*IGFOA Professional Education Committee Utility Billing Team presents:*

**Utility Billing Seminar**
**June 12, 2025**
NIU Naperville, 1120 E. Diehl Rd., Naperville, IL 60563

# AGENDA

**8:30 – 8:50 AM**       **Check-in, Networking & Coffee**

**8:50 – 9:00 AM**       **Welcome and Introductions**
                                  **Melanie Hein,** Education Manager, *IGFOA*
                                  **Reese Weigle**, *Plante Moran. PEC Utility Billing Team Leader*

**9:00 – 10:00 AM**       **Artificial Intelligence: Your New Utility Billing Superpower**
                                  **Speakers: Nav Ramineni,** Founding Account Executive, *Midwest, Polimorphic*
                                  **Trent Corbin**, Solutions Engineer, *Software Solutions, Inc.*
                                  **Beth Beaty,** Business Development Representative, *Software Solutions, Inc.*

Ever heard of AI and wondered, "How can that help me in utility billing?" This session is designed just for you! We'll demystify artificial intelligence and show you how it can benefit your department, whether you're a seasoned supervisor or a billing clerk just starting out. We'll break down AI into simple, practical terms and explore how it can boost accuracy, efficiency, and customer satisfaction.

Get ready for a hands-on experience! **Bring your phone, tablet, or laptop,** and we'll guide you through some fun, interactive exercises where you'll use AI tools. We'll dive into the art of "prompt writing" to help you improve your writing skills. This is your chance to see AI in action and discover how it can become your new utility billing superpower!

**Learning Objectives:** *Participants completing this session will be able to:*

- Understand the Basics: Explain what AI is and how it applies specifically to utility billing.
- Boost Efficiency: Discover how AI-powered tools, like chatbots and automation, can streamline your daily work.
- Improve Customer Connections: Explore how AI can enhance communication and make billing more transparent for your customers.
- Become a Prompt Pro: Write effective prompts to get the most out of AI tools for your utility billing needs.

**CPE:** About 1.0 hours  **Field of Study:** Information Technology –Technical  **Level:** Overview

**10:00 – 10:15 AM**       **Break**

**10:15 – 11:15 AM**     **Empower your Community and Staff with AMI (Advanced Metering Infrastructure)**
**Speakers: Danielle Melone,** Senior Account Executive, *Veregy*
**Erin Q. Perry, PMP,** Senior Project Manager/Project Developer, *Veregy*
**John Lambert, PE, CEM,** Senior Project Engineer, *Veregy*

Updating old technologies will significantly enhance process efficiencies that will automate billing, reduce water loss and increase uncollected revenues. Our team has worked closely with utilities to provide a holistic approach that transforms your overall data and water management to be more accurate and controlled. This session will provide an overview of the benefits turnkey advanced metering infrastructure projects will bring to utility billing.

Following a customized approach will ensure the right technologies and solutions are chosen to provide the utility with a complete automated water management system with components that will function collectively. This approach provides a 20-year lifecycle cost analysis and quantifies expected revenue gains resulting from updating technologies. In addition to offsetting projects costs with the increased revenues we will also illustrate how you can improve your water resource management and provide performance guarantees. We will review how improving communications with customers and allowing them to have the ability to manage data and track consumption will increase customer service and decrease risk on the utility.

**Learning Objectives:** *Participants completing this session will be able to:*

- Understand how water system infrastructure upgrades can help automate utility billing to be more efficient and provide a complete and accurate database for years to come.
- Review the systematic approach that is taken with integrating data among old and new technologies to ensure accurate billings and that the different system integrations are correct.
- Learn how the different technology options will directly impact your financial and operational end results.
- Learn how to improve customer service through enhanced utility communications making billing transparent and giving customers the ability to manage usage.

**CPE:** About 1.0 hours  **Field of Study:** Information Technology –Technical  **Level:** Overview

**11:15 AM – 12:15 PM**   **Data Governance: The Right Data to the Right People at the Right Time**
**Speakers: Ryan Allen,** Analytics Manager, *Plante Moran*
       **Sean Cassidy,** Data Governance Manager, *Plante Moran*

Do you ever feel like you aren't getting the most of out of your data?
Or that getting the right data takes too long? Or when you do get the data, you aren't confident it's accurate?

Welcome to data governance! We will define data governance, explore the three pillars of data governance, cover best practices and keys to success, as well as look at common use cases. This session is designed to give you a brief overview of the role data governance plays in helping you make better decisions.

**Learning Objectives:** *Participants completing this session will be able to:*

- Define data governance.
- List the three pillars of data governance.
- Identify one use case that applies to your current situation.

**CPE:** About 1.0 hours  **Field of Study:** Information Technology –Technical  **Level:** Overview


**12:15 – 1:15 PM**        **Networking Lunch**

**1:15 – 2:15 PM**         **Roundtable: Delinquencies and Collections, Shut offs**
                           **Facilitators: Reese Weigle,** *Plante Moran*
                                        **Adam Orton,** *City of Crystal Lake*
                                        **Josh Peacock,** *Village of Streamwood*
                                        **Scott Gargano,** *Village of Lombard*


**2:15 – 3:15 PM**         **Legal Aspects of Utility Billing Part I - Bankruptcies**
                           **Speakers: Carmen P. Forte, Jr.,** Partner, *Klein, Thorpe, and Jenkins, Ltd.*
                                      **James M. Joyce**, Senior Associate, *Klein, Thorpe, and Jenkins, Ltd.*

Local government attorneys from Klein, Thorpe & Jenkins, LTD. with extensive knowledge in local government utility billing legal affairs will address common legal concerns encountered by utility providers. Topics to be covered include bankruptcy, Red Flag Rules, tenant/landlord responsibilities, and collections.


**Learning Objectives:** *Participants completing this session will be able to:*

- Avoid legal pitfalls
- Avoid getting in the middle of tenant/landlord disputes
- Explore the legal opportunities available to improve collection efforts
- Understand methods to improve policies, procedures, and ordinances as it relates to utility billing and collection
- Understand responsibilities under the Red Flag Rules
- Learn about common legal issues encountered during the utility billing process, including bankruptcy, collection, tenant/landlord rights, and utility accountholder identity verification and protection.

**CPE:** 1.0 hours    **Field of Study:** Business Law – Technical    **Level:** Overview


**3:15 – 3:30 PM**         **Break**

**3:30 – 4:00 PM**         **Legal Aspects of Utility Billing Part II – Red Flag Rules**
                           **Speakers: Carmen P. Forte, Jr.,** Partner, *Klein, Thorpe, and Jenkins, Ltd.*
                                      **James M. Joyce**, Senior Associate, *Klein, Thorpe, and Jenkins, Ltd.*

Local government attorneys from Klein, Thorpe & Jenkins, LTD continue with part 2 of their session as described above.

**CPE:** 0.5 hours    **Field of Study:** Business Law – Technical    **Level:** Overview

**4:00 PM**                    **Closing Remarks**
                              **Reese Weigle**, *Plante Moran. PEC Utility Billing Team Leader*

**Delivery method:** Group-live
**Prerequisites:** None
**Advanced preparation required:** None
**CPE program level:** Overview
**Field of Study:** Refer to Program Description and Learning Objectives above
**Last Review/Revision/Update:** June 12, 2025
**NASBA CPE Credits:** About 4.5 CPE hours

*IGFOA reserves the right to modify the agenda, sessions, and speakers.*