



SGA Fall Leadership Conference
Gas Forecasters Forum
Hyatt Regency Riverfront – Jacksonville, Florida
October 15-17, 2007

Final Agenda

Monday, October 15

- 12:00 p.m. **Conference Golf Scramble** – The Golf Club at North Hampton (transportation and box lunch provided)
- 6:30 - 7:30 p.m. **Welcome to Jacksonville Reception**
(Dinner on your own)

Tuesday, October 16

- 7:00 – 8:30 Continental Breakfast
- 8:30 - 10:45 **CONFERENCE GENERAL SESSION**
Welcome and Introductions
- 8:30 – 9:30 **FERC Hot Button Issues and Priorities**
Guest Speaker: *John Moot*, FERC General Counsel
Mr. Moot will provide an overview of issues FERC will be focusing on, including topics such as:
- Infrastructure provisions of the Energy Policy Act
 - Development of new natural gas storage capacity
 - Maintaining an environmentally safe infrastructure
 - Pre-filing processes for LNG terminals and gas pipelines
 - Alaska natural gas transportation projects
 - Competitive markets and market manipulation
 - Comprehensive energy market oversight program
- 9:30 Refreshment Break
- 9:45 – 10:45 **National Energy Legislation Update – Where Do We Go From Here?**
Guest Speaker: *Tom Moskitis*, Managing Director – External Affairs, American Gas Association
- 10:45 Break
- 11:00 – 5:30 **GAS FORECASTERS FORUM**
- 11:00 Introductions & Meeting Expectations

11:15 – 12:00

What's New in Short-Term Forecasting Models?

Model providers and their gas utility customers present the latest improvements in the art of short-term forecasting. Short-term forecasting products and providers include GasDay from Marquette University and GasLoadForecaster from Energy Solutions International.

12:00 -1:00

Conference Luncheon

1:00 - 1:45 p.m.

JOINT SESSION:

Gas Forecasters Forum; Rates/Regulatory Affairs (LDC only)

An Economic Analysis of Consumer Response to Natural Gas Prices

David Shin, Chief Economist, American Gas Association (with Bob Trost & Fred Joutz, Professors of Economics, George Washington University)

The results of AGA's recent study on gas price elasticity will be presented. This study calculated the trends in weather-adjusted consumption per customer and short-term and long-term price elasticity estimates for a national sample of AGA member companies. The presentation will be followed by Q&A and discussion.

1:45 – 2:00

Break

2:00 – 3:15

Forecasting Gas Consumption Trends

Moderator: *Jim Fay*, President, North Star Energy Group

Gas forecasters saw an accelerated consumption decline during the post-hurricane winter of 2005-2006, followed by a rebound last year. What are the components of this recent trend? What market factors and customer behaviors are driving this trend? How can these observations factor into forecasts of future consumption?

1. **Consumption Trends in Southern California**, *Herb Emmrich*, Demand Forecasting & Economic Analysis Manager, Southern California Gas Company
2. **Asymmetric Response to Changes in Price of Residential Use Per Customer**, *Joel B. Cohen*, Senior Forecast Analyst, NiSource, Inc.
3. **Seasonal Consumption Trends**, *George Chapel*, Manager, Market Forecasting, DTE Energy Gas
4. General Discussion on Recent Consumption Trends

3:15 – 3:30

Break

3:30 – 4:45

Customer Attrition and Growth Forecasting

Moderator: *Bill Gresham*, Manager of Forecasting, NiSource Energy Distribution

High gas prices have now begun to impact customer counts and market share. Gas forecasters are revisiting assumptions about customer additions from new construction, but also finding the attrition of existing customers to be challenge. This session will address the issue of changing patterns in customer counts and forecasting future net customer growth.

1. **National & Regional Trends**, *Jim Fay*, President, North Star Energy Group

2. **Forecasting Customer Growth in Southern California**, *Herb Emmrich*, Demand Forecasting & Economic Analysis Manager, Southern California Gas Company
3. **The Effect of Conservation and Customer Growth on Design Day**, *James Dean*, Planning Analyst, NiSource, Inc.
4. **Predicting Customer Attrition at AGL**, *Dan Nikolich*, Manager, Planning and Forecasting, AGL Resources
5. General Discussion on Recent Customer Growth and Attrition Trends

4:45 - 5:30

Research Update: The Heck-with-it Hook and Other Observations.

Ronald Brown, Ph.D., Marquette University

Ron Brown will present an update on his research undertaken in the last year. This will include new observations of natural gas consumption on very cold days, and on “shoulder” days. There will also be a discussion of possible approaches to be used to model these demand trends.

5:30 p.m.

Adjourn

6:00 - 7:00 p.m.

Conference Reception

Wednesday, October 17

7:30 - 8:30 a.m.

Conference Breakfast

8:30 – 9:30

JOINT SESSION:

Gas Forecasters Forum; Rate and Regulatory Affairs; Gas Transportation

Energy Outlook: Gas Supply and Pricing; LNG and Alternative Fuels

Robert Linden, Pace Global Energy Services

Each year, the Gas Forecasters Forum has provided an expert outlook on the supply and price picture. This presentation will address the role of LNG in the supply and price picture, future gas prices, and expectations for power generation and total gas demand.

9:30- 9:45

Break

9:45 – 10:15

2007-2008 Winter Weather Forecast

Moderator: *Fred Monger*, Senior Regional Planning Analyst, Atmos Energy

Speaker: *Jeff Johnson*, Chief Science Officer, DTN/Meteorologix, Inc.

Each year, the Gas Forecasters Forum provides a weather outlook for the upcoming heating season. The outlook includes an update on the status and trends of large-scale drivers, such as El Nino the North Atlantic Oscillation. This year’s presentation will be by DTN/Meteorologix, Inc., who recently acquired both Surface Systems, Inc. and WeatherBank.

10:15 - 11:30

Gas Forecasters Forum - Roundtable Discussion

Moderator: *Jack Dunlap*, Manager, Gas Operations Engineering, Pacific Gas & Electric

Preliminary Topics (some topics may have been covered during prior sessions):

1. *Does the movement toward decoupling revenues from volumes create any unique gas forecasting challenges? If so, how have various forecasters addressed those challenges?*

2. Gas supply planning vs facilities planning. Some utilities use a different criteria for planning and sizing facilities and for contracting for gas supply resources. Is the practice common? What reliability criteria do companies use for supply planning, facilities planning?

3. Global Warming legislation – what will it do to gas demand trends - decrease due to conservation or increase because of lower carbon content. How have forecasters addressed this issue?

4. What are gas forecasters assuming for price elasticity? How have asymmetric elasticities been developed? What concerns have regulators expressed?

5. Have changes in unaccounted-for gas and/or gas theft been an issue recently for gas companies?

6. How have the consumption trends of the last few years affected peak day?

7. What are gas utilities finding from load research and market research projects?

Other topics to be determined

11:30

Wrap-Up & Adjourn

REGISTRATION FORM
SGA Fall Leadership Conference
October 15-17, 2007 Jacksonville FL

Name _____ Title _____

Company _____

Address _____

City _____ State _____ Zip _____

Email _____ Ph. _____

Please indicate the primary roundtable you plan to attend. You may attend multiple sessions but select only one to assist in proper planning.

Gas Forecasters Forum **Communications/Public Affairs**
 Gas Transportation **Rates/Regulatory Affairs** **Tax Roundtable**

Registration Fee: \$545 (SGA member company employee) \$745 (non-member)

Golf Fee: \$150 Handicap Average Score

Check your preferred method of payment:

Credit Card: American Express MasterCard Visa

Card # _____ Exp. _____

Name on Card _____

Please invoice Check enclosed RMA (Registration Management Account)

List questions/topics you want to discuss:

RETURN REGISTRATION TO:

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REMINDER:

Hotel Deadline: Sept 24, 2007
For hotel reservations call the Hyatt Riverfront
at (904) 588-1234 or 800-233-1234

Please check here if you are disabled or require special services. Attach a written description of requirements.

Cancellation Policy: Refunds must be requested from SGA. For cancellations up to two weeks before the program, 100% refund. Within two weeks of the program, 25% of the fee. Within three days, no refund but substitutions may be made