

American Water Summit 2018

Inspiring Innovation

Loews | Philadelphia, PA
Oct. 24-26



We bring smart, creative, inspired people **together**

Stantec has immediate openings for water-focused professionals across North America, with significant opportunities in **California** and **Texas**.

From some of the largest and most complex projects ever undertaken to those benefiting small remote communities, our focus on delivering innovative, fit-for-purpose solutions remains the same. Join Stantec Water – chances are you'll make a positive difference in your own community and in those that appreciate you all around the world.



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Welcome to Philadelphia



American Water Summit 2018 Partners



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WUCA
Water Utility Climate Alliance

The American Water Summit 2018 convenes at a boom time for the US and Canadian water sectors. Investment growth is at its highest level in a decade, the near-term economic outlook remains positive, and there has been robust support for key federal funding programs. The result is strong demand for new water technologies and infrastructure – at least in the short term – but we are here to determine what comes next.

It is clear that despite the positives we have witnessed in 2018, the systems that have worked for the North American water sector for the past 40 years are now more vulnerable than ever. At the same time, the opportunities for innovation are looking brighter than ever.

We have worked hard to cultivate the American Water Summit as the key space for top executives in the water industry – public and private – to discuss how change will shape the business of water.

For our agenda, we have assembled three different perspectives to help craft America's water future:

Finance and Strategy

The financial underpinnings of the American water sector are poised for change. The sessions in this strand will explore the new business and investment models that will define the industry in the years to come and determine the meter by which success will be measured.

The CTO Forum

The next large-scale shift in the American water sector will require more than just financing and technological innovation. Success will rely on comprehensive engagement between end-users, solutions providers and key stakeholders. This strand is packed with forward-thinkers prepared to overcome the sector's greatest challenges.

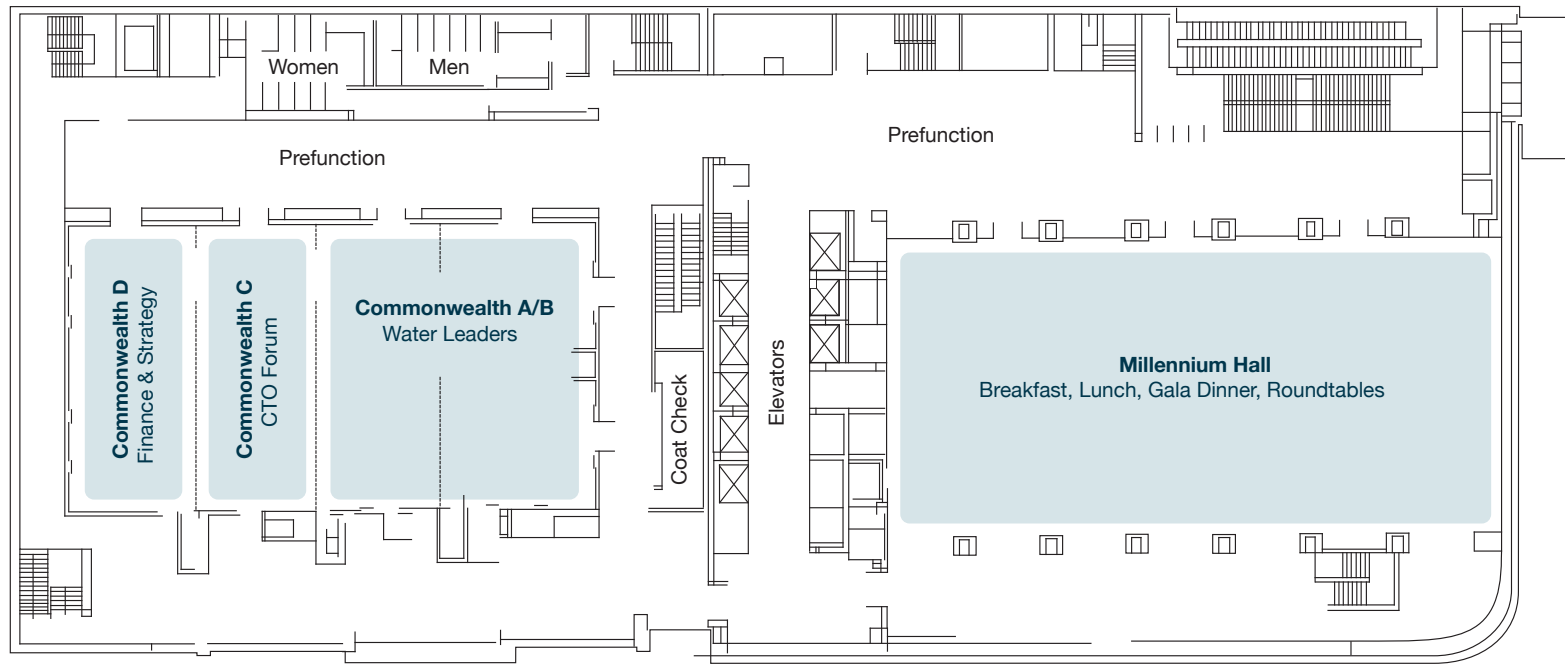
Water Leaders

Utility-led innovation is changing the way we think about the sector. These sessions showcase the individuals driving change from the inside out, and it includes the inauguration of new members into the Leading Utilities of the World initiative.

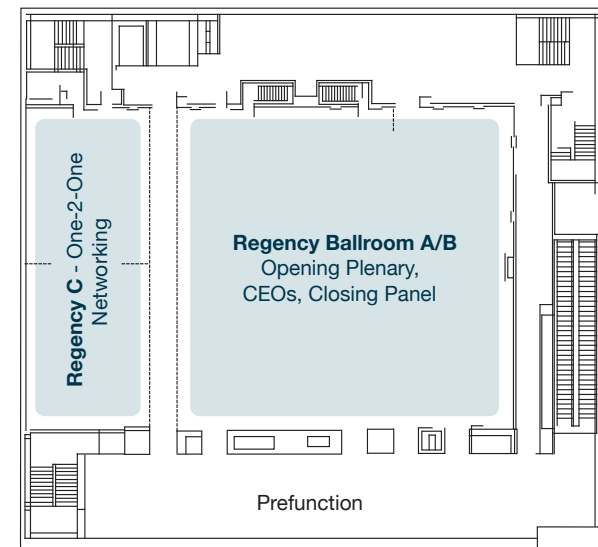
Our pre-conference workshop this year focuses on transforming the water utility into a smart system. Virtually every utility has a mandate to do more with less, and while digital technologies offer the opportunity to dramatically improve productivity, adoption to date has been painfully slow. We've brought together the utility leaders who are driving the digital transformation to discuss how procurement and return on investment can be made to work.

Over the next few days, you will join the industry's most pioneering thought-leaders to help craft America's water future and inspire innovation across the sector. Your contribution is vital, and we thank you for joining us this year in Philadelphia.

Map of Locations/Sessions



Loews Second Floor



Second Floor Mezzanine

PRE CONFERENCE

Wednesday, October 24th

Accelerating the Digital Utility

Making procurement, return on investment, and objectives work for water



AMERICAN WATER
SUMMIT 2018

Accelerating the Digital Utility

Making procurement, return on investment, and objectives work for water

OCTOBER 24 | LOEWS HOTEL | PHILADELPHIA, PA

PRE-CONFERENCE WORKSHOP

Workshop Overview

Digital technologies offer a unique window of opportunity to transform the productivity of the water sector, but to date, progress in adopting these technologies has been painfully slow. It matters because all utilities are being asked to do more with less, and a step change in productivity is the only way ahead.

This high-level half-day workshop brings together some of the world's most respected utility leaders and key vendors to address the obstacles to digital technologies implementation. It goes straight to the point asking the questions that really matter:

- What do utilities really want from digital?
- How can procurement be made to work for both sides?
- Can the returns, the risks and the investment requirements be better quantified?

With former DC Water General Manager **George Hawkins** in the chair and with international utility leaders from the UK, Canada and Australia joining the discussion alongside some of the most dynamic US utility leaders, this event will shape the way digital water services are rolled out in the US and beyond.

Whether you are a utility looking to invest in improved productivity or a technology supplier looking to open out the market, it is going to be an expensive event to miss. With direct access to the key thought leaders and a focused agenda it will save months of time spent on business development and strategy planning in a single afternoon.

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DIGITAL SHOWCASE:



PRE CONFERENCE
Wednesday
Oct 24th

Workshop Agenda

1:00-1:15 PM **Introduction by George Hawkins**

1:15-2:30 PM **Utility Perspectives**

Each leader spends four minutes outlining their experience of digital systems procurement and operation, before outlining in another four minutes how they think that smart technologies will shape their operations over the next decade.

CHAIR

George Hawkins, *Moonshot LLC*

SPEAKERS

Erin Mahoney, *Regional Municipality of York, Canada*
Andy Kricun, *Camden County Municipal Utilities Authority*
Jason Tucker, *Anglian Water Services, UK*
Sue Murphy, *Water Corporation, Australia*
Martin Adams, *Los Angeles Department of Water and Power*
David Stanton, *Suez North America*
Bill Teichmiller, *EJ Water Cooperative*

2:30-2:35 PM **Transition Break**

2:35-3:30 PM **Procurement and Cost Benefit Analysis**

How do utilities approach the decision to invest in digital systems and what is the process of procurement? These are two crucial questions which are shaping the development of the digital utility, but does anyone have the right answers? This panel brings together all the different perspectives on the issue to understand their thinking and bring it into close alignment.

SPEAKERS

Ting Lu, *Clean Water Services*
Esteban Azagra, *Arcadis*
Raja Kadiyala, *Jacobs*
David Henderson, *XPV Water Partners*
Elí Díaz-Atienza, *Puerto Rico Aqueducts and Sewers Authority (PRASA)*

3:30-4:00 PM **Networking Break**

PRE CONFERENCE
Wednesday
Oct 24th

Workshop Agenda

4:00-5:30 PM

Workshop Challenge

The audience is divided into teams with each team assigned a challenge related to accelerating the adoption of digital technologies. Each team will be headed by a utility leader, and together they will work up solutions to the challenge to be presented to the other teams at the end of the session.

5:30-6:00 PM

Closing Panel and Learning Points

6:00-7:00 PM

Networking Reception



Are You Listening?

Our Mi.Net® AMI system enables you to capture, interpret, and view critical data aspects of your water infrastructure.

By adopting Internet of Things (IoT) standards through our LoRa® Alliance partnership, utilities can transform their water infrastructure into an open communications network, enabling them to improve the service they offer their customers and enable the connectivity of all city services. From managing water connections with proven remote disconnect meters to permanent leak detection technology, we provide a comprehensive solution to manage your entire smart water program.

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CONFERENCE

Thursday, October 25th

CONFERENCE
Thursday
Oct 25th

Day One Agenda

7:00-8:30 AM

Breakfast & Registration Opens

8:30-10:00 AM

Opening Address

Secretary Rick Perry, *US Department of Energy*

Opening Plenary

Innovative business models and technologies are redefining how the American water sector responds to its most pressing challenges, as the pillars that have defined the industry for decades are poised for change. Federal regulators, gold standard utilities and industry visionaries provide a holistic outlook on the future of the American water sector.

KEYNOTE PRESENTATION

Rich Karlgaard, *Forbes*

CHAIR

Debra Coy, *XPV Water Partners*

SPEAKERS

Andy Kricun, *Camden County Municipal Utilities Authority*

Erin Boeke Burke, *S&P Global*

Howard Neukrug, *Global Water Leaders Group*

2018 Strand Descriptions

Finance & Strategy

The financial systems that underpin the American water sector are poised for change. This session strand navigates the new business and investment models that will define the industry in the years to come.

The CTO Forum

Crafting America's water future requires more than just technological innovation, it requires a 360-degree approach that engages end-users, solutions providers and key stakeholders. These sessions uncover the opportunities for forward-thinkers as the sector responds to its greatest challenges.

Water Leaders Strand

This strand showcases the utility-led innovation which is recasting the water sector from the ground up, beginning with the inauguration of new members into the Leading Utilities of the World initiative.

CONFERENCE
Thursday
Oct 25th

Day One Agenda

10:00-10:30 AM

Networking & Coffee Break

10:30-12:00 PM

Roundtables

The Most Pressing Questions for America's Water Future

Expert speakers lead tables of 10-12 delegates in tightly focused discussions on what is new and trending in the water industry. Each delegate will have 4 rotations of 20 minutes to participate in an intimate, face-to-face exchange of ideas.

** Please see GWI staff for Roundtables handout*

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12:00-1:30 PM

Lunch

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12:30-1:30 PM

One-2-One Networking & Coffee Break

The One-2-One Networking Sessions are designed to secure valuable face time with any registered delegate.

One-2-One Networking provides an intimate setting for you to shake hands and strike pivotal deals.

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Day One Agenda

1:30-3:00 PM

FINANCE & STRATEGY

Financing Water After the Great Recession of 2020

In 2018 investment has been flowing back into the water sector at a faster rate than at any time since the 2009/10 stimulus, but we can all feel vulnerability at the heart of the system. Income from customer rates is insufficient to meet long term investment needs, and the tax cuts that have spurred economic growth could ultimately entail the restructuring of public finances. This panel session brings together six unique perspectives on the utility sector's exposure to the inevitable economic down-cycle and how the sector must act now to ensure that it is the master of change rather than its victim.

CHAIR

Paul Hasler, *GW*

SPEAKERS

Bill Teichmiller, *EJ Water Cooperative*
John Hallacy, *The Bond Buyer*
Ryan M. Connors, *Boenning & Scattergood*
Robert Powelson, *NAWC*
Daphne Kenyon, *Lincoln Institute of Land Policy*
Brian Thomas, *Delta Conveyance Finance Authority*

THE CTO FORUM

CTO Panel

Innovative thinking is required in order to ensure the American water sector gets the technology solutions that it needs for the next five years. Too many new technologies suffer from a lack of market relevance or from a prolonged commercialization process. A group of the most influential chief technology officers in the water sector come together to discuss the innovative approaches required to create better harmony between technology offerings and end-users' needs.

CHAIR

Charlie Walker, *GW*

SPEAKERS

Jay Iyengar, *Xylem*
Karen Golmer, *MIT Deshpande Center for Technological Innovation*
Sebastien Bessenet, *Veolia Water Technologies*
Cindy Paulson, *Brown and Caldwell*
Ting Lu, *Clean Water Services*

WATER LEADERS STRAND

Inducting New LUOW Members

The Leading Utilities of the World is a global network of the world's most successful and innovative water and wastewater utilities. Since the initiative's launch in 2017, 32 Gold Standard utilities have been inaugurated, and now five new nominees will present their outstanding innovations and 5-year plans to be inducted into the network.

ADVISORY BOARD

Howard Neukrug, *Global Water Leaders Group and Leading Utilities of the World*

Biju George, *DC Water*

Sue Murphy, *Water Corporation, Australia*

SPEAKERS

Jim Lochhead, *Denver Water*

Karen Pallansch, *Alexandria Renew*

Harlan Kelly, *San Francisco Public Utilities Commission*

Louise Hunter, *Northumbrian Water, UK*



FOUNDATION PARTNER:

JACOBS

AN INITIATIVE OF:

WATER LEADERS

3:00-3:30 PM

One-2-One Networking & Coffee Break

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Day One Agenda

3:30-5:00 PM

FINANCE & STRATEGY

Creating the Future of Finance

What does a sustainable financial model look like for the American water sector, and how do we bring it about? It is not enough to talk about the value of water: some hard decisions need to be taken in order to make the slogan a reality, because no one wants to foot the bill. Here we invite representatives of the federal government, local government and the private sector to outline their vision and the way they expect to see it delivered.

CHAIR

Adam Krantz, *NACWA*

SPEAKERS

Jill Jamieson, *JLL*
Michael Patella, *EPA*
Edward Fanter, *Deloitte*
Disque Deane, *Water Asset Management*
Christopher McLean, *Rural Utilities Services, USDA*
Nicolette Bateson, *Great Lakes Water Authority*

THE CTO FORUM

America's Toughest Wastewater Challenges

What is the biggest pain point for industrial water users? For most of them it is the problem of managing their wastewater streams to meet the often conflicting requirements of regulation, stewardship commitments and corporate budgets. Here we invite some of those facing the greatest challenges to explain the solutions they have developed and how water technology companies could make their lives easier.

CHAIR

Jon Freedman, *Suez Water Technologies & Solutions*

SPEAKERS

Michael Misstishin, *D.G. Yuengling & Son, Inc.*
Francis McAllister, *Freeport McMoRan*
Bill Kennedy, *Duke Energy*
Lori Traweck, *Gulf Coast Authority*

WATER LEADERS STRAND

Leadership Roundtables

What makes the 'Leading Utilities of the World' innovation network different is the development of a truly innovative culture within and across utilities. In this session, the speakers from the first innovation session will receive prepared and structured feedback on their presentations from the Advisory Board of the 'Leading Utilities of the World' innovation network. Attend this session to join with the leaders of the world's most innovative utilities at roundtables, and hear their insights on how the water sector can progress to an even higher level of performance, both as individual organizations and through collaboration.

ADVISORY BOARD

Howard Neukrug, *Global Water Leaders Group and Leading Utilities of the World*
Biju George, *DC Water*
Sue Murphy, *Water Corporation, Australia*

SPEAKERS

Jim Lochhead, *Denver Water*
Karen Pallansch, *Alexandria Renew*
Harlan Kelly, *San Francisco Public Utilities Commission*
Louise Hunter, *Northumbrian Water, UK*



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CONFERENCE
Thursday
Oct 25th

Day One Agenda

5:00-5:30 PM

One-2-One Networking & Coffee Break

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5:30-6:30 PM

Cocktail Hour

6:45-10:00 PM

Gala Dinner

MASTER OF CEREMONIES Rich Henning, *Suez*

GUEST SPEAKER Edward Burtynsky, *Ed Burtynsky Photography*

"I wanted to understand water: what it is, and what it leaves behind when we're gone. I wanted to understand our use and misuse of it. I wanted to trace the evidence of global thirst and threatened sources. Water is part of a pattern I've watched unfold throughout my career. I document landscapes that, whether you think of them as beautiful or monstrous, or as some strange combination of the two, are clearly not vistas of an inexhaustible, sustainable world." – Edward Burtynsky, www.edwardburtynsky.com

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CONFERENCE

Friday, October 26th

CONFERENCE
Friday
Oct 26th

Day Two Agenda

7:00-8:15 AM

Breakfast

8:15-9:30 AM

Day 2 Plenary: CEOs Panel

A new kind of thought leadership is emerging as the North American water industry adapts to rising interest rates, rising raw materials prices, and rising client sophistication. Our panel of senior executives are helping to shape the future by driving change to address the needs of a rising population, unpredictable weather patterns, and an increasingly data-driven economy.

CHAIR

Andrew D. Seidel, *UGSI Solutions, Inc.*

SPEAKERS

Allan Connolly, *Aclara*

Patrick Decker, *Xylem*

Eric Gernath, *Suez North America*

Cindy Wallis-Lage, *Black & Veatch*

Bob Pragada, *Jacobs*

Scott Hall, *Mueller Water Products*

9:30-10:00 AM

One-2-One Networking & Coffee Break

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Day Two Agenda

10:00-11:30 AM

FINANCE & STRATEGY

What Do Investors Want From Water?

Ultimately, we are all in the business of creating value, but who really understands where value lies in the water sector? In this session we invite major water investors to describe what they want from water and how we can deliver more of those valuable qualities.

CHAIR

Deane Dray, *RBC Capital Markets*

SPEAKERS

Alina Donets, *Allianz Global Investors*
Matt Sheldon, *KBI Global Investors*
Janet Glazer, *Fidelity Investments*
Bill Malarkey, *Amane Advisors*

THE CTO FORUM

What Does a Great Water Future Look Like?

The future of the water industry depends on the aspirational visions of next generation utility leaders. This session gives you the opportunity to be at the forefront of industry development as these next generation utility leaders, who were matched with a utility mentor prior to the event, present their vision of a water utility in the year 2040.

CHAIR

Howard Neukrug, *Global Water Leaders Group*

MENTORS

Roger Bailey, *Central Contra Costa Sanitary District*
Patrick Cairo, *PCairo Management Consulting LLC*
Kishia Powell, *City of Atlanta Department of Watershed Management*
Adel Hagekhalil, *City of Los Angeles*
Carla Reid, *Washington Suburban Sanitary Commission*

NEXT GENERATION LEADERS

Dana Gonzalez, *Hampton Roads Sanitation District*
Raul Gonzalez, *Hampton Roads Sanitation District*
Tera Fong, *DC Water*
Kelly Anderson, *Philadelphia Water Department*
Aisha Niang, *Houston Water*
Serge Haddad, *Los Angeles Department of Water and Power*

SESSION SPONSOR



WATER LEADERS STRAND

Adaptive Infrastructure: Paths to Preparedness

Water utilities are facing operational threats like never before. From historic flooding and droughts to targeted cyber attacks, cities are beginning to rethink their physical and digital infrastructure to prepare for new extremes. Discover how private companies and utilities can collaborate to adopt innovative stormwater management approaches, water reuse and desalination projects, and front line cybersecurity initiatives.

CHAIR

Jill Hudkins, *Tetra Tech*

SPEAKERS

Matthew Ries, *DC Water*
Marc Cammarata, *Philadelphia Water Department*
Jim Lochhead, *Denver Water*
Alan Cohn, *New York City Department of Environmental Protection*
Erica Brown, *Association of Metropolitan Water Agencies*
Richard Harasick, *Los Angeles Department of Water and Power*

Day Two Agenda

11:30-11:45 AM

Transition Break

11:45-1:00 PM

FINANCE & STRATEGY

Totex Thinking

Perhaps the biggest opportunity for squeezing further efficiencies out of the American water sector is in optimizing procurement between capex and opex. In the UK they call it Totex thinking: the idea that taking separate accounts of profit & loss spending and balance sheet investment ultimately adds to the customer's bill. Instead the focus is on managing risks right down the supply chain to minimize the overall cost to the customer. How can American utilities further optimize their spending to keep rates down?

CHAIR

Ian Elkins, *GW*

SPEAKERS

Pete Perciavalle, *Stantec*
Katherine Oven, *Santa Clara Valley Water District*
Brian Cullen, *VICO*
Jason Tucker, *Anglian Water Services*
Luis Casado, *Gannett Fleming*

THE CTO FORUM

The New Economics of the Regulatory Frontier

Despite retreats in some areas of industrial environmental regulation, the EPA has been active in addressing concerns about emerging contaminants such as PFAS (per- and polyfluoralkyl substances). These bring with them a new technological and financial challenge: how can they be eliminated without an exponential increase in treatment costs? Water Desalination Report Editor Tom Pankratz has brought together some of the key combatants on this regulatory frontier to discuss what is needed in technology terms to sustain these advances in customer protection.

CHAIR

Tom Pankratz, *Water Desalination Report*

SPEAKERS

YuJung Chang, *AECOM*
Dr. Dora Chiang, *CDM Smith*
Catherine Swanson, *Evoqua Water Technologies*
Nora Stockhausen, *Calgon Carbon*
Michael Pickel, *Horsham Water and Sewer Authority*

WATER LEADERS STRAND

Uninvented Technologies

The needs of municipal end-users and the solutions provided by their private sector counterparts are still far from being reconciled. Chaired by Booky Oren, this session gathers a group of innovative utility leaders to discuss how technological solutions may be developed to meet their long-standing operational and capital challenges.

CHAIR

Booky Oren, *Booky Oren Global Water Technologies*

SPEAKERS

Erin Mahoney, *The Regional Municipality of York*
Deven Upadhyay, *Metropolitan Water District of Southern California*
Reese Johnson, *Metropolitan Sewer District of Greater Cincinnati*
Donovan Burton, *San Antonio Water System*

CONFERENCE
Friday
Oct 26th

Day Two Agenda

1:00-2:00 PM

Lunch

1:30-2:00 PM

One-2-One Networking & Coffee Break

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One-2-One Networking provides an intimate setting for you to shake hands and strike pivotal deals.

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2:00-3:00 PM

Closing Panel

The Summit zooms out for an international perspective of the global water market. GWI's Publisher, Christopher Gasson, hosts a panel of industrial and municipal water sector experts with a discussion of what the North American water sector must learn from the rest of the world.

CHAIR

Christopher Gasson, GWI

SPEAKERS

Sue Murphy, Water Corporation, Australia

John Gibson, Veolia North America

Heiner Markhoff, Suez Water Technologies
& Solutions

Thierry Noel, Amame Advisors

Speakers

ADAM KRANTZ

CEO, *National Association of Clean Water Agencies*

ADEL HAGEKHALIL

Assistant General Manager, *Los Angeles City Sanitation*

AISHA NIANG

Deputy Assistant Director for Wastewater Operations,
Houston Water

ALAN COHN

Managing Director, Integrated Water Management, *New York City Department of Environmental Protection*

ALINA DONETS

Portfolio Manager, *Allianz Global Investors*

ALLAN CONNOLLY

President, *Aclara*

ANDREW SEIDEL

CEO, *UGSI Solutions, Inc.*

ANDY KRICUN

Executive Director, *Camden County Municipal Utilities Authority*

BERNARD YAROS

Economist, *Moody's Analytics*

BIJU GEORGE

COO, *DC Water*

BILL KENNEDY

Strategic Engineering and Water Programs Manager,
Duke Energy

BILL MALARKEY

Managing Partner, North America Region, *Amane Advisors*

BILL TEICHMILLER

CEO, *EJ Water Cooperative*

BOB FREUDENTHAL

Executive Director, *Tennessee Association of Utility Districts*

BOB PRAGADA

COO, *Jacobs*

BOOKY OREN

Chairman and CEO, *Booky Oren Global Water Technologies*

BRIAN CULLEN

President & CEO, *VICO*

BRIAN THOMAS

Executive Director, *Delta Conveyance Finance Authority*

CARLA REID

General Manager, *Washington Suburban Sanitary Commission*

CATHERINE SWANSON

Business Development Manager, *Evoqua Water Technologies LLC*

CHARLIE HINRICHSEN

Chemical Treatment Specialist, *Chevron (retired)*

CHARLIE WALKER

Technology Editor, *Global Water Intelligence*

CHRISTOPHER MCLEAN

Acting Administrator, Rural Utilities Services, *USDA*

CHRISTOPHER GASSON

Owner, *Global Water Intelligence*

CINDY PAULSON

Senior Vice President, *Brown and Caldwell*

CINDY WALLIS-LAGE

President, Water Business, *Black & Veatch Corporation*

DANA GONZALEZ

Chemist, *Hampton Roads Sanitation District*

DAPHNE A. KENYON, PHD.

Resident Fellow in Tax Policy, *Lincoln Institute of Land Policy*

DAVID FOOSE

Director, Power and Water Cybersecurity,
Emerson Automation Solutions

DAVID HENDERSON

Founder, *XPV Water Partners*

DAVID STANTON

President Utility Operations, *SUEZ*

DAVID ZAMBITO

Co-Chair, Utility, *Environmental & Energy (UE2)*,
Group Office Managing Partner, *Cozen O'Connor*

DEANE DRAY

Managing Director, *RBC Capital Markets*

DEBRA COY

Partner, *XPV Water Partners*

DEVEN UPADHYAY

Assistant General Manager/Chief Operating Officer,
Metropolitan Water District of Southern California

DISQUE DEANE JR.

Chief Investment Officer & Co-Portfolio Manager, *Water Asset Management, LLC*

DOMINIQUE LUECKENHOFF

Senior Advisor to the Regional Administrator,
US EPA Region III

DONOVAN BURTON

Vice President, Water Resources & Governmental
Relations, *San Antonio Water System*

Speakers

DR. DORA CHIANG

Technical Strategy Leader - Emerging Contaminants,
CDM Smith

EDWARD BURTYNSKY

Founder, *Edward Burtynsky Photography*

EDWARD FANTER

Senior Member, Infrastructure Advisory, *Deloitte*

ELI DÍAZ-ATIENZA

Executive President, *PRASA*

ERIC GERNATH

CEO, *Suez - North America*

ERICA BROWN

Chief Strategy and Sustainability Officer, *Association of Metropolitan Water Agencies (AMWA)*

ERIN BOEKE BURKE

Associate, *S&P Global*

ERIN MAHONEY

Commissioner of Environmental Services, *The Regional Municipality of York*

FRANCIS MCALLISTER

Vice President of Land & Water, *Freeport-McMoRan*

GEORGE HAWKINS

Founder and President, *Moonshot LLC*

HARLAN KELLY

Commissioner, *San Francisco Public Utilities Commission*

HEINER MARKHOFF

CEO, *Suez Water Technologies & Solutions*

HOWARD NEUKRUG

Senior Advisor, *Global Water Leaders Group*

IAN ELKINS

Editor, *Global Water Intelligence*

JAMES REYES

Vice President of Sales, *Aquatic Informatics*

JANET GLAZER

Managing Director, Research, Equity Division,
Fidelity Investments

JASON TUCKER

Director of Alliances & Integrated Supply Chain, *Anglian Water Services Ltd.*

JAY IYENGAR

Senior Vice President & Chief Innovation &
Technology Officer, *Xylem*

JEFF GREEN

Executive Chairman, *Moleaer Inc.*

JEFFREY HUGHES

Director, *UNC Environmental Finance Center*

JILL HUDKINS

Vice President and National Practice Leader for One Water
Programs, *Tetra Tech*

JILL JAMIESON

Managing Director, *JLL*

JIM LOCHHEAD

CEO & Manager, *Denver Water*

JOHN DURAND

Former President & COO, *WaterBridge Resources*

JOHN GIBSON

President & COO, Municipal and Commercial Business,
Veolia North America

JOHN HALLACY

Program Director & Contributing Editor, *The Bond Buyer*

JON FREEDMAN

Senior Vice President, Global Government Affairs, *Suez Water Technologies & Solutions*

KAREN GOLMER

Innovation Manager, *MIT Deshpande Center for Technological Innovation*

KAREN PALLANSCH

CEO/General Manager, *Alexandria Renew Enterprises*

KATHERINE OVEN

Deputy Operating Officer, *Santa Clara Valley Water District*

KISHIA POWELL

Commissioner, *Atlanta Department of Watershed Management*

LORI TRAWEEK

General Manager and CEO,
Gulf Coast Authority

LUIS CASADO

Water Business Line Director, *Gannett Fleming*

MARC CAMMARATA

Director Office of Watersheds, *Philadelphia Water Department*

MARK HALLEMAN

Senior Vice President, *Inframark*

MARTIN ADAMS

Director of Water Operations, *Los Angeles Department of Water and Power*

Speakers

MATT SHELDON

Senior Portfolio Manager, Natural Resources Equity Team,
KBI Global Investors

MATTHEW RIES

Chief, Water Quality and Watershed Management,
DC Water

MICHAEL GAUGLER

Senior Vice President, *Janney Montgomery Scott*

MICHAEL MISSTISHIN

Environmental Coordinator/Wastewater Treatment Manager,
D.G. Yuengling & Son Inc.

MICHAEL PATELLA

Senior Policy Advisor, Water Infrastructure and Resiliency
Finance Center, *Environmental Protection Agency*

MICHAEL PICKEL

Director of Compliance & Regulatory Affairs,
Horsham Water & Sewer Authority

NICOLETTE N. BATESON

Chief Financial Officer/Treasurer, *Great Lakes Water Authority*

NORA STOCKHAUSEN

Vice President, Municipal & Reactivation Business Unit,
Calgon Carbon Corporation

NORMA CAMACHO

CEO, *Santa Clara Valley Water District*

PATRICK CAIRO

President, *PCAIRO Management Consulting*

PATRICK DECKER

CEO, *Xylem*

PAUL HASLER

North America Editor, *Global Water Intelligence*

PETE PERCIAVALLE

Director, Client Enterprise Solutions and
Utility Optimization, *Stantec*

RAJA KADIYALA

Vice President, Global Director for Digital Solutions, and Senior
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Amane Advisors is an international strategic advisory firm dedicated to the water industry. We advise our clients by delivering accurate and relevant market intelligence, creating focused and results-oriented strategies, leading value-creating transactions and designing unique offerings for their products and services. Our mission is to advise water industry leaders who are pushing the frontiers, inspiring innovation and creating the future.

Our advice is based on years of analysis and experience, as well as our partnership with Global Water Intelligence and the hundreds of global water experts in our network. We draw on insights and expertise from the water industry and farther afield to transform your aims and ambitions into successes. We offer a unique portfolio of services to business leaders, innovators and investors to maximise returns, accelerate growth and create sustainable competitive advantages:

- Market Intelligence
- Strategy Development
- Commercialization
- M&A Support
- Digital Transformation
- PPP Advisory



Capstone Headwaters is one of the largest independent investment banking firms in the United States. We exist solely to provide unbiased advice and achieve exceptional results for entrepreneurs, family-owned businesses and private equity backed companies.

Headquartered in Boston, Capstone Headwaters has 150 professionals across 19 offices in the US, UK and Brazil with a global reach that includes over 300 professionals in 33 countries. Our advisory capabilities include M&A advisory, debt & equity private placement and project & infrastructure finance. We pride ourselves on our deep industry expertise across 16 industries and our ability to deploy cross-industry teams to ensure that we bring multi-industry perspectives in pursuit of outstanding results for our clients.

Our Water Technology practice is one of the foremost dedicated sector advisory groups with the ability to draw on our broader Industrial Technologies, Chemicals, Oil & Gas, and Industrial Services domain knowledge as needed. Our unwavering commitment and high-integrity approach have allowed us to be ranked as one of the most active and awarded advisors in the country. Most notably, we have been recognized as Middle Market Firm of the Year 12 times by 5 different industry sources over the past seven years. For more information, visit www.capstoneheadwaters.com.



As the Nation's largest distributor of Waterworks products, Core and Main (www.coreandmain.com) distributes a complete line of water, sewer, storm and fire protection products and asset management technology solutions to serve the needs of private water companies, contractors and municipalities in all aspects of public works and private construction industries.

Core and Main believes in the mission of developing solutions for water-related challenges facing the nation. We work with organizations engaging conversation at the legislative level to bring visibility to the aging infrastructure issues our cities currently face. We are proud to partner with like-minded industry professionals to help bring safe, clean water to communities across the United States. Through our vast network of associates, 240+ facilities and over \$300,000,000 combined inventory we provide unique solutions in driving operational efficiencies including asset management technology, GIS/GPS, materials training, emergency services planning and risk mitigation. We are flexible in our solutions so that your priorities and focus is ours.

When you partner with Core and Main, know that we are much more than just supplies. We are solutions.



IDE is a world leader in water treatment solutions. The company specializes in the development, engineering, construction and operation of enhanced small to mega-size sea and brackish water desalination solutions. This includes industrial water treatment and water reuse solutions, based on the most advanced technologies, at some of the world's largest membrane-based and thermal-based desalination plants. We provide high quality water for a wide range of markets - municipalities, oil and gas, mining, refineries and power stations, with a total capacity over 3 million m³/day. With offices in the US, China, India, Australia, Chile and headquarters in Israel, we deliver full customer partnership anywhere in the world.

IDE believes in true partnership. From the outset, we custom tailor each solution to our clients' unique requirements, carefully develop the best approach to meet each project's needs, budget and challenges in full, and provide consistent and attentive support. IDE's Seawater Reverse Osmosis (SWRO) projects constantly set new records in high quality, low cost and energy efficiency, as demonstrated in IDE's plant at Sorek, Israel, which is the world's largest SWRO desalination plant. IDE has a well-earned reputation as the technology leader in the industry, constantly developing creative solutions for existing challenges.

Sponsor Descriptions



Jacobs leads the global professional services sector delivering solutions for a more connected, sustainable world. With \$15 billion in fiscal 2017 revenue when combined with full-year CH2M revenues and a talent force of more than 77,000, Jacobs provides a full spectrum of services including scientific, technical, professional and construction- and program-management for business, industrial, commercial, government and infrastructure sectors. Jacobs combines local delivery teams, deeply rooted in the community with global subject matter experts and best practices to flexibly address evolving project demands and bring world-class solutions to meet the most complex infrastructure challenges for their clients in public and private sectors. For more information, visit www.jacobs.com.



The LOR Foundation works to increase prosperity in the rural Mountain West, while preserving the character that defines these iconic places. We're more than just a funder. We provide expertise, make connections and support projects that allow towns to thrive. The rural West is a beautiful and complex region. Each of the 220 counties across LOR's five-state region (ID, MT, WY, CO, NM) has its own quirks, its own assets, and its own puzzles. Together with communities, we protect clean water supplies, preserve agricultural land and open space, revitalize main streets and improve access to the outdoors and recreation. We believe a healthy economy and a healthy environment can exist in balance. And we understand why people are rural by choice. Our hope is to make that choice easier. www.lorfoundation.org



The mission of Magna Imperio Systems Corporation is to enable solutions to the world's water crisis through innovative technology and services. The challenges of this crisis are both industrial and municipal with water desalination waste and energy consumption as one of the foremost challenges. Our company was founded with the purpose of developing and commercializing our END™ electro-desalination technology to conserve, recycle, and deliver clean water where it is needed, anytime, anywhere in the world.

END™ systems transform two key components of traditional electrodialysis to deliver maximum water recovery with minimum energy consumption in numerous brackish water treatment applications. Applications include RO brine recovery and high recovery hard brackish water treatment in markets from food and beverage to those requiring de-centralized mobile treatment solutions. END™ systems are fully automated and modular to deliver treatment capacities from 5 gpm to 100 gpm and beyond.

Our dedicated team of business leaders, engineers, and scientists is committed to rapidly expanding the impact of END™ treatment technology in water and energy sensitive industries to reduce costs and maximize desalinated water production. We will accomplish this while adhering to the highest standards of personal integrity and environmental sustainability.



Mueller Water Products, Inc. (NYSE:MWA) is a leading manufacturer and marketer of products and services used in the transmission, distribution and measurement of water in North America. Our broad product and service portfolio includes engineered valves, fire hydrants, metering products and systems, leak detection and pipe condition assessment. We help municipalities increase operational efficiencies, improve customer service and prioritize capital spending, demonstrating why Mueller Water Products is Where Intelligence Meets Infrastructure®. Mueller Water Products brands include Mueller®, Echologics®, Hydro Gate®, Hydro-Guard®, Jones®, Mi.Net®, Milliken®, Pratt®, Singer®, and U.S. Pipe Valve & Hydrant. For more information, visit www.muellerwaterproducts.com.



Newterra is a leading provider of decentralized and modular water, wastewater, and groundwater remediation solutions to resource, power generation, industrial, private development, and select international markets. Newterra currently has operations in Canada, United States, Germany, and Chile that enables the company to address the needs of clients globally. Serving a global client base with diverse water challenges, you will find our solutions meet the high purity water needs of power plants, remediating mining tailing ponds, and providing modular potable water and sewage treatment for communities and remote camps.

Combined with its suite of patented technologies, Newterra's capabilities include design, engineering, and manufacturing, as well as a full suite of aftermarket services. Controlling the process directly, including post-installation support, allows Newterra to deliver with confidence. We're your one point of contact for a successful project. In addition to being selected as a Cleantech Top 100 Company in 2013 and 2015, Newterra has also achieved Platinum status as a distinguished recipient of Deloitte's 50 Best Managed Companies Award since 2008.

For more information Visit our website <https://www.newterra.com>

Sponsor Descriptions



Omya is a leading global producer of industrial minerals derived from calcium carbonate and dolomite, and a worldwide distributor of chemical products. Calcium carbonate has multitude of characteristics that make it an ideal raw material for a wide variety of uses in environmental applications including water & waste water treatment.

- Omyaqua® high quality EN-1018 or NSF-60 drinking approved calcium carbonate for remineralization/stabilization of soft and desalinated water.
- Omya Advanced Remineralization Process using micronized Omyaqua® within a modular, highly efficient and patented remineralization process providing stabilized superior final water quality. The process effectively improves CAPEX and OPEX of existing and newly planned desalination post-treatment systems.
- Omya Optical® used in sewage treatment plants to naturally enhance the activated sludge process and help biological treatment processes maintain peak efficiency. Acting as a pH stabilizing mineral increasing the acid neutralizing capacity and provides an excellent buffer against sudden pH changes. Supports the biological process providing ballast to flocs for reduced turbidity and improved dewatering performance.
- Innovative natural mineral-based products and solutions are developed targeting more efficient removal of suspended solids, improved dewatering performance for sludge and mine tailings or the removal of heavy metals in surface & ground water as well as process & waste water treatment.



Communities are fundamental. Whether around the corner or across the globe, they provide a foundation, a sense of place and of belonging. That's why at Stantec, we always design with community in mind.

We care about the communities we serve—because they're our communities too. We're designers, engineers, scientists, and project managers, innovating together at the intersection of community, creativity, and client relationships. Balancing these priorities results in projects that advance the quality of life in communities across the globe.

The Stantec community unites approximately 22,000 employees working in over 400 locations across 6 continents. As the #1 ranked International Design Firm in sewer/waste and water (ENR), we approach every project—whether at the local, regional, or watershed level—thoughtfully, and execute it responsibly. We partner with our clients to design fit-for-purpose solutions that address the unique needs of their project and the community it serves. Our holistic approach balances creative vision and technological innovation with environmental, regulatory, and economic needs. Stantec trades on the TSX and the NYSE under the symbol STN. Visit us at stantec.com or find us on social media.



Operating across the United States and Canada with over 3,200 employees, SUEZ in North America is dedicated to smart environmental sustainability and resource management. Every day, we provide drinking water, wastewater, and waste collection service to 6.4 million people and treat over 600 million gallons of water and over 450 million gallons of wastewater. Through our business partnerships, we deliver water treatment and advanced network solutions to 16,000 industrial and municipal sites; process 55,000 tons of waste for recycling; and rehabilitate and maintain water assets for more than 4,000 municipal and industrial customers. As a subsidiary of Paris-based SUEZ, we manage \$4.1 billion in total assets and posted revenues of 1.064 billion in 2017.



The Water Design-Build Council, a non-profit 501C6 educational organization, was established in 2005 for the purpose of helping owners and industry practitioners become knowledgeable about the best practices for use in design-build delivery methods for the WATER infrastructure. WDBC members and advisors are dedicated to its mission...to *evolve best practices for successful implementation of water projects through collaborative delivery methods by facilitating thought leadership with stakeholders through research, education, and communication.*



Woodard & Curran is an integrated planning, engineering, science, and operations company, offering a diverse range of services to help our clients address the toughest infrastructure, environmental, water resources, and manufacturing challenges.

Talented people are at the heart of our firm. Our company was founded in 1979 on a simple business concept: provide an enjoyable place to work with opportunity, integrity, and commitment, and we will attract talented people. It happened. At the heart of our company are experts in their fields who are passionate about what they do, solving complex water and environmental issues with creativity and tenacity. Our integrity and commitment are matched only by the depth of our expertise. Our staff are specialists in their fields, offering in-depth understanding of cutting-edge technology, astute problem-solving, multi-disciplinary engineering, and expert funding and regulatory guidance. Privately held and steadily growing, we serve public and private clients from 30 offices across the country.




XPV Water Partners is comprised of experienced water entrepreneurs, operators, and investment professionals dedicated to making a difference in water. XPV partners with, invests in, and actively supports water-focused growth companies so they can grow and deliver value for all stakeholders. XPV manages over \$400 million in investment capital from some of the top institutional investors in North America, Europe, the Middle East, and Asia. The XPV family of portfolio companies is making a difference in water both by driving more efficient management of the world's most critical resource and by creating significant shareholder value that can help move the industry forward. Visit www.xpvwaterpartners.com to learn more.



Xylem is a leading global water technology company committed to developing innovative technology solutions to the world's water challenges. The Company's products and services move, treat, analyze, monitor and return water to the environment in public utility, industrial, residential and commercial building services settings. Xylem also provides a leading portfolio of smart metering, network technologies and advanced infrastructure analytics solutions for water, electric and gas utilities. The Company's nearly 17,000 employees bring broad applications expertise with a strong focus on identifying comprehensive, sustainable solutions. Headquartered in Rye Brook, New York with 2017 revenue of \$4.7 billion, Xylem does business in more than 150 countries through a number of market-leading product brands.

Xylem's business is built on a foundation of sustainability. The Company has been included on FORTUNE's 2018 "Change the World" list, a ranking of 50 companies that make a significant social impact through their core business strategy. Listed as number 7 in the ranking, Xylem was recognized for creating tangible social value through its innovative solutions that are helping to solve water challenges across the world. Xylem was also ranked number 10 in Barron's 100 Most Sustainable Companies list. For more information, please visit us at www.xylem.com.





Let's Solve Water


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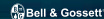
Water is infinitely renewable but the amount of water on earth is fixed.


At Xylem, we provide sustainable, industry-leading solutions to our customers' challenges across the water cycle. With advanced technologies to move, treat and test water in sustainable ways, along with smart metrology, network communications and advanced data analytics, we are helping customers operate with greater efficiency and reliability than ever before. Our 17,000-strong global team is dedicated to creating innovative solutions that create value for our customers and help renew this valuable resource for future generations.
















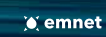














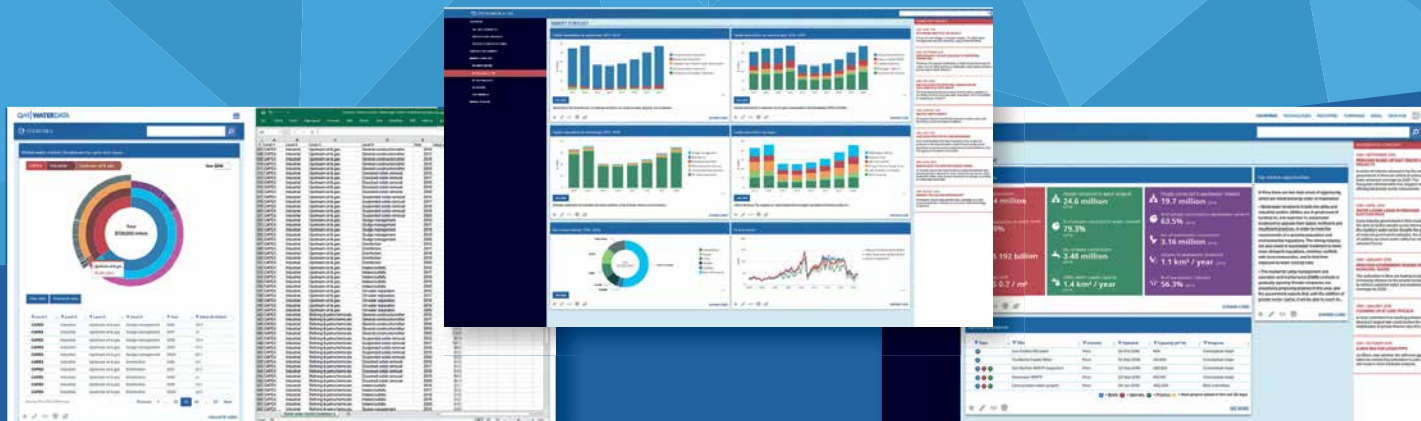




xylem.com



Streamline your business planning process



GWI WaterData is GWI's market intelligence platform, offering the richest, most accurate and timely information service for validating strategy in the international water market. Analyse the current size and growth rate of your market, assess the competitive and technological landscape, and identify potential customers, partners and routes to business opportunity.



Uncover opportunities in your target markets; access a global picture and then dive deeper into 100 country profiles and 2018-2023 market forecasts.



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Develop a strategy to take to your board. Track market trends and monitor the activities of key players with regular data updates, webinars, and 400+ company profiles.



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