Eversource ConnectedSolutions**
- September 9           **Western Power's 100 MW Challenge**

**Check the PLMA Calendar for Registration!**

**PLMA**<sup>TM</sup>

Load Management Leadership

**EDUCATION PLANNING**

Co-Chairs:  
Mark Martinez and Christine Riker

## Mission:



**Demand Response  
Training Series**

To Grow and Refine PLMA Training: Curriculum Quality and Student Quantity

- Provide training classes to a virtual platform (by design) and also pivoted due to COVID-19
  - ***Introduction to Demand Response Fundamentals*** (online & on-demand)
- PLMA training classes held in 2020 & 2021 – Live Online!
  - ***Evolution of DR to DERs***  
October 29-29 (43<sup>rd</sup> conf) and April 21-22, from 9:30pm – 1:30pm PT
  - ***DR Wholesale Markets***  
September 15-16 (SCE) and Spring 2021 cancelled due to lack of registrations
  - ***DR Program Design and Implementation***  
September 15-16 (SCE) and April 7-8, from 8am-2pm PT
- Next scheduled courses planned for Fall 2021 and “on request” training available as well
- Coordinating with the PLMA Strategic Initiatives for DER Adoption & Thought Leadership





Load Management Leadership

**CONNECTED DEVICES**

Co-Chairs:  
Cindy Berry, Kari Binley,  
and J.T. Thompson

- **HOT TOPIC Conversations**

- Great response to HOT TOPICS “Building a DER Portfolio through Business Case Modeling” with Shelly Hagerman and Therese Miranda-Blackney

- **Next Up!**

- Leverage member feedback from Fall Conference for content creation
- Continue the conversation about the stacked effect of DERs / Value Streams (EE / DR / TOU)

- **Excited about Baltimore!**

**Don't ask JT for one more GoToWebinar/Zoom/Webex meeting!**



**WOMEN IN DM**

Co-Chairs:  
Melissa Knous and Lenore Zeuthen

# Mentoring Program Pilot Participants



*CMS ENERGY*



## ▲ October 2019 – Women in DM Engagement Survey Results:

- 80 respondents
- 58% wanted “workshops and skills development”
- 64% wanted to discuss “challenges women experience + strategies for mitigating”

## ▲ November 2019 – Women in DM pre-conference session

- 23 out of 31 session participants interested in mentoring/mentorship

## ▲ Spring 2020 – Women in DM introduced pilot concept to Executive Committee

- Hosted info session (webinar) for PLMA members
- Wrote applicant questionnaire
- Researched & developed “Quick Start Guide”

## • August 2020 – Pilot Launch

- **19 applicants, 12 participants chosen**
- Women in DM co-chairs liaison with assigned participants

## • Sept 2020 – March 2021

- Co-Chair check-ins with assigned participants
- Co-Chair mid-point check-ins with assigned participants
- Endcap: included one-on-one interviews and an anonymous survey

## Survey: 8 Respondents, Anonymous

Median Scores  
(1= Low 10 = High)

- How likely are you participate in the year-long program, or recommend it to others? **9.5**
- How would you rate the Quick Start Guide? **7**
- How would you rate your co-chairs? **8.5**
- How would you rate your match? **9.5**
- Overall, how would you rate your experience in the pilot? **7.5**

“My match was exactly what I was looking for in a mentor...someone who has gone through similar challenges I face in my career.”

“A mentor with longevity and success in the industry means that either the mentor is male, or in very very short supply. Encouraging more senior leaders (male or female) would improve matching.”

### Verbatim Comments

“I was looking for a female perspective on the industry and [my mentor] was able to deliver.”

“Meeting with both the mentor and mentee would provide a different insight into the dynamic of the relationship.”

“We may want to use the in-person conferences to facilitate the connection”

“I think it’d be nice if mentees could indicate whether they want a female mentor, in case they have women-specific issues. For example, experiences regarding pregnancy in the workplace or dealing with sexual harassment.”

## 12 One-on-One Interviews

Would like to see activities including speakers and Zoom get-together for entire cohort

Asked for additional scheduled contact and better responsiveness from co-chairs

Suggested we add supplemental content, eg. articles, videos, discussion topics, activities

Plus: A clarifying statement defining mentorship and rules of engagement

\*Exercise caution when matching vendors; avoid pairing competitors\*

Also: an option to request gender in match; rec’d minimum difference in career seniority

**Participants reported to still be actively in contact after the close of the pilot**

“Thank you for taking the time and effort to put this together. I really appreciated the experience.”

- ▲ April 2021: Presented **pilot evaluation** to Officers, Executive Committee
  - Delivered recommendations for mentorship program development, implementation, and management
  - Offered a new vision for promoting Affinity Groups
  
- ▲ Program launch and management requires a **team effort**, as well as ongoing input from Women in DM



Load Management Leadership

**RETAIL PRICING**

Co-Chairs:  
Farrokh Albuyeh, Jordan Folks,  
Christopher Gallo, and Allison  
Hamilton



## ▲ Co-Chairs onboarded in October 2020

- **Allison Hamilton**  
*National Rural Electric Cooperative Association (NRECA)*
- **Jordan Folks**  
*Opinion Dynamics*
- **Farrokh Albuyeh**  
*Open Access Technology International (OATI)*
- **Chris Gallo**  
*Con Edison*

## ▲ Pricing IG was formally introduced at the Fall 2020 Conference





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## HOT TOPIC 1

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Maryland's PC44  
Time-of-Use Pilots

Dr. Sanem Sergici

December 1, 2020



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## HOT TOPIC 2

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Mass-Market Demand-Based Rates

Rebecca Roberts; Eric Van Orden  
Jordan Folks; Chris Gallo

February 11, 2021



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## HOT TOPIC 3

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To Be Announced

June 2021



Load Management Leadership

**CUSTOMER ENGAGEMENT**

Co-Chairs:  
Diana Sefcik, Vanessa Richter,  
and Tracy Schmidt

## ▲ 2021 Sessions:

March 4:

Residential DR - Full House Retention and Recruitment Strategies, and Challenges

## ▲ Looking Ahead

- Call for topic ideas for next sessions



Retention & Recruitment  
Strategies and Challenges

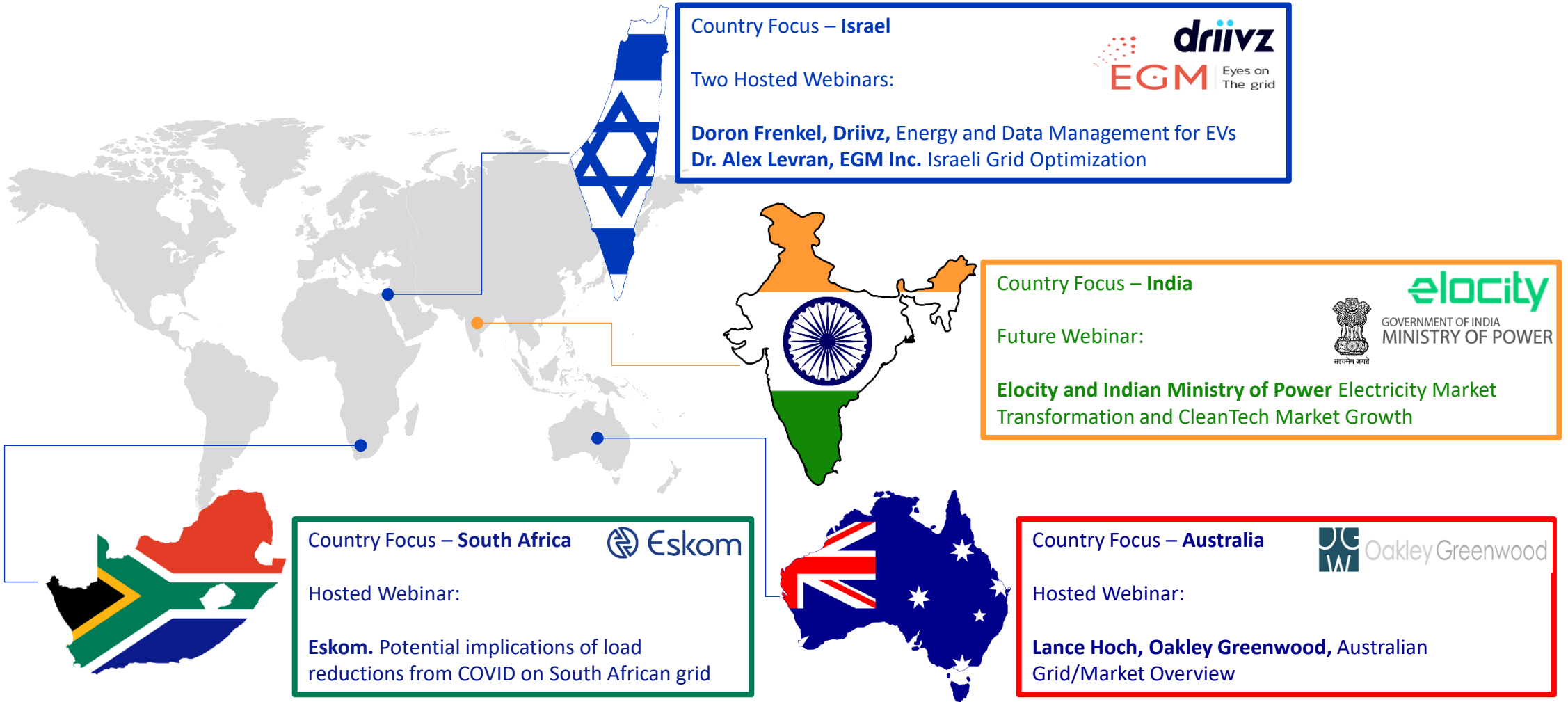
**PLMA**<sup>TM</sup>

Load Management Leadership

**GLOBAL LOAD MANAGEMENT**

Co-Chairs:  
Jon Hilowitz, Scott Coe,  
and Ross Malme

# Recent Initiatives – Country Focus



## ▲ Updates

- Hosted multiple webinars spotlighting various countries
- Growth Capital Investment in Energy Tech: Understanding the Trends webinar
- Soft launch of new EV Charging Interest Group
- Currently weekly leadership calls
- **Still looking for new members to get involved**

## ▲ Future Opportunities

- Region-Focus Candidate #1 - **India**: Electricity Market and CleanTech Market Growth (featuring PLMA member Elocity and Indian Ministry of Power)
- Region-Focus Candidate #2 - **The Gulf States**
- Region-Focus Candidate #3 – **The Nordic Countries**
- **Growth Capital Investment in Energy Tech**



**PLMA**<sup>TM</sup>

Load Management Leadership

**ELECTRIC TRANSPORTATION**

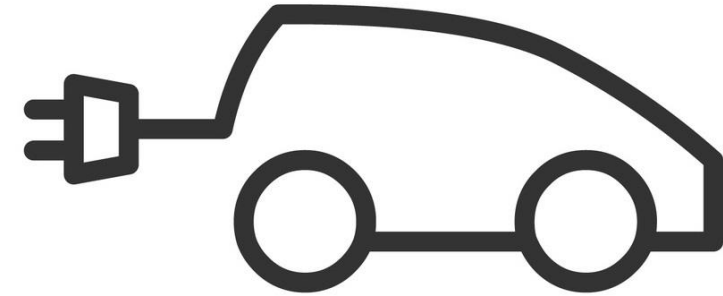
Co-Chairs:

Joyce Bodoh, Kessie Avseikova,  
Nick Bengtson,  
Katie Parkinson, and Chad Saliba



## ▲ Accomplishments

- Formation, Co-Chairs
- Biweekly planning calls
- Website page



## ▲ First HOT TOPIC Conversation 4/29

- Talk on EV initiatives from Rappahannock Electric Coop
- Interactive survey on future HOT TOPICS and member interests

## ▲ Two EV presentations in upcoming **43<sup>rd</sup> PLMA Conference**

## ▲ Planning for June Interest Group Week

- **“So You’ve Got EVs, Now What?  
Options for Running EV Load Management Programs”** (working title)



Load Management Leadership

**CONFERENCE PLANNING**

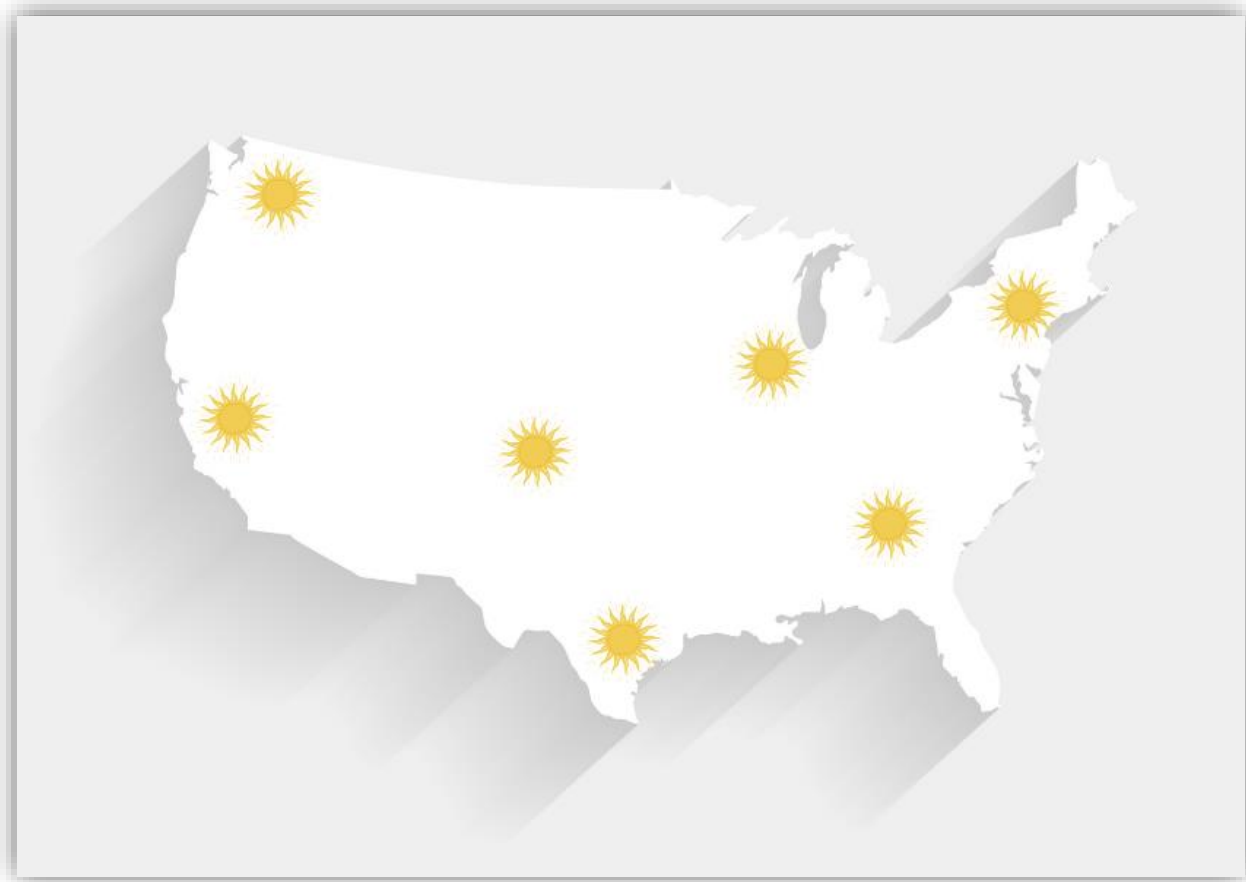
Co-Chairs:  
Bruce Brazis and Meridith Uniacke



**Registration Closes Friday, May 7!!!**

# **The 43<sup>rd</sup> PLMA Conference**

**May 10-12, 2021 – Live Online**



**PLMA**<sup>TM</sup>  
Load Management Leadership

**44th  
Conference  
Live Watch!**

Mark Your Calendar for:

# The 44<sup>th</sup> PLMA Conference

November 2021 – Regional Live Watch Parties (tbd)



**45th  
Conference  
Baltimore, MD**

Mark Your Calendar for:

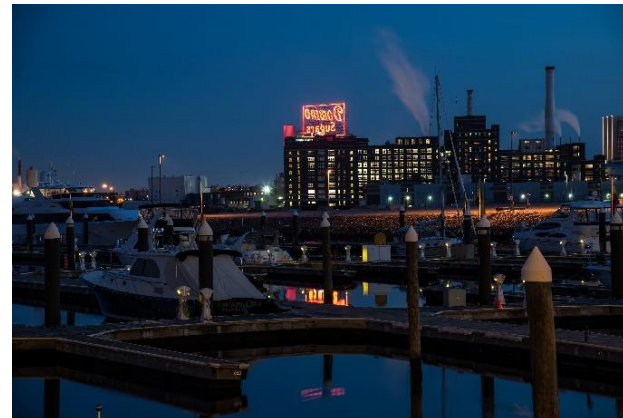
# **The 45<sup>th</sup> PLMA Conference**

**April 4-6, 2022 - Baltimore, Maryland**

# Welcome to Baltimore: It's Charming!

## Full of History and Heart:

- Home of the first gas utility in U.S., est.1817
- Steamed Chesapeake Bay Blue Crabs
- Edgar Allen Poe House and Museum
- National Aquarium
- B&O Railroad Museum
- Museum of Industry
- SS Constellation
- Fort McHenry / Star Spangled Banner
- Ravens M&T Bank Stadium
- Oriole Park at Camden Yards



# Strategic Vision 2021

# Key Initiatives *(enhanced in 2020)*

A

Spark DER  
Innovation

B

Foster DER  
Adoption

## *Strategic Initiatives*

---

## *Operational Imperatives*

1

Ally Strategy

2

Improve Resource  
Efficiency  
(Volunteers & Paid Staff)

Succession Planning

3

Financial Planning &  
Operations

4

Member Development

Membership Best Practices  
Membership Engagement Tactics

## *Foundational Supports*

Board Structure, Bylaws, Policies, and Procedures

Mission – Vision - Values



# Development and Execution Process

**PLMA**

**A - Establish PLMA as the primary resource and catalyst for driving DER adoption and integration through practical applications for grid management**

- Tasks:**
  - Strategic use of education and interest groups
  - Outreach to other trade organizations to fill gaps in their strategy/put a flag in the ground
  - Drive adoption through practical application of technology for grid management
- Metrics:**
  - Increase membership from DER providers & organizations
  - Increase depth from existing members/distribution/product development
  - Thought leadership papers at practical level and C Suite level
  - Presentations on integration success
  - White papers on DER
- Team:**
  - Michael Brown, Dave Hyland, Joe Childs & TBD



**DER Thought Leadership - Executive**

To Date: 0

2019 Target: 2

*Number of Strategic or Executive initiatives (webcasts, publications, etc.) focused on helping leaders and plan for a changing energy landscape.*

**Metrics Development & Tactical Planning**  
(report out in Spring 2020)

*new!*



**Volunteer Leadership Retreat (August 2020)**

- Self assessment survey
- Best practices
- Roles & responsibilities
- Membership engagement

Vision 2021 Strategic Planning Retreat (August 2019 with report-out in Fall 2019)



Fall 2020  
Spring 2021  
Updates



**Vision 2021 REFRESH Planning Retreat (August 2021)**



Vision 2021 REFRESH Update + Progress (Fall 2021)

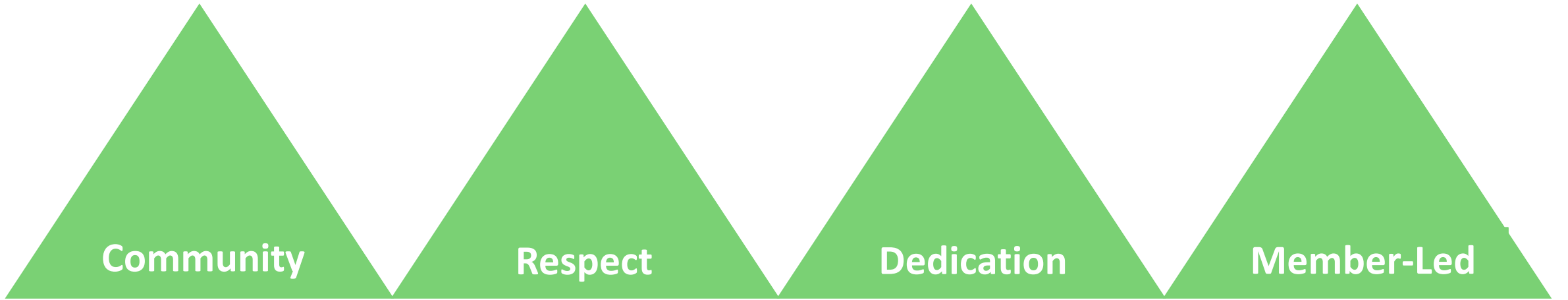
# Development and Execution Process



To Run for an Officer position, please plan to join  
PLMA in August for the  
**Vision 2021 REFRESH** Planning Retreat.

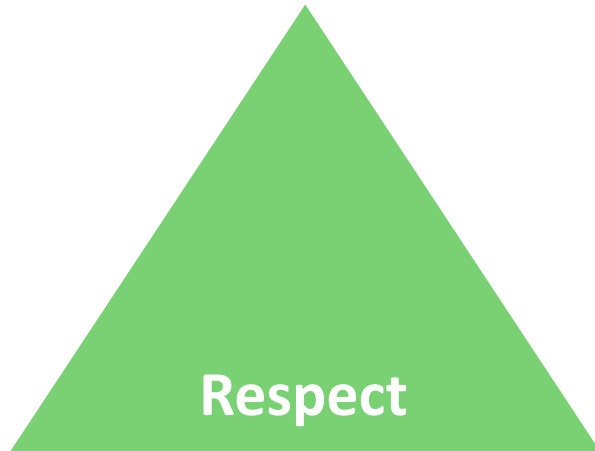


# Values





We value and create an inclusive and supportive environment where peers collaborate in a familiar space to address common challenges while nurturing relationships, networks, and new ideas.



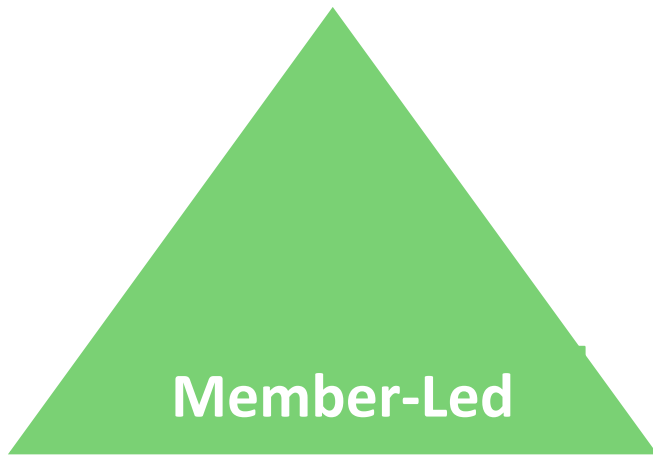
We listen to and value perspectives from a diversity of people, professional backgrounds, cultures, and life experiences to broaden our own and one another's humanity, skills, and knowledge.

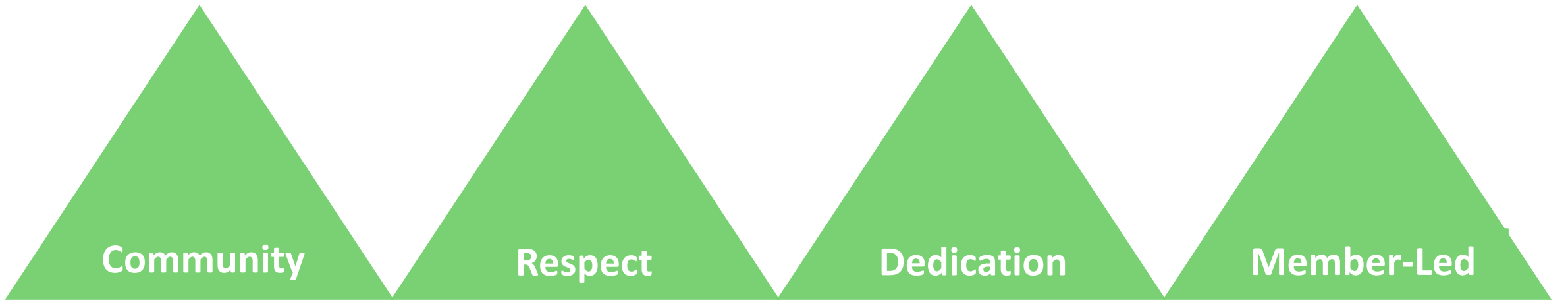


We are committed to stewarding the advancement of load management, demand response, and distributed energy resources as core elements of the clean energy transformation.



We are passionate about encouraging professional and personal development opportunities for all through leadership, mentoring, and education. Together, we actively engage in creating PLMA: its vision, mission, strategy, and programming.







# PLMA<sup>TM</sup>

Load Management Leadership

## Community

We value and create an inclusive and supportive environment where peers collaborate in a familiar space to address common challenges while nurturing relationships, networks, and new ideas.

## Respect

We listen to and value perspectives from a diversity of people, professional backgrounds, cultures, and life experiences to broaden our own and one another's humanity, skills, and knowledge.

## Dedication

We are committed to stewarding the advancement of load management, demand response, and distributed energy resources as core elements of the clean energy transformation.

## Member-Led

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A

Spark DER Innovation

A

Spark DER  
Innovation

**“Stimulate DER advancement by providing a process/platform for identifying industry needs and accelerating innovation.”**

**Team Lead:** Robin Maslowski with Rich Barone, Michael Brown, Olivia Patterson, Christine Riker, Ruth Kiselewich, John Powers, Matt Carlson, Jim Muselik, Matthew Haak, Dave Erickson, Patty Cook, Paul Tyno, Eric Van Orden

- Create a structured process to identify, prioritize, and disseminate DER innovation gaps/needs/topics/challenges that could be addressed by PLMA activities/initiatives
- Establish and maintain a common, objective hub for identifying, prioritizing, and fostering adoption of leading-edge solutions that address “greatest DER challenges” in innovative, replicable/practical ways
- Enhance PLMA operational practices to drive activities/initiatives that address key themes/needs/priorities as identified by membership

# Spark DER Innovation

We are here!  
Join us on  
June 9<sup>th</sup>

A. Workshop

B. Foster DER Adoption

Challenge Categories  
Practitioner Perspectives



Stage 1:  
Challenge  
Categorization

A.  
Challenge  
Definition

B.  
Innovation  
Stories

Stage 2:  
Innovation  
Forum



Stage 3:  
Challenges  
Transitioned

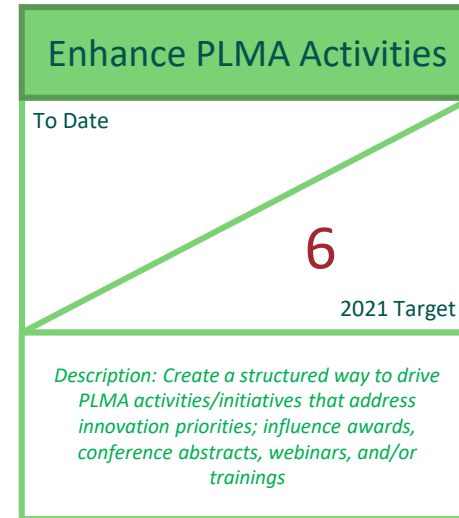
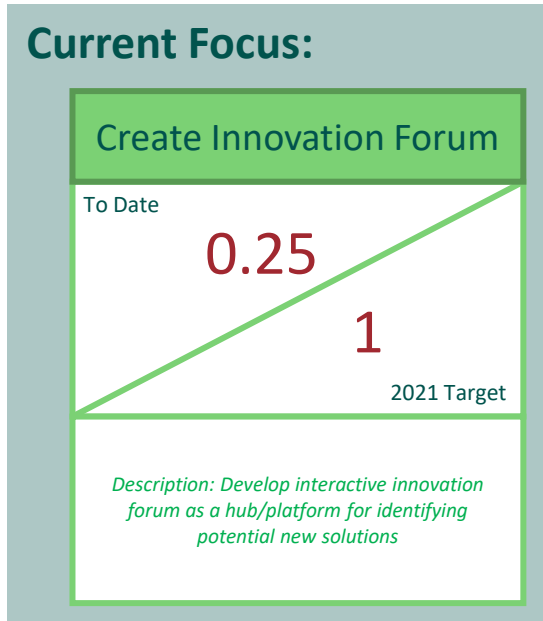
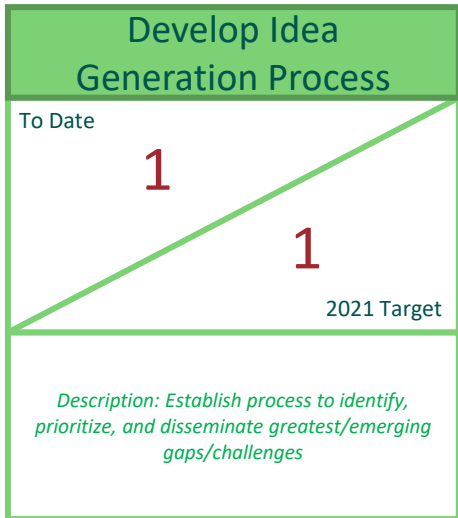
A. Enhance  
PLMA  
Activities

B. Foster  
DER  
Adoption

**A**  
Spark DER  
Innovation

**“Stimulate DER advancement by providing a process/platform for identifying industry needs and accelerating innovation.”**

Team Lead: Robin Maslowski with Rich Barone, Michael Brown, Olivia Patterson, Ruth Kiselewich, John Powers, Matt Carlson, Jim Muselik, Matthew Haak, Dave Erickson, Patty Cook, Paul Tyno, Eric Van Orden



B

Foster DER Adoption

## Foster DER Adoption

**“Pave the DER path by promoting forward-leaning solutions, market models, organizational change management, and operational experiences.”**

Team Lead: Rich Barone with Robin Maslowski, Michael Brown, Olivia Patterson, Ruth Kiselewich, Rich Hasselman, Eric Van Orden, John Powers

- Illustrate DER adoption – most notably PV, storage and EVs, as a key means of expanding the scope and value of the Demand Response Toolkit.
- Reflect utility, market, and customer perspectives on DER Adoption based on real world examples.
- Emphasize both the successes AND failures to simultaneously illuminate “how to’s” while sharing key lessons learned, and industry challenges.

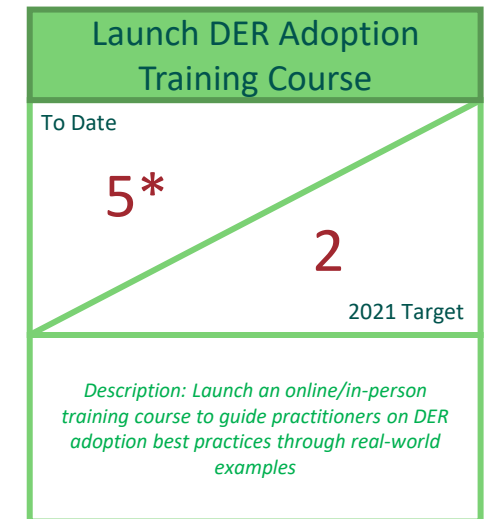
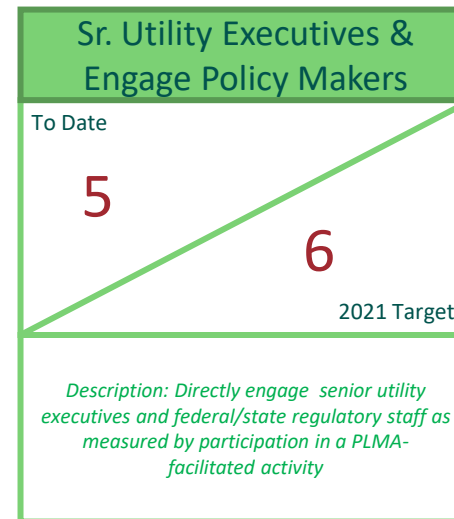
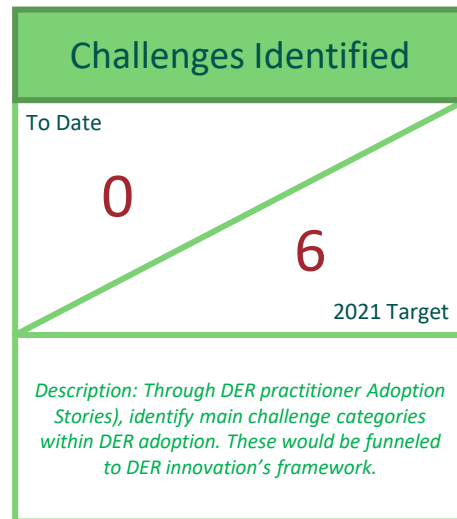
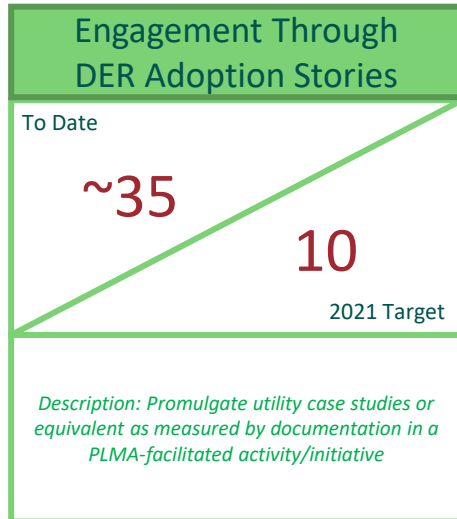


B

## Foster DER Adoption

# “Pave the DER path by promoting forward-leaning solutions, market models, organizational change management, and operational experiences”

Team Lead: Rich Barone with Robin Maslowski, Michael Brown, Olivia Patterson, Christine Riker, Ruth Kiselewich, Rich Hasselman, Eric Van Orden, John Powers



# 2020-21 Strategic Initiative B Highlights

## DER Adoption: PLMA Content

- DER focus in all content development
- Dovetailing content tracking efforts with PLMA's content evolution (LMS)
  - 2020-2021: 77 "Packages of Content" now in LMS
  - DER connected directly or indirectly to almost all tracked content

## Engage Policymakers and Sr. Utility Management

- Synergistic with Operational Imperative: Ally Strategy
- DER Strat B's targeted Allies will be assigned Ambassadors via Ally Ambassador Program:
  - SEPA
  - NARUC
  - NASEO
  - EEI

# 2020-21 Strategic Initiative B Highlights

## DER Training

- **All PLMA trainings now include DER content**
- **Three 2020 Trainings:**
  - Evolution of DR to DER
  - DR Wholesale Markets
  - Program Design and Implementation
- **Two 2021 Trainings to date**
- **Advanced DER-specific training currently under development**
  - Targeted Launch: Fall 2021

1

## Ally Strategy

1

Ally Strategy

**“Build on the solid efforts developed previously to identify and secure strategic relationships with other industry organizations and trade allies.”**

Team: Jenny Roehm and Joe Childs

## Finalize Ally Strategy Framework

- PLMA Organization Relationship Database Review ✓
- Finalize framework based on current alliances (SEPA, AESP, EEI, etc.).

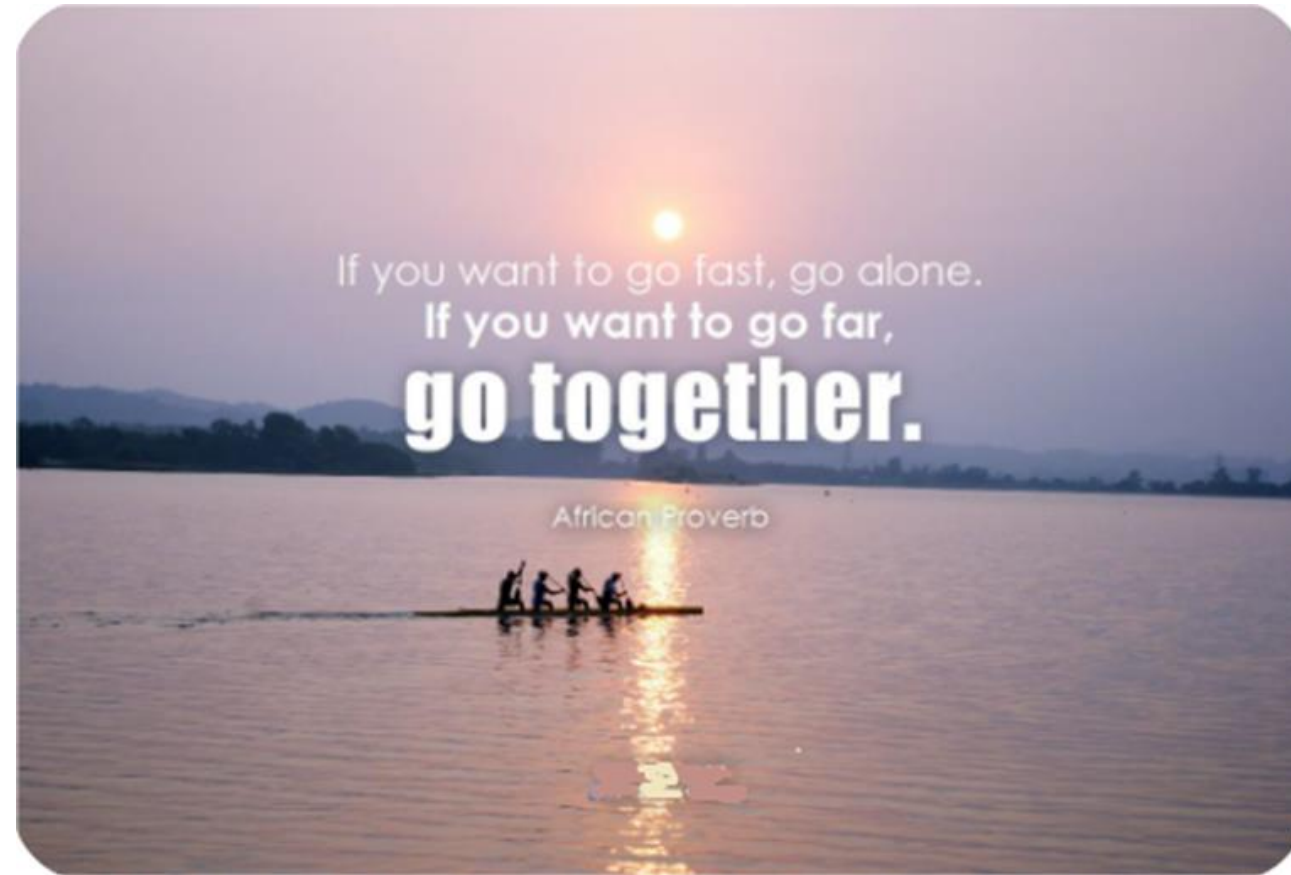
## Ally Strategy Tactics

- Relationship Ambassadors beyond Executive Committee and Staff
  - *Ambassador Guidebook* – work in progress
  - *Ambassador Training* – Planned Fall 2021
- Take PLMA on the Road – deliver training and presentations
- Get involvement from other technical organizations
  - Build on success, learn from the past

# Ally Ambassador Program

## Guidebook 2021:

- 1) Program Overview Goals
- 2) The Ambassador's Role
- 3) The Ambassador's Core Tasks
- 4) Set Annual Goals for your Ally
- 5) Tracking and Reporting Schedule
- 6) Supporting Resources
- 7) Relationship Evaluation



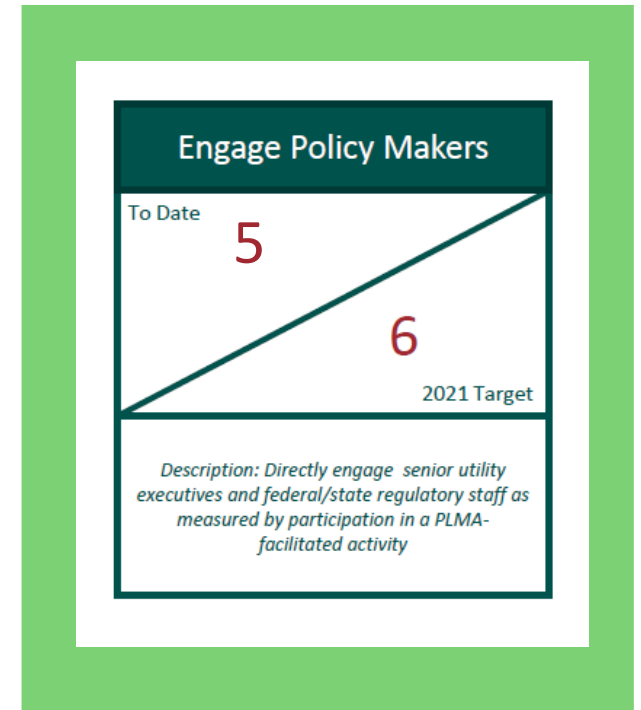
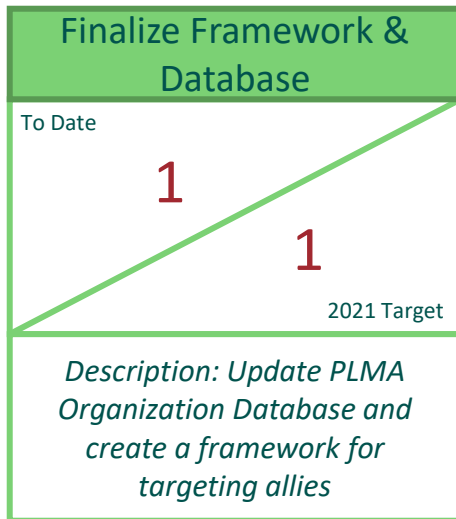
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## Ally Strategy

**“Build on the solid efforts developed previously to identify and secure strategic relationships with other industry organizations and trade allies.”**

Team: Jenny Roehm and Joe Childs

## Strategic Initiative B Foster DER Adoption



# A Complementary Path:

**Kelly Speakes-Backman** (43<sup>rd</sup> Conf keynote)

DOE Principal Asst Deputy Secretary

**David Nemptow** (GEBs webinar)

DOE Director of BTO

**Mary Ann Piette** (GEBs webinar)

LBNL Dir of Bldg Tech and Urban Systems

**Teja Kuruganti** (GEBs webinar)

ORNL Snr Member of R&D Staff

**Marcus Hawkins** (FERC webinar)

Exec Director, Association of MISO States

## Strategic Initiative B Foster DER Adoption

### Engage Policy Makers

To Date

5

6

2021 Target

*Description: Directly engage senior utility executives and federal/state regulatory staff as measured by participation in a PLMA-facilitated activity*



2

Improve Resource Efficiency  
(Volunteers and Paid Staff)

2

Improve Resource Efficiency  
(Volunteers & Paid Staff)

**“Empower volunteer leaders and drive mission-focused efforts through volunteer leader development, strategic investment in Paid Staff, and incentive alignment.”**

Team Lead: Michael Brown with Officers and Executive Committee

- Provide leadership development for Volunteer Leaders.
- Build out paid Staff support framework for Volunteer Leaders and Groups that are driving mission-based initiatives.
- Optimize the balance of skill sets for paid Staff applied to operational tasks and strategic mission-focused tasks.
- Ensure mission-focused incentive alignment for paid Staff.
- Develop succession planning frameworks for Volunteers and paid Staff.

2

### Improve Resource Efficiency (Volunteers and Paid Staff)

# “Empower volunteer leaders and drive mission focused efforts through volunteer leader development, strategic investment in paid Staff, and incentive alignment.”

Team Lead: Michael Brown with Officers and Executive Committee



- 2020 Retreat (done)
- 2021 Retreat (to do)

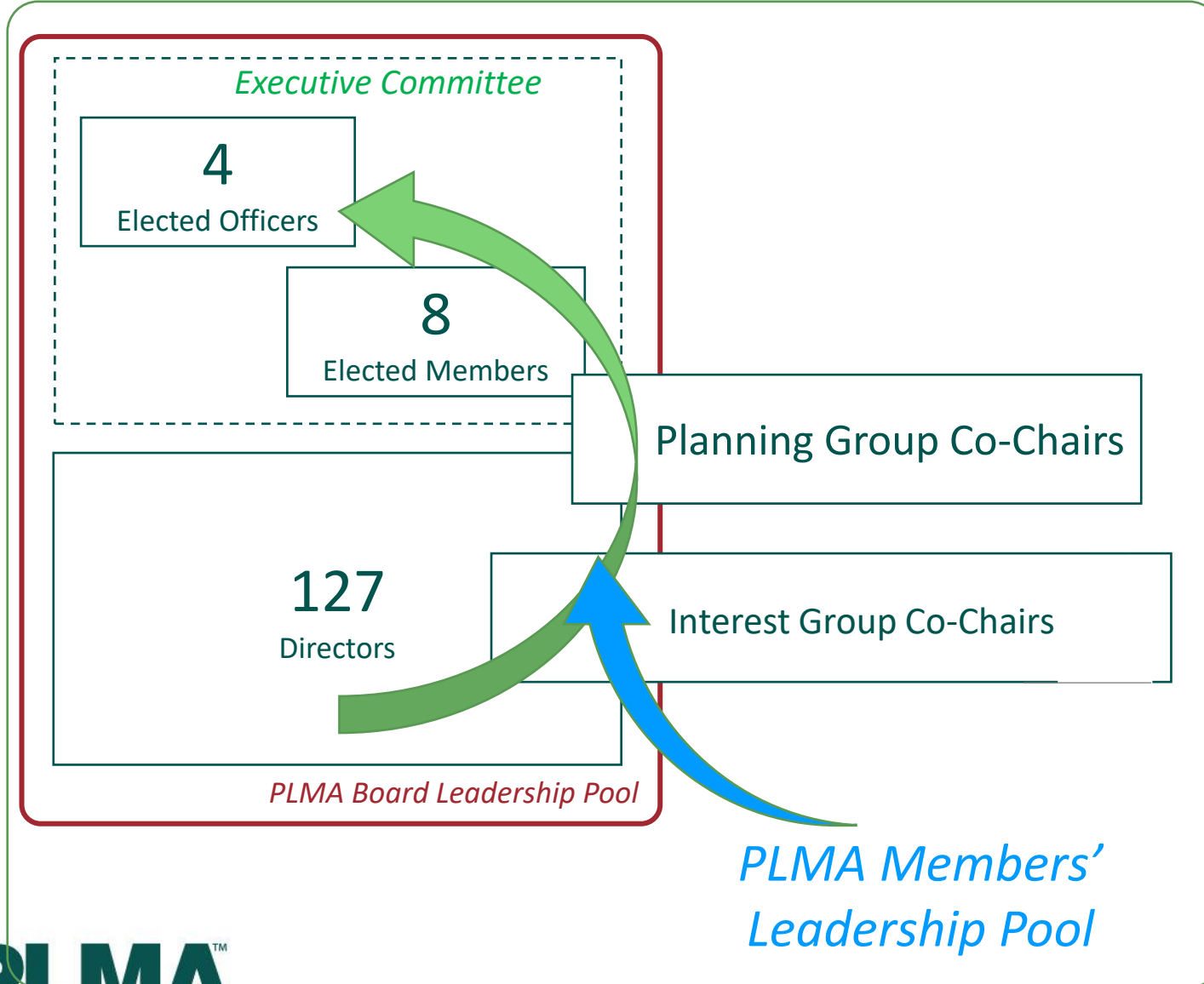


- Employee Transition Plan (done)
- 2021 Resource Plan (done)



- 2 x Officers
- 1 x EC
- 3 x Co-Chairs
- 2 x Officers
- 1 x EC
- 4 x Co-Chairs

# Succession Planning - 1



## Volunteer Leadership

- Pathways development from board and member company leadership pools
- Supports broader membership engagement and development
- Consistent with by-laws and organization governance (eg. ensure qualified candidates for elected positions)
- Role clarity and qualifications

## Paid Staff

- Ensure success and going concern via risk managed resource allocation
- Establish performance expectations
- Conduct benchmarking for well-defined roles
- Processes (eg. Search Committee), contingency, transition plans

# Succession Planning - 2

## PLMA SUCCESSION PLAN - SUMMARY VIEW (Draft)

4/28/2021

### VOLUNTEER ROLES

Role	Group	Group ID	Role Description	Elected or Appointed	Incumbent	Incumbent Intent	Identified Successor	Potential Successors
<b>Officers</b>	Officer	1						
Chair	Officer	1		Elected	Michael Brown	Not running for re-election	Rich Barone - intent to run	
Vice-Chair	Officer	1		Elected	Rich Barone	Not running for re-election		
Secretary	Officer	1		Elected	Joe Childs	Not running for re-election		
Treasurer	Officer	1		Elected	Troy Eichenburger	Running for re-election		
<b>Executive Committee</b>	Executive Committee	2						
EC 1	Executive Committee	2		Elected	Ruth Kiselewich	Unknown/Undecided		
EC 2	Executive Committee	2		Elected	Derek Kirchner	Vacating on May 7th		
EC 3	Executive Committee	2		Elected	Christine Riker	Unknown/Undecided		

## Near Term Efforts

- Ensure **solid candidate roster** for Fall Officer Elections starting with leadership pools
- Work to help self-identified **group co-chairs** identify successors
- Ensure transition training via **leadership development** efforts
- Continue flushing out draft succession plan

3

## Financial Planning & Operations

## Financial Planning and Operations

**“Refine Financial Planning and Operations to support strategic growth and position for longer-term financial sustainability.”**

Team: Troy Eichenberger with Ruth Kiselewich, Laurie Duhan, Michael Brown

### **Financial Planning**

- Maintain financial stability to support strategic goals
- Create a long-term investment plan

### **Financial Operations**

- Articulate pricing strategy and revenue priorities
- Articulate risk and expense management options

3

## Financial Planning and Operations

# “Refine Financial Planning and Operations to support strategic growth and position for longer-term financial sustainability.”

Team: Troy Eichenberger with Ruth Kiselewich, Laurie Duhan, Michael Brown





4

## Member Development

4

## Member Development

# “Drive member engagement and development to ensure PLMA’s long term growth and success.”

Team Lead: Derek Kirchner with Justin Chamberlain, Andrea Simmons, Olivia Patterson, Rich Philip

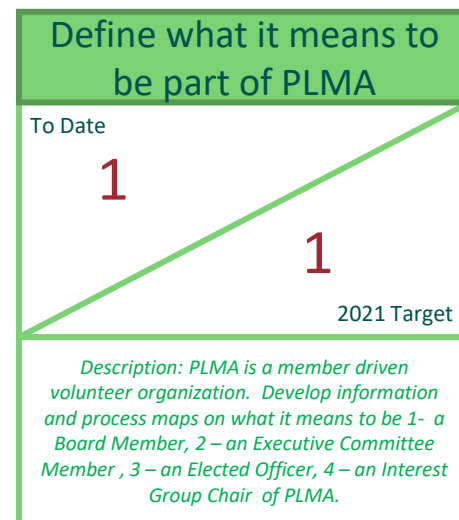
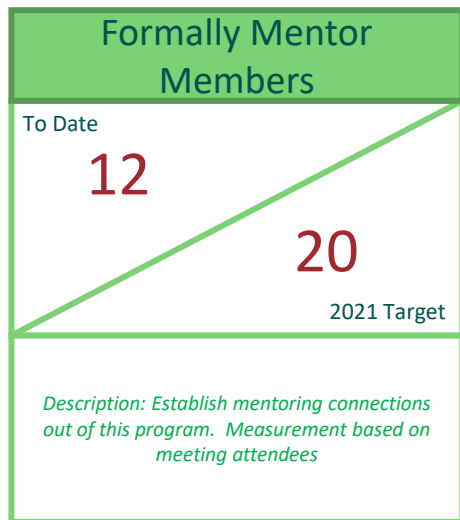
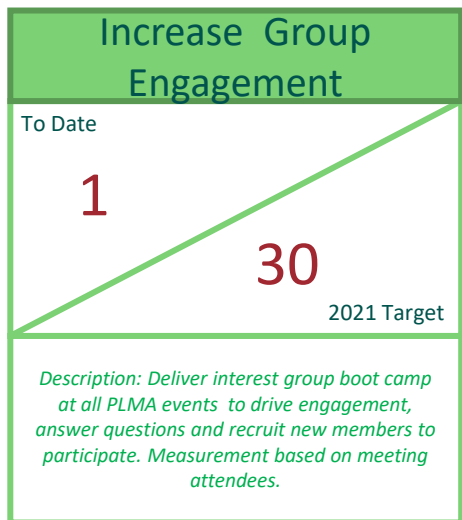
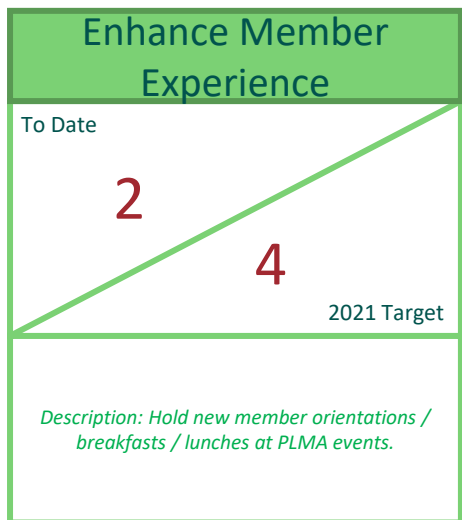
- Strategically drive the engagement and development of current and prospective PLMA member organization staff as well as key allies (i.e. policy makers, etc.).
- Define and develop the roles, responsibilities, and experience of PLMA membership and leadership.
- Define and develop how PLMA supports a “mentoring” approach.
- Define and develop infrastructure to communicate/share information to PLMA members vs. allies for greater engagement.

4

## Member Development

# “Drive member engagement and development to ensure PLMA’s long term growth and success.”

Team Lead: Derek Kirchner with Justin Chamberlain, Andrea Simmons, Olivia Patterson, Rich Philip



# Vision for PLMA's Membership Initiatives

## Membership Initiatives support vision and goals to:

1. Better define PLMA Values
2. Drive member engagement + development to ensure PLMA's long-term success

## Membership Initiatives focused on:

- ▲ Enhancing Member Experience
- ▲ Increasing Group Engagement
- ▲ Formally Mentor Members
- ▲ Publish Leadership Bios
- ▲ Define what it means to be part of PLMA

## Moving Forward:

- ▲ Ensure membership initiatives align with evolving value for member practitioners

# Officer Bios

## Officers (2019-2021):



Board Chair

Michael Brown  
Berkshire Hathaway  
NV Energy

[Read Michael's Bio](#)



Board Vice Chair

Richard Barone  
TRC

[Read Richard's Bio](#)



Treasurer

Troy Eichenberger  
Tennessee Valley  
Authority

[Read Troy's Bio](#)



Secretary

Joseph Childs  
Eaton

[Read Joe's Bio](#)



### Michael Brown

**PLMA Title:** Chair of the Board

**Company:** NV Energy / Berkshire Hathaway Energy  
**Company Title:** Manager  
**Years with PLMA:** 13  
**Years in the Industry:** 20

#### How Did You Become a Member of PLMA's Leadership Team?

I started regularly attending PLMA conferences in 2007 to



### Richard Barone

**PLMA Title:** Vice Chair

**Company:** TRC Company  
**Company Title:** VP  
**Years with PLMA:** 7  
**Years in the Industry:** 15

#### How Did You Become a Member of PLMA's Leadership Team?

I was initially recruited by John Powers to join the DER Integration Interest Group as a co-chair in the fall of 20



### Troy Eichenberger

**PLMA Title:** Treasurer

**Company:** Tennessee Valley Authority  
**Company Title:** Senior Manager  
**Years with PLMA:** 9  
**Years in the Industry:** 15

#### How Did You Become a Member of PLMA's Leadership Team?

PLMA is a great place to explore your leadership interests because



### Joseph E. Childs

**PLMA Title:** Secretary

**Company:** Eaton  
**Company Title:** Sr. Manager DR Strategy and Business Relations  
**Years with PLMA:** 21  
**Years in the Industry:** 35 years in the Utility Industry

#### How Did You Become a Member of PLMA's Leadership Team?

I attend events for a few years and sat in on board meetings

#### Subject Matter Expertise / Areas of Knowledge:

• marketing

# PLMA Member Survey Highlights: April 2021

*N = 44*

1. Interested in a Volunteer Leadership Role: **59% YES**
2. Biggest obstacle to participation: **Time / Current Workload**
3. Interested in participating in a Mentoring Program: **50% YES**  
**Mentee: 32% | Mentor: 36% | Both: 36%**
4. Is PLMA addressing the topics you're interested in: **81% YES**
5. What do you value most about PLMA?

Networking:	<b>43%</b>
Learning Opps:	<b>25%</b>
Conferences	<b>18%</b>
Webinars:	<b>9%</b>
Training:	<b>2%</b>

# Join the Member Engagement Team!

To volunteer in any PLMA  
Membership initiative,  
please contact Olivia Patterson:  
[opatterson@opiniondynamics.com](mailto:opatterson@opiniondynamics.com)

# Chair's Closing Remarks

Michael Brown

NV Energy/Berkshire Hathaway Energy





# Please Get Involved!

## Help PLMA Support the Clean Energy Transformation

[signup@peakload.org](mailto:signup@peakload.org)



Meet  
our  
Keynote

**43<sup>RD</sup> PLMA<sup>TM</sup>**  
Load Management Leadership  
**CONFERENCE**

Acting Assistant Secretary  
for Energy Efficiency + Renewable Energy  
U.S. Department of Energy

**Kelly Speakes-Backman**



**May 10-12, 2021**

**Registration Closes Next Friday, May 7!**

**[www.peakload.org/43rd-conference](http://www.peakload.org/43rd-conference)**

**Thank You PLMA Board Members!**  
Questions?