

WEF/AWWA The Utility Management Conference 2026

Draft Technical Program

(Updated December 22, 2025)

Conference: March 25-27, 2026

Pre-Conference Workshops: March 24, 2026

**Charlotte Convention Center, Charlotte,
North Carolina**

www.wef.org/utilitymanagement

Workshop A: Funding the Flow; A Roadmap to Funding Water and Sewer Infrastructure in an Era of Revitalization
8:30 AM - 5:00 PM, Tuesday, March 24

The American Water Works Association's latest State of the Industry report ranked 'Financing for capital improvements' the number one issue facing the water and sewer industry. To navigate this challenge, utilities should consider preparing a Funding Master Plan as an effective tool to ensure adequate funding of critical infrastructure. Because financing decisions cut across every aspect of utility operations, finance serves as the integrator that links strategic planning with capital projects, asset management, and long-range system needs. This session will explore and clarify the process of preparing, developing, implementing, and maintaining a Funding Master Plan. The Funding Master Plan provides a financial 'road map', outlining how the utility will fund critical infrastructure needs while maintaining the on-going cost of operations. The session will address the key questions of why a Funding Master Plan is needed, who should be involved, and how to accomplish this objective.

Workshop B: Getting the Most Out of Your CIP: Portfolio Prioritization for Utilities
8:30 AM - 12:00 PM, Tuesday, March 24

Unlock the power of smart infrastructure planning! This hands-on workshop equips utility professionals with practical tools and frameworks to prioritize capital projects effectively-balancing risk, compliance, equity, and cost. Through real-world case studies, interactive group exercises, and expert insights, participants will gain the confidence to lead transparent, strategic, and resilient CIP programs tailored to any utility size. Learn to navigate competing interests, limited data, and funding constraints while aligning investments with long-term community goals.

Workshop C: Wateropolis - Communicating the Value of Water
8:30 AM - 12:00 PM, Tuesday, March 24

Welcome to Wateropolis! This interactive board game is designed to provide utility leaders with insight into engaging stakeholders and building community support for the value of water. Wateropolis is a facilitated gaming experience that leverages the industry's Effective Utility Management Initiative and leads participants through the myriad of issues and choices that regularly confront their local utility service providers. Group participation leads to interesting and insightful discussions regarding the value of services provided by utility organizations.

Workshop D: Leading by Example - Championing Digital & AI Transformation in Water Utilities by C-Suite and Leadership (WRF Projects)
8:30 AM - 12:00 PM, Tuesday, March 24

This interactive workshop builds on the Water Research Foundation's AI Adoption Framework and Upskilling and Reskilling Framework, bringing national research directly to utility leaders. Executives will learn why leadership sponsorship is critical for sustainable digital and AI transformation, explore practical applications of GenAI and Agentic AI, and participate in a hands-on lab to build their own AI agent. Leaders will leave with actionable insights and examples to model within their organizations.

Workshop E: Collaborative Delivery Best Practices for Water Infrastructure Projects
1:30 PM - 5:00 PM, Tuesday, March 24

Applicable across a wide range of project types, collaborative delivery, including construction manager at risk (CMAR), progressive design-build (PDB), design-build-operate (DBO), and public-private-partnerships (P3), is increasingly the delivery method of choice for complex infrastructure projects, due to its effectiveness in supporting innovative, efficient, and sustainable solutions for communities. This half-day, interactive workshop addresses the essential steps that originate with the utility decision to embrace collaborative project delivery and continue through the planning, procurement, management, and implementation of a successful water infrastructure project.

Workshop F: From Siloes to Strategy: Advancing Holistic Enterprise Risk Management for Water Utilities
1:30 PM - 5:00 PM, Tuesday, March 24

This workshop invites utility leaders to rethink risk. Not as a checklist to minimize, but as the discipline that makes organizations durable, trusted, and innovative. Participants will explore how financial, operational, and reputational risks intersect, and how integrated approaches can strengthen both creditworthiness and community resilience. Through interactive exercises, frameworks such as risk registers, heat maps, and PESTLE analysis come to life, helping attendees map vulnerabilities, uncover opportunities, and connect everyday decisions to long-term strategy. Designed for general managers, CFOs, and emerging risk leaders, this session transforms risk management from a defensive function into a proactive, system-wide practice for the future.

Workshop G: Leading from the Frontline: Empowering Operators for Leadership Success
1:30 PM - 5:00 PM, Tuesday, March 24

Leading from the Frontline: Empowering Operators for Leadership Success will offer operators leadership skills to manage the transition to a leadership/supervisory roll; including ways to deliver performance feedback, and tools to handle ethical decision making. Hear from operators who have made the transition and get feedback on best practices. This workshop will have several interactive components to practice these skills and network with other operators.

Opening General Session

8:30 AM - 10:00 AM, Wednesday, March 25

More information is coming soon!

Session 01: Water Bill Warriors: Building Local Foundations for Sustainable Customer Assistance

Wednesday, March 25, 10:30 AM - 12:00 PM

As federal utility funding remains constrained, communities urgently need stable, localized solutions. This 90-minute session focuses on a powerful model: independent, utility-specific foundations-'Water Bill Warriors'-dedicated to sustained water bill assistance within specific service areas. Hear from leaders of three successful foundations who will share their blueprints for establishing and operating these resilient 501(c)(3) entities. This is the essential roadmap for utility leaders seeking to establish a permanent, non-federal lifeline to address the growing water affordability crisis.

Facilitators: Jacqueline Jarrell, Catherine Carter, Raftelis

Panelists: Angela Charles, Charlotte Water; Michael Johnson; Kelley Dearing Smith, Louisville Water

10:30 AM Welcome and Setting the Stage

10:35 AM Part 1: Defining the Foundation: Legal and Governance

11:00 AM Part 2: Operationalizing Aid: Policies and Partnerships

11:25 AM Part 3: Securing the Future: Stability and Formation

11:40 AM Q&A: Audience questions with the panelists

11:55 AM Closing Summary with final key takeaways from each panelists

12:00 PM Session adjourns

Session 02: Strategic Management for a One Water Future: From Crisis, to Discipline, to Enterprise Alignment
Wednesday, March 25, 10:30 AM - 12:00 PM

This three-part session explores the full lifecycle of strategic planning and performance management across leading North American water utilities. Together, these case studies provide a practical roadmap for utilities seeking to elevate strategy from a periodic planning exercise to a durable organizational discipline.

10:30 AM Building Calgary's OneWater 2050 Future through Integration, Resilience, and Strategic Vision

Katelyn Skornia, Jason Carter, Arcadis; Sarah Kemmers, City of Calgary; Joanna Brunner, Arcadis; Rudolf Russel du Toit, City of Calgary

11:00 AM Thinking Beyond the Plan: Exploring the Unintended Benefits of DC Water's Active Approach to Strategic Management

Matt Ries, DC Water; James Shaw, Arup

11:30 AM From Pit Stop to Pole Position: Fine-Tuning Loudoun Water's Winning Strategic Plan

Thomas Lipinski, Loudoun Water; Pamela Kenel; Malia Turner, Ryan Nagel, Sarah Dominick, Hazen and Sawyer

Session 03: Building an AI Roadmap Plus AI for PFAS Treatment Analysis and Customer Service

Wednesday, March 25, 10:30 AM - 12:00 PM

AI can transform water utilities – but only when strong governance, trusted data and a ready workforce come first. This session begins with how DC Water built their AI and Data Roadmap using a four-sprint roadmap that unified siloed initiatives under cybersecurity-informed guardrails, modern data architecture and staff resource transformation. Hillsborough County will then share how they've operationalized AI with an AI Assist program that has accelerated staff readiness, integrated with core systems and elevated customer service. Lastly, a PFAS use case demonstrates how generative design for rapid and defensible master planning can expand alternative model consideration, compress timelines and cut costs. Attendees will leave with a repeatable blueprint to operationalize AI responsibly – from enterprise strategy to frontline service.

10:30 AM From Data Chaos to AI Readiness: Building DC Water's AI & Data Roadmap

Nadine Zerrini, Mark Reid, DC Water; Francis Cooper

11:00 AM Hillsborough County Water Resources is navigating the AI journey to transform customer experience

Georges Gonzalez, Hillsborough County

11:30 AM Tackling PFAS: How A Major Regional Water Utility Reduced Planning Costs & Accelerated Treatment Scenario Analysis with Generative Design

Lizzie Hobson, Adam Tank, Transcend

**Session 04: Strengthening Small Communities Through Collaboration,
Innovation, and Regional Solutions**
Wednesday, March 25, 10:30 AM - 12:00 PM

This session explores how small communities are using collaboration to secure long term sustainability and modernize their water and wastewater services. Through three compelling case studies, attendees will see the progression from early-stage cooperation in Upstate New York, to a structured, countywide partnership evaluation in North Carolina, and finally to the creation of a multi county regional water district in Minnesota. Together, these presentations illustrate that regionalization is not a single decision but a stepwise journey that strengthens trust, improves financial stability, and expands technical capacity. Participants will gain practical insights into how communities can align data, governance, and shared purpose to build resilient regional solutions while honoring local identity.

**10:30 AM Uniting Small Systems: Regional Collaboration for Sustainable
Water and Wastewater Management in Upstate New York**

Daniel Pomeroy, Carollo Engineers

**11:00 AM Rural Utilities Collaborating on a Countywide Partnership
Evaluation: Assessing Water and Wastewater Regionalization
Opportunities in Martin County, NC**

Timothy Devine, Hazen and Sawyer; Julius Patrick, GUC / Martin County
Regional Water and Sewer Authority

**11:30 AM Breaking Barriers: Forming a Multi-County Regional Water District
in the 21st Century**

Kellen Grubb, Advanced Engineering and Environmental Services, Inc
(ae2s); Lucas Spaeth, West Central Regional Water District

Session 05: Executive Perspectives: Three Keys to Building Future-Ready Utilities

Wednesday, March 25, 1:30 PM - 3:00 PM

Only 11% of utility executives strongly believe that their organizations are future ready. This session provides an overview of global best practices and insights gathered over five years from 125 utility leaders on the critical investments and leadership actions necessary to build resilient, agile, people-centered, and digitally enabled utilities for long-term success. An executive panel provides practical application of these recommendations from Chief Executive Officer, Chief Operating Officer, and Chief Engineer and Strategy Officer perspectives.

Facilitators: Jason Carter, Esteban Azagra, Arcadis

Panelists: Glenn Marzluf, Del-Co Water Company; George Cassady, Hillsborough County; Mike Huot

1:30 PM Overview of the Session and Introduction of Speakers

1:40 PM Fundamentals of Building an Effective Leadership Team and Future Ready Utilities

2:00 PM Executive Panel on Building Future-Ready Utilities

2:50 PM Facilitated Question & Answer

3:00 PM Session adjourns

Session 06: NC WaterWARN: Lessons Learned from Restoring Water and Wastewater Service in Western North Carolina
Wednesday, March 25, 1:30 PM - 3:00 PM

This session will tell the story of water and wastewater utilities in western North Carolina impacted by Hurricane Helene through the eyes of NC WaterWARN and the utilities that provided aid. The story will be told from three perspectives: in the field providing aid to utilities in need, from the WARN organizational perspective, and from the big picture government collaboration perspective. It will begin with storm preparation, discuss WARN response in the midst of unprecedented challenges, and discuss the response and recovery. The session will focus on lessons learned that can be applied to utilities across the country (not just in hurricane zones), and make leaders think critically about their own emergency action plans, as well as their ability to support neighbors in need.

- 1:30 PM Introduction to NC WaterWARN and Hurricane Helene**
Eileen Navarrete, Brown and Caldwell; Beth Eckert, Cape Fear Public Utility Authority; Patrick Smith, City of Greensboro
- 1:50 PM Discussion regarding scale of response after Hurricane Helene, WARN organizational challenges and lessons learned**
Beth Eckert, Cape Fear Public Utility Authority
- 2:10 PM Presentation/Discussion regarding utilities response to aid requests, field challenges and lessons learned**
Patrick Smith, City of Greensboro
- 2:30 PM Presentation/Discussion regarding collaboration with State and Federal government, supporting other efforts beyond WARN capabilities and navigating the State Emergency Operations Center**
Eileen Navarrete, Brown and Caldwell
- 2:45 PM Discussion and Q&A session regarding overall lessons learned for WARN and individual utilities**
Beth Eckert, Cape Fear Public Utility Authority; Eileen Navarrete, Brown and Caldwell; Patrick Smith, City of Greensboro

Session 07: Building Trust and Inclusion: Innovative Strategies for Utility Engagement, Transparency, and Accessibility
Wednesday, March 25, 1:30 PM - 3:00 PM

In today's evolving environmental landscape, fostering meaningful relationships between utilities and the communities they serve is more critical than ever. This session explores three complementary strategies for strengthening public trust and engagement in the water sector. Attendees will learn how utilities can foster community partnerships through dynamic education and outreach programs, use intuitive report cards to communicate performance and influence policymaker support, and enhance accessibility by aligning outreach and customer service with ADA compliance standards. Together, these presentations provide actionable insights and replicable tools to help utilities create transparent, inclusive, and resilient water stewardship practices that meet the needs of all stakeholders.

1:30 PM Building Bridges: Education and Outreach Initiatives to Strengthen Utility-Community Partnerships

Jessica Green, Orange County Utilities

2:00 PM From CCR to GPA: How Utility Report Cards Shape Public Trust and Policymaker Support

Manuel Teodoro, University Of Wisconsin

2:30 PM A Strategy for Water Sector Utilities to Engage the Public and Improve Trust – Enhance Compliance with Title II of the Americans with Disabilities Act

Maggie Macomber, Nicole Bartlett, Jennifer Frost, Charlotte Water;
Alyssa Dodd, City of Charlotte Storm Water Services

Session 08: Advancing Utility Projects Through Alternative Delivery Methods

Wednesday, March 25, 1:30 PM - 3:00 PM

Utilities nationwide are facing mounting challenges such as aging infrastructure, regulatory pressures, and the need for resilient, cost-effective solutions. Hillsborough County's One Water Program demonstrates how a \$1.87 billion integrated approach and Progressive Design-Build (PDB) delivery can meet aggressive schedules, manage risk, and enhance collaboration for large-scale water and wastewater projects. Similarly, the City of Fort Lauderdale's Prospect Lake Clean Water Center, a \$600 million DBOMF public-private partnership, showcases how P3 models can accelerate delivery, ensure long-term performance, and adapt to emerging regulations like PFAS compliance. For smaller-scale projects, Job Order Contracting (JOC) highlights a flexible procurement method that streamlines execution, improves cost predictability, and optimizes limited staff resources. Together, these case studies illustrate innovative collaborative delivery strategies that utilities can leverage to address diverse project scales and complexities while maintaining quality, schedule, and accountability.

1:30 PM Hillsborough County's \$1 Billion Progressive Design-Build for One Water Program – Regional Wastewater Conveyance and Treatment

Lisa Rhea, Thomas Mamott, Hillsborough County

2:00 PM Managing P3 Water Contracts: Mitigating Risks while Maintaining Quality, Schedule, and Budget

Janeen Wietgreffe, Hazen and Sawyer; Albert Carbon, City of Fort Lauderdale; Megan Ross, Kiewit

2:30 PM Expanding the Toolbox: Job Order Contracting as a Collaborative Delivery Model for Small Capital Projects

Igor Scherbakov, Kevin Pilong, Alexandria Renew Enterprise

Session 09: Shared Strength: Building Resilient Water Utilities Through Regional Governance

Wednesday, March 25, 3:30 PM - 5:00 PM

Regional collaboration and cooperative governance are becoming essential for water and wastewater utilities nationwide to ensure long-term viability and resilience. This strategic shift addresses modern challenges-such as aging infrastructure, new contaminants, and financial pressures-by allowing providers to achieve crucial economies of scale, pool expertise, and share financial risk. Governance models vary widely, necessitating a data-informed process that weighs local priorities (like accountability and service levels) against regional needs (such as regulatory compliance and growth management). This session will feature leaders from three diverse regional entities to discuss the drivers, benefits, and challenges of their approaches. The discussion will help attendees understand the process for identifying appropriate regional solutions, compare various governance models, and appreciate the necessity of critical stakeholder engagement in sustaining effective regional systems.

Facilitator: Jacqueline Jarrell, Raftelis

Panelists: Greg Flory, Piedmont Triad Regional Water Authority (PTRWA); Mickey Conway, Metro Water Recovery; James Beck, City of Des Moines

3:30 PM Welcome & Context

3:35 PM Introduction of Panelists

3:45 PM Panel Presentations: Drivers & Motivation

4:15 PM Facilitated Discussion: Benefits, Challenges, and Lessons Learned

4:40 PM Audience Q&A

4:55 PM Key Takeaways & Closing

5:00 PM Session adjourns

Session 10: Building a Resilient Foundation for Innovation: Leadership, Technology Trends, and Change Management Tools for Water Utilities

Wednesday, March 25, 3:30 PM - 5:00 PM

Discover why sustainable innovation requires both strong organizational foundations and strategic technology adoption. This interactive session exposes common pitfalls in innovation efforts, explores the critical role of leadership and emotional intelligence, and provides actionable frameworks for operationalizing change in water utilities-with a focus on real-world failures, lessons learned, and practical tools that organizations can implement immediately.

Facilitator: Katherine Saltzman, Isle Utilities

3:30 PM Part 1 - The Opportunity: Technology Solutions in Action - What innovation actually looks like within water utility organizations

Cristina Ahmadpour, Isle Utilities

3:55 PM Part 2 - Reality Check: Why Technology Fails - The gap between successful pilots and full-scale implementation

Cristina Ahmadpour, Stephanie Corso, Isle Utilities

4:15 PM Part 3 - Bridge the Gap: Change Management Fundamentals - Introduce frameworks for testing new technologies while managing organizational and technical risk

Stephanie Corso, Cristina Ahmadpour, Isle Utilities

4:25 PM Part 4 - Building the Foundation: The People Side - Confront uncomfortable truths about leadership gaps and their impact on innovation adoption

Stephanie Corso, Isle Utilities

4:50 PM Part 5 - Integration & Action Planning Tools to take back to your organization

Cristina Ahmadpour, Stephanie Corso, Isle Utilities

5:00 PM Session adjourns

Session 11: Collaboration in Motion: Inside the Catawba-Wateree Water Management Group's Model for Shared Governance and Basin Resilience

Wednesday, March 25, 3:30 PM - 5:00 PM

This session offers an inside look at the governance structure, facilitation methods, and decision-making tools that have sustained the Catawba-Wateree Water Management Group for more than 15 years. It will demonstrate how a shared-board model fosters trust, alignment, and long-term success across multiple utilities and jurisdictions, providing a replicable framework for other regional partnerships.

Facilitator: Sabrina Colon, HDR

Presenters: Jimmy Bagley, City of Rock Hill; Jeff Lineberger, Duke Energy; Vicki Taylor, Catawba-Wateree Initiative

Session 1: Inside the CWWMG Board – Governance, Charter, and Consensus in Action

Session 2: Tools for Collaboration – Communication Protocols, and Shared Priorities

Session 3: Evolving Together – Lessons from 15 Years of Multi-Utility Partnership Q&A

**Session 12: Beyond Water Positive: Achieving Multiple Community Benefits
through Innovative Industrial, Utility, and Stakeholder Partnerships
Wednesday, March 25, 3:30 PM - 5:00 PM**

Collaborative partnerships between industry, utilities, and local stakeholders have the potential to develop holistic and visionary approaches to water project design, development, and implementation. Large scale industrial and municipal projects can be an economic engine of a community and deliver multiple benefits for the community that are tangible and felt beyond the near-term economic return on investment or achieving a numeric metric, such as water positive. This session highlights key considerations in project development that, when intentionally applied, meet the technical needs and maximize community co-benefits. Panelists, representing an AI/Database company, municipal water utility, consulting, and a non-government organization will provide real world insights that highlight community benefits that include, but are not limited to, economic diversity, higher paying jobs, increased tax base, and ability to solve more complex water supply and water quality challenges.

Facilitators: Rick Warner, Jacobs; Shannon Spurlock, Pacific Institute

Panelists: Joseph Danyluk, Jacobs; John Newsome, City of Columbus Department of Public Utilities; Alise Porto, Switch

3:30 PM Introductions, Agenda, and Background

3:35 PM Opening Keynote

3:45 PM Audience participation thru Mentimeter questions

3:50 PM Facilitated panel discussion focused on session learning objectives

4:30 PM Facilitated audience participation thru Mentimeter questions with panel feedback

4:50 PM Session reflections and next steps

5:00 PM Session adjourns

Session 13: Strategic Insights from Utility Leaders - Planning, Developing, Implementing and Communicating Your Next Strategic Plan
Thursday, March 26, 8:30 AM - 10:00 AM

Is a strategic plan something that is worthwhile for my utility? How would it benefit our utility? What if we already have a strategic plan – should we update it? All of these are great questions to ask and in this strategic planning session, utility leaders will provide their honest insights on what it takes to plan for, develop, implement and communicate a strategic plan. Strategic planning goes beyond just the thoughts of a few utility leaders. This session will provide case study examples from a range of utilities from across the country on what they have learned from their strategic planning journey. This interactive session is geared toward utility leaders that are thinking about a strategic plan, preparing to develop a strategic plan, or in the midst of implementing their own strategic plan. The session will also include a facilitated panel discussion to help answer attendee questions as well as to share the insights and lessons learned from a range of utilities.

Facilitators: James Decker, Hazen and Sawyer; James Ginley, Jim Ginley Consulting LLC

8:30 AM Overview of the Session, Introduction of Presentation Speakers

8:40 AM Presentation on Planning for a Strategic Plan

Zachary Tarlton, Union County Water

8:55 AM Presentation on Developing a Strategic Plan

Andres Villarraga, Washington Suburban Sanitation Commission

9:10 AM Presentation on Implementing a Strategic Plan

Carmen Moreno-Rivera, Louisville & Jefferson County MSD

9:25 AM Presentation on Communicating a Strategic Plan

Colin Stifler, Charlotte Water

9:40 AM Facilitated Panel Discussion and Q&A Session

10:00 AM Session adjourns

Session 14: Strengthening Water Systems: Crisis Management and Emergency Preparedness

Thursday, March 26, 8:30 AM - 10:00 AM

Water and wastewater utilities face increasing risks from natural disasters and cyber threats, making emergency preparedness and resilience essential. Teamwork and a structured approach, such as the Incident Command System (ICS), are critical in mounting an effective response and recovery during emergency events. This session incorporates learned experience to assist utilities protect public health, maintain essential services, and adapt to evolving threats.

8:30 AM Teamwork in a Time of Crisis - Emergency Response and Recovery from Hurricane Helene at the North Fork WTP in Asheville, NC

Glendon Fetterolf, CDM Smith; Bill Hart, City of Asheville; Bill Dowbiggin, CDM Smith

9:00 AM Expanding the Incident Command System (ICS) Beyond Disaster Recovery – A Framework for Water and Wastewater Utility Resilience

Chris Jones, London Womack, Hillsborough County

9:30 AM From Compliance to Confidence: Quantifying Water Utility Cyber Risk

David Espy, AECOM Technical Services

Session 15: Evolving Practices in DEI: From the Utilities Perspective for The Organization and the Community
Thursday, March 26, 8:30 AM - 10:00 AM

This session will share how a water utility and a wastewater utility implement DEI in an evolving legal, political, and social environment. You will hear from leaders in law and diversity, equity and inclusion on navigating the barriers and challenges to advancing their values of equity and inclusion in recruitment, workplace culture, and community engagement to build trust among employees and with stakeholders. You will also share and learn from each other about furthering DEI and remaining a resilient organization.

- 8:30 AM Welcome- overview of the session and introduction of the speakers**
Kellie Watson, Louisville & Jefferson County MSD
- 8:40 AM Engagement Activity- breakout into groups and discuss current activities and challenges, and report out of discussion**
Kellie Watson, Louisville & Jefferson County MSD; Sharise Horne, Louisville & Jefferson County MSD; Cathy Scrivner, Louisville Water Company
- 9:00 AM Presentation 1- background, terms, current state, and legal framework**
Kellie Watson, Louisville & Jefferson County MSD
- 9:15 AM Presentation 2- water utility presentation on DEI in recruitment and workplace culture**
Cathy Scrivner, Louisville Water Company
- 9:30 AM Presentation 3- wastewater utility presentation on community engagement**
Sharise Horne, Louisville & Jefferson County MSD
- 9:45 AM Engagement activity-breakout groups and report out on solutions to challenges**
Sharise Horne, Louisville & Jefferson County MSD; Kellie Watson, Louisville & Jefferson County MSD; Cathy Scrivner, Louisville Water Company

Session 16: Reducing Risk and Improving Outcomes Through More Effective Asset Onboarding Practices – Developing and Implementing Improved Processes and Tools

Thursday, March 26, 8:30 AM - 10:00 AM

Current asset onboarding practices in the industry often lack the intentionality and standardization found in other project phases, resulting in disorganized and incomplete data scattered across multiple platforms. This creates challenges for stakeholders during final uploads to O&M and asset management systems, causing delays and increasing long-term operational risks. A UMC 2024 presentation highlighted Portland Water Bureau's shift from spreadsheets to a robust Data Collection Tool (DCT) built on the Microsoft Power Platform, streamlining asset data management for its Bull Run Water Treatment Program. The proposed session will expand on these lessons, featuring a panel discussion (owner and contractor) on risks of poor onboarding and strategies for improvement, including business processes, technology, collaboration, leadership, change management, and contract adherence, drawing on real-world experiences to support more effective long-term O&M and asset management outcomes.

Facilitators: Kirk Olds, Hansa Keswani, Brown and Caldwell

Panelists: Greg Norby, Central Contra Costa Sanitary District; Joe Skokan, King County Dept Of Nat'l Res & Parks; Kiersten Lee, MWH Constructors

8:30 AM Welcome Agenda and Context Setting Speaker Introductions Initial Audience Polling

8:45 AM Speaker No. 1 - Portland Water Bureau Case Study Presentation

9:00 AM Speaker No. 2 - King County Wastewater Treatment Division Case Study Presentation

9:15 AM Speaker No. 3 - Central Contra Costa Sanitary District Presentation

9:30 AM Facilitated Panel Discussion

10:00 AM Session adjourns

Session 17: Rates and Charges for Weather and Large User Resilience
Thursday, March 26, 10:30 AM - 12:00 PM

The development of modern rates, charges, and financial strategies is essential for financing resilient water, wastewater, and stormwater systems. Speakers will discuss with participants how tailored fee structures can fund drought mitigation strategies and robust stormwater infrastructure improvements. The session concludes by focusing on equitable cost allocation models designed to stabilize revenue while ensuring large users contribute fairly to system-wide operations and capital investment.

10:30 AM Hit Them Where It Hurts: Enforcing Drought Restrictions With Surcharges and Violation Charges

Jennifer Ivey, Carollo Engineers; Martha Wright, Cecilia Velasquez, San Antonio Water System

11:00 AM Implementing a Stormwater User Fee in Arlington County, VA

Krista Abele, Steve Skowron, Arlington County Government (Virginia); Henrietta Locklear, Raftelis; Brittany Baporis

11:30 AM Financial Strategy for High-Volume Data Center Integration: Lessons from the City of Lancaster, Ohio

Jeff Yeschick, Arcadis; Denise Crews, City of Lancaster

Session 18: The Long Game: Leadership, Friendship, and Finding Your People
Thursday, March 26, 10:30 AM - 12:00 PM

What happens when leadership isn't just about roles and titles, but about relationships? This dynamic panel brings together four women leaders from across the water industry who met nearly two decades ago through professional association volunteer roles-and have since walked alongside each other through the highs and lows of leadership. Together, they have faced major career shifts, tough decision points, personal losses, and professional wins. They've mentored each other, challenged each other, and shared the messy and meaningful parts of growing into leadership.

Facilitator: Haley Falconer, City of Boise

Panelists: Leslie Samel, CDM Smith; Michelle Hatcher, City of Franklin; Rebecca West, ReWa

10:30 AM Session Introduction and Panelist Intros

10:45 AM Facilitated Q&A and Discussion

11:30 AM Audience Q&A

11:50 AM Session Closeout and Call to Action

Session 19: Data Center 101: Water Utility Strategies for Working with Data Centers

Thursday, March 26, 10:30 AM - 12:00 PM

Data centers are powering the AI age and in doing so, they require abundant water resources to cool the computers and chips. A single large data center can use up to 5 million gallons of water per day. This session spotlights several water systems that have worked with hyperscalers to supply them water, including Loudoun Virginia, Aurora Colorado, and Prince William, Virginia. We will learn about data center specific rate structures, capital planning, and demand planning.

10:30 AM When Water Doesn't Come Back: Aurora's Policy for Data Center Connection Fees – Beyond the meter

Fernando Aranda, Hazen and Sawyer; Catherine Olukotun, Aurora Water

11:00 AM Insatiable Demand: Aligning Water Rates and Capital Fees for Data Centers

David Hyder, Stantec; Lyle Beefelt, Brian Sipes, Prince William Water

11:30 AM Planning for Digital Thirst in the Age of Data Centers at Loudoun Water, Virginia

Darrin Geldert, Loudoun Water; Jessica Fritsche, Emily Keller, Carollo Engineers

**Session 20: Collaborative Delivery Under Pressure: Lessons in Readiness,
Resilience, and Real-World Adaptability**
Thursday, March 26, 10:30 AM - 12:00 PM

This session explores how progressive design-build (PDB) and collaborative delivery models are transforming infrastructure projects and organizational culture. From Harris County Flood Control District's proactive governance framework to King County's recovery of a critical sewer rehabilitation project, and Prince William Water's \$200M facility-wide initiative driving organizational change, these case studies reveal practical strategies for success. Attendees will learn how early integration of legal and procurement, transparent communication, and strong leadership champions can overcome permitting hurdles, scope changes, and cultural resistance. Join us to discover lessons on adaptability, organizational readiness, and collaboration that enable owners to deliver complex projects under pressure with confidence and accountability.

10:30 AM P5 is the Key to DB: Building Organizational Readiness Before the Storm

Chitra Foster, Carollo Engineers Inc.; Scott Elmer, Harris County Flood Control District

11:00 AM Overcoming Schedule Challenges through Progressive Design-Build

Ben Fuentes, Kennedy Jenks

11:30 AM The Owner's Perspective: Setting Yourself Up for Success in Collaborative Delivery

Shannon Spence, Prince William Water

**Session 21: Turning Inflection Points into Strategic Transformation: A 360
Degree Perspective**

Thursday, March 26, 1:30 PM - 3:00 PM

In an era of rapid technological, environmental, and cultural change, the traditional approach to strategic planning no longer meets the needs of modern organizations. Flip charts, dot stickers, and traditional plans once played a central role, but today's utilities operate in environments that are far more complex, connected, and data-driven. We've evolved our organizations and can now evolve the way we approach strategy. This session offers a 360-degree perspective on what it means to modernize strategic planning. Participants will hear from three distinct perspectives - leadership, governance, and facilitation - each offering insights into how organizations can move from static plans to living frameworks that are adaptive and actionable.

1:30 PM Part I: Leadership Perspective: From Inflection Point to Transformation

Brenley McKenna, WateReuse California

2:00 PM Part II: Board Perspective: Governing for Clarity and Accountability

Paul Sciuto, Monterey One Water

2:30 PM Part III: Facilitator Perspective: Beyond the Flip Chart

Katie Burkhart, Point: Valey

**Session 22: Growing Leaders, Preserving Knowledge: A Modern Utility
Succession Planning Approach
Thursday, March 26, 1:30 PM - 3:00 PM**

Across our industry, staff are aging and nearing retirement. At the same time, many utilities are focusing efforts on attracting and retaining staff. Succession planning is the foundation of ensuring we build resilient organizations that are prepared for the future. In this session, join us for a panel discussion and hear from industry leaders from both large and small utilities on their approach to succession planning and the challenges and success they have faced along the way. Then learn one utility's approach to succession planning and how this process can be used and adapted by others for future success, leveraging both internal and external development resources.

- 1:30 PM Introduction and poll audience**
Carolyn Ross, Charlotte Water
- 1:35 PM Panel discussion - The need for succession planning, challenges, pitfalls, and successes**
Carolyn Ross, Charlotte Water; Beth Eckert, Cape Fear Public Utility Authority; Courtney Driver, City of Winston Salem
- 2:10 PM Questions from the audience**
- 2:20 PM One utility's approach to creating a succession planning process**
Carolyn Ross, Charlotte Water
- 2:55 PM Questions from the audience**
- 3:00 PM Session adjourns**

Session 23: Governance That Delivers: From Board Engagement to Workforce Resilience

Thursday, March 26, 1:30 PM - 3:00 PM

Effective governance is a critical driver of long term utility performance, resilience, and public trust. This session explores how utilities can move from engaging Boards of Directors as strategic partners to operating mature governance systems that support informed decision making and accountability. Case studies illustrate how shared ownership of strategy, structured oversight, and data driven dialogue strengthen alignment between boards and staff. The session then connects governance directly to one of the sector's most urgent risks: building and sustaining a capable, future ready workforce. Attendees will gain practical insights into governance practices that enable organizational capacity, workforce development, and sustained service excellence.

1:30 PM From Barriers to Breakthroughs: Collaborative Permitting for a Circular Water Economy

Justin Mattingly, Water Environment Federation

2:00 PM Empowering Effective Governance: Strengthening Board Engagement for Strategic Impact

Andres Villarraga, Julianne Montes De Oca, WSSC Water

2:30 PM Building the Water Workforce of Tomorrow through Research and Collaboration

Joanna Brunner, Katelyn Skornia, Arcadis; Melissa Meeker; Christine Ow, Arcadis

Session 24: Systems Thinking in Water: Regional Planning, Urban Climate Adaptation, and Advanced Potable Reuse
Thursday, March 26, 1:30 PM - 3:00 PM

Integrated water management is necessary to achieve climate resilience and sustainable resource use across diverse systems and situations. Case studies in this session range from New York City's complex urban environment, where hydraulic modeling informs flood mitigation and circular water strategies, to Central Ohio's 15-county region, utilizing comprehensive resource modeling to align economic development with long-term water availability. Furthermore, the session addresses the future of water supply, demonstrating how advanced automation and Critical Control Point frameworks enable regulatory compliance and build public trust in Direct Potable Reuse (DPR) systems. Ultimately, these examples showcase how systems-level thinking, from regional planning and industrial siting to technological transparency, is essential for securing a resilient water future.

1:30 PM Comprehensive Stormwater Management - Combining Flood Mitigation and Water Reuse

Joel Kaatz, Arcadis

2:00 PM Guiding Industrial Siting, Reuse, and Policy in Central Ohio with Integrated Water Resource Modeling

Stephanie Ishii, Kathleen Smith, Hazen and Sawyer

2:30 PM Operational Assurance through Automation: Safeguarding Water Quality at the Pure Water Center Using Critical Control Points

Kalyani Ganesan, Manoj Yegnaraman, Carollo Engineers

**Session 25: Financing the Future: Strategies, Resilience, and Value in Water
Infrastructure Investment
Thursday, March 26, 3:30 PM - 5:00 PM**

Water finance involves securing and managing the funding needed to build, maintain, and upgrade water infrastructure, such as treatment plants and distribution networks. Utilities often rely on a mix of financial tools, including municipal bonds, federal programs like WIFIA loans, and local ratepayer revenues to support these investments. Effective water finance strategies are essential for ensuring reliable service, meeting regulatory requirements, and supporting community resilience and economic growth.

3:30 PM WIFIA vs. Wall Street: Choosing Between a WIFIA loan and a Revenue Bond

Delaney Ridgley, Raftelis; Philip Thompson-King, Chester County Wastewater Recovery; Bart Kreps, Raftelis

4:00 PM Path to Triple-A A Financial Resilience Blueprint from Mount Pleasant Waterworks

Mark Coffin, Mount Pleasant Waterworks; William Kerr, Raftelis

4:30 PM Value of Water Campaign: The Economic Benefits of Investing in Water Infrastructure

Benjamin Stewart, Stantec Consulting Services Inc.; Emily Simonson, US Water Alliance; Janet Clements

Session 26: Made It, Now What? Lessons Learned from New(er) Utility Leaders
Thursday, March 26, 3:30 PM - 5:00 PM

This panel brings together a group of utility executives, all appointed in the last three years, to discuss the dramatic shifts in the utility sector. Today's leaders face intense challenges, including financial constraints, complex regulatory demands, institutional knowledge loss, aging infrastructure, and climate change risks. Hear from executive leaders of water utility districts across various regions. They will share groundbreaking approaches their organizations have implemented to fundamentally redefine their core mission and operational strategies. The session, moderated by an industry Vice President, will provide direct insights into balancing strategic, operational, human, and financial goals, offering a glimpse into what is required to lead a successful utility now and into the future. Attendees will learn how different cultural and political environments shape utility success.

Facilitators: Scott Parker, Jacqueline Jarrell, Raftelis

Panelists: Jan Lee, Dublin San Ramon Services District; Robert Schultz, City of Newport; Tim McCollough, Rochester Public Utilities; Andrew Damron, Napa Sanitation District

3:30 PM Introduction

3:35 PM Panelist Introductions and Background

3:55 PM What are the key challenges facing utilities today and how do the panelists as leaders maneuver through those challenges?

4:15 PM Organizational Culture and what does leadership look like?

4:30 PM Setting a foundation for operational excellence. Future trends, preparation what do we need to be prepared for and how are the panelists preparing?

4:50 PM Last words and closing

5:00 PM Session adjourns

Session 27: Building Regional Solutions Through Local Voices: The Engagement Journey Behind the Stowe Water Resource Recovery Facility
Thursday, March 26, 3:30 PM - 5:00 PM

Delivering a regional water resource recovery facility is as much about building trust as it is about building infrastructure. The Stowe Water Resource Recovery Facility (WRRF) project illustrates how a strategic, transparent engagement process can transform a complex regionalization effort into a widely supported community asset. Developed by Charlotte Water to replace and consolidate aging plants across multiple jurisdictions, the project relied on early and sustained outreach, from neighborhood meetings and stakeholder workshops to tailored messaging and feedback loops that directly influenced design and siting decisions. This session will share the tools, strategies, and lessons learned from that process, highlighting how public input shaped project outcomes and strengthened long-term partnerships.

Facilitators: Sabrina Colon, HDR; Jennifer Frost, City of Charlotte

Panelists: Nicole Bartlett, Angela Charles, Charlotte Water; Will Shull, HDR

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| 3:30 PM | Opening Remarks: Why Engagement Defines Successful Regionalization |
| 3:40 PM | Session 1: The Stowe WRRF Story – Regional Vision, Local Input |
| 4:05 PM | Session 2: Engagement in Action - Building Trust Through Conversations, Tours, and Transparency |
| 4:30 PM | Session 3: From Feedback to Design - How Community Perspectives Shaped Facility Outcomes |
| 4:50 PM | Q&A and Takeaways: Translating Lessons to Future Regional Projects |
| 5:00 PM | Session adjourns |

Session 28: Planning Under Pressure: Funding Strategies, Capital Planning, and Real-World Solutions for Small Communities
Thursday, March 26, 3:30 PM - 5:00 PM

Small communities face rising infrastructure costs, limited rate bases, and growing expectations for long term sustainability. This session brings together financial strategies, right sized capital planning approaches, and a powerful case study to show how small systems can plan effectively under real world constraints. Attendees will first examine the financial pressures shaping small utility budgets, then learn practical frameworks for building sustainable capital improvement plans and finally see how the City of Saluda applied these tools to address critical stormwater failures through strategic planning and funding alignment. The session demonstrates that even the smallest communities can make meaningful progress when they combine clear planning with disciplined funding strategies.

3:30 PM Small Communities, BIG Needs; No Problem.

Justin DeMello, Woodard & Curran; TJ Fish, City of Groveland, FL

4:00 PM Small Systems, Big Plans. How Small and Rural Utilities Build Sustainable Capital Plans

Frederick Tack, CONSOR Engineering

4:30 PM A Blueprint for Scale: Strategic Stormwater Infrastructure Improvement and Funding in Small, Resource-Constrained Communities

Katie Cromwell, Keith Readling, Raftelis; Steven Orr, City of Saluda

Session 29: One Water: Driving Resilience through Innovation, Governance and Integrated Planning
Friday, March 27, 8:30 AM - 10:00 AM

This session brings together utility-driven perspectives on advancing One Water management through governance, planning, and innovation. It begins with an exploration of governance frameworks and digital modernization themes that shape resilience and risk strategies for utilities. Next, a case study highlights a utility's direct experience implementing integrated planning, offering practical insights while noting gaps in connecting planning to reuse opportunities and circular resource flows. Finally, the discussion showcases Los Angeles' decade-long journey from the One Water LA 2040 Plan to the nation's largest potable reuse program, emphasizing collaboration, adaptive planning, and technical evolution. Together, these presentations provide actionable lessons on institutional alignment, stakeholder engagement, and the engineering pathways needed to achieve sustainable, resilient water systems.

8:30 AM The Journey from One Water LA to Pure Water Los Angeles - Turning a Plan into Reality!

Inge Wiersema, Carollo Engineers

9:00 AM Governance as a Catalyst: Portland Oregon One Water Story

Erich Pacheco, Portland Water Bureau; Lakshmi Priya Dhanapal; Quisha Light, Portland Water Bureau; Jason Graham, Stantec Inc.; Ting Lu, City of Portland Bureau of Environmental Service

9:30 AM Integrated Management Planning: How Charlotte County Utilities is Setting the Stage for Resilience and Modernization

Jamie Zimmermann, HDR; Kenneth Stecher, Charlotte County; Sharon Wright, HDR

Session 30: From Strategy to Resilience: Operationalizing Vision, Measuring Performance, and Planning for Climate Uncertainty
Friday, March 27, 8:30 AM - 10:00 AM

Utilities across the water sector are increasingly challenged to move from strategic intent to sustained, measurable results while preparing for climate uncertainty. This session presents a practical progression from translating vision into daily operational decisions, to measuring what matters for accountability and learning, to scaling strategy through integrated, climate-informed planning. Case studies from Boise, Sacramento, and Honolulu illustrate how utilities operationalize strategy, refine performance measures, and align capital investment with community values and climate risk. Speakers will share tools for prioritization, performance indices, dashboards, and risk-based decision frameworks that support transparency and adaptability. Attendees will leave with a clear roadmap for turning strategy into action and building resilient, future-ready utilities.

8:30 AM Flow State: Aligning Utility Vision, Drivers, and Delivery

Elizabeth Lowell, Brown and Caldwell; Allison Hornak, City of Boise Public Works Department; Tiffany Torres, Brown and Caldwell

9:00 AM Strategic Planning: The Next Step - Measuring What Matters

Katelyn Skornia, Jason Carter, Arcadis; Dillon Miele, Sacramento Area Sewer District; Esteban Azagra, Arcadis

9:30 AM Strategic Planning for a Climate Resilient Future: Honolulu's One Water Approach

Rachel Duncan, Carollo Engineers; Teresa Sprague, Brown and Caldwell

Session 31: Healthy Leadership System Management: Building Communication, Capability, and Capacity
Friday, March 27, 8:30 AM - 10:00 AM

Utilities today face increasing pressures from workforce turnover, operational complexity, project backlogs, growing community expectations, and rising capital investment needs. Healthy Leadership System Management offers a framework to navigate these challenges by strengthening communication, capability, and capacity across the organization. This technical session shows how leaders can build resilient, future ready utilities by improving internal communication, supporting inexperienced or transitioning teams through strong systems, and expanding organizational capacity with project management augmentation. The session moves from individual leadership skills to operational team systems and finally to enterprise level project execution. Attendees will gain practical strategies to strengthen culture, reduce risk, and improve sustainable performance at every level.

**8:30 AM Strategic Internal Communication for Healthy Leadership:
Empowering Utility Managers to Meet Current and Future
Challenges**

Donnell Duncan, Arcadis; Tony Carnell, Henry County Water Authority

**9:00 AM Bridging the Knowledge Gap: An Approach to Managing an
Inexperienced Workforce in Public Utilities**

Izaiah Kruenegel, South Platte Renew

**9:30 AM The Fast and the Functional: Accelerating Utility Projects with PM
Augmentation**

Kerstin Kenty, Jacobs; Susan Goebel-Canning, Pinellas County Utilities

Session 32: From Long Range Planning to Regional Action: Building Water Resilience Through Strategy, Supply, and Governance
Friday, March 27, 10:30 AM - 12:00 PM

Utilities across the country are facing unprecedented growth, climate uncertainty, and rising expectations for reliability and affordability. This session traces a practical journey from long range, data driven planning to securing regional water supply and ultimately executing governance and operational transformation at scale. Using case studies from North Carolina and Western South Dakota, speakers will demonstrate how disciplined forecasting reveals future risk, why regional collaboration becomes essential when local options are constrained, and how successful utility mergers turn strategy into sustained performance. Attendees will gain insight into aligning planning with regulatory and political realities, navigating complex regional partnerships, and managing the financial and workforce challenges of large scale change. The session provides a clear roadmap for utility leaders seeking to move from vision to action in an increasingly uncertain future.

10:30 AM Planning with Purpose: Cary's Adaptive Water Strategy Through 2070

Sarah Braman, Town of Cary; Nicola Hill, HDR

11:00 AM Western Dakota Regional Water System - Planning for Western South Dakota Water Security

Cory Chorne, Advanced Engineering and Environmental Services, LLC;
Kristin Conzet, Western Dakota Regional Water System

11:30 AM Regionalization That Works: A Guide to Successful Utility Merger

Brian White, Freese and Nichols, Inc.; Victor Czar, City of Sanford

**Session 33: From Chaos to Capability: Leadership, Transformation, and
Innovation in Utility Management**
Friday, March 27, 10:30 AM - 12:00 PM

Utilities across the water sector are under increasing pressure to restore trust, improve performance, and adapt to rapidly changing conditions. This session traces a practical journey from stabilizing leadership and organizational culture, to undertaking intentional enterprise transformation, to sustaining progress through research, innovation, and collaboration. Case studies illustrate how clear expectations, accountability, and leadership development rebuild internal and external confidence. Speakers will then show how disciplined evaluation and peer benchmarking translate crisis lessons into lasting organizational and operational improvements. The session concludes by exploring how mature utilities can leverage collaboration and innovation to address sector wide challenges and drive long term resilience.

10:30 AM Chaos to Consistency: A Leadership Playbook that Sticks

Robert Purvis, City of Daphne

11:00 AM From Challenge to Change: Organizational Transformation at Austin Water

Olivia Beck, Stephanie Sue, Iliana Venegas, Austin Water

**11:30 AM Accelerating Research & Innovation through Strengthening
Collaboration & Change Catalysts**

Katelyn Skornia, Joanna Brunner, Jason Carter, Arcadis; Charles Bott,
Hampton Roads Sanitation District (HRSD)

Session 34: AI for Capital Planning, Data Drudgery and Customer Service
Friday, March 27, 10:30 AM - 12:00 PM

Water and wastewater utilities are implementing AI to solve problems, improve efficiency and increase work capacity across utility departments. We dive deep into three different areas where utilities are utilizing AI, also known as use cases. Use case 1 is to improve the efficiency and decrease the time for capital planning, use case 2 is using AI agents to improve administrative workflows, and the third session is interactive and will teach participants how one utility is using ChatGPT prompts for customer service interactions. Participants will also be provided with an opportunity to use ChatGPT and learn effective prompts.

10:30 AM Building Trust Through Technology: Using AI and Data to Advance Affordability and Transparency

Quisha Light, Portland Water Bureau

11:00 AM Using AI Agents to Increase Workforce Capacity, Automate Mundane Work, and Improve Data Accuracy

D. Albrey Arrington, Loxahatchee River District; Rick Blalock, Agentuity; Joe Chung, Loxahatchee River District

11:30 AM Frontiers in AI – Improving Customer Service and Communications, An Interactive Session

Julie Mechling, Pittsburgh Water; Henrietta Locklear, Raftelis; Megan Hancock; Lindsay Hughes, Tapped In Public Relations