



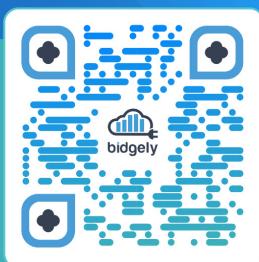
Executive Innovation Collaborative



DECEMBER 2022

WELCOME

Where Utility Leadership Meets Tech Innovation to Accelerate the Clean Energy Future



UEIC AGENDA DETAILS

Day 1: Tuesday, December 13, 2022

START	END	ACTIVITY	LOCATION
8:00am	9:00am	Breakfast	Citizen Hotel, Grange Restaurant 926 J St, Sacramento, CA
9:00am	9:20am	Transportation to Sacramento Power Academy	Chartered Bus
9:20am	10:20am	SMUD Executive Tour: SMUD's Hedge Solar Farm and the Sacramento Power Academy and Tour <i>*Close-toe shoes are mandatory</i>	Sacramento Power Academy 9268 Tokay Ln. Sacramento, CA 95829
10:20am	10:40am	Transportation back to SMUD	SMUD, 6201 S Street, Sacramento
10:40am	11:00am	UEIC Event Commences: (Security Check and Welcome)	Exec Board Room, SMUD
11:00am	11:10am	Paul Lau Welcome	Exec Board Room, SMUD
11:10am	11:30am	UEIC Overview and Welcome	Exec Board Room, SMUD
11:30am	12:00pm	SMUD 2030 Carbon Plan + CIO Insights	Exec Board Room, SMUD
12:00pm	1:00pm	Lunch	Arden Room, SMUD
1:00pm	3:00pm	CXO / CIO Roundtables <i>Session 1</i>	Exec Board Room, SMUD
3:00pm	3:30pm	Break	Exec Board Room, SMUD
1:00pm	3:00pm	CXO / CIO Roundtables <i>Session 2</i>	Exec Board Room, SMUD
5:30pm	5:50pm	Transportation Back to Hotel	Chartered Bus
5:50pm	7:00pm	Break (Filming at Hotel)	Citizen Hotel
7:00pm	9:00pm	Dinner	Il Fornaio - Private Dining

Day 2: Tuesday, December 14, 2022

START	END	ACTIVITY	LOCATION
8:00am	9:00am	Breakfast at Hotel	Citizen Hotel, Grange Restaurant Private Dining pace
9:00am	9:30am	Key Takeaways	
9:30am	11:00am	Commute to Winery	Chartered Limo Bus
11:00am	3:00pm	Napa Valley Exursion	Darioush Winery 4240 Silverado Trail, Napa, CA 94558
3:00pm	4:45pm	Commute to Airport (SMF or SFO)	Chartered Limo Bus (SMF then Hotel); Private Car (SFO)
5:00pm	—	END OF DAY	



DRESS CODE

- Event Dress Code is business casual. For Day 2 (Napa excursion) please optimize for comfort and be prepared for some time outdoors and light walking (weather permitting).
- If attending the tour, it is mandatory to wear closed toe shoes. The tour will include about 10-15 minutes outdoors, so please dress accordingly.

FILMING GUIDANCE

As part of our commitment to thought leadership, we will be producing short executive perspective spotlights from this event. We'd like to request 30 minutes of your time on Dec 13 for a short filming session.

Please note, as always, you will be given the opportunity to review /approve everything produced featuring you.

During the session, you'll be asked 2 key questions:

1. What is the value of coming together with your peers to exchange knowledge and ideas on successfully achieving a clean energy future?
 - Output: Content from this question will be used to create a short video to help garner future attendance for UEIC roundtables.
2. What levers are critical to securing clean energy goals? What is the role of technology in achieving this for your team?
 - Output: Content from this question will be used to create an executive perspectives compilation video (Examples: "[AI is Here](#)" and "[Utility Leadership](#)") as well as individual speaker highlights ([Example 1](#) and [Example 2](#)).

Location: Filming will take place in the Auditorium Lounge

NAPA EXCURSION

Since most innovation takes place outside of the conference room, we're excited to invite our guests to enjoy a day trip to Napa. Following breakfast and a short recap of the roundtable key takeaways, we will head to [Darioush Winery](#), where we will enjoy a tour, wine-paired gourmet lunch and olive oil tasting in the private barrel room, and scenic views of the vineyard. Note that there will be plenty of options for those who do not wish to drink wine. Please let Puja Chandler (pchander@bidgely.com) know of any dietary restrictions and/or if you will prefer non-wine options.

The winery experience will conclude around 3:30 PM. The limo bus will go to the Sacramento airport (SMF) and the Citizen Hotel, and a separate private car will head to SFO. Both will reach the airport by 5 PM to accommodate all flights.

If you are going directly to the airport, please bring your luggage on the bus (there will

be ample room). Otherwise, you can leave luggage at the Citizen Hotel.

Our guests from SMUD are encouraged to park at (or rideshare to) the Citizen Hotel for the Napa excursion.

LOGISTICS & LOCATIONS

Guests are hosted at the Citizen Hotel in beautiful downtown Sacramento. You will receive your hotel confirmation number and key details from Preeth Kumar (preeth@bidgely.com). Please reach out with any questions.

Hotel Address:

926 J St, Sacramento, CA 95814

The Roundtable and Filming will take place at SMUD's HQ on December 13. If you are not attending the tour, please meet directly at SMUD HQ. If you are attending the tour, transportation will be arranged for you.

SMUD HQ Address:

6201 S St, Sacramento, CA 95817

ROUNDTABLE CONTENT

Goal and Format

These roundtable discussions are designed to focus on the technologies and solutions available to tackle the industry's biggest challenges.

We'll focus on a few key problems in the industry, outlined below, and ask participants to share their unique thoughts and approaches with the team (approximately 10 minutes per speaker in each roundtable session). Bidgely will share our thought leadership from a grid & customer-centric AI and data perspective, and solicit feedback from the group (20 minutes in total). Each roundtable session will conclude with final thoughts from the participants, followed by closing remarks from the moderator.

These sessions are not about theoretical approaches. Rather, they are designed to yield incisive and practical solutions for solving key industry challenges with the required urgency to meet the challenges of today for the tomorrow's utility of the future.

SESSION 1: GRID OF THE FUTURE

Problem Statement

As utilities begin to grapple with a multivariate grid of the future (new load growth, clean energy targets, modified generation mix, increasing weather anomalies, and energy technology and transactions), what are some of the core and pressing challenges we still face and how are we addressing these to meet the demands of today's grid in anticipation of tomorrow?

How will we approach grid balancing today forward?

- The renewable generation makes the supply profile intermittent compared to past coal and natural gas based plants. How will we balance the new supply profile against the load?
- How do we identify which parts of the grid will need upgrading sooner compared to the rest of the grid?
- How do we measure the potential of NWA (non-wire alternatives) approaches versus infrastructure investment in upgrading assets?

How can we manage the grid cost effectively and at scale?

- How can we accomplish load shifting at a reasonable price per kW once EV adoption starts tipping the scale?
- How can we find, engage, optimize, evaluate and compensate each customer owned resource appropriately to manage load effectively and efficiently?

How will we manage the increasing rate of DERs and energy technology growth?

- Can we predict EV penetration / solar generation?
- How will we manage the uneven geographic distributions of load growth and hence localized congestion?
- How will we manage customer (new) participation in resource capacity and load balancing activities (eg - DR, V2G technologies)?

SESSION 2: EMPOWERING & ENABLING GRID OF THE FUTURE CUSTOMERS

Problem Statement

Given a paradigm shift of energy as an ever more present and price sensitive commodity for customers, what are some of the core and pressing challenges we're facing today and as we progress into the future?

What do Customers want from their Utility today?

Education & Expertise

- If I buy solar; will my energy bill be better or worse?
- Does an EV make sense for me? Will I save money on the total cost of energy between my home and vehicle?
- Which rate should I choose? How do I manage my usage?
- How can I contribute to environmental change, with options available to me on devices (smart thermostats, batteries, heat pumps, etc) or usage behavior?

Optimization

- How can I monetize my new investments - solar, EV and batteries - to save or make more money?

Customer Service/Experience

- Is my energy easy for me to manage? Does it inform relevant decisions?
- Is my utility service quality and customer experience better or worse than my experiences in other verticals?

What does a utility want from its customers?

Flexibility

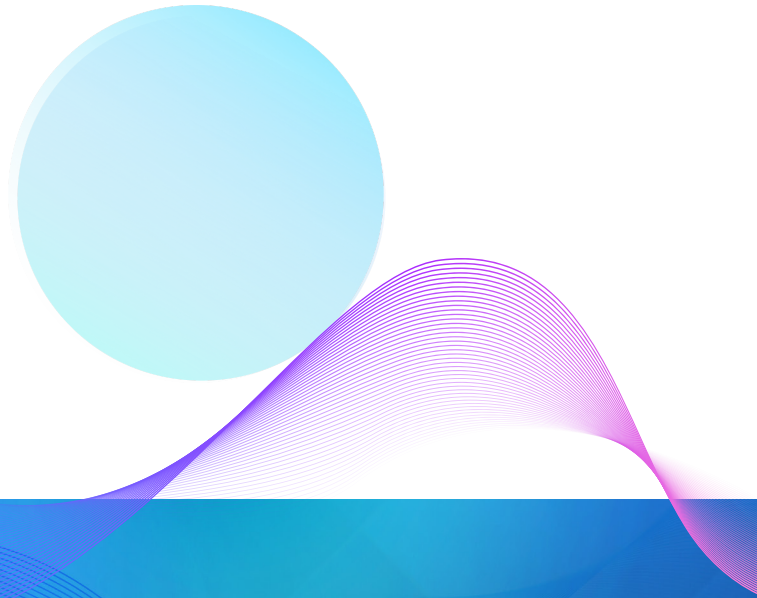
- How can we access and influence customer resources to be used at times that helps grid load balancing
- How can we stack resources at a customer level?


Customer Loyalty (LTV)

- How do we keep our customers from purchasing power from alternative parties?
- What more can we offer (within the realm of regulation)?

Customer Assets

- Who will manage the customer's assets? The OEM, Utility, or Third parties?
- How can utilities optimize their position for long term revenue and control of the industry?
- How do we ensure equitable access / ability to participate in a dynamic grid (e.g. high income / single family segments having more DER opportunities versus LMI / multi-family customer segments)? Should incentives be dynamic in these scenarios?



 bidgely UtilityAI™

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