A celebration of the Sustainable Utility: The 35th annual Forum

An interview with Michael Carter, president of E Source Research and Advisory
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September 12, 2022

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To kick off E Source Forum 2022 this week, we caught up with Michael Carter, president of E Source Research and Advisory, to discuss the ways that this year's event aims to empower the Sustainable Utility.

Sannie Sieper. E Source has hosted the Forum, its annual event for the utility industry, since the late 1980s. For those who have never attended, what would you tell them about it?

Michael Carter. The original idea behind the Forum was to host a different kind of event … one aligned with the original definition of that word. We wanted to create a venue where people in the utility industry—and those who serve those utilities—could come together and openly converse about the issues affecting them. After all, we didn't create the Forum to be a passive user experience. We encourage healthy debate and aim to create an environment where people can talk (and listen) and get a 360-degree view of the industry's major issues as well as learn ways to address them. In that regard, I'm convinced the concept of the Forum is just as relevant now as it was 35 years ago.

The other noteworthy aspect of the event is that it's a *working* forum. We like to hash things out at the Forum and will be discussing the most pressing and complex challenges utilities face while getting into the nitty gritty of programs, approaches, and advances that are working to meet these challenges.

This week we aim to have an unencumbered, contemporary dialogue with the understanding that the best ideas are ones that can be put to use back in the utility workplace.

SS. This isn't just any Forum. This is the 35th time E Source is holding it. That's quite a run! What do you see as the significance of this anniversary, and to what do you attribute the Forum's staying power?

The best ideas are ones that can be put to use back in the utility workplace.

MC. For any industry event to run 10 years in succession is pretty outstanding. So to have the Forum

last and in fact flourish for 35 years—through all the ups and downs that have occurred in the utility industry—is a remarkable achievement. There are very few organizations that have achieved that measure of successful longevity.

The endurance of the Forum testifies to an organization—in this case, E Source—doing something right. The key is keeping a consistent north star to look toward. At E Source, our north star has always been energy efficiency. Using energy wisely is just as important today (and most would argue even more so) as it was 35 years ago when we launched the Forum, a period in US history when the oil crisis of the 1970s was still imprinted on our collective psyche and the imperative to alleviate dependence on foreign sources was still palpable.

So the longevity and vitality of the Forum hinge on relevance. We've been thinking about the right things and consistently creating the space to address them in a way that attendees can bring them back home to their utilities. We create a space that's dynamic and enhanced by deep industry expertise—both our own and those of our clients and partners.

SS. This year's Forum theme is Empowering the Sustainable Utility. How does this theme reflect the priorities of today's utilities and the growing capabilities of E Source?

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MC. E Source is really in the business of looking around the corner for our utility clients and helping them prepare for that future. As a result, over the last five years or so, we've put issues such as decarbonization, resiliency, reliability, equity, and distributed energy resources in the spotlight. As we continue to look around the corner, we see all of these macrothemes playing a major, ongoing role in the lives of our clients and their customers. So much so that we began to see them as interconnected pieces of a greater whole, and that's what we're calling the Sustainable Utility. Yes, some of this is sustainable in the traditional sense, like how renewables will play a central role in the utility of the future. But it's also sustainability from the perspective of being a reliable, equitable resource that not only delivers energy to those people and businesses that need it but also sustains the utility itself. That is, it makes financial sense.

Utilities don't have the luxury of being either reliable or equitable or green. They need to do all of this simultaneously and in a way that respects the customer, the environment, and the bottom line. This is the challenge of the century. Helping utilities get there is our mission, responsibility, and passion.

SS. I'm sensing the urgency. The Sustainable Utility taps into something really big.

MC. Utility professionals always come to the Forum looking for answers, but consider this. California experienced its biggest demand day in history just last week. There's a growing wave of EV-driven electrification. And there are massive increases in energy prices this year, and those costs disproportionately impact low- and moderate- income customers and small and medium businesses. Against this backdrop, finding solutions is more urgent and mission-critical than ever. That's why the Forum (and E Source) exists.

And just as the utility industry and our clients' needs have evolved, so has E Source. Forum attendees are going to see an agenda that's broader and deeper than they've ever seen—one that addresses the multifaceted challenges of becoming a Sustainable Utility. Yes, the Forum is first and foremost an

E Source Research and Advisory event, but our expert presenters and workshop leaders come from our other areas of expertise, including data science, system selection and implementation, solution consulting, equity consulting, battery storage, and EV charging.

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E Source has acquired nine companies over the last two years to stay ahead of the increasingly complex and urgent demands of the utility industry. In that regard, you'll find a breadth and depth of expertise and operational acumen that's unique in this field. Utilities don't want us looking around the corner for just one thing—we have the team and capabilities to see, interpret, and act on the interconnected challenges they face.

SS. What's exciting you most about the event this week?

MC. A lot of things excite me about the Forum. I think the agenda—addressing the macroissues as well as the component parts of what it means (and what it takes) to become a Sustainable Utility—is the best we've ever had. And it's backed by our strongest lineup of in-house and outside experts ever.

I also love that we tap into the high-level concerns of senior utility executives right before the Forum in our leadership council meetings. Here, we get a sense of what's on their desks every day. And we show that our event is operational in focus, ensuring frontline employees across the organization come away from the Forum with knowledge and practical advice they can apply in their jobs the minute they get back.

I also like the strong return of customer experience as a focus of conversation at this year's Forum. The customer is the axis upon which the Sustainable Utility turns, and I think attendees this year will be blown away by the advances we've made in understanding and interacting with customers. We do this both through breakthrough work in data science—we can literally build a digital replica of every individual utility customer as the basis for understanding individual customers and offering enhanced programs for them—and ethnographic research. The best part is we also have the ability to put capabilities like this together to increase the pace and impact of program improvements.

Last but not least, I can't wait to see more than 600 utility professionals, representing a vital cross section of the utility industry in the US and Canada, in person! I love this business, this industry, and the people who work in it. The opportunity to look them in the eye, hear what's on their minds, and have an opportunity to help them at this seminal moment is energizing and motivating. I can't wait.

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