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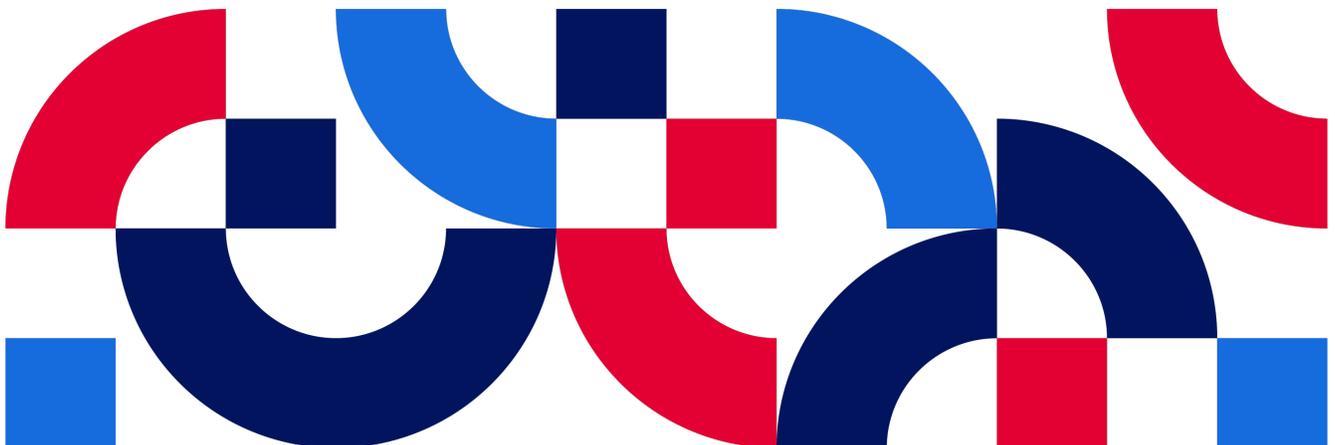
12081 W. Alameda Parkway, # 464  
Lakewood, CO 80228

P – 970 682 4217



# Transformational Consulting Solutions for Community-Owned Utilities

By Staff of Hometown Connections, Inc.



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# Hometown Connections Consulting Solutions

## Introduction

Hometown Connections, Inc. takes pride in having been a resource for public power for more than 20 years. We work closely with governing bodies, executives, and staff from scores of utilities across the United States with the common goal of strengthening public utilities and the value they bring to their local communities.

### Consulting and Education Support

Services from Hometown Connections Include consulting assignments focused on the unique requirements of the organization as well as generic training classes or workshops.

The Hometown Connections management consulting team has extensive experience facilitating initiatives for utilities to reach excellence in governance, strategic planning, customer service, process improvement, talent management, and overall achieving higher levels of performance.

# Board Governance

Maintain a clear understanding of the industry's complex technology, regulatory, financial, and human resource issues with Board Development solutions from Hometown Connections. Governing boards and city council members overseeing community-owned utilities need to understand their roles and responsibilities as stewards of the city's utility services.

Hometown Connections staff briefs governing officials on industry conditions and offers training on how to work with, and guide, the utility staff.

Hometown Connections organizes its governance development consulting assignments, workshops, and courses around these primary topics—with ability to customize content to the needs of individual utilities, state associations, or joint action agencies.

## **Governing Board Development: Building and Sustaining an Effective Team**

Hometown Connections addresses how to assemble, onboard, and maintain a high performing board.

Topics covered include:

- Succession planning
- Attracting viable board candidates
- Candidate orientation
- Orientation for new board members (and existing too!)
- Building a strong board culture
- Mechanics of a good board meeting

## **Duties, Responsibilities and Legal Obligations of Public Power Governing**

Hometown Connections reviews the common requirements of most public power governing boards.

Foundational information for the board:

- Organization-specific: charter, by-laws
- Independent utility governing board: legal relationship and responsibilities to the government agency that formed the utility
- State-specific rules that may speak to open meetings and records, conflicts of interest, training required, potential PUC oversight, etc.
- Legal counsel
- Key Board Responsibilities
- Strategic planning
- Financial oversight and planning

## **The Voice of the Customer: The Board's Role in Representing Owners, Customers and Other Stakeholders**

Hometown Connections covers how the utility governing board can establish itself as the proper voice of the organization's customers/owners:

- How to "be" the voice of the customer as board members
- How to be a conduit of information between the customers/owners of the utility and the utility
- How to communicate with elected/appointed officials in other agencies and levels of government

## **Measuring for Success: Performance Monitoring and Accountability for Boards**

Hometown Connections examines feedback mechanisms for the CEO and how the governing board can pursue its own continuous improvement opportunities.

- Monitoring organizational performance
- Evaluating and Managing the CEO
- Self-assessment tools for the CEO

# Strategy

Hometown's consultants help public utilities address today's business management challenges and advance towards a successful future.

## Strategic Planning for Long-Term Utility Effectiveness

The Hometown Connections proven strategic planning process applies to utilities of all sizes and services.

- Develops a practical, step-by-step blueprint for adapting to specific market conditions, regulatory changes, and the evolving expectations of customers
- May update existing strategic plans
- Benefits from an efficient and time-saving process that places a premium on simplicity, flexibility and logic
- Avoids the complexity and rigidity of other approaches that can grind a strategic planning effort to a halt

## Strategic Issues that will Determine the Future of Public Power and Your Utility

Hometown Connections reviews industry changes and public power utilities response to the challenges presented. All levels of leaderships, to include governing boards, gain a strong appreciation for the critical role of effective governance in the face of these changes.

- Legislative and legal
- Technology
- Customer changes
- Expectations
- Demographics
- Workforce changes
- How public power utilities are responding to these changes
- The role of governing boards
- The need for community engagement
- The importance of Strategic Planning

## Measuring & Sustaining the Value of Public Power

Hometown Connections reviews metrics and qualitative data to identify and share with stakeholders the value municipal utilities provide to their local community and customers.

- Why is it important to understand the value of your public utility?
- Approach to identifying and tracking metrics
- Qualitative data related to the value of public power
- Challenges and opportunities to collect the data
- Telling your story

# Managing Risk

Hometown's consultants help community-owned utilities mitigate risks through the re-design or development of effective foundational business practices.

## Business Operations Assessment

Operational gaps and risks can hinder you from being efficient, effective, and productive. A Business Operations Assessment will identify opportunities to streamline operations, eliminate silos, and build an effective strategy for the future. We can provide a path to strengthen your organization's ability to be resilient, maintain an effective workforce, integrate or implement technologies, launch new services, and adapt to changing customer expectations.

We can perform an assessment of your organizational business practices in order to prioritize, streamline, and integrate strategies:

- Customer Service & Communications
- Security
  - Cyber, Physical, Info Protection/Privacy
- Safety
- IT/OT
- Accounting & Finance
- Purchasing
- Engineering/System Management
- Project Management
- Program Development & Management
- Vendor Management
- City Relations
- Workforce Training & Development
- Succession Planning
- Technology and Business Alignment
- Fostering Culture Transformation

## Enterprise Risk Management

Enterprise risk management is integral and foundational to organizational strategy, financial stability, operational efficiency, business continuity, and business transformation. It is not a stand-alone activity and its function is core to the successful execution of business objectives and measurement of outcomes. How to manage risk can sometimes be confusing, but once an effective program is implemented, it can assist in prioritization and making efficient key business decisions. We can help you learn how:

- To understand the purpose of risk management, the benefits, and how to seamlessly integrate it into strategic planning, governance, and prioritization.
- To identify risks and assess their criticality, individually and collectively.
- To categorize, and rank risks within your organization.
- To respond to, monitor and report risks.
- To implement an Enterprise Risk Management Framework.

- To train your organization in the identification and mitigation of risks.

## **Cybersecurity Assessment**

As the services organization dedicated to enhancing the performance of community-owned utilities, Hometown Connections is supporting smaller systems lacking the resources to close their cybersecurity gaps. Its low-cost Cybersecurity Assessment identifies shortcomings in cyber defenses and helps utilities develop strategies to resolve them. Through an alliance network organized by Hometown Connections, qualified personnel at joint action agencies conduct the assessments to provide:

### **Program Evaluation**

- Comparison of the client's current technology architecture, policies, and controls with the guidelines of The Center of Internet Security (CIS) Controls and the American Public Power Association (APPA) Scorecard.

### **Network Vulnerability Assessment**

- Using vulnerability scanning tools to look for weaknesses in information systems on the client's network.

### **Phishing & Incident Response**

- Using email security awareness tools to simulate phishing attacks and provide awareness training to staff.
- Performing an incident response tabletop exercise

### **Detailed Recommendations** on how to:

- Address deficiencies
- Prioritize action items
- Budget for security improvements

### **Report and Presentation**

- For governing board and utility/city staff

# Customer Care

Hometown Connections gives governing officials and employees of community-owned utilities vital information on creating a culture of customer service excellence across the enterprise.

## Strategies for Successful Customer Service Operations

Hometown Connections organizes its customer service consulting and education services around these core areas.

- What is good customer service?
- How to segment customers into categories and identify their specific requirements
- Changing demographics of utility workforce and customers
- Utility customer expectations – today and tomorrow
- The seven hallmarks of utility customer service
- Building customer service around your customers
- Operating with the customer's needs in mind when building policies and operations
- How to create a culture of customer service

## Information Governance - How does this help drive the Customer Experience?

Identifying and finding the right information to provide the most efficient and effective customer service can be a challenge. Understanding how to protect customers privacy while using their information presents additional concerns. In today's digital world, providing the right information, at the right time, can set the tone for how customers feel about their experience with your organization.

Working on the front lines, you are the voice of the customer and have unique insight into what they need and how quickly. Hometown Connections will help you understand the key elements of an information governance program and learn how to:

- Assess your customer information maturity
- Identify and classify customer information for the best customer experience
- Understand the difference between information and data
- Protect customer privacy
- Work with information technology teams to build an Information Governance Program

# Leadership & Employee Development

To maximize the performance of utility personnel, Hometown Connections consultants offer leadership training and employee development services.

## Totally Responsible Person® Training for Individuals and Teams

With continuous change in our industry, there's a lot for everyone to do, and success depends on each member of the team working together like a well-oiled machine. Sometimes personality differences and interpersonal dynamics can derail projects and productivity. With Totally Responsible Person® (TRP®) training from Hometown Connections, each of your team members will learn to stay positive, productive, and effective, no matter the circumstances.

Hometown Connections provides TRP training to utility employees at all levels of the organization in virtual and in-person formats.

### Who Should Take TRP Training

Individual contributors, supervisors, managers and executives

### Learning Objectives

- Distinguish between the Totally Responsible Person and “victim mentality”
- Apply TRP to manage challenging workplace situations
- Give and receive constructive feedback with confidence
- Stop workplace gossip and criticism and communicate effectively
- Identify productive alternatives to enabling and rescuing in the workplace
- Create a personal action plan to apply the TRP principles at work

### Bottom Line Results

- Greater self-awareness and leadership capability
- Greater influence and accountability
- Development of your people
- Improved communication, feedback
- Better work relationships
- Improved teamwork and creativity
- Increased innovation and problem-solving
- Increased productivity and respect
- Decreased stress and conflict
- Greater enjoyment of work and life!

The TRP workshop will help everyone on your staff achieve a greater self-awareness, a feeling of personal accountability, and an understanding of the necessity to provide honest, candid feedback to others.

## Staff Bios

We understand clearly that part of our mission is to support the growth and development of public power professionals and governing board members. Our management consultant subject matter experts continually explore ways to share insights, industry trends, and proven solutions with public power utilities across the nation. Some of our team members are highlighted below.

Staff	Biography
<b>Tim Blodgett</b> President & CEO Chief Executive Officer	Tim has held the positions of President and CEO of Hometown Connections since January 2001. He is responsible for HCI's overall efforts in delivering value to public power utilities. Tim has worked with many public power utilities in the area of governance and strategic consulting with an emphasis on continuous improvement and is a frequent guest speaker at industry forums.
<b>Charise Swanson</b> Vice President of Client Services	Charise joined the staff in 2020 and is a highly-recognized specialist in utility change management. She develops creative solutions to complex problems for utilities in areas such as leadership, strategy, operational effectiveness, customer service, and compliance. Her accomplishments include leading Smart City initiatives, and multi-million-dollar projects in advanced utility technologies and integrated business planning.
<b>Steve VanderMeer</b> Executive Consultant	Steve joined Hometown Connections in 1998 and provides consulting, facilitation and training services to public power utilities in strategic planning, governance and customer service. During his time with Hometown, he has worked with several hundred public power utilities on a wide variety of issues.
<b>Phyllis Currie</b> Executive Consultant	Phyllis joined HCI consulting team in August 2015. Previously, she was the General Manager of Pasadena Water and Power (PWP), in California. Under her leadership, PWP added new electric generation units to its power plant, added a water treatment plant, embarked on multi-year infrastructure improvement programs to upgrade the city's water and electrical distribution systems, and developed aggressive goals for renewable energy and water conservation.
<b>Marc Gerken, PE</b> Executive Advisor/Strategy & Joint Action Agency Relations	From 2000 to 2020, Marc served as president and chief executive officer of American Municipal Power, Inc. (AMP), the nation's largest joint action agency. For Hometown Connections, He is advising community-owned utilities and joint action agencies on board leadership, strategic planning, succession planning, financing infrastructure, construction development, and executive management support.
<b>William Acee</b> Executive Consultant	Bill Acee joined the HCI consulting team in 2019. Since 1990, Bill has been committed to local government in the Village of Sherburne NY and has been closely involved with public power at the local, state and national levels. He has served the village for thirty years and has been integrally involved all aspects of the village's utility operations.
<b>Susan Ryba</b> Executive Marketing Consultant	Susan has managed Hometown's marketing and communication efforts since 1998, promoting the company's broad range of utility consulting, technology, and management solutions. She supports Hometown's clients with the writing, design, layout, and promotion of their strategic plans.