



**ASSOCIATION OF
METROPOLITAN
WATER AGENCIES**

**AMWA Board of Directors
Meeting Agenda**

**June 8, 2025
7:30 a.m. – 12:00 p.m. MDT**

**Denver Water, 1600 W 12th Ave, Denver, Colorado
Dilon Conference Room**



AMWA Board of Directors
Denver Water, 1600 W 12th Ave, Denver, Colorado
Dilon Conference Room
Sunday, June 8, 2025, 7:30 a.m. – 12:00 p.m. MDT

7:30 **Breakfast**

8:00 **Welcome**

AMWA business

1. President's Remarks (Jeff Szabo)
2. Minutes from April Board meeting (Chris Browning)
3. CEO Report
4. Auditor recommendations implementation
5. Financial Update (Lindsey Rehtin)
6. Appointment to fill vacant Region 6 seat (John Sullivan)

Pg# Action

1 DECISION
10 INFORMATION
13 INFORMATION
15 INFORMATION
DECISION

8:15 **Board vs. Staff Roles** (Bob Saner)

DISCUSSION

9:15 **Subscriber Policy** (Calvin Farr)

1. 2026 Dues Schedule

22 DISCUSSION
28 INFORMATION

9:45 **Environmental Justice Award** (Jeff Szabo)

29 DISCUSSION

10:15 **AMWA Updates**

Counsel's report

INFORMATION

Policy

1. Legislative Update
2. Regulatory Update
3. Sustainability Update

31 INFORMATION
37 INFORMATION
41 INFORMATION

Management Initiatives

1. Utility Management Update
2. Membership Update

43 INFORMATION
48 INFORMATION

10:55 **New Business**

11:00 **Staff Culture- Closed Session** (Jeff Szabo)

DISCUSSION

12:00 **Adjourn**



Draft Meeting Minutes

Draft AMWA Board of Directors Meeting Minutes
April 7, 2025, 9:00 a.m. ET
Washington, DC

Attendance:

AMWA Board of Directors

- | | | |
|---------------------|----------------------|---------------------|
| 1. Jeff Szabo | 2. Calvin Farr | 3. Lindsey Rechten |
| 4. Chris Browning | 5. Julie Anderson | 6. Verna Arnette |
| 7. Cathy Bailey | 8. Tad Bohannon | 9. Jeff Brown |
| 10. Alex Chen | 11. Randy Hayman | 12. Matthew Jalbert |
| 13. Dave Johnson | 14. Yann Le Gouellec | 15. Angela Licata |
| 16. Rachel Murphy | 17. Will Pickering | 18. Shaun Pietig |
| 19. Holly Rosenthal | 20. John Sullivan | 21. Ken Waldroup |

AMWA Staff

- | | | |
|------------------------|-----------------------|-----------------------|
| 22. Bob Saner, Counsel | 23. Tom Dobbins | 24. Antoinette Barber |
| 25. Dan Hartnett | 26. Eugenia Cadena | 27. Heather Talbert |
| 28. Kaline Gabriel | 29. Hayden MacLachlan | 30. Jessica Evans |
| 31. Megan Seymour | | |

Other Attendees

- | | | |
|---|--|--|
| 32. James LeMire,
American Cast Iron Pipe
Co. | 33. David Westman,
Westman & Associates
Consulting | 34. Sheila Wiora,
Gulf Coast Water
Authority |
| 35. Bill Murray, Reading
Area Water Authority | 36. John Kmiec, Tucson
Water | 37. Hugh Sinclair,
Arcadis |
| 38. Jeremy Cummings,
Columbus Water Works | 39. Spencer Bruce,
Louisville Water | 40. Jeffrey Thompson,
DC Water |

AMWA President Jeff Szabo called the meeting to order at 9:04 a.m.

Approval of Previous Meeting Minutes

Mr. Szabo requested a motion to amend the previous meeting’s minutes to update the attendance record. Mr. Chris Browning moved that the AMWA Board accept the minutes with the proposed revision. Ms. Julie Anderson seconded. **With an auditory poll all in favor, the meeting minutes were amended.**

Chief Executive Officer Report

Chief Executive Officer Tom Dobbins delivered the CEO report. Mr. Dobbins thanked members for their patience during the new office space discussion and recognized Ms. Eugenia Cadena, for her efforts with the new auditors, membership renewals, and conference logistics.

Mr. Dobbins explained that the 2025 Water Policy Conference was expected to exceed its attendance and revenue targets. Dues collection is ongoing, with efforts led by Heather Talbert to secure payments from outstanding members. Additionally, a hardship membership has been awarded to five utilities: Hartford Metropolitan District, Kalamazoo Public Services, Pinellas County Utilities Department, Westmoreland County, and Peace River Regional Water Supply.

Mr. Dobbins then discussed improved cross departmental collaboration, through weekly director meetings. As well, staff continues to have regular offsite trainings sessions. He thanked the Board for the feedback and positive results of the Board survey.

Committee structures have been realigned for efficiency, particularly with the creation of a Membership Committee, chaired by Mr. Calvin Farr and Ms. Julie Anderson. Membership growth in 2024 were to bring in six new utilities, rounding the total to 179 members. The 2025 goal is to bring in seven new member organizations.

Membership Trends:

Year	Subscribers	Members
2023	21	178
2024	33	179
2025	29	178

Mr. Dobbins recognized the organization’s strong program performance. He highlighted AMWA’s collaboration with the US Water Alliance on a much-needed economic impact study for the water sector to show how investments in water infrastructure positively impact the overall economy and job creation.

WaterISAC

Mr. Dobbins acknowledged Mr. John Sullivan for his leadership and recruitment successes with the Water Information Sharing & Analysis Center (WaterISAC). Current membership numbers are ahead of last year's figures. However, funding remains an ongoing challenge.

Audit Committee Report

President Szabo then introduced Mr. Yann Le Gouellec, speaking on behalf of the Audit Committee. Mr. Le Gouellec summarized the results of the recent audit, which included a clean opinion on revenues. He also noted the following recommendations: increasing cyber liability insurance coverage and adjusting the organization's stock allocations from 12% to 20%. Additionally, it was recommended that the organization document its financial processes and expand its segregation of duties.

A question was raised regarding rotating the auditor through bylaw amendments. Mr. Jeff Brown asked whether the audit recommendations were sufficiently robust. Mr. Le Gouellec responded that this is not currently outlined in the bylaws, and the Board could vote to amend. Ms. Murphy responded that a fresh perspective was valuable. President Szabo then stated the Board's expectation to have an update on the progress of addressing the recommendations. Mr. Dobbins confirmed progress would be presented at the June Board meeting. A motion to approve the audit was offered by Mr. Brown seconded by Ms. Angela Licata. **With an auditory poll all in favor, the audit for 2024 was approved.**

Counsel's Report

President Szabo introduced AMWA General Counsel, Bob Saner who provided updates on ongoing litigation, including challenges to EPA's National Primary Drinking Water Regulations for PFAS, and the Lead and Copper Rule Improvements.

Mr. Saner further explained the status of litigation on the federal regulation of fluoride under TSCA, and a question about the Executive branch's power to withhold Congressionally appropriated funds.

President Szabo asked Board members to share if their organizations had lost federal funding or for questions. Several members cited issues with BRIC grants, PFAS abatement on private property, and other local funding issues. Mr. Szabo emphasized the importance of maintaining visibility on funding discussions.

Mr. Dan Hartnett, AMWA Chief Policy Officer described the broader issues with FEMA and the Administration, which is why some BRIC grants and others have not been funded. Several Board members noted complications at their utilities due to Bureau of Reclamation staffing cutbacks and increased confusion around grant allocations, the water impact of emerging technologies like AI, and federal appropriations awards that have not been paid out.

Bylaws Update

Mr. Hartnett then presented the Board with two proposed bylaws amendments that would:

1. Align the beginning and end of Board terms with electronic elections held in advance of the EMC.
2. Allow for Executive Committee elections to be held electronically before the EMC Board meeting.

After a brief discussion on board member terms, a motion to approve the proposed amendments was proposed by Mr. Waldroup and seconded by Mr. Sullivan. **With an auditory poll all in favor, the amendments to the AMWA bylaws were adopted.**

Policy Issues

President Szabo introduced Policy Committee Chair Mr. Spencer Bruce and Vice Chair Mr. Jeff Thompson to report on AMWA's current regulatory and legislative activities.

Mr. Bruce noted that AMWA's first Policy Committee meeting took place in March and featured discussion on AMWA's position on fluoride, among other issues. Several Board members offered perspectives on how their utilities are approaching the issue.

Mr. Bruce then summarized the current state of Legislative issues, including AMWA's work to facilitate introduction of legislation to protect utilities from incurring PFAS cleanup liability under CERCLA.

In response to a question, Mr. Hartnett explained that Environment and Public Works Committee Republican members want to advance legislation with liability protections for PFAS passive receivers and are currently internally discussing options that could attract the 60 votes necessary to pass the Senate. Mr. Hartnett said reaching this threshold would require at least 7 Democrats to join all Senate Republicans in the effort, so the legislation would need to be bipartisan.

Mr. Bruce next discussed water affordability legislation (LIHWAP), and AMWA's expectation that Senator Alex Padilla will introduce a LIHWAP reauthorization bill once a Republican co-sponsor is secured. In response to a question, Mr. Hartnett emphasized that AMWA would speak to the benefits of both LIHEAP and LIHWAP and how both are essential programs.

The Board discussed several other legislative items, including the status of tax-exempt municipal bonds and the implications for infrastructure financing should Congress eliminate the exemption as part of a tax reform proposal that is expected to be released this spring.

Mr. Bruce continued the discussion by addressing the current AMWA Regulatory issues, including a contracted study to examine General Services Administration (GSA) data on Legionella occurrence in federal buildings. Mr. Hartnett stated that AMWA would use the data to inform comments on revisions to the Microbial Disinfectant Byproducts Rule.

Several Board members discussed the value of the project to examine the GSA data, and the process for identifying projects for which AMWA staff will ask the Board to approve supplemental funding.

Ms. Jessica Evans, AMWA's Senior Manager of Government Affairs and Sustainability Policy, briefly discussed AMWA's support for the Water Utility Climate Alliance (WUCA) and the development of its workplan.

Utility Management Issues

Education Subcommittee Vice Chair Mr. Matthew Jalbert reported on Utility Management Committee activities. He announced that the Water Policy Conference, which combined with Water Week for 2025, was on track to break another attendance record.

He also updated the board on the status of the planning activities for the 2025 Executive Management Conference (EMC) in Austin, Texas, including the call for abstract process, potential keynote speakers, and anticipated early registration opening in May. Mr. Dobbins encouraged board members to submit an abstract topic. Ms. Antoinette Barber, Director, Communications and Utility Management Programs, recognized Dave Johnson, Assistant General Manager of Las Vegas Valley Water District for his utility's prompt 2025 abstract submission.

Mr. Jalbert continued the discussion on programmatic updates, including the planned upcoming webinars, increased participation in Member-to-Member Inquiries, and the launch of the 2025 Awards Program. Mr. Jalbert added that the AMWA awards submission period opened in February and will close July 11, with review panels occurring over the summer. He mentioned the criteria for the Gold and Platinum awards have been updated to align with the 2024 Effective Utility Management framework. Mr. Jalbert paused for questions. With none posed, Mr. Dobbins asked the board their thoughts on utilities reapplying for awards if they have not progressed to the next awards tier within a decade or other specified amount of time, expressing that a utility's status could have changed over time.

The board had a quick discussion with suggestions including surveying utilities on the reasons they have not applied for an award in recent years, distinguishing between applying for the next available level of award or renewing applications, and clearly defining the timeframe of an award on AMWA's website. Mr. John Sullivan remarked that the peer-reviewed awards were a moment in time and remarked that an Olympic medalist who has won – doesn't have to reapply. Board members appeared to agree. The issue was raised that a utility's award status and dates are not listed on the website. Ms. Barber noted that AMWA has the award dates of each winning utility listed on the website under the awards page; the award level and status of each member is provided on the membership listing page. She also mentioned that the association is conducting a webinar on April 29, 2025, to target those utilities that have never received a Gold Award, in response to Mr. Sullivan's suggestion of targeting this group.

Mr. Farr asked the Board whether the name of AMWA's standalone Environmental Justice (EJ) and Equity Award would need to change due to the current administration's position on EJ initiatives and programs. A discussion on the issue followed, with board members providing

their various perspectives on the name of the award and environmental justice and DEI initiatives in general.

Mr. Dobbins asked the Board in an unofficial poll if the EJ Award should be renamed and suggested the EJ Working Group could take up the issue. Ms. Bailey expressed concern with capitulating to the new administration's posture two months into a term and recommended the Board not pass this decision off to the EJ Working Group, citing the Board's previous commitment to environmental justice a few years ago. She suggested that the committee or working group do the prework to tee up a more robust and informed discussion at the June AMWA Board Meeting, emphasizing that the ultimate decision and recommendation need to come from the board.

Key points of the discussion included potential political fallout and concerns with retaining the current name, the importance of environmental justice as a policy position to AMWA's mission and core values, and whether the focus should be on renaming the award or reframing the association's related programs in the context of the policy position.

Mr. Szabo tabled the conversation for discussion at the June meeting and introduced Mr. Farr to present on membership. A summary of the 2025 Workplan and the first membership Committee meeting were reviewed.

Membership Issues

Mr. Farr noted ongoing membership renewals, with five utilities requesting hardship consideration. The Board discussed the value of having clear subscriber criteria, and the importance of enforcing subscriber rules to maintain value. Mr. Dobbins promised review of Subscriber criteria and further discussion on the subject. He went on to introduce Mr. Bill Murray of Reading, PA, and requested Board assistance in reaching out to members with unpaid dues.

Adjournment

Mr. Szabo called for any additional business. With no further matters raised, the meeting was adjourned for a private session at 11:00 a.m. ET.



AMWA BOARD OF DIRECTORS

EXECUTIVE SESSION

WASHINGTON, DC

APRIL 7, 2025

After completing its Spring business meeting the AMWA Board met in Executive Session for approximately one hour. Present in addition to Board members were David Westman of Westman and Associates Consulting LLC, AMWA CEO Tom Dobbins and AMWA Counsel Bob Saner. The purposes of the Executive Session were to receive and discuss the results and recommendation of two surveys recently completed by the Westman firm. Mr. Westman provided oral summaries of each. The full written reports had been previously circulated to the full Board.

GOVERNANCE SELF ASSESSMENT SURVEY

Mr. Westman first presented his findings and recommendations from the Board's self-assessment survey completed in February of 2025. He made several initial observations:

- Conducting a board survey of this type every two to three years is considered a best practice in the trade association world.
- The AMWA Board's 80% response rate is in line with his experience of other engaged boards.
- The aggregate assessment results reflected a high performing board, above average based on his professional experience.

At the same time, some results suggested areas for possible improvement. He identified five in particular:

1. Better orientation of new directors.
2. Clearer differentiation of the respective governance and management roles of the Board, the Officers and the CEO.
3. Assignment of mentors to coach new directors during their first year of board service.
4. Continuing education of the full board drawing on
 - a. generic resources available in the association and governance communities (e.g. ASAE and NACD), and
 - b. tailored presentations on fiduciary obligations specific to AMWA's finances, risk management practices and performance evaluation practices.

5. More structured oversight of the CEO with emphases on
 - a. Short- and long-term succession planning, and
 - b. Performance and compensation evaluation including a more structured approach to incentive compensation.

Mr. Westman was clear that he was not recommending that all of these areas be pursued immediately or simultaneously. Rather, he suggested tackling one or two at a time, and recommended prioritizing items 2 and 4 above.

There followed a brief discussion suggesting general agreement by Board members with the findings and recommendations outlined by Mr. Westman, including the prioritization of items 2 and 4 for initial focus. No formal vote was taken.

One director observed that in addition to orienting and mentoring new board members, each director should consider similar approaches within their own utilities so that others on their own staffs would understand the value AMWA brings.

CEO PERFORMANCE ASSESSMENT

Mr. Westman next addressed the Board survey completed in March of 2025 assessing the CEO's performance. After reviewing the survey methodology utilized, he summarized the results as follows:

- A strong majority of directors views the CEO in a very positive fashion with high ratings on virtually all survey questions.
- A small minority of directors had markedly different views, with a wider than normal variance between positive and negative assessments on some factors.
- Discrete concerns and possible areas for improvement were suggested in the narrative feedback provided by individual directors, but the wide variation in that feedback made it difficult to find consensus around common themes.

Mr. Westman directed Board members to page 8 of his written report for consideration of several possible areas of focus:

- Better CEO communication with members explaining the value proposition, particularly in light of recent dues increases
- Strengthening the CEO's relationship with individual Board members with more sensitivity to communication style, openness to divergent views and avoidance of defensive postures.
- Strengthening relationships between the CEO and individual staff members, and the relationships between and among staff members, to build a more cohesive team.

Having outlined these possible steps, Mr. Westman reiterated the substantial variation in perspectives and suggested it might relate to one of the findings from the Board's self-assessment, namely different understandings of the appropriate role of the CEO compared to the

role of the Board. He also surmised that some of the variation might be attributable to a lack of understanding about what the CEO was actually doing, or to simple differences in personality and style. He then suggested two possible action items:

1. The President could speak individually with the more critical directors to probe the reasons for their more negative assessments, and
2. The Board should strengthen its CEO performance review and compensation process, consistent with his recommendation from the Board's self-assessment survey.

He then closed his presentation by reiterating his primary finding, namely that the CEO's performance was rated very highly by a large majority of directors.

The Board then reacted to Mr. Westman's presentation with questions and comments related to both surveys. Points raised by Board members included all of the following with the CEO responses *in italics*:

- The officers already do set annual goals and objectives for the CEO. Input from all Board members to the officers would be welcome.
- The CEO should consider pairing his trade association management expertise with more emphasis on AMWA's unique legacy, mission and values. *The strategic plan provides this direction, and the CEO manages in accordance with it.*
- There is a clear need for more clarity around roles and responsibility, as the Executive Committee has already identified. *The CEO welcomes a clearer delegation of authority.*
- Initial orientation of new directors is important, but annual follow up would also be beneficial, particularly if given one-on-one. *Agreed.*
- Continuing training of the full board on fiduciary responsibilities should be considered. *Agreed and it will be implemented.*
- AMWA has a large and diverse board, and some dissent is natural. It's important that individual perspectives be heard, but the CEO can't be expected to do exactly what each director prefers. *The CEO values input and wants each director to be heard. He is considering additional coaching on how to better accomplish this.*
- More emphasis on staff training and succession planning would be desirable.

After all directors had an opportunity to contribute to the discussion, President Szabo excused Mr. Westman, Mr. Dobbins and Mr. Saner from the meeting. These notes end at that point.



It has only been a few weeks since our last meeting, but we continue to make substantial progress in all our programs.

Financial Resources

We continue to well financially:

- As you see, we are making very good progress on the numerous recommendations from our new auditors.
- We are off to a good start in 2025. We continue to bring in dues revenues and should exceed our budget.
- The Water Policy Conference netted in the black.

Staff Resources

- We continue to focus on our teamwork and staff culture, and you see the results in the execution of the Water Policy Conference and the accomplishments in your board book. I continue to be amazed at what we accomplish with the resources we have
- I am particularly pleased with the performance of our directors' team and the quality of our meetings and collaboration
- Our directors picked this month for our employee engagement survey, and it will be completed in time to review during our staff offsite on the 24th.
- The staff are very excited about our new office space. The architects were impressed with how quickly and collaboratively the team worked together to pick out carpeting, lighting and other fixtures.
- I am pleased to inform you that Jessica Evans has been promoted to Director of Regulatory Programs.
- The team and I will continue to work hard to exceed your expectations and deliver quality programs to you and our members.

Volunteer Resources

- We have had strong engagement of our committees in our government affairs program
- And our Utility Management Committee and the Education Subcommittee have been very engaged in pulling together the Executive Management Conference programming

Membership

- We are having a strong recruitment year with 6 new utility members, and 2 utilities with their applications in. We are just waiting on their checks. The sector sees the value we are bringing to our member utilities.
- The Board will need to decide the scope of our Subscriber program. The Membership Committee and staff have put in considerable work to frame the options and their impact on the organization. I am hopeful that the Board will be able to make a decision on the issue at this meeting.

Programs

- As you see, our programmatic work remains strong
- We have had a recent flurry of progress on our legislative initiatives
- We had a strong response from utilities from our call for abstracts for the Executive Management Conference. Our programming is coming together nicely

Sister Associations

- I continue to work closely with our sister associations
- We are making progress on our initiative with US Water Alliance and NACWA on comprehensive economic statistics for the water sector. This will be very valuable in our fight for the SRF and other AMWA appropriations.
- We have worked closely with AWWA on lobbying the White House and EPA on our PFAS litigation with favorable results- the EPA will redo the regulations on the hazard index chemicals.
- We continue to provide leadership in advancing advocacy through our coalitions

WaterISAC

WaterISAC is growing its programming exponentially:

- We continue to grow membership and our sponsorship program at a brisk pace
- Our analysts are speaking all over the country helping utilities with the cyber and physical security and promoting the value of WaterISAC membership
- We had a strong and highly rated H2OsecCon virtual conference. I am in conversation with AWWA to do our first in-person conference in conjunction with ACE next year
- The week leading into our meeting I am at NRWA's In Service conference to promote WaterISAC to their state executives
- We have three tabletop exercises scheduled for 2025 and commitments for several more in 2026.

Funding remains our biggest challenge. We appreciate AMWA's work to reintroduce legislation to fund WaterISAC.

I want to recognize John Sullivan for his excellent leadership of the WaterISAC

Conclusion

AMWA continues to get topline results, even compared to our sister organizations with greater resources. This can be attributed to the collaboration and effort made by the staff team, with the excellent support of our volunteers.

As part of the finalization of AMWA’s 2024 audit and in collaboration with our new auditing firm- GRF, the following recommendations were provided to AMWA staff. Below is a summary of each recommendation along with the current status of implementation:

1. Consolidation with Water Information Sharing and Analysis Center (WaterISAC)

Status: Complete

Effective January 1, 2024, AMWA and WaterISAC are consolidated for financial reporting purposes.

2. Policies, Procedures, and Segregation of Duties

Status: In Progress

- **Policies and Procedures Manual:**
Staff is working with the new accounting firm to develop a comprehensive manual outlining financial policies and procedures.
- **Segregation of Duties:** GRF recommended the following process to ensure proper segregation of duties: Being implemented:
 - Hayden will open incoming mail, log all payments, and make deposits using the check reader.
 - Eugenia will record the payments in the accounting system and update the corresponding member files.
 - Tom will open the bank statements, review and initial them, and then pass them along to Eugenia.
- **Conflict of Interest Policy:**
All employees have signed conflict-of-interest statements. This process will be completed annually going forward.
- **Salary Documentation:**
All salary letters will be documented and maintained in employee personnel files.
- **Payroll Allocations:**
Monthly payroll allocations are reviewed and signed off by the CEO and kept on file.
- **Credit Cards:**
As of April 2025, the CEO’s credit card charges are sent to AMWA’s Treasurer for approval.

3. Compliance with Investment Policy

Status: Ongoing

Staff recently reviewed the investment portfolio. Current allocations are consistent with policy at approximately 20%.

4. IT Risk Assessment

Status: In Progress

AMWA staff received the IT recommendation from the auditors and is in the process of developing a plan to carry out the IT risk assessment.

5. Cyber Liability Insurance Coverage

Status: Complete

AMWA has purchased cyber liability insurance along with employee dishonesty coverage.

6. Cybersecurity Awareness Training

Status: In Progress

Staff has selected KnowBe4 as the cybersecurity awareness training program and is currently in the initial phase of rolling out the training to staff.

Statement of Financial Position

We are presenting the March financial statement, as our new accountants are still becoming familiar with our system and, unfortunately, the April statement was not completed in time for the board meeting.

That said, we want to provide a brief update on April activity: we collected an additional \$155,000 in outstanding dues, and thanks to strong sponsor support, the Water Policy Conference generated a \$40,000 surplus. These funds will be used to enhance the upcoming Executive Management Conference in Austin this October.

Financial Overview – March Statement

Per the attached March financial statement, our financial position remains strong. Our cash balance stands at \$1.84 million. We are actively managing our cash by moving funds into money market accounts or short-term Treasury bills, recognizing that this represents our annual high-water mark for cash flow. Nearly all membership dues have been collected, with a few remaining payments expected in the second quarter. Additional revenue is anticipated from membership recruitment (pro-rated), the Executive Management Conference, and sponsorships—which are tracking positively.

Our investments total \$3.29 million, and with other current assets included, total assets exceed \$5.415 million. This remains significantly above budget in accordance with our investment policy.

Our largest liability is our office lease, followed by accrued vacation.

Under Net Assets, you will see the Board-approved expenditures drawn from the Management Fund and reserves.

Revenue and Expenditure Budget Performance

Revenues:

With the dues collected in April, we have now met our annual budget target for membership dues. In addition, we are still expecting approximately \$140,000 in outstanding dues, and we remain confident those payments will be received. We also continue to actively recruit new members.

It's important to note that dues are not our only revenue source. We have already exceeded our interest income projection by \$3,000, putting us on track to meet—or potentially exceed—our

overall revenue goals. If, for any reason, revenues fall short, we will recommend appropriate adjustments to expenditures during the Finance Committee's midyear budget review.

Expenses:

Although it is still relatively early in the year, our expenses remain in line with the approved budget. We are currently under our projected spending by \$76K, which, if sustained, will help offset any potential revenue shortfalls.

Net Position:

Our current net position is \$76,000 in the black, which is a strong position for this point in the year. At midyear, staff will propose minor adjustments to ensure the budget remains balanced while reflecting actual revenue and expenditure trends.

Conclusion

Aside from the timing of dues payments, there are no significant concerns with our revenues or expenditures currently. Staff will continue to closely monitor the organization's financial position and will promptly communicate any material developments to the Finance Committee.

**Association of Metropolitan Water Agencies
Statement of Financial Position
As of March 31, 2025 and 2024**

	<u>As of Mar. 31, 2025</u>	<u>As of Feb. 28, 2025</u>	<u>As of Mar. 31, 2024</u>
ASSETS			
Current Assets			
Checking/Savings			
Cash			
Checking Accounts	\$ 207,115	\$ 168,291	\$ 168,510
Savings/Money Market Accounts	1,634,512	1,230,391	1,394,007
Total Cash	<u>1,841,627</u>	<u>1,398,682</u>	<u>1,562,517</u>
Other Current Assets			
Due From Water Isac	1,213	1,156	57
Due From Employee	43	43	
Miscellaneous Receivable		1,221	7,500
Management Fee/Expenses Due From WUCA	4,935	4,869	4,638
Prepaid Expenses	92,936	81,180	83,269
Prepaid EMC Expenses	5,000	5,000	5,000
Accrued Interest & Dividends Receivable	17,963	17,963	20,676
Bond Premium	1,062	1,089	1,389
Total Other Current Assets	<u>123,152</u>	<u>112,521</u>	<u>122,529</u>
Total Current Assets	1,964,779	1,511,203	1,685,046
Investments	3,292,100	3,678,153	3,130,179
Fixed Assets			
Computer Equipment			2,959
Office Furniture & Equipment	23,177	23,177	48,727
Leasehold Improvements	50,449	50,449	50,449
Accumulated Depr & Amortization	<u>(66,619)</u>	<u>(65,919)</u>	<u>(86,720)</u>

No assurance is provided on these financial statements. Management has elected to omit substantially all disclosures and the statement of cash flows required by the GAAP basis of accounting.

**Association of Metropolitan Water Agencies
Statement of Financial Position
As of March 31, 2025 and 2024**

	<u>As of Mar. 31, 2025</u>	<u>As of Feb. 28, 2025</u>	<u>As of Mar. 31, 2024</u>
Total Fixed Assets	7,007	7,707	15,415
Other Assets			
Artwork	14,515	14,515	14,515
Security Deposits	13,463	13,463	13,463
Right of Use Asset	123,406	135,736	270,022
Total Other Assets	<u>151,384</u>	<u>163,714</u>	<u>298,000</u>
TOTAL ASSETS	<u>\$ 5,415,270</u>	<u>\$ 5,360,777</u>	<u>\$ 5,128,640</u>
LIABILITIES & NET ASSETS			
Liabilities			
Current Liabilities			
Accounts Payable	\$ 48,351	\$ 54,728	\$ 3,316
Truist Credit Cards	8,914	7,430	8,840
Miscellaneous Payable	3,154		
Accrued Pension Payable	36,329	19,304	34,672
Flex Spending	2,550	2,324	2,456
Accrued Vacation	45,296	45,296	45,769
Operating Lease Liability	<u>150,426</u>	<u>165,454</u>	<u>130,594</u>
Total Current Liabilities	<u>295,020</u>	<u>294,536</u>	<u>225,647</u>
Long Term Liabilities			
Lease Liability			<u>195,512</u>
Total Long Term Liabilities	<u>-</u>	<u>-</u>	<u>195,512</u>

No assurance is provided on these financial statements. Management has elected to omit substantially all disclosures and the statement of cash flows required by the GAAP basis of accounting.

**Association of Metropolitan Water Agencies
Statement of Financial Position
As of March 31, 2025 and 2024**

	<u>As of Mar. 31, 2025</u>	<u>As of Feb. 28, 2025</u>	<u>As of Mar. 31, 2024</u>
Total Liabilities	295,020	294,536	421,159
Net Assets			
Undesignated Reserves-Beginning Balance	2,778,048	2,778,048	2,958,209
Current Year Revenue over Expenses	2,026,310	1,953,779	1,588,349
Strategic Planning & Technology Expenditures	(40,750)	(37,200)	(34,566)
Undesignated Reserves-Ending Balance	<u>4,763,608</u>	<u>4,694,627</u>	<u>4,511,992</u>
Management Fund-Beginning Balance	100,000	100,000	107,670
Current Year Expenses over Revenue	(38,675)	(24,000)	(20,860)
Management Fund	<u>61,325</u>	<u>76,000</u>	<u>86,810</u>
Fund Balance Legal	295,848	295,848	109,287
Current Year Expenses over Revenue	(531)	(234)	(608)
Fund Balance Legal-Ending Balance	<u>295,317</u>	<u>295,614</u>	<u>108,679</u>
Total Net Assets	<u>5,120,250</u>	<u>5,066,241</u>	<u>4,707,481</u>
TOTAL LIABILITIES & NET ASSETS	<u><u>\$ 5,415,270</u></u>	<u><u>\$ 5,360,777</u></u>	<u><u>\$ 5,128,640</u></u>

Association of Metropolitan Water Agencies
Revenue and Expenditure Budget Performance
For the Three Months Ended March 31, 2025

	<u>Mar. 2025</u>	<u>Mar. Budget</u>	<u>Jan.-Mar. 2025</u>	<u>YTD Budget</u>	<u>Annual Budget</u>
Operating Revenues					
Dues Income	\$ 221,500	\$ 147,019	\$ 2,469,250	\$ 2,302,603	\$ 2,616,000
Management Fee - Water Isac	41,667	41,666	125,000	125,000	500,000
Management Fee - WUCA	4,869	4,916	14,608	14,750	59,000
IRA Tax Credit Project - WUCA					25,000
Water Policy Conference (WPC) and Executive Management Conference (EMC)					
Fees - WPC	29,800		131,374		
Sponsorships - WPC	15,000		56,750		
Less: WPC Costs	(31,914)		(74,653)		
Net WPC	<u>12,886</u>		<u>113,471</u>		37,500
Fees - EMC					
Sponsorships - EMC	15,000		56,750		
Less: EMC Costs	(3,920)		(18,670)		
Net EMC	<u>11,080</u>		<u>38,080</u>		37,500
Other Income	750	1,000	4,286	3,000	12,000
Interest Income	19,501	12,500	40,745	37,500	150,000
Total Operating Revenues	<u>312,253</u>	<u>207,101</u>	<u>2,805,440</u>	<u>2,482,853</u>	<u>3,437,000</u>
Operating Expenditures					
Salaries	126,263	127,584	374,815	382,750	1,631,000
Accounting Services	6,568	2,870	21,344	17,670	43,500
AMS Operating Fees	3,026	2,916	9,077	8,750	35,000
Annual Report			2,851	4,500	4,500
Audit	2,902	2,900	31,107	31,100	33,500
Business Expenses	1,830	2,500	4,764	7,500	30,000
Coalitions			16,000	16,000	16,000
Computer Exp. & Web Maintenance	1,024	2,666	6,246	8,000	38,000
Contingency		15,209	14,951	45,625	182,500
Contract Labor	22,499	20,000	47,498	60,000	240,000
Credit Card and Bank Fees	116	334	533	1,000	4,000
Dues and Subscriptions	3,035	2,916	10,688	8,750	35,000
Employee Development	35	1,834	35	5,500	22,000

No assurance is provided on these financial statements. Management has elected to omit substantially all disclosures and the statement of cash flows required by the GAAP basis of accounting.

Association of Metropolitan Water Agencies
Revenue and Expenditure Budget Performance
For the Three Months Ended March 31, 2025

	<u>Mar. 2025</u>	<u>Mar. Budget</u>	<u>Jan.-Mar. 2025</u>	<u>YTD Budget</u>	<u>Annual Budget</u>
Fringe Benefits	16,153	18,166	48,749	54,500	218,000
General Insurance	451	500	1,801	1,500	6,000
Human Resources TPO		2,334	1,171	7,000	28,000
Leased Equipment	443	416	1,153	1,250	5,000
Membership Development	6,400	3,500	40,450	34,550	75,000
Office Supplies		84		250	1,000
Parking	297	209	623	625	2,500
Pension Expense	13,434	12,584	37,654	37,750	151,000
Printing/Reproduction/Postage		334	43	1,000	4,000
Professional Services (Legal)	4,600	4,500	13,800	13,500	54,000
Professional Services (Legal) Exps	63	291	158	875	3,500
Public Relations Campaign					200,000
Rent/Utilities	13,123	13,334	38,998	40,000	160,000
Service Contracts	299	334	898	1,000	4,000
Staff Conference Registrations	1,500	416	1,500	1,250	5,000
Summer Board Meeting	597	600	597	600	16,000
Taxes - Misc.					
Taxes - Payroll	10,396	12,600	33,914	37,800	137,000
Telephone	683	1,000	2,716	3,000	12,000
Travel	1,375	3,334	3,095	10,000	40,000
Total Operating Expenditures	<u>237,112</u>	<u>256,265</u>	<u>767,229</u>	<u>843,595</u>	<u>3,437,000</u>
 Net Operating Revenue over Operating Expenditures	 75,141	 (49,164)	 2,038,211	 1,639,258	 -
 Other Fund Revenue (Expenditures)					
Depreciation Expense	(701)		(2,102)		
Realized Gain/Loss & Fees	(1,460)		(5,549)		
Member Management Initiatives	(15,425)		(42,925)		
Legal Fund	(297)		(531)		
Technology	(3,550)		(40,750)		
 Net Revenue over Expenditures	<u>\$ 53,708</u>	<u>\$ (49,164)</u>	<u>\$ 1,946,354</u>	<u>\$ 1,639,258</u>	<u>\$ -</u>

No assurance is provided on these financial statements. Management has elected to omit substantially all disclosures and the statement of cash flows required by the GAAP basis of accounting.



In response to AMWA Board concerns, the Membership Committee reviewed the Subscriber program for potential revisions and provided recommendations. Staff prepared four options, from eliminating the program to maintaining it with modifications. A consensus formed around retaining the program but removing product-based subscribers. Below is this option in more detail:

Proposed Revision to Subscriber Program Option 2: Policy Revision Starting in the 2026 Membership Year

Starting in the 2026 membership year, eligibility for subscribers is limited to law firms, engineering firms, construction firms, water research organizations, and utility management consulting firms. These groups closely align with AMWA's core focus on legislative and regulatory review and policy implementation, directly supporting utility operations with actionable resources and guidance.

Pros:

- Enhances the presence of thought leaders who contribute expertise and share best practices with members.
- Expands the range of abstracts submitted for the Engineering and Management Conference (EMC), while also increasing content available for webinars.
- Potential sponsor and subscriber revenue growth could offset the need for dues increases or higher event registration fees.

Implications and Next Steps:

Subscribers:

- The non-renewal of manufacturing-oriented subscribers will reduce the total number of subscribers, resulting in a net loss of 5.
- Fewer subscribers may lead to a decline in event sponsorships, as many subscribers also serve as lead sponsors.

Operations:

- Develop comprehensive guidelines for subscriber engagement and expectations.
- Revise the subscriber application to include:
 - Code of Conduct
 - List of references
 - Statement of interest ("Why be a member")
- Develop an interview process with the AMWA CEO and Membership Director before approval.

Budgetary Considerations:

- Estimated revenue loss from non-renewing subscribers (based on 2025 figures):
 - Manufacturing subscribers: \$47,500
 - Other Subscribers + Manufacturing Subscribers: \$114,000
 - Estimated sponsorship revenue loss: \$75,000.

- A dues increase is needed due to this decline. The proposed increase is 2% for utility members if only manufacturing subscribers are removed. If both manufacturing and other categories are removed, the increase for utility members would be 7.5%.
- A narrower pool of prospective subscribers may limit future revenue growth, potentially affecting programming and the overall utility member experience.

Education and Programming:

- A projected reduction in webinars and educational sessions:
From 13 webinars in 2024 to 5 (a reduction of 8 sessions).
At the 2024 EMC, panel offerings would be reduced from 10 to 7 sessions.

Other options considered were:

Option 1: Eliminate the category beginning with the 2026 membership year.

Pros:

- Only utility members may participate in conferences and webinars.
- To cultivate a more intimate group

Going Forward:

Subscribers:

- Decrease in numbers (2025: 31 subscribers)
- Revision of the bylaws to eliminate the category and any mention of it throughout.

Budget:

- The allocated funds would decrease significantly.
 - Loss of revenue from subscriber fees (the 2025 budget for subscriber fees is \$287,000).
 - Loss of non-dues revenue: event registrations and sponsorships
2024 sponsorships: \$210,000
2024 registration total: \$82,200
- Following the notable dues hike in 2025, another considerable increase in 2026 is essential. The anticipated increase for 2026 is expected to range from **24% to 36%**, which includes 19% to compensate for lost subscriber fees and sponsorship revenue, plus an additional 5-17% to cover operational costs and complete the step process. This situation poses a potential risk to utility membership.

Education:

- The removal of a major source of content for webinars
(In 2024, nine out of thirteen webinars were run by subscribers, while the remaining four were quarterly all-member meetings.)
- Reduction of educational sessions at WPC and EMC.
(2024 - 20 of the 27 submitted abstracts were by subscribers.)

Events:

- Significantly higher registration fees for utility members at events or lessening the utility attendee experience to prevent increased registration fees.
(Lower food quality, fewer A/V equipment options, no welcome gifts, potentially lower-tier service, smaller hotel)

Option 3: Limit the total number of subscribers in relation to the number of utility members, based on the current figure of 17%.

Pros:

- We will maintain a stable membership base to foster content and engagement.
- Will know who is renewing for 2026.
- Stable budgeted revenue.

Going Forward:

Category:

- Establish a waitlist for potential members.
- Limit subscriber diversity by capping the total count.

Operations:

- Establish a set of guidelines for all subscribers.
- Revise the application form to include:
 - o Code of conduct; list of references; “Why be a member”

Budget:

- Possible losses include:
 - o Future sponsors
 - o Future webinar subjects
 - o Future education sessions at EMC and WPC.
- Funding from sponsorships may decline if the same subscribers are solicited each year. (Limited to \$181,000). Multi-year sponsorships could secure future revenue.

Option 4: Keep the category in its current form, with or without modifications.

Pros:

- No changes have been made to the bylaws.
- As usual, keep pursuing opportunities for a diverse membership base.
- No implications regarding the budget.
- New educational topics include white papers, webinars, and EMC/WPC.

Potential Modifications to Subscriber Category:

Operations:

- Establish a set of guidelines for all subscribers.
- Update the application form to include:

- Code of conduct; list of references; “Why be a member”

Events:

- Attendance at WPC / EMC is restricted to one attendee per subscriber. Sponsors at certain levels may receive two attendees for one event only. This decision could impact their choice to remain subscribers, sponsors, or attend events.
- Create utility-only sessions for EMC/WPC.
- Reserving tables specifically for utility members during educational sessions and meal functions.



Subscriber Breakdown

Below is the current breakdown of subscribers by category.

<u>A/E/C Firms</u>	<u>Manufacturing</u>	<u>Other</u>
AECOM	American Flow Control, Inc	Baron & Budd, P.C
Arcadis	Aquasight	EMA, Inc **
Black & Veatch Corp	McWane Valve and Hydrant	Raftelis **
Brown and Caldwell**	Metron	SL Environmental Law
Carollo Engineers, Inc **	OnCourse Home Solutions	Uni-Bell PVC Pipe Association
CDM Smith, Inc. **		Water Collaborative Delivery Association
Garney Construction **		Xylem **
GHD		
Hazen and Sawyer		
HDR		
Kennedy/Jenks Consultants **		
Kiewit Water Facilities		
M.E. Simpson		
Ramboll		
Stantec **		
Structural Technologies **		
Tetra Tech **		
** = Current Sponsors		

2022 Subscribers
 AECOM
 Arcadis
 ATKINS
 Baron & Budd, P.C.
 Black & Veatch Corp.
 Brown and Caldwell
 Carollo Engineers, Inc.
 CDM Smith
 EMA, Inc
 Greeley and Hansen
 Hazen and Sawyer, P.C.
 HDR Engineering, Inc.
 Kennedy/Jenks Consultants
 Raftelis
 Stantec
 Tetra Tech
 Xylem, Inc.

Product Subscribers
 Aquasight
 ARCOS, LLC

Total fees: \$127,737
 Fee Charged: \$6,723/ea

Subscriber to Member Ratio:
 21 subscribers to 166 Utilities (13%)

**** = Sponsors**

Highlighted Subscribers are product-based.

2023 Subscribers
 AECOM
 Arcadis**
 ATKINS
 Baron & Budd, P.C.
 Black & Veatch Corp.**
 BV Managing Consulting
 Carollo Engineers, Inc.**
 CDM Smith**
 EMA, Inc**
 Garney Construction**
 GHD
 Goodwyn, Mills and Cawood, Inc.
 Hazen and Sawyer, P.C.
 HDR
 Kennedy/Jenks Consultants**
 Raftelis**
 SL Environmental Law Group
 Stantec
 Structural Technologies
 Tetra Tech
 Xylem, Inc.**

Product Subscribers
 Aquasight
 Booky Oren Global Water
 HomeServe USA

Total fees: \$159,850
 Total Sponsors: \$136,000
 Fee Charged: \$6,950/ea

Subscriber to Member Ratio:
 24 Subscribers to 178 Utilities (13%)

2023 Subscriber Cancellations
 ARCOS LLC
 Greeley and Hansen LLC

2024 Subscribers
 AECOM
 Arcadis **
 ATKINS
 Baron & Budd, P.C.
 Black & Veatch Corp.**
 Brown and Caldwell**
 Carollo Engineers, Inc.**
 CDM Smith**
 EMA, Inc**
 Garney Construction**
 GHD
 Hazen and Sawyer, P.C.
 HDR Engineering, Inc.
 Kennedy/Jenks Consultants**
 Kiewit Water Facilities
 M.E. Simpson Co., Inc.
 Raftelis**
 Ramboll
 SL Environmental Law Group
 Stantec**
 Structural Technologies**
 Tetra Tech**
 Xylem, Inc.**

Product Subscribers
 American Flow Control
 Aquasight
 Booky Oren Global Water
 Isle Utilities
 Oncourse Home Solutions
 SediVision
 Upstream Tech
 Virridy

Total fees: \$232,500
 Total Sponsors: \$210,500
 Fee Charged: \$7,500/ea

Subscriber to Member Ratio:
 31 Subscribers to 179 Utilities (17%)

2024 Subscriber Cancellations
 BV Managing Consulting
 Goodwyn, Cawood, & Mills
 HomeServe, Inc.

2025 Subscribers
 AECOM
 Arcadis
 ATKINS
 Baron & Budd, P.C.
 Black & Veatch Corp.
 Brown and Caldwell**
 Carollo Engineers, Inc.**
 CDM Smith, Inc.**
 EMA, Inc.**
 Garney Construction**
 GHD
 Hazen and Sawyer
 HDR
 Kennedy/Jenks Consultants**
 Kiewit Water Facilities South
 M.E. Simpson Co., Inc.**
 Raftelis**
 Ramboll
 SL Environmental Law Group PC
 Stantec**
 Structural Technologies**
 Tetra Tech**
 Uni-Bell PVC Pipe Association
 Water Collaborative Delivery Association
 Xylem**

Product Subscribers
 AMERICAN Flow Control Inc.
 Aquasight
 McWane Valve and Hydrant
 Metron
 Oncourse Home Solutions

Total fees: \$270,000
 Total Sponsors: \$151,250
 Fee Charged: \$9,000/ea

Subscriber to Member Ratio:
 30 Subscribers to 180 Utilities (17%)

2025 Subscriber Cancellations
 Booky Oren Global
 Isle Utilities
 SediVision
 UpstreamTech
 Virridy
 WaterValue LLC

2026 AMWA Dues Schedule Options

AMWA's Board approved the 2026 dues schedule following the June 2024 Board meeting, as part of a two-year dues plan. Those approved dues rates, and their percentage increase over 2025 rates, are shown below.

Additional columns display alternative proposed 2026 dues rates to offset revenue losses associated with possible changes to subscriber eligibility criteria

Service Population	2026 Dues	Percent Change	With Additional 2% increase	With Additional 7.5% increase
Subscribers	\$9,500	6%	\$9,700	\$10,300
<100,000 to 150,000	\$6,600	6%	\$6,800	\$7,100
150,001-200,000	\$6,900	6%	\$7,100	\$7,500
200,001-250,000	\$7,200	6%	\$7,400	\$7,800
250,001-300,000	\$12,200	5%	\$12,500	\$13,200
300,001-350,000	\$12,800	6%	\$13,100	\$13,800
350,001-400,000	\$13,500	5%	\$13,800	\$14,600
400,001-450,000	\$14,200	9%	\$14,500	\$15,300
450,001-500,000	\$14,900	15%	\$15,200	\$16,100
500,001-600,000	\$16,100	5%	\$16,500	\$17,400
600,001-700,000	\$17,000	6%	\$17,400	\$18,300
700,001-800,000	\$17,800	5%	\$18,200	\$19,200
800,001-900,000	\$18,700	9%	\$19,100	\$20,200
900,001-1,000,000	\$19,600	14%	\$20,000	\$21,100
1,000,001-1,250,000	\$24,000	5%	\$24,500	\$25,800
1,250,001-1,500,000	\$25,200	5%	\$25,800	\$27,100
1,500,001-1,750,000	\$26,500	5%	\$27,100	\$28,500
1,750,001-2,000,000	\$27,800	8%	\$28,400	\$29,900
2,000,001-2,500,000	\$29,700	5%	\$30,300	\$32,000
2,500,001-3,000,000	\$31,200	5%	\$31,900	\$33,600
3,000,001-3,500,000	\$35,300	5%	\$36,100	\$38,000
3,500,001-4,000,000	\$37,100	5%	\$37,900	\$39,900
4,000,001-4,500,000	\$39,000	5%	\$39,800	\$42,000
4,500,001-5,000,000	\$41,000	8%	\$41,900	\$44,100
5,000,001-6,000,000	\$42,400	5%	\$43,300	\$45,600
6,000,001-7,000,000	\$43,700	5%	\$44,600	\$47,000
7,000,001-8,000,000	\$45,000	7%	\$45,900	\$48,400
8,000,001-9,000,000	\$46,400	11%	\$47,400	\$49,900
9,000,001-10,000,000	\$47,800	14%	\$48,800	\$51,400
10,000,001 +	\$49,200	17%	\$50,200	\$52,900

Background

AMWA launched the Environmental Justice and Equity (EJ) Award, the first of its kind in the water sector, in 2023 to recognize member utilities that commit to advancing equity and justice in their communities. The general criteria for the Award include using assessment and planning, equity in access and costs, civic involvement in decision-making, and integrative strategies. Recipients of this award will demonstrate how they have identified and overcome the historic inequities and barriers to sustainable urban water systems within their communities.

At AMWA's April 2025 Board meeting, the Board Vice President Calvin Farr raised the question about whether the Association would change the name of the award in the wake of the new administration's purge of Environmental Justice (EJ) programs from the federal government.

The Board had a broad discussion of the issue without resolution. The Executive Committee directed that a position paper be produced regarding the renaming of the Award.

Question:

Should AMWA rename the Environmental Justice and Equity Award?

Option 1: Maintain the Name of the Award

AMWA would leave the award in place to demonstrate our commitment to our policy position and leadership in the sector.

Pros:

- AMWA would be acting consistently with our values and our positions, which will be respected by our members, sister organizations, and friends on Capitol Hill.
- We would communicate our continued support and recognition of those members, who are working for equity and environmental justice, particularly when it is opposed in some quarters.

Cons:

- An anti-DEI politician or the press could potentially draw attention to the award.
- Certain anti-DEI policy makers, most likely in the White House, may refuse to work with us or even undermine our policy objectives, although this is not likely.

Option 2: Rename the Award

While no issues have been raised by any of our stakeholders or any policy makers, including the White House, AMWA could proactively rename the award to recognize members for the work they do in the area without using the words “Environmental Justice” and “Equity.”

Alternatives could be:

- Community Engagement and Service Award
- Community Transformation Award
- Ensuring Water Access Award
- Underserved Ratepayers Focus Award
- Serving the Economically Disadvantaged Award

Pros:

- It eliminates the risk that an anti-DEI politician could target AMWA or undercut any of our public policy initiatives.

Cons:

- The association would not be upholding one of its values.
- It would be offensive to many of our members, including those 6 water systems, who have won the award and worked hard for environmental justice and equity in their communities.
- It would show a lack of commitment and consistency to an important AMWA policy.

Conclusion

The Board may want to leave the name of the Environmental Justice and Equity Award at this time. AMWA has successfully convinced the White House to support us on our PFAS litigation, and no members of Congress have declined to support our issues because of the award. If the climate changes and becomes more hostile towards the association as a direct result of the award, the Board can always revisit the situation in the future.



2025 ADVOCACY STATISTICS

As of May 23

Held

97

meetings with members and staff on Capitol Hill



Participated in

22

meetings with Trump Administration officials and advisors, and career staff



Submitted

12

comments and letters to federal agencies, including EPA (7), White House agencies (3), OSHA/Department of Homeland Security (1), and OSHA/Department of Labor (1)



Signed

18

letters to members of Congress



Endorsed

6

bills in the 119th Congress



Water System CERCLA Liability for PFAS

Due to EPA's 2024 designation of PFOA and PFOS as hazardous substances under CERCLA, drinking water utilities could be at risk of incurring cleanup liability at Superfund sites when they remove and dispose of PFAS deposited into water supplies by upstream polluting industries. With support from the lobbying firm Invariant, AMWA continues to collaborate with other drinking water and wastewater associations in support of holding polluters accountable for cleaning up PFAS by securing statutory liability protections under CERCLA for water systems that properly follow treatment and disposal rules for the contaminants.

The focus of this collaboration is the Water Systems PFAS Liability Protection Act, a bill that AMWA helped develop in 2023. The bipartisan legislation was reintroduced in the House in February by Reps. Marie Gluesenkamp Perez (D-Wash.) and Celeste Maloy (R-Utah) as H.R. 1267, and would protect drinking and wastewater utilities that comply with PFAS disposal guidelines from CERCLA liability for the cleanup of PFAS. The coalition is also working toward reintroduction of the Senate version of the bill. The Senate Environment and Public Works Committee (EPW) has indicated a desire to draft a larger PFAS package that includes solutions to protect a wider range of passive receivers, including water and wastewater systems, and AMWA continues to communicate with Senators on EPW and committee staff about this priority. Senator Pete Ricketts (R-Neb.) has conveyed to Invariant that he will take over reintroduction of the bill from Senator Cynthia Lummis (R-Wy.). The coalition is awaiting more information as the Senator decides whether to reintroduce the water sector liability protections as part of a bigger package or a standalone bill.

AMWA continues to reach out to congressional offices to sign on as cosponsors and has built support from key Senate EPW staff as well as Chair of the committee, Senator Shelley Moore Capito. During EPA Administrator Lee Zeldin's confirmation hearing with the EPW Committee, Senator Capito highlighted this issue and Administrator Zeldin responded that he has heard concerns on this issue and plans to work with Congress to address passive receiver liability. Since taking office, Administrator Zeldin released a high-level action plan for combatting PFAS, which included additional testing and monitoring of PFAS, addressing compliance challenges and requests from Congress and drinking water systems related to national primary drinking water regulations, and working with Congress and industry to establish a clear liability framework that operates on polluter pays and protects passive receivers. AMWA continues to communicate with the administration and EPA about plans to revise existing PFAS regulatory requirements.

Water Infrastructure Appropriations

AMWA continues to advocate for full funding for critical water infrastructure assistance programs, such as the Drinking Water State Revolving Fund, WIFIA, and several targeted EPA grant programs. The current political environment poses a very challenging landscape for EPA

funding. The Trump Administration’s FY26 budget request seeks to cut EPA funding by 55%, including a 90% cut to Drinking Water and Clean Water SRF funding.

Based on AMWA’s discussions with members of Congress and Capitol Hill staff, the association believes there is little chance that Congress will reduce SRF or EPA funding by anywhere close to the levels reflected in the administration’s proposal. For example, in May AMWA staff met with Rep. Mike Simpson (R-Id.), the Chairman of the House Appropriations subcommittee with jurisdiction over EPA, who told AMWA that the House Republicans’ own FY26 funding plan for EPA “will look nothing like the administration’s proposal.” This aligns with public comments that Chairman Simpson has made, as well as Sen. Lisa Murkowski (R-Alaska), the chair of the Senate Appropriations subcommittee with EPA oversight, who has called the administration’s plan “unserious.”

Nevertheless, AMWA is delivering the message to Capitol Hill that this level of cuts would be devastating to local water infrastructure financing efforts, and must be rejected. For example, the association has drafted a letter template for utilities to draft their own letters to Members of Congress expressing opposition to these cuts. AMWA is also leading efforts to develop a stakeholder coalition letter to Congress expressing opposition to the water infrastructure cuts.

AMWA also continues to make connections with lawmakers on the importance of water infrastructure funding to public health and the economy. In March AMWA contracted with the lobbying and government affairs firm Steptoe to build support for two specific EPA programs for which AMWA has a long track record of support: the Reducing Lead in Drinking Water grant program and the Midsize and Large Drinking Water System Infrastructure Resilience and Sustainability Program. AMWA was actively involved in Congress’ creation of both programs, but each program expires after FY26.

Through Steptoe, the association has submitted FY26 appropriations requests to more than three dozen congressional offices asking for those programs to be funded at their fully authorized amounts of \$100 million per year and \$50 million per year, respectively. Conversations with congressional offices have been largely positive and AMWA is currently working with Steptoe to draft a drinking water-focused letter to House and Senate Appropriations leadership outlining the importance of these programs as well as other key drinking water programs like the SRFs and WIFIA.

Low-Income Water Ratepayer Assistance

With support from Invariant, AMWA continues to work with a coalition of water sector stakeholders to support a long-term authorization and funding for a federal program to help low-income households maintain their drinking water and wastewater service. The focus of AMWA’s efforts is the Low-Income Household Water Assistance Program Establishment Act, which the association helped develop and continues to support. The legislation would extend LIHWAP, which was first established as a temporary pandemic-era program to help eligible low-income households in every state access federal funding to restore water service connections and prevent future disconnections for nonpayment. Staff with the Office of Senator Alex Padilla (D-Calif.)

have told AMWA that he will re-introduce the bill in the Senate this year, without a controversial provision that would have required LIHWAP to be transferred from HHS to EPA.

On the House side, AMWA's lobbyists at Invariant recently secured a commitment from Rep. Rob Bresnahan (R-Penn.) to serve as the co-lead the bill alongside sponsor Rep. Eric Sorenson (D-Ill.). Reps. Sorenson and Bresnahan plan to introduce the House version of the LIHWAP reauthorization bill early this summer, and AMWA's coalition will begin intensive outreach to build a list of bipartisan cosponsors.

Despite these positive developments, passage of the LIHWAP Establishment Act is expected to be an uphill battle for several reasons. Aside from the challenge of standing up a new social spending program in the current political environment, LIHWAP would require a significant federal investment to build on the initial \$1.1 billion appropriation that Congress provided during the pandemic. Additionally, energy sector organizations have expressed concerns about the potential of LIHWAP to draw funding away from the LIHEAP program, and several environmental organizations have stated that they would prefer to see LIHWAP housed at EPA. Administration proposals to defund LIHEAP make this an even more complicated situation and the lack of support from the Administration on the program that LIHWAP was modeled off signals that there may not be a desire to move LIHWAP forward. AMWA and other partners have engaged in discussions with these other interests to find common ground, and we remain open to addressing low-income assistance through other models. But until a credible alternative approach emerges, the association plans to continue to use the LIHWAP Establishment Act as the marker proposal on Capitol Hill until the underlying political dynamics change.

Water Sector Cybersecurity

AMWA continues to support two legislative proposals that would strengthen the cyber posture of the nation's water systems. AMWA is working to position each proposal for possible inclusion in any larger water infrastructure or cybersecurity package that Congress could compile this session, such as the Water Resources Development Act.

First, AMWA was the impetus for legislation that would direct EPA to take steps to promote and encourage water systems' participation in WaterISAC. This year AMWA worked with Congresswoman Jan Schakowsky (D-Ill.) and Senator Ed Markey (D-Mass.) to secure reintroduction of the Water Information, Security, and Cyber Threat Protection Act, also known as the WaterISAC Threat Protection Act (H.R. 2344/S. 1118). AMWA views that bill as one tool that could supplement comprehensive water cybersecurity legislation, as well as a valuable mechanism to build awareness of WaterISAC on Capitol Hill. AMWA has also discussed the bill with both Republican and Democratic EPW Committee staff and received positive feedback. Discussions with Republican EPW Committee Members have been encouraging and Senator John Boozman (R-Ark.) has expressed interest in joining as a co-lead to make the Senate bill bipartisan.

In addition to H.R. 2344/S. 1118, Rep. Rick Crawford (R-Ark.) recently reintroduced H.R. 2594, the Water Risk and Resilience Organization Establishment Act, which would direct EPA to certify a Water Risk and Resilience Organization (WRRO) made up of nongovernmental water

and cyber sector experts that would develop, with EPA approval, appropriate cybersecurity practices for water and wastewater systems facing different risk profiles. The bill was first introduced in 2024 and is the result of years of discussions and collaboration between AMWA, AWWA, and other stakeholders to articulate a framework for water utility cyber oversight that is led and developed by experts in the sector and is based upon recommendations made by the Cyberspace Solarium Commission in 2020. AMWA and AWWA are continuing discussions with potential Republican sponsors of the legislation.

Lead Service Line Replacement Funding

Since 2022, AMWA has been the leading advocate for the Financing Lead Out of Water (FLOW) Act, legislation that would reduce IRS red tape encountered by drinking water systems that attempt to pay for private-side lead service line replacements with tax-exempt bonds. The bill was inspired by challenges faced by Denver Water when it undertook its lead service line replacement program and AMWA expects the issue to come more urgent in the coming years as water systems begin to plan their compliance with the Lead and Copper Rule Improvements service line replacement mandate.

Rep. Claudia Tenney (R-N.Y.) and Gwen Moore (D-Wis.) plan to reintroduce the bill in the House this year, with formal introduction expected as early as June. Senator Michael Bennet (D-Colo.) will once again lead the bill in the Senate, though his staff prefers to hold off on formal introduction in the upper chamber until a lead Republican cosponsor is on board. AMWA has discussed this opportunity with multiple Republican offices, but unfortunately no Republican has been willing to step up and co-lead the bill. As a result, Sen. Bennet may introduce the measure in the House with only Democratic cosponsors, while a search for a lead Republican continues.

The goal for the legislation this year is to position it for inclusion in a future tax extenders package, especially given that lead service line funding through the Bipartisan Infrastructure Law is scheduled to expire in 2026 and may not be reauthorized under the Trump Administration.

Resilience and Tax Priorities

AMWA continues to be an active participant in the Public Finance Network, a coalition that is actively lobbying Congress to preserve current law related to the federal tax exemption on municipal bond interest. Through letters, reports, and other direct outreach, the coalition has repeatedly made the point that imposing new taxes on municipal bond interest would increase borrowing costs for water systems and other local government agencies – which would raise the cost of infrastructure investment, and lead to higher rates for local ratepayers.

The coalition achieved a victory in May when a massive tax reform bill approved by the House of Representatives left the tax status of municipal bond interest untouched. The Senate is expected to consider changes to the bill and vote on its own version by Independence Day, so AMWA and the coalition will have to keep up pressure on that chamber to ensure that municipal bond interest is not targeted in its version of the bill. But the absence of changes to the policy in the House bill puts the water sector in a strong position at the start of the process.

On water system resilience, AMWA has secured commitments from Rep. Salud Carbajal (D-Calif.) and Sen. Lisa Blunt Rochester (D-Del.) to reintroduce marker legislation for reauthorizing EPA's Midsize and Large Drinking Water System Infrastructure Resilience and Sustainability Program. The program was enacted in 2021 after more than a decade of work by AMWA, and it, along with similar programs that address resiliency for small systems and wastewater systems, offer funding to help community water systems undertake projects to address extreme weather or cybersecurity vulnerabilities. This program was authorized through IIJA at \$50 million per year and is scheduled to expire in 2026. In addition to AMWA's efforts to secure additional funding for the program, the association is working with its lobbyists at Steptoe to reauthorize the program as well.

Following outreach from AMWA, Rep. Carbajal and Sen. Blunt Rochester each agreed to introduce reauthorization legislation in their respective chambers, with the goal of working with AMWA to include the bills in larger IIJA reauthorization legislation that Congress may consider before the end of next year. AMWA is currently coordinating with Steptoe to identify and secure Republican co-leads for this legislation in each chamber.

MDBP Rule Revisions

EPA remains on track to propose revisions to the Microbial and Disinfection Byproducts (MDBP) rules before the end of July, with a final rule anticipated by September 2028. In anticipation of this proposal, and as a follow-on item from a series of workshops that AMWA held alongside AWWA and ASDWA in 2024 to evaluate NDWAC recommendations, in February AMWA partnered with those organizations in writing to EPA to offer consensus perspectives of items that should be in the revised regulation. These included:

- Revising the Surface Water Treatment Rule secondary disinfection requirement to establish a minimum numeric level of 0.2 mg/L for chlorine and total chlorine secondary disinfectant residuals;
- Considering an option for review of DBP compliance monitoring plans for total trihalomethanes and haloacetic acid five, for inclusion of monitoring locations representative of consecutive system interconnects; and
- Revising the Surface Water Treatment Rule to require regular inspection and maintenance of finished water storage facilities.

In addition, AMWA shared further perspectives in its own letter to EPA, where the association provided additional guidance on defining finished water storage, reevaluating finished water storage tank inspection and cleaning costs, and affording primacy agency discretion and flexibility in the regulation of consecutive systems.

Meanwhile, following the Board's approval in March, AMWA and AWWA entered into an agreement with Corona Environmental Consulting to conduct a first-of-its-kind analysis on a national *Legionella* occurrence data set that is expected to provide new information to inform AMWA's comments on the proposed MDBP rule. The study is comparing *Legionella* readings from a select list of federal buildings with the disinfectant residual levels reported by the water system serving the building. The study hypothesizes that there will be little correlation between these figures, which could be used to push back on any EPA proposal to combat *Legionella* occurrence by increasing minimum disinfectant residual requirements.

The project is the result of months of effort by AMWA. After the association filed a FOIA request to obtain the building test results from the General Services Administration, that data was obtained in April. Corona immediately began analyzing the raw data, and worked with AMWA and AWWA to identify several utilities that would be asked to provide their residual data for comparison. As of mid-May, ten utilities had agreed to participate and/or provided their data. Corona expects to complete the study and share a report detailing the results early this summer.

PFAS National Primary Drinking Water Regulations

Since President Trump took office in January, AMWA has consistently engaged and built a network of connections within his administration, with a particular focus on encouraging EPA to back down from the National Primary Drinking Water Standards for PFAS that were finalized under the Biden Administration last year. In May, those efforts paid off when EPA announced plans to rescind and reconsider part of the standards, and extend the compliance timeline for others.

Specifically, EPA announced that it will rescind and reconsider the National Primary Drinking Water Regulations for GenX, PFNA, and PFHxS, as well as the “Hazard Index” mixture of these contaminants and PFBS, “to ensure that the determinations and any resulting drinking water regulation follow the legal process laid out in the Safe Drinking Water Act.” EPA officials told AMWA that they believe this portion of the rule can be reconsidered without violating SDWA’s anti-backsliding provisions because EPA did not follow the required procedural steps when it initially promulgated the “Hazard Index” standards in 2024.

Additionally, EPA announced that it will retain the four parts-per-trillion MCLs for PFOA and PFOS, but in conjunction with efforts to address compliance challenges faced by water systems. EPA first plans to extend the timeline to comply with the PFOA and PFOS standards by two years, to 2031, while also utilizing a “federal exemption framework” available under section 1416 of the Safe Drinking Water Act through which EPA could exempt certain public water systems from the PFOA and PFOS standards if certain “compelling factors” (including economic factors) are identified, and if the exemption would not result in “an unreasonable risk to health.”

Other parts of EPA’s new PFAS strategy include:

- A new “PFAS OUTreach Initiative” (PFAS OUT) through which any public water system affected by the PFOA and PFOS standards could directly connect with EPA to obtain technical assistance and additional resources to help meet the standards.
- A pledge to develop new effluent limitations guidelines (ELGs) for PFAS that will reduce the amount of the contaminants that enter the environment.
- A promise to “engage with Congress and industry to establish a clear liability framework that ensures passive receivers and consumers are protected” from incurring PFAS environmental cleanup costs under CERCLA – a top AMWA priority.

Each of these new plans come against the backdrop of AMWA and AWWA’s litigation challenging the legality of the entire PFAS NPDWR, which was filed last summer. While the case remains pending before the U.S. Court of Appeals for the DC Circuit, AMWA has also repeatedly met with EPA and OMB officials to encourage the Trump Administration to explore any available options to back down from the Biden-era rules. And just before EPA’s announcement was made, AMWA filed comments with OMB reiterating our argument that EPA should use every opportunity to correct the deficiencies of the standard. We believe this repeated

engagement, alongside the strong legal arguments made in the lawsuit, provided EPA with a workable path to follow to address the shortcomings of the rule.

In terms of next steps, the Trump EPA plans to propose a new rule this fall to extend the compliance deadline for meeting the PFOA and PFOS MCLs until 2031, with the goal of finalizing that rule in the spring of 2026.

The agency will also have to formally take action to rescind the “Hazard Index” PFAS standards, and will then issue a new preliminary determination for them. According to EPA, this maneuver will not violate SDWA’s anti-backsliding provisions because (as alleged in AMWA’s lawsuit), EPA improperly issued its preliminary determination and proposed rule at the same time, limiting opportunities for public comment on each. And as a result, the “Hazard Index” MCLs should not be considered binding standards in the first place.

Fluoride

In April Health and Human Services (HHS) Secretary Robert F. Kennedy, Jr. and EPA Administrator Lee Zeldin announced a series of actions that will examine regulations and recommendations related to the addition of fluoride to drinking water.

According to comments made to the press by Secretary Kennedy, HHS plans to convene the Community Services Preventive Task Force, an independent, non-federal panel of fifteen public health experts, to “study and make a new recommendation on fluoride.” Secretary Kennedy also communicated his intent to tell the Centers for Disease Control and Prevention (CDC) to stop recommending community drinking water fluoridation to promote dental health. Currently CDC recommends that water be fluoridated to 0.7 mg/L for this purpose. While HHS or CDC cannot force utilities to stop fluoridation, the recommended advisory levels carry a high degree of influence over the choices made by individual states and communities.

Meanwhile, EPA announced that the agency will “expeditiously review new scientific information on potential health risks of fluoride in drinking water,” and cited as rationale the August 2004 National Toxicology Program report that said with “moderate confidence” that fluoride exposure above 1.5 milligrams per liter is associated with lower IQ in children.

EPA said that its review of the latest science will lead to an “updated health effects assessment for fluoride that will inform any potential revisions to EPA’s fluoride drinking water standard.” This could potentially lead to revisions to EPA’s current fluoride MCL and MCLG of 4 mg/L, though any effort to revise that standard downward would have to go through the normal notice and comment process through which AMWA would engage.

Though AMWA has no position on whether communities should add fluoride to their drinking water to promote dental health, the association is closely monitoring this issue. Of particular interest are potential revisions to the MCL that could pose complications for communities with naturally occurring levels of fluoride, or the possibility that EPA could utilize the Emergency Powers provisions of the Safe Drinking Water Act to effectively force communities to end water fluoridation practices.

AMWA has also communicated with the Trump Administration about the importance of EPA continuing to pursue an appeal a district court judge's September 2024 ruling that overturned EPA's decision to not regulate fluoride through the Toxic Substances Control Act. AMWA has raised concerns about this case setting precedent for outside interest groups to leverage TSCA as a means to circumvent Safe Drinking Water Act standard-setting, which would undermine the transparent, science-based regulatory process through which EPA sets drinking water standards. In May, the court granted EPA another 30-day delay in the case, pushing back the deadline for EPA's appeal to June 11.

Perchlorates

EPA is expected to propose a perchlorate NPDWR this year, as required by a consent decree signed by the agency during the Biden Administration. That consent decree requires EPA to propose a perchlorate NPDWR by November 21, 2025, and to finalize a standard by May 21, 2027. Earlier this year AMWA engaged in EPA's Federalism consultation for this rule in advance of the proposal and provided comments highlighting the need for a streamlined monitoring and waiver process to manage financial burdens that water systems will experience because of the rule.

Cross-Sector Thought Leadership

Throughout the spring, AMWA staff have worked to highlight AMWA's role as a leader in water utilities adaptation and infrastructure resilience. Since the April Board meeting, AMWA staff participated in, delivered presentations, and raised AMWA's profile at the following events focused on sustainability, climate change adaptation, and operational and planning resilience in the water sector:

1. On April 3, AMWA staff participated in the University of Pennsylvania's Water Center's Spring Water Policy Forum, delivering an update to participants on federal actions affecting water utility's ability to invest in and plan for future conditions and meeting with regional water utility leaders (including numerous AMWA members), regulators, consultants, and nonprofits.
2. AMWA staff delivered remarks during Washington, DC's first Climate Week held from April 28 to May 2. Participants of the water-focused events included the public, private, and nonprofit sectors; sessions on water and climate change included discussions of how sectors can collaborate to continue to find funding and innovative solutions that advance water infrastructure's resilience in a changing physical and political environment.
3. AMWA continues to fulfill its contract with the Water Utility Climate Alliance (WUCA) to provide leadership, management, administrative, event, and contractual support, leveraging opportunities to share WUCA's leadership on adaptation with the greater AMWA membership. On May 6 and 7, AMWA staff led the annual WUCA spring staff meeting held at the New York City Department of Environmental Protection (NYCDEP)'s Newtown Creek Wastewater Resource Recovery Facility. Staff worked with WUCA leadership to conduct event support and develop the agenda, which included flash peer learning exchanges on wildfire and drought recovery and implementation of decision-making under deep uncertainty frameworks for water supply and waste- and stormwater planning. The agenda also included updates from the WUCA 2025 work plan and an initial discussion and brainstorming activity, facilitated by AMWA staff, on the development of WUCA's next strategic planning session, which will take effect from 2027 to 2031.
4. Finally, on May 13 and 14, AMWA staff participated in a water and power sector resilience workshop hosted by the Pacific Northwest National Laboratory, Department of Energy Water Power Technologies Office, American Public Power Association, and AWWA. AMWA staff were one of the selected speakers, delivering a presentation on a project in the Mid-Atlantic region on better predicting the intensity of major precipitation events to inform water infrastructure. The workshop participants included association staff, academics, federal researchers, water utility leaders (including AMWA members) and others from the water and power sectors.

Federal Water Infrastructure Adaptation and Resilience Funding Advocacy

AMWA has been tracking potential impacts to water adaptation and resilience funding opportunities as a result of proposed cuts to federal spending. AMWA staff have been reviewing the potential impacts that cuts to federal programs outside of the EPA may have on water systems. Proposed cuts to federal agencies, including NOAA, FEMA, and USGS, and their programs, will negatively affect water systems. One major impact of federal executive decisions has been the rescission of funds from the FEMA Building Resilient Infrastructure and Communities (BRIC) program, which had provided hundreds of millions of dollars to water utilities, including many AMWA members, to conduct proactive infrastructure projects.

AMWA has also been tracking proposed appropriations and reconciliation bills that will affect water systems' ability to prepare for disasters and invest in renewable energy opportunities. Proposed cuts outlined in the President's Budget to NOAA's Office of Ocean and Atmospheric Research (OAR) would jeopardize certain weather forecasting tools, hydrology models, and climate projection resources that water systems rely on for both short-term operations and long-term planning. These cuts include NOAA's climate projections, which help water systems understand what future drought and precipitation may look like, the release of Atlas 15 (a model examining the intensity of future precipitation intensity), and the closure of NOAA's Climate Adaptation Partnerships (CAP), which have worked with AMWA members in all regions of the nation to provide state-of-the-art services that inform water demand modeling, drought plans, design guidance, and more. Staff have also been following the fate of certain clean energy tax credits, made available to public water systems through direct pay, that water utilities may use to gain funds for projects like on-site solar, wind, micro-hydropower, and more.

To respond to these funding proposals and advocacy opportunities, AMWA has led or signed onto several letters to Capitol Hill encouraging representatives to maintain funding for programs crucial to water utilities' energy, infrastructure, and operational resilience. Additionally, AMWA provided feedback to the FEMA Review Council in its May 15 comments urging the maintenance of FEMA disaster response efforts and reiterating the need for significant improvements to the Public Assistance Program reimbursement process.



Management Initiatives

AMWA is making significant strides in its **2025 Knowledge-Sharing Workplan**, advancing programming, enhancing communication channels, and deepening member engagement. With ongoing improvements and strategic partnerships, the association remains a leading resource in the water sector. Below is an update on key activities by the association to help support members in adopting and implementing best practices.

AMWA sets its sights on the 2025 Executive Management Conference, webinars

AMWA's events remain essential forums for knowledge sharing, advocacy, and leadership development, providing members with invaluable insights, networking opportunities, and the latest updates on policy and management priorities.

- Following the success of another record-breaking **Water Policy Conference**, AMWA now shifts its focus to its premier event, the **2025 Executive Management Conference (EMC)**. Planning for the 2025 EMC is progressing swiftly following two **record-setting attendance** years. AMWA launched early registration in mid-May, matching last year's timeline but with double the initial registrations compared to 2024. The abstract submission period reflects similar participation levels to last year, with an **uptick in utility submissions**. Over the coming weeks, staff will collaborate with the **Utility Management Committee and Education Subcommittee** to shape the preliminary program and finalize the keynote selection. Engagement with the **host city** will strengthen marketing and production efforts to ensure valuable attendee experiences.
- AMWA continues to broaden its **webinar series**, delivering timely discussions on **policy, utility management, and operational best practices**. April's [*Managing Water Impacts from Data/AI Tech Center Growth*](#) webinar, co-hosted with Brown and Caldwell, exemplified thought leadership, by exploring the implications of data center expansion on water systems. With more targeted sessions planned, including an upcoming webinar focused on **preparing for a compensation survey** and a session highlighting **advocating for SRF**, AMWA remains dedicated to fostering timely discussions that support utility leadership. AMWA's webinar evaluation process has resulted in high ratings, with **nearly 100 percent** of all participants recommending all programming to colleagues.

Member-to-Member Inquiries continue to drive utility engagement and value in second quarter

AMWA's **Member-to-Member Inquiry (M2M)** program remains a cornerstone of utility collaboration, driving meaningful knowledge exchange and problem-solving among members. In the second quarter of 2025, the program continued its upward trajectory, **surpassing the previous year's activity** with four new inquiries, bringing the total to **eight for the year**. These surveys tackled critical operational priorities, including **advanced metering infrastructure**, wholesale partner agreements, **private line service protection agreements**, and geese management, among others.

AMWA convenes awards webinar to increase participation, seeks to line up peer-review panels

As previously reported, AMWA opened the submission period for its progressive awards program in February and will accept applications through July 11, to recognize outstanding utility management and workforce performance among its members.

To support potential applicants, Awards Committee Chair Robert Cheng led a well-received webinar, [*How to Get Recognized: A Guide to AMWA's Awards Program*](#), on April 29, drawing participation from staff at more than 20 utilities. The session provided insights into the updated Gold and Platinum Award aligned with the **2024 Effective Utility Management Framework**, the application process, helping utilities assess their strengths and areas for improvement. The engaged audience rated the webinar highly; since the event, AMWA has already received multiple inquiries about the submission process from the tiered program, including the Sustainability Award and the independent Environmental Justice and Equity Award. Most of these inquiries were from candidates for the Gold Award, indicating strong interest in applying for recognition.

AMWA continues to promote the awards across its marketing channels and remains committed to expanding participation. Staff also discussed **an open call for reviewers** during the May 20 Utility Management Committee Meeting, encouraging involvement in the judging process. Peer review panels will evaluate applications later this summer, and AMWA will honor award recipients at a special luncheon during the 2025 EMC.

Highlighting the practical applications of INSIGHT

INSIGHT remains a cornerstone of utility financial management, providing drinking water utilities with essential data for operational planning, stakeholder engagement, and long-term sustainability. Its robust database and dashboard equip members with financial and operational **benchmarks** that drive informed decision-making across the sector. Following the completion of the 2024 survey, AMWA and Raftelis continue to explore new avenues for enhancing **INSIGHT's practical applications**, with a focus on optimizing financial strategies, rate-setting methodologies, and affordability program development. As part of this effort, Raftelis has written a series of articles in *Water Utility Executive* newsletter with staff planning to deliver a report on key takeaways that reinforce the tool's value.

Newsletters continue best-in-class engagement in second quarter

- **Monday Morning Briefing (MMB)** - MMB continues to provide members, subscribers, and the sector with timely insights on legislative, regulatory, and management priorities. Open rates are averaging over 50 percent in the second quarter of 2025, well above industry standards. Click through rates also remain strong at nearly 30 percent. AMWA staff continues to evaluate ways to further optimize content delivery.
- **Water Utility Executive (WUE)** - WUE continues to deliver monthly themed insights on executive leadership, best practices, and other key topics. Open rates remain at 50 percent and click-through rates are at 11 percent. The March issue of WUE has slightly edged out the other issues, claiming the top spot for most opens, while the April article, [*Three Highlights of AMWA's Policy Agenda Report at Recent Board Meeting*](#), was the most read of the year.

AMWA continues to expand social media presence

April marked a strong month for AMWA's digital engagement, propelled by visibility and conversations from the 2025 WPC and Water Week. **LinkedIn** continues its upward trajectory as a leading platform for policy and management discussions, while **Instagram** has gained momentum in broadening outreach. Engagement across X and Facebook. AMWA has also soft-launched its **YouTube** channel to showcase its knowledge-sharing programming. Staff continue to explore additional platforms, including *Medium*, to further diversify communication strategies.

Additional management initiatives

- **2025 Water & Wastewater Leadership Center (WWLC):** The 2025 WWLC cohort convened March 3–13 at the University of North Carolina's Kenan-Flagler Business School, with **AMWA members making up 60 percent** of the group. Notably, **100 percent** of participants expressed that they would recommend the learning experience to their peers, underscoring the program's value in leadership development. As previously reported, AMWA will collaborate with partners to refine the curriculum based on survey feedback and will launch promotion for the 2026 program in the fall.
- **Value of Water Campaign:** AMWA remains committed to strengthening its partnership with the Value of Water Campaign, supporting key initiatives. During **United for Infrastructure Week**, AMWA amplified messaging around the importance of investment in resilient and sustainable water systems, reinforcing its advocacy for long-term infrastructure solutions. AMWA will also have a staff presence at the **One Water Summit in July**, in Pittsburgh, to engage in discussions that shape water management, climate resiliency, and policy.
- **WRF Project 5178:** AMWA remains actively engaged in the **Water Research Foundation's** workforce development project, contributing to surveys and the creation of targeted tools that enhance workforce resilience and operational efficiency. As part of these efforts, AMWA is supporting a **virtual workshop on June 18**, focused on *Best Practices and Frameworks* for advancing **utility management** via digital transformation and AI integration in the sector.



PRELIMINARY PROGRAM

(As of May 23, 2025)

SUNDAY, OCTOBER 26

Registration

8:00 AM - 12:00 PM

Texas Foyer

Executive Committee Meeting (closed)

11:00 AM - 12:00 PM

Big Thicket

Board of Directors Meeting

12:00 PM - 4:30 PM

Texas 5-7

Welcome Reception

5:00 PM - 6:30 PM

Foothills Ballroom, 17th Floor

MONDAY, OCTOBER 27

Registration

8:00 AM - 4:00 PM

Texas Foyer

Networking Breakfast

7:30 AM - 8:30 AM

Texas 5-7

Interactive Keynote Session (Includes 15-20-minute break)

9:00 AM - 12:00 PM

Texas 1-3

2025 Utility Management Awards Luncheon

12:15 PM - 1:45 PM

Texas 5-7

Case Studies, Presentations, and Panel Discussions

2:00 PM - 5:00 PM

Texas 1-3

Networking Dinner

6:00 PM - 7:00 PM

Foothills Ballroom, 17th Floor

TUESDAY, OCTOBER 28

Registration

8:00 AM - 12:00 PM

Texas Foyer

Breakfast Buffet

7:30 AM - 8:30 AM

Texas 5-7

Water Sector Keynote Address

9:00 AM - 9:50 AM

Texas 1-3

Case Studies, Presentations, and Panel Discussions

9:50 AM - 11:50 AM

Texas 1-3

Networking Luncheon (No programming)

12:00 PM - 1:00 PM

Texas 5-7

Case Studies, Presentations and Panel Discussions

1:15 PM - 4:30 PM

Texas 1-3

Reception

5:00 PM - 6:00 PM

TBD

WEDNESDAY, October 29

Site Visit/Austin City Networking Tour

7:30 AM - 12:30 PM

TBD



AMWA's Membership Work Plan for 2025 has produced the following results as of May 15, 2025.

Engaging Members

Regional Member Meetings—To enhance engagement for the upcoming Executive Management Conference, we have organized in-person regional member meetings for local AMWA utility general managers, directors, and staff. These meetings will showcase current initiatives and advocacy priorities, allowing members to ask questions of AMWA's CEO. Additionally, we are developing an informational toolkit for members to take back to their utilities. Furthermore, prospective new members of AMWA are welcome to attend these meetings.

- *Update:* The central regional meeting in Texas occurred on June 5 in Austin, hosted by Austin Water. A third regional Texas meeting will be held in Houston at the end of the summer.

Quarterly Member Briefings—We continue to host our successful virtual briefings **every quarter** for all members, subscribers, and guests. These briefings focus on key areas of AMWA under a unified theme: Q1—Advocacy / WPC; Q2—Utility Management; Q3—Membership / EMC; Q4—Year-End / Look Ahead.

- *Update:* The second quarter briefing on June 26 will focus on Utility Management. Attendees will be introduced to one of the newest members, the Santa Clarita Valley Water Authority, CA.

Renewing Members

Ensure that at least 95% of memberships are renewed by March 31, 2025.

- *Update:* As of May 15, we have achieved an overall renewal rate of 95%, with a 96% renewal rate for utilities and a 77% renewal rate among subscribers.

Recruiting Members

The objective for 2025 is to attract seven new utility members. As of May 15, we have gained six new members with two pending memberships. We are reviewing our top prospect list to identify the utilities to target in our recruitment efforts.

- *Update:* The list below highlights the major prospects we are considering:

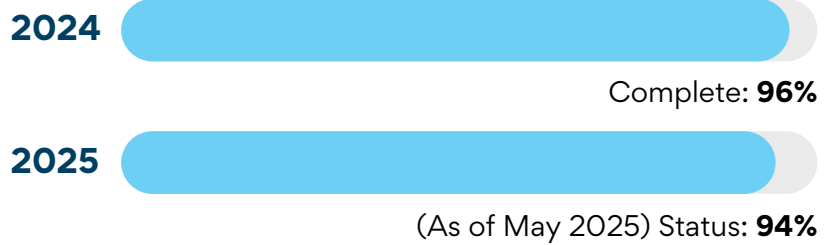
North Jersey District Water Supply Commission, Wanaque, NJ
Western Municipal Water District, Riverside, CA
Upper San Gabriel Valley Municipal Water District, Monrovia, CA
Municipal Utilities Co./City of Ontario, Ontario, CA
Inland Empire Utilities Agency, Chino Hills, CA
Cedar Rapids Water Division, Cedar Rapids, IA
Waterbury Water Department, Waterbury, CT
Hillsborough County Public Utilities Department, Tampa, FL
Citizens Energy Group, Indianapolis, IN
Livonia Department of Public Works, Livonia, MI
Irvine Ranch Water District, Irvine, CA
South Bend Water Works, South Bend, IN

KNOWLEDGE SHARING & MEMBERSHIP STATISTICS (2025)

MEMBERSHIP RENEWAL

In 2025,

6 new members



As of May 2025,

8 member to member inquiries

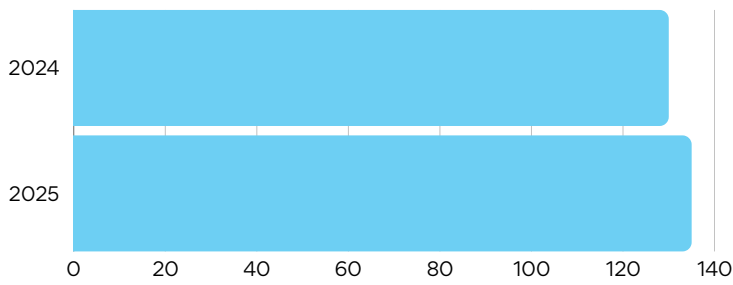
As of May 2025,



AMWA has recruited **6** out of 7 new members towards the goal for the year.

CONFERENCE ATTENDANCE

Last year, AMWA's **Water Policy Conference (WPC)** broke attendance records with 130 attendees. This year, AMWA joined Water Week, and the conference broke attendance records once again with **135** attendees.



SOCIAL MEDIA

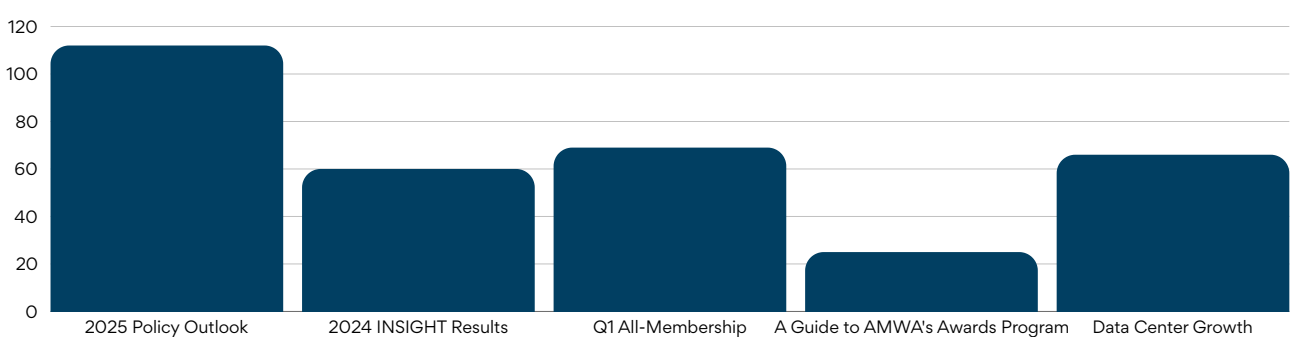
As of May 2025,

3,180+ followers on X (Twitter)

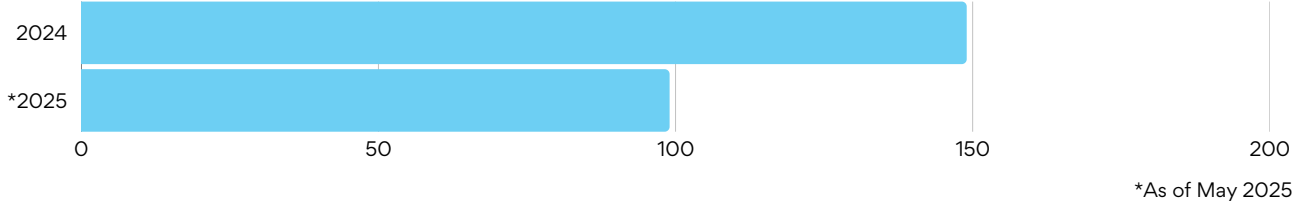
3,040+ followers on LinkedIn

200 followers on Instagram

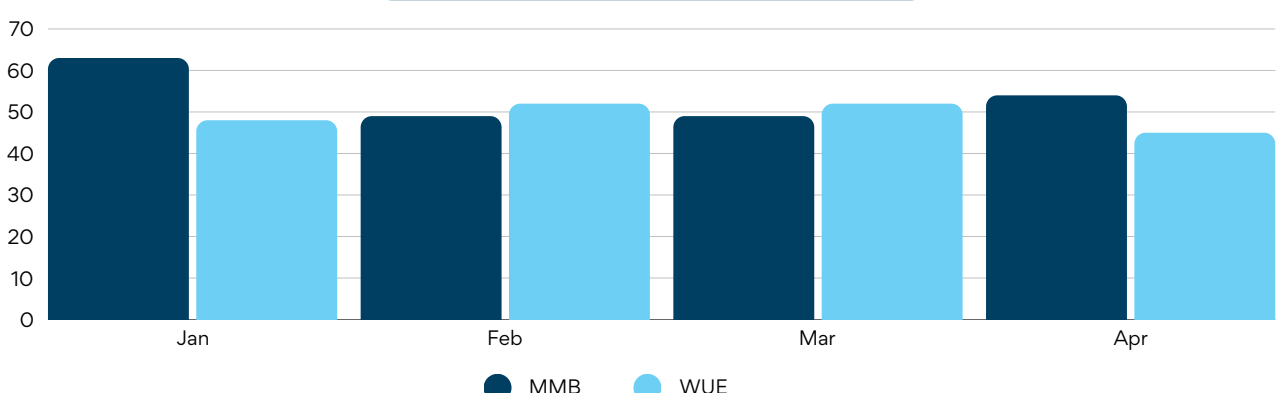
WEBINARS



PRESS ENGAGEMENT



NEWSLETTER METRICS (OPEN RATES)



2025 INTERNAL WORK PLAN DASHBOARD

POLICY	QUARTER 1	QUARTER 2	GOAL
FLOW Act	 Dan Hartnett & Megan Seymour	ON TRACK	Following the retirement of Rep. Dan Kildee, AMWA will cultivate a new House sponsor of the Financing Lead Out of Water Act, and will pursue reintroduction of the legislation in the House and Senate.
PFAS CERCLA Legislation	 Dan Hartnett, Megan Seymour & Erin Phillips	ON TRACK	AMWA will continue its collaboration with the Water Coalition Against PFAS to build support for legislation to provide liability protection under CERCLA for drinking water and wastewater systems that lawfully dispose of water treatment byproducts containing PFAS.
Drinking Water Quality (MDBPs)	 Dan Hartnett, Jessica Evans & Erin Phillips	ON TRACK	AMWA will continue to engage with other water sector stakeholders to flesh out strawman recommendations for the rule in response to the NDWAC guidance and collect input from association members on critical issues.
Cybersecurity Legislation	 Dan Hartnett & Megan Seymour	ON TRACK	Secure reintroduction of cybersecurity legislation promoting WaterSAC participation, and establishment of the WRRO.
WaterSAC	 Tom Dobbins	ON TRACK	Meet fiduciary responsibility to provide \$500K worth of services to WaterSAC. Ongoing to provide leadership and accounting services. Assist with deployment of AMS concurrent with AMWA. Provide graphic support as necessary.
Resiliency (Climate)	 Jessica Evans	ON TRACK	Implement strategy to share best practices, resilience funding opportunities, etc., to membership by leveraging subscribers, partnering organizations, and members
Resiliency (IRA Tax Credit Project)	 Jessica Evans	ON TRACK	Develop product for WUCA and AMWA on pursuing IRA grant funding related to GHG management
Resiliency (WUCA Contract)	 Jessica Evans, Erin Phillips & Wingel Caburian	ON TRACK	AMWA will continue to support the obligations of its standing contract with WUCA, including management, administrative, event, and contractual support.
Affordability	 Dan Hartnett, Megan Seymour & Erin Phillips	ON TRACK	AMWA will work with Senator Alex Padilla of California to facilitate reintroduction of the LIHWAP Establishment Act or similar legislation to reauthorize the Low-Income Household Water Assistance Program at the Department of Health and Human Services.
Environmental Justice (External Engagement)	 Jessica Evans	COMPLETE	Develop a comprehensive strategy for Association programming and engagement based on committee discussions/WPC conversations
Environmental Justice (Internal at AMWA)	 Jessica Evans	COMPLETE	Execute 2024 EJ & Equity Award
Infrastructure Funding	 Dan Hartnett, Megan Seymour & Erin Phillips	ON TRACK	Educate members of Congress about the importance of funding EPA SRF, WIFIA, resilience, lead programs in FY25 and FY26
Perchlorate NPDWR	 Dan Hartnett & Erin Phillips	ON TRACK	AMWA will evaluate the existing resources on perchlorates, establish a working group of interested members, and begin evaluating projected pain points and proposed solutions.
Fluoride	 Dan Hartnett	ON TRACK	Promote SDWA as the preferred method for regulating fluoride levels in drinking water, in the face of increasing political pressure to discourage fluoridation.
PFAS Litigation	 Tom Dobbins & Dan Hartnett	ON TRACK	AMWA will continue its role as a petitioner in the case of AWWA vs. EPA as the litigation challenging EPA's NPDWR for several PFAS makes its way through the U.S. Court of Appeals.
UCMR-6	 Dan Hartnett, Jessica Evans & Erin Phillips	ON TRACK	AMWA will develop comments based on the proposal, gathering member feedback on the proposed contaminants, analytical methods, and laboratory capacity.

2025 INTERNAL WORK PLAN DASHBOARD

KNOWLEDGE SHARING	QUARTER 1	QUARTER 2	GOAL
Content Webinars	 Antoinette Barber & Wingel Caburian	ON TRACK	Provide at least 9 webinars for members
Forum Development	 Heather Talbert & Hayden MacLachlan	ON TRACK	Expand membership opportunities beyond the executive level through organized forums
Membership Meetings (Regional)	 Heather Talbert & Hayden MacLachlan	ON TRACK	Conduct in-person regional member meetings
Membership Meetings (Virtual)	 Heather Talbert, Antoinette Barber, Wingel Caburian & Hayden MachLachlan	ON TRACK	Conduct virtual briefings for all members/subscribers/invited guests on areas within AMWA
Events: EMC and WPC	 Antoinette Barber & Wingel Caburian	ON TRACK	Execute successful 2024 WPC and EMC
Membership Recruitment	 Tom Dobbins, Heather Talbert & Hayden MachLachlan	ON TRACK	The 2025 Membership goal is 7 new utility members and 10 new subscriber members.
Membership Retention	 Heather Talbert & Hayden MacLachlan	ON TRACK	Have 95% of members renewed.
Communications	 Antoinette Barber & Wingel Caburian	ON TRACK	Raise brand awareness and engagement of AMWA programs, products, and services
Strategic Plan Management	 Tom Dobbins	ON TRACK	Roll out strategic plan to membership, incorporate into annual planning
OPERATIONS	QUARTER 1	QUARTER 2	GOAL
Technology Upgrade	 Dan Hartnett, Heather Talbert & Hayden MachLachlan	ON TRACK	Phase 1 of Fonteva implementation complete by June target.
Budget	 Tom Dobbins & Eugenia Cadena	ON TRACK	Manage '24 budget, build '25 budget
Project Management Software	 Hayden MacLachlan	ON TRACK	Asana operational with, minimally, half of all projects uploaded by end of year
Standard Operating Procedures	 Hayden MacLachlan	ON TRACK	Centralize location of and written instructions for operations, processes, and procedures

AMWA Board of Directors
Roster and Election Timetable
As of May 2, 2025

Class A
Seats up for election in 2026

<u>Seat</u>	<u>Occupant</u>	<u>Utility</u>	<u>EPA Region</u>	<u>Term</u>
Region 2	Angela Licata	New York City DEP	2	2
Region 5	Cathy Bailey	Greater Cincinnati Water Works	5	0
Region 8	Julie Anderson	Denver Water	8	0
Region 9	Dave Johnson	Las Vegas Valley Water District	9	0
Region 10	Alex Chen	Seattle Public Utilities	10	0
At-Large A-1	Todd Swingle	Toho Water (FL)	4	1

Class B
Seats up for election in 2027

<u>Seat</u>	<u>Occupant</u>	<u>Utility</u>	<u>EPA Region</u>	<u>Term</u>
At-Large B-1	Matthew Jalbert	Trinity River Authority of Texas	6	0
At-Large B-2	Shane Chapman	Metropolitan Water District of Southern California	9	2
At-Large B-3	Vacant			
At-Large B-4	Yann Le Gouellec	Newport News Waterworks (VA)	3	1
At-Large B-5	Jeff Brown	Onondaga County Water Authority	2	1
At-Large B-6	Rachel Murphy	Contra Costa Water District	9	0

Class C
Seats up for election in 2028

<u>Seat</u>	<u>Occupant</u>	<u>Utility</u>	<u>EPA Region</u>	<u>Term</u>
Region 1	Vacant			
Region 3	Will Pickering	Pittsburgh Water	3	1
Region 4	Lindsey Rechtin	Northern Kentucky Water District	4	1
Region 6	Vacant			
At-Large C-1	C. Tad Bohannon	Central Arkansas Water	6	2
At-Large C-2	Kenneth Waldroup	Cape Fear Public Utility Authority	4	1

Class D
Seats up for election in 2025

<u>Seat</u>	<u>Occupant</u>	<u>Utility</u>	<u>EPA Region</u>	<u>Term</u>
Region 7	Shaun Pietig	WaterOne	7	0
At-Large D-1	Jeff Szabo	Suffolk County Water Authority	2	2
At-Large D-2	Randy Hayman	Philadelphia Water Department	3	1
At-Large D-3	Calvin Farr, Jr.	Prince William Water	3	1
At-Large D-4	Verna Arnette	Beaufort-Jasper Water & Sewer Authority	4	0
At-Large D-5	Holly Rosenthal	Phoenix Water Services Department	9	1
At-Large D-6	Chris Browning	Oklahoma City Water	6	0

Emeritus
Two-year term ending in 2026

<u>Seat</u>	<u>Occupant</u>	<u>Utility</u>	<u>EPA Region</u>	<u>Term</u>
Emeritus	John Sullivan	Boston Water and Sewer Commission	1	1

NOTES:

The board may have up to 10 seats representing different EPA regions. The board may also have up to 15 at-large seats.

"Term 0" indicates that the director is serving the remainder of an unexpired term. This service does not count toward their 2-term limit.

A Director Emeritus is a term-limited Board member appointed by the President to a term not to exceed two years. They are non-voting members of the Board of Directors.

Board officers are not subject to term limits, and may therefore be elected to serve more than two consecutive terms.