



N A R U C

National Association of Regulatory Utility Commissioners

Guidelines for NARUC Support of Training Programs, Conferences, and Other Events

The NARUC Subcommittee on Education and Research has responsibility for the oversight of the Association's educational and research programs. As one of its tasks, the Subcommittee establishes appropriate standards and policies to govern the operation of any educational, training or research programs supported by NARUC.

The following guidelines shall apply to the administration of all conferences, workshops, committee retreats, and other events when other institutions seek NARUC's endorsement for their activities. These guidelines shall not apply to the meetings of NARUC affiliates. NARUC supports solicitation of a broad range of ideas from diverse viewpoints in any event or meeting supported or endorsed by the Association.

The NARUC Executive Committee shall have responsibility for approving all inquiries for all categories of NARUC support. The Executive Committee shall be permitted to bestow a multi-year approval (maximum three years, or until revocation upon identification of significant issues) upon certain annual events (such as training programs or conferences). For all applications, the Executive Committee shall first seek the recommendation of the Subcommittee on Education & Research.

NARUC recognizes the following categories of support. It is envisioned that the term Promotional support will be used for conferences, workshops, and other events. Endorsement is appropriate for formal technical training programs.

- **Promotional**

A promoter is defined as an organization or association providing non-monetary support, cross-marketing, or in-kind contributions. NARUC may be a promoter of another organization's event in line with the criteria described below. NARUC and the primary organizer shall sign a memorandum of understanding (MOU) defining each party's roles and obligations, including but not limited to advertising/marketing and use of the NARUC logo (see page 7 for example MOU). This support is the type offered for events.

Examples: In 2021, NARUC was a Promoter for the annual Consumer Critical Issues Forum (CCIF); the annual ERRA Energy Investment Regulatory Conference; a one-time Clean Air Task Force, Carnegie Mellon University, the University of Michigan, EPRI, and WRI-hosted virtual workshop; the annual SEPA Grid Evolution Summit; and other events)

- **Endorsement**

NARUC may endorse a formal training program, which means that it has reviewed the training curriculum and deems it appropriate and useful for the regulatory community. This

status allows the organizer to use NARUC's logo and name following signature of a MOU (see page 7). The MOU shall detail both parties' roles and responsibilities, including use of the NARUC name and/or logo, clarification of NARUC's name and the relationship to the organizer in marketing materials, and other requirements as negotiated. Endorsement of a training program requires the inclusion of a member of NARUC's Subcommittee on Education & Research in the curriculum review or agenda development process to ensure that the program content meets NARUC's expectations.

Examples: In 2022, NARUC endorsed courses hosted by the University of Missouri-Columbia Financial Research Institute; Wisconsin Public Utility Institute; New Mexico State University Center for Public Utilities Regulatory Training; Institute for Regulatory Law and Economics; University of Florida Public Utility Research Center; and the Stanford Center for Professional Development.

Events shall be deemed to be officially supported by the NARUC in those instances when the NARUC Executive Committee has expressly approved such support, upon recommendation of the Subcommittee on Education and Research, as defined in the categories above through a MOU or other agreement. All operations involving NARUC financial commitments shall be approved by the NARUC staff acting under the general supervision of the Officers and the Executive Committee and/or Board of Directors. Co-organizers of such events shall work with the NARUC staff to assure compliance with these guidelines.

Recommendation from Subcommittee on Education and Research: Any request for NARUC to support an event shall be referred to the Subcommittee on Education and Research for a recommendation. The Chair, in consultation with the members of the subcommittee, shall consider, at a minimum, the following criteria in determining whether to recommend NARUC's support:

- Timing of the event and the likely impact on attendance at other NARUC-supported events.
- The reason NARUC is being solicited to support the event.
- The level of staff or other resources NARUC is likely to divert to support the event or is being specifically asked to contribute to support the event.
- Impact on NARUC committees and/or their support or level of engagement.
- Whether the event is likely to add value to NARUC's membership or reputation.
 - o Target audience: Likely degree of NARUC member participation at event.
 - o Topics and focus: Subject matter's relevance to members' duties and NARUC's mission, goals, and priorities.
 - o Regulatory relevance: Given the political and social climate at the locus of the event, if support will enhance NARUC's standing in the regulatory community.
 - o Additionality: Whether the event fills a gap, complements, or competes with existing NARUC-supported programming
 - o Reach: Whether the event is national or regional in scope.
 - o Funding: Who the funders and sponsors are (e.g., commercial, non-profit, regulated or affiliated with regulated entities).

The Chair should reference these criteria and their impact in any oral or written recommendation to the Executive Committee through the *Application Form for NARUC Support of Training Programs, Conferences, and Other Events* (see page 4).

Application to Subcommittee on Education & Research: The Subcommittee has developed the *Application Form for NARUC Support of Training Programs, Conferences and Other Events* to be used by outside parties seeking NARUC support. This will ensure proper use of the NARUC name and logo as well as ensure that all NARUC members are aware of all educational and training related activities. The information provided in the Application Form will be used to compile an ongoing calendar of educational events, to be posted on the NARUC website.

Scheduling: The scheduling of more than one NARUC supported event on any given date shall be discouraged. NARUC shall not support an event which conflicts with a previously announced supported event without the approval of the Executive Committee. The Executive Committee shall not approve a proposed request for support that conflicts with any scheduled meeting of the Association, including the Winter and Summer Committee Meetings, the Annual Convention, or the annual meeting of any regional affiliate organization.

Promotion: NARUC shall utilize a mix of reasonable means to promote attendance at NARUC supported events including publication in the NARUC Bulletin, mailings, distribution of promotional literature at NARUC events, use of the NARUC logo and publication of notice of the event on the NARUC webpage under Upcoming Events. The exact nature of this promotion will be detailed in the memorandum of understanding for each event.

Adopted by the NARUC Executive Committee, July 24, 1996, amended by the 110th NARUC Annual Convention on November 9, 1998 and by the NARUC Board of Directors on March 10, 2004, August 2, 2006, July 23, 2008, February 16, 2011, November 18, 2013, July 26, 2016, and November 16, 2022.