



2011 Spring Coal Forum

A Coal Industry Leadership Conference of Substance
March 8-10, 2011 - Sandpearl Resort - Clearwater Beach, FL

www.sandpearl.com

DECISION-MAKING IN A COMPLEX BUSINESS ENVIRONMENT

Conference at a Glance

Tuesday, March 8th, 2011

8-11 am	ACC Board of Directors Meeting
Noon-5 pm	Business Networking Time ~ Golf/Spa/Business Appointments
1-4:30 pm	Tomorrows Leadership Council Leadership Development Seminar (by invitation)
5-5:45 pm	Board Reception for New & Prospective Members (by invitation)
5:30-7:30 pm	Spring Coal Forum Welcoming Reception
7:30-9:30 pm	Tomorrows Leadership Council Dinner (by invitation)

Wednesday, March 9th, 2011

8 am-3 pm	Spring Coal Forum Conference Sessions
3-5:30 pm	Business Networking Time
3:15-4:30 pm	Industry Issues Roundtable (optional)
5:30-7:30 pm	Spring Coal Forum Welcoming Reception

Thursday, March 10th, 2011

7:30-8:30 am	ACC Membership Business Meeting Breakfast
8:45-11:15 am	Concluding Conference Sessions
11:15 am	Conference Adjourns

2011 SPRING COAL FORUM

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Final Program

Tuesday, March 8th, 2011

8-11 am	ACC Board of Directors Meeting
Noon-5 pm	Business Networking Time ~ Golf/Spa/Business Appointments
1-4:30 pm	TLC Leadership Development Seminar (by invitation)
	Randall Craig, President, Pinetree Advisors Inc. ~ www.randallcraig.com
	“Social Media without Wasting your Time, Losing your Identity or getting Disqualified: Strategy, Efficiency and Risk for Attendees and Organizations”
5-5:45 pm	Board Reception (by invitation)
5:30-7:30 pm	Spring Coal Forum Welcoming Reception
7:30-9:30 pm	Tomorrows Leadership Council Dinner (by invitation)

Wednesday, March 9th, 2011

8–8:15 am	Delegate Welcome & Conference Overview Janet Gellici, CAE, Chief Executive Officer, American Coal Council
8:15–9 am	Spring Coal Forum - Opening Keynote Presentation Chair: Scott Hutter, President, American Coal Council & President & CEO, Martin Engineering



The Global Economy & the Outlook for Coal

Dr. Lawrence Chimerine

Dr. Lawrence Chimerine is President of Radnor International Consulting and a Partner & Member of the Investment Committee of Miller Investment Management. For more than 25 years as an economic consultant, Chimerine has lent his advice and counsel to an impressive resume of major Fortune 500 companies, financial institutions and government agencies, providing consultation on the state of U.S. and world economics, and the impact of economic conditions on decision making, budgeting and strategic planning.

Chimerine has earned a valued reputation as a leader in the economic arena. He has served on numerous governmental advisory boards, including the House of Representatives Task Force on International Competitiveness, the Census Advisory Committee, and the Economic Policy Board of the Department of Commerce. He is frequently called upon to testify on key economic issues before Congressional committees and appears regularly on popular television programs such as the Lehrer News Hour, Adam Smith's "Money World", Wall Street Week, Today, Good Morning America, Crossfire, C-Span and CNBC.

2011 SPRING COAL FORUM

Wednesday, March 9th, 2011 (continued)

9–9:20 am Break

9:20-10:40 am

Marketplace Factors ~ Part I

Chair: **Dave Smercina, Senior Vice President, SGS Minerals**

This session provides an update on the state of the energy industry, including supply & demand of coal in domestic and international markets and the implications for coal of natural gas market supply and demand.

- ◆ Coal Supply & Demand Outlook: Thermal & Industrial Markets
 - **Ralph Barbaro, President, Energy Research Company**
- ◆ U.S. Coal Export Market Opportunities & Challenges
 - **Forrest Hill, President, Energy Publishing LLC**
- ◆ Natural Gas Market Developments
 - **George Ross, Senior Partner, Strategic Energy Research & Capital LLC**

10:40–11:00 am Break

11:00 am-12:15 pm

Marketplace Factors ~ Part II

Chair: **Scott Castleberry, Director Coal Marketing, BNSF Railway**

This session examines additional marketplace factors affecting coal's competitive position in the energy industry, including public policy and finance.

- ◆ Public Policy is Like a Box of Chocolates
 - ~ You Never Know What You're Going to Get
 - **Thomas A. Hewson, Principal, Energy Ventures Analysis Inc.**
- ◆ Financial Markets Perspective on Utility-Coal Industry
 - **Paul Forward, CFA, Stifel, Nicolaus & Company, Inc.**

12:15-1:15 pm

Networking Lunch

2011 SPRING COAL FORUM

Wednesday, March 9th, 2011 (continued)

1:30-3:00 pm

Coal Consumers Strategic Issues Focus on Environmental Compliance

Chair: **Doug Gagnon, Executive Vice President Fuels, Fuel Tech**

This session examines critical decision-making points for utility and industrial coal consumers in relation to complying with environmental directives.

- ◆ EPA Perspective on Regulatory Environment:
An Update on EPA Energy Regulations
 - **Robert Wayland, Leader Energy Strategies Group**
U.S. Environmental Protection Agency (EPA)
Office of Air Quality Planning & Standards
- ◆ Implications of EPA Regulations
 - **Hugh Wynne, Senior Research Analyst, Bernstein Research**
- ◆ Utility Perspective on Environmental Compliance
 - **Rob Hardman, Director Coal Services, Southern Company**
- ◆ Coal Supplier Perspective on Environmental Compliance
 - **Gene Kitts, Senior Vice President, International Coal Group**

3-5:30 pm

Business Networking Time

Opportunity to schedule business appointments with industry colleagues.

3:15-4:30 pm

Industry Issues Roundtable Optional Interactive Session

This optional conference session provides an opportunity for a focused, roundtable discussion on critical industry issues.

Topic Focus:

Developing messages that educate, inoculate and motivate active support for coal projects.

Discussion Leader: **John Davies, Davies Public Affairs**

5:30-7:30 pm Reception

2011 SPRING COAL FORUM

Thursday, March 10th, 2011

7:30-8:30 am American Coal Council Membership Business Meeting Breakfast

8:45-9:45 am

Coal Supplier Strategic Issues

Focus on Permitting & Mine Safety

Chair: **Jason Hayes, Communications Director, American Coal Council**

This session examines critical decision-making points for coal suppliers in relation to complying with regulatory & legislative directives.

- ◆ Coal Mine Permitting: Status Report & Outlook
 - **Bill Bissett, President, Kentucky Coal Association**
- ◆ Coal Mine Safety: Status Report & Compliance Initiatives
 - **Henry Chajet, Partner Health & Safety Law, Patton Boggs LLP**

9:45-10:00 am Break

10:00-11:15 am

C-Level Concluding Keynote Session

Chair: **Charles Matthews, Vice President Wholesale Energy & Fuels, Wisconsin Electric Power & President-Elect (2012), American Coal Council**

Senior level executives share their perspectives on the future of the energy/coal industry, addressing how they are maneuvering through the morass of industry challenges.

Keynote Speakers

Nick Akins, President, American Electric Power

Bryan Galli, President, Peabody COALSALES



11:15 am Conference Adjourns

VERSION: March 4, 2011 ~ Program times & speakers subject to change. *Invited

INFORMATION

American Coal Council

1101 Pennsylvania Avenue, NW, Ste. 600 ~ Washington, DC 20004

(202) 756-4540 - info@americancoalcouncil.org - (732) 281-6581 FAX

2011 SPRING COAL FORUM

PROGRAM DEVELOPMENT COMMITTEE

Mike Durham, ADA-Environmental Solutions ~ Co-Chair

Rick Boyd, Manager Fuel Operations, Dominion Energy ~ Co-Chair

Mike Kelley, Director Sales & Marketing, Cloud Peak Energy ~ Board Liaison

Debbie McBride, National Sales Director, SGS Minerals

Scott Castleberry, Director Economic Analysis (Coal), BNSF Railway

Doug Gagnon, Executive Vice President Fuels, Fuel Tech

Janet Gellici, American Coal Council